

FAILTE IRELAND

TOURISM EMPLOYMENT SURVEY

2010

June 2011



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INTRODUCTION



Background

- The findings presented in the *Tourism Employment Survey 2010* have been prepared against a background of very difficult conditions. For the third successive year, the number of overseas visits to Ireland declined.
- Despite this tourism remains a key source of employment. Fáilte Ireland's 2010 employment survey indicates total tourism employment of circa. 178,000. On this measure the industry accounts for one-in-ten jobs across the economy.
- Fáilte Ireland has worked closely with the trade to review how the skills of those working in the sector can be further strengthened and developed. Labour market interventions are now oriented around keeping people at work in tourism businesses while at the same time providing them with the means to enhance their skills and career development opportunities. Based on the figures above there are reasons to believe that these efforts are continuing to paying dividends.
- Tourism has the potential to absorb significant numbers of unemployed workers as the recovery takes hold in the industry. The government recognizes this and several of the proposals in the *Jobs Initiative* are specific to the industry.



Objectives

The purpose of the survey is to provide data on employment in the tourism industry and in particular on the regional spread of tourism employment.

The specific objectives of the survey are:-

- To track changes in employment numbers and the structure of employment
- To collect this information in a similar way to that undertaken in previous years.

The objective is to examine employment patterns in the following sectors:

- Hotels
- Guesthouses/ B+Bs
- Self-catering Accommodation
- Licensed Restaurants
- Non-licensed Restaurants
- Public Houses
- Tourism Services and Attractions



Research Methodology (1)

- On-line survey of tourism employers from each of the main sectors of the tourism and hospitality industry.
- The number of tourism and hospitality enterprises in Ireland in 2010 is estimated at 16,501.
- Tourism Development International contacted 7,287 establishments from which an effective sample of 1,805 interviews was achieved.
- This represents an overall response rate of 25% and a sample of 10% of tourism and hospitality enterprises in the country.
- The starting point for the sample collection process was Tourism Development International's database of over 7,000 tourism enterprises.
- This database was supplemented with industry information supplied by Fáilte Ireland, the Irish Hotels Federation, and the Revenue Commissioners.



Research Methodology (2)

- Telephone interviews were conducted with establishments not in a position to complete the on-line survey.
- The self-catering sector comprises caravan and camping establishments, hostels, and group self-catering schemes.
- The tourism services and attractions sector comprises golf courses, equestrian centres, visitor attractions, car hire, coach hire, cruising and water based activity centres.
- Table 1 presents and overview of the universe/ sample details. Table 2 sets out the regional distribution of tourism and hospitality enterprises.



Research Methodology (3)

Table 1 – Universe / Sample Details

Sector	Population	Initial Sample	Effective Sample	Response Rate	Sample as % of Population
Hotels	909	909	155	17%	17%
Guesthouses	310	310	101	33%	33%
B&Bs	2,231	722	224	31%	10%
Self-catering/ Hostels/ Caravan and Camping	369*	360	190	53%	51%
Licensed Restaurants	2,433	1,734	327	19%	13%
Non-Licensed Restaurant	1,337	217	76	35%	6%
Public Houses	7,615	2,229	415	19%	5%
TSA	1,296	806	317	39%	24%
Total	16,501	7,287	1,805	25%	10%

* Comprises 96 Caravan & Camping; 136 Hostels; 138 Group Self-catering



Research Methodology (4)

Table 2 – Regional Distribution of Tourism and Hospitality Enterprises

Sector	Region							
	Total	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotels	909	161	124	111	164	90	146	113
Guesthouses	310	41	25	41	91	31	44	37
B&Bs	2,231	122	257	293	611	268	419	261
Self-catering/ Hostels/ Caravan and Camping	369*	30	29	33	139	41	48	50
Licensed Restaurants	2,433	686	377	272	475	251	221	151
Non-Licensed Restaurant	1,337	456	213	127	181	109	136	116
Public Houses	7,615	746	1,249	1,036	1,485	982	1,135	983
TSA	1,296	144	192	197	327	130	198	107
Total	16,501	2,386	2,466	2,110	3,473	1,902	2,347	1,818

* Comprises 96 Caravan & Camping; 136 Hostels; 138 Group Self-catering

SUMMARY OF MAIN FINDINGS



Summary of Main Findings (1)

- The Irish tourism and hospitality industry employed an estimated 177,935 in 2010.
- Pubs and hotels were the most significant employer (employing 51,693 and 46,373 individuals respectively). These two sectors combined account for over half of total employment in the industry (see table 3).
- The licensed restaurant sector is also a major employer with an estimated 38,657 individuals employed.
- An estimated 18,702 are employed in the tourism services and attractions sector while non-licensed/ fast food establishments account for an estimated 14,336 jobs.
- Employment in the B&B sector was measured for the first time and is estimated to be of the order of 3,937. Self-catering establishments and guesthouses employed an estimated 2,426 and 1,812 individuals respectively.
- All sectors of the tourism and hospitality industry recorded a decline in employment compared to 2009 (see table 4).



Summary of Main Findings (2)

- In volume terms, the most significant decline in employment was recorded in respect of the hotel sector. There were also marked reductions in staffing levels in the pub and licensed restaurant sectors.
- With 23% 'share' of employment, tourism enterprises in Dublin (41,336) were the most significant employers in regional terms followed by the South West (35,700) individuals and the East and Midlands (26,981) individuals (see table 5)
- An estimated 144,897 individuals were employed on a year-round basis. This represents 83% of total employment (see table 7).
- The tourism and hospitality industry provided employment for men and women in more or less equal measure (see table 8).
- In terms of occupations, the highest levels of employment were recorded in respect of food service (39,435 individuals), bar service (34,889 individuals), and culinary (21,693 individuals) (see table 9).
- 27% of individuals employed in the industry were non-Irish with the bulk of these from EU countries (see table 10).



Table 3 – Overall Employment 2010

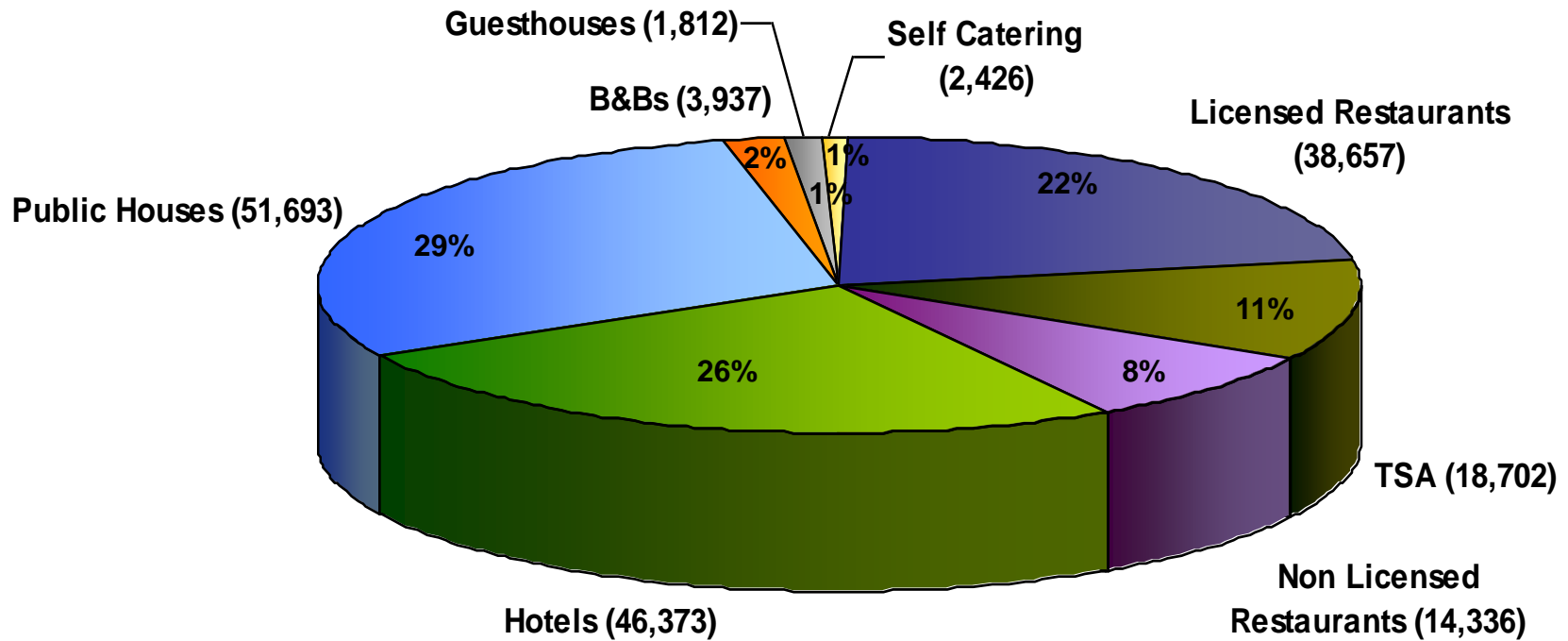




Table 4 – Overall Employment (2007-2010)

Sector	2009	2010	% Change 2009/2010
Hotels	52,308	46,373	-11
Guesthouses	1,931	1,812	-6
B&Bs*	-	3,937	-
Self-catering/ Hostels/ Caravan and Camping	3,058	2,426	-21
Licensed Restaurants**	41,049*	38,657	-6
Non-Licensed Restaurant	16,134	14,336	-11
Public Houses	53,983	51,693	-4
TSA***	31,449	18,702	NA
Total	199,912	177,935	

* Only available for 2010

** Revised estimate for 2009

*** TSA not all of the sectors included in 2009 are included in the 2010 Survey



Table 5 – Regional Distribution of Tourism Employment

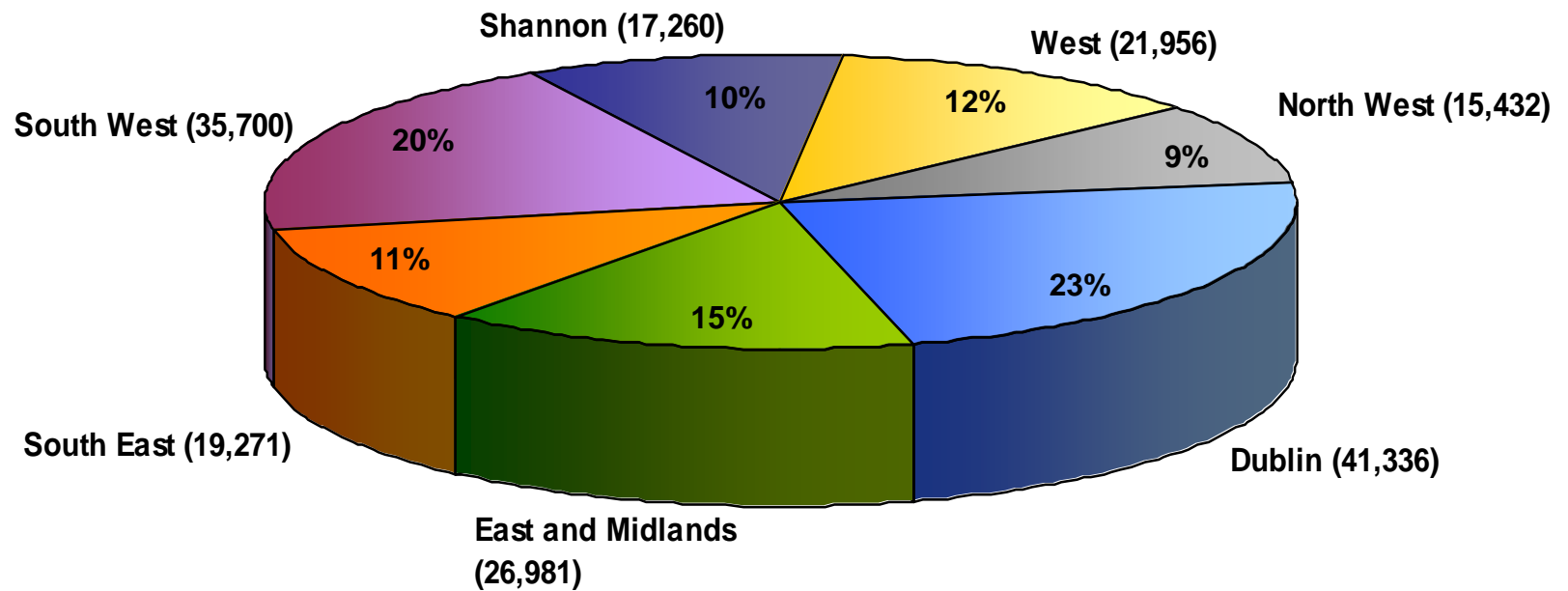




Table 6 – Regional Distribution of Tourism Employment by Sector

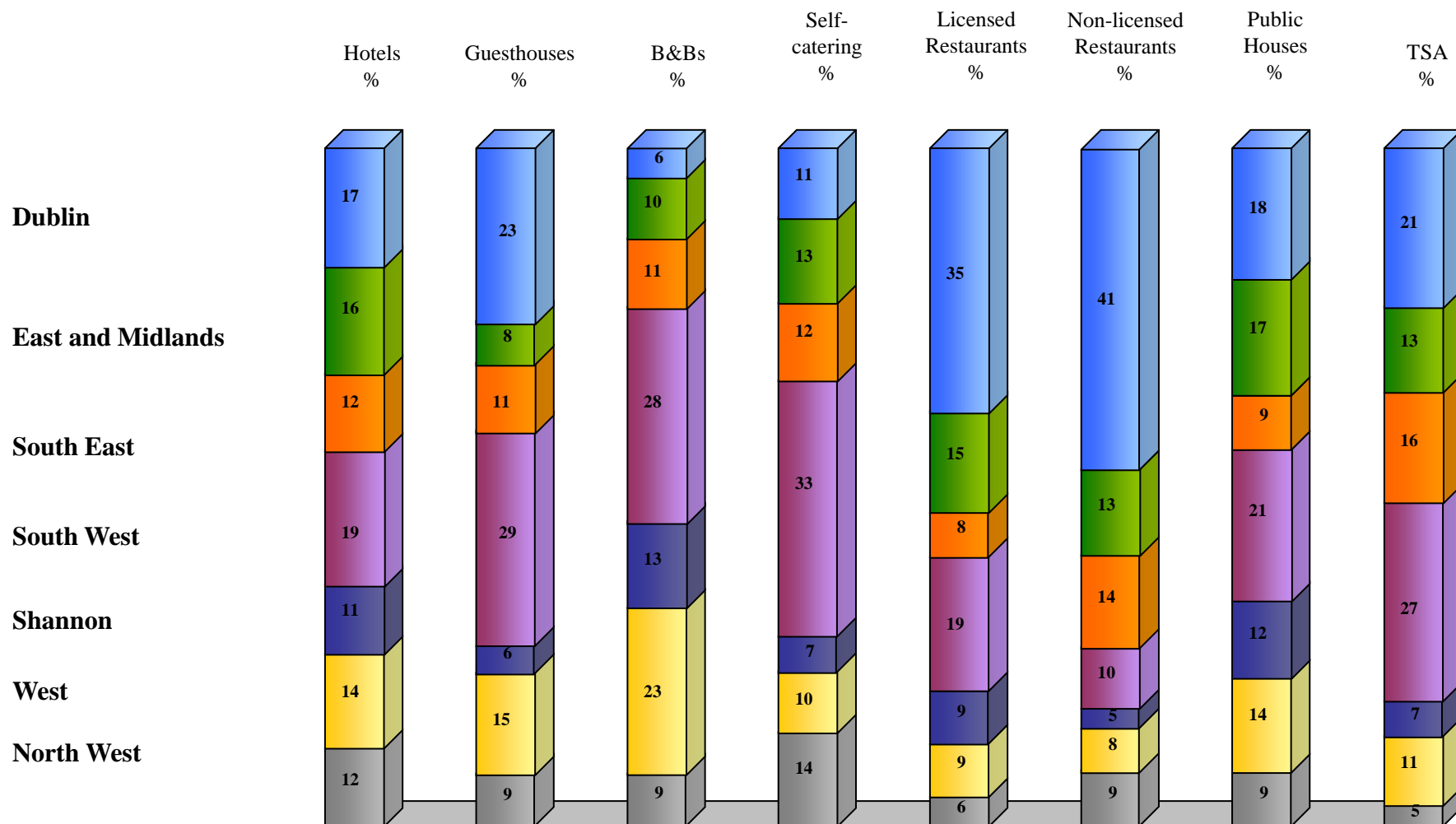




Table 7 – Overall Employment by Status

Status	Employees	%
Full-time Year-round	76,327	43%
Part-time Year-round	70,570	40%
Full-time Seasonal	7,703	4%
Part-time Seasonal	17,247	10%
Unpaid Family	3,785	2%
Volunteers/ Trainees	2,304	1%
Total	177,935	100%



Table 8 –Employment by Gender

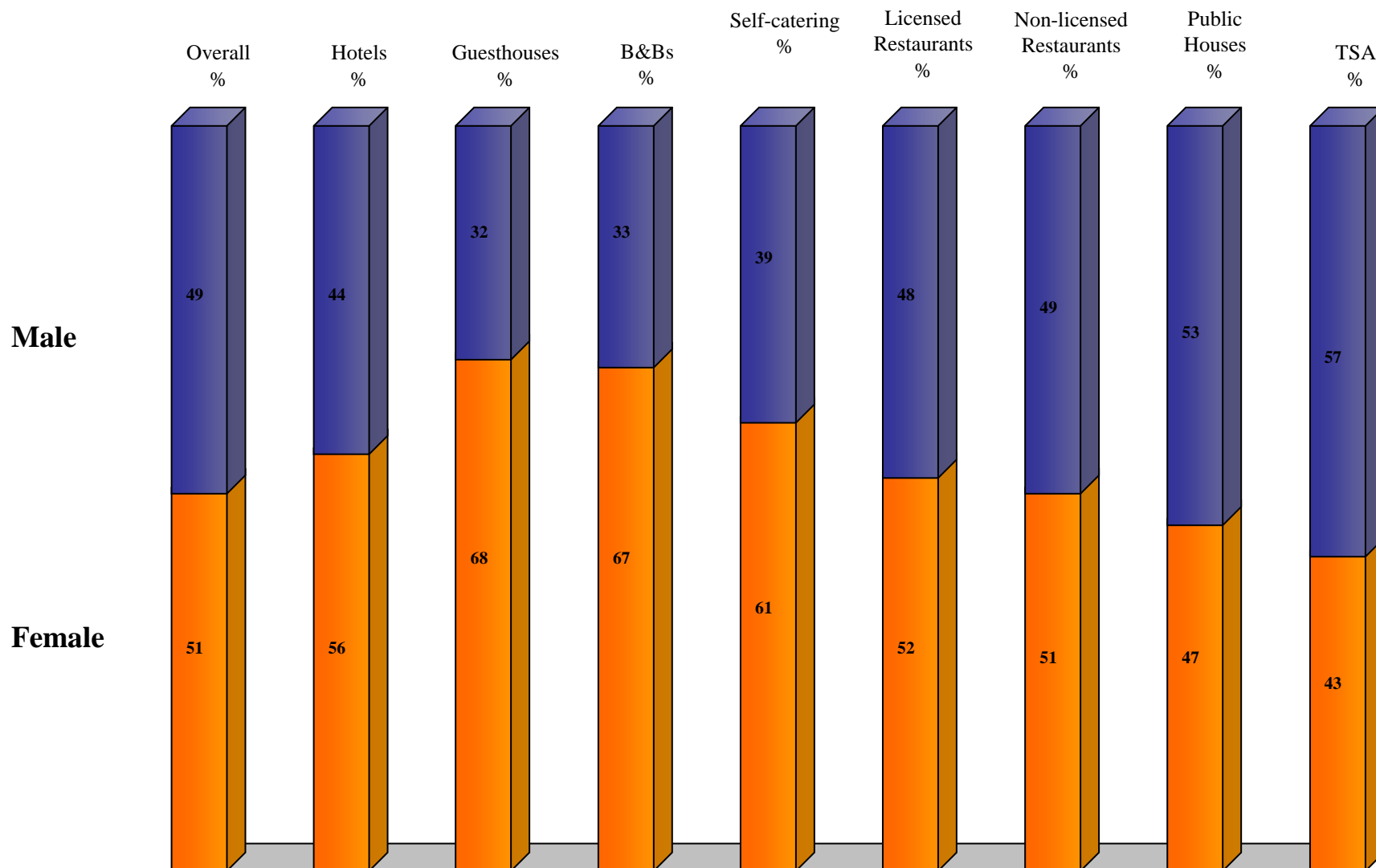




Table 9 – Year Round Employment by Occupation and Sector (2010)

Occupation	Total	Sector							
		Hotels	Guesthouses	B&Bs	Self-catering	Licensed Restaurants	Non-licensed Restaurants	Public House	TSA
Managers	19,465	3,411	303	983	352	3,122	951	8,758	1,584
Supervisors	4,647	2,079	42	18	93	787	91	581	958
Administrative/ Clerical/ Front Office	6,835	3,333	90	12	172	536	18	212	2,462
Culinary	21,693	5,363	139	19	57	10,621	2,098	3,027	370
Food Service	39,435	7,678	228	21	104	16,075	9,947	4,840	542
Bar	34,889	4,553	78	9	65	1,890	12	27,590	691
Accommodation Service	7,285	5,941	262	99	481	83	-	88	330
Sales and Marketing	1,487	645	39	-	14	35	-	451	304
Other Skilled Service	6,135	2,096	34	21	83	308	13	87	3,492
Other non Service Area	5,026	1,241	40	15	50	806	-	124	2,750
Total	146,897	36,340	1,255	1,198	1,470	34,264	13,129	45,757	13,484



Table 10 – Year-round Employment by Nationality

Status	Employees	%
Irish Employees	106,842	73%
EU Employees	30,211	20%
Non-EU Employees	9,844	7%
Total	146,897	100%



Table 11 – Year-round Employment – Nationality by Sector

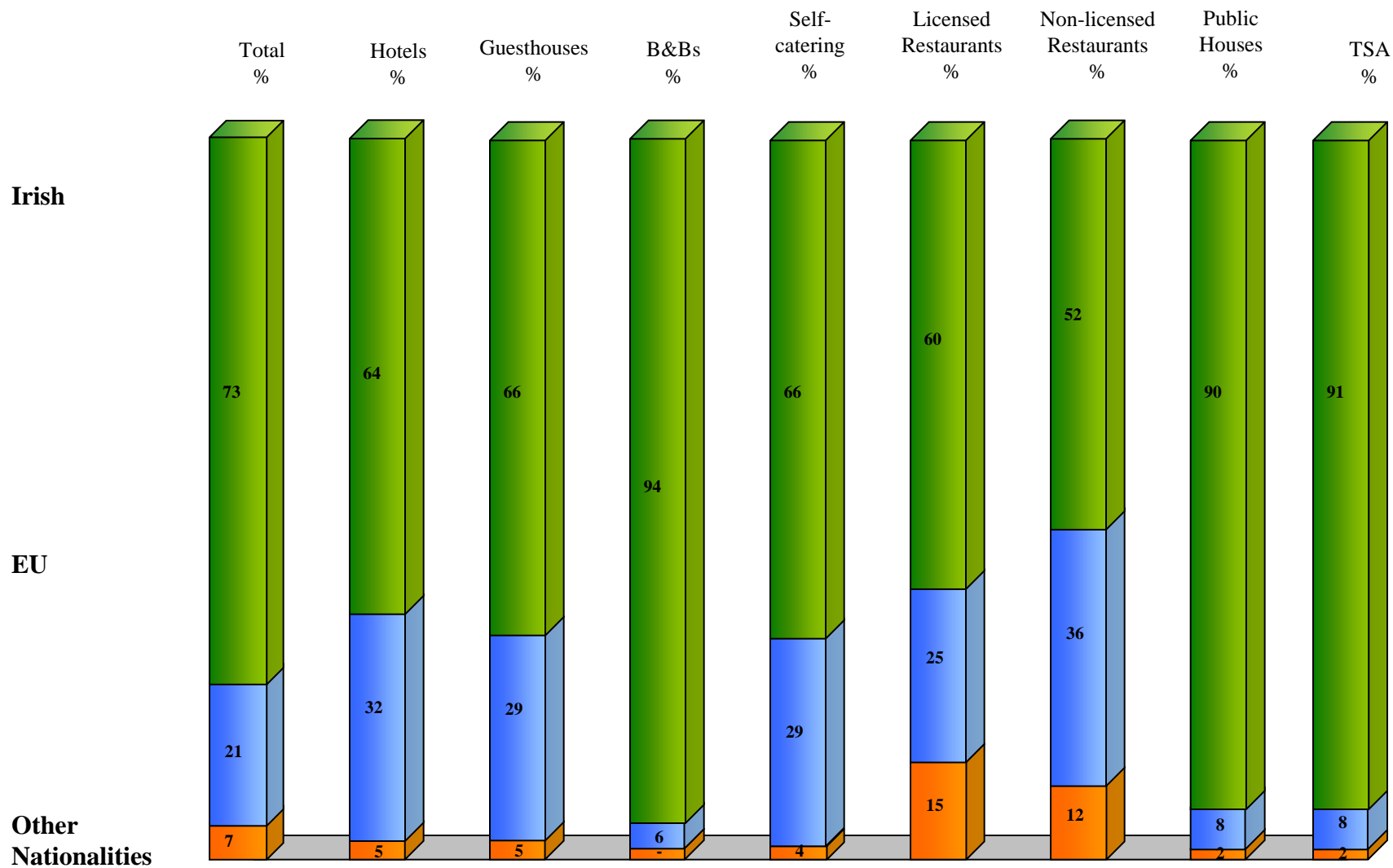




Table 12 – Year-round Employment – Occupation by Nationality

Occupation	Irish	EU	Other Nationalities
Managers	17%	4%	4%
Supervisors	3%	4%	2%
Administrative/ Clerical/ Front Office	5%	3%	3%
Culinary	12%	20%	31%
Food Service	21%	41%	43%
Bar	29%	10%	10%
Accommodation Service	3%	12%	4%
Sales and Marketing	1%	<0.5%	<0.5%
Other Skilled Service	5%	3%	2%
Other non Service Area	4%	3%	2%
Total	106,842	30,211	9,844

HOTELS



Table 13 – Hotels – Regional Distribution

Region	
Dublin	161
East and Midlands	124
South East	111
South West	164
Shannon	90
West	146
North West	113
Total	909



Table 14 – Hotels – Size

Size	
Under 20 rooms	26%
21-49 rooms	28%
50-99 rooms	25%
100+ rooms	22%
Total	100%



Table 15– Hotels – Employment by Status

Status	Employees	%
Full-time Year-round	19,035	41%
Part-time Year-round	17,305	37%
Full-time Seasonal	3,090	7%
Part-time Seasonal	6,232	13%
Unpaid Family	262	<1%
Volunteers/ Trainees	449	1%
Total	46,373	100%



Table 16 – Hotels – Employment Status by Region

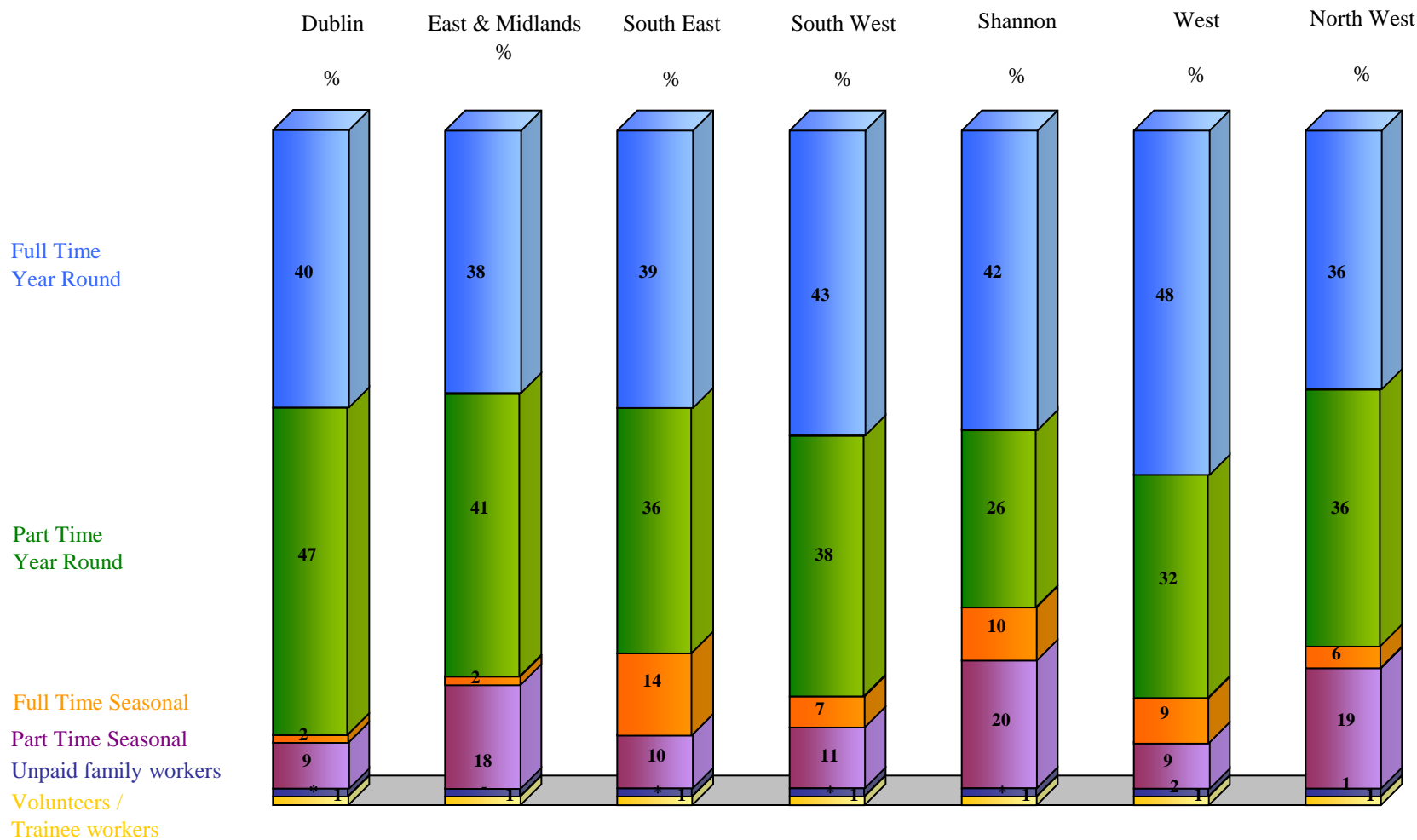




Table 17 – Hotels – Occupation of Year-round Employees

Occupation	Employees	%
Managers	3,411	10
Supervisors	2,079	6
Administrative/ Clerical/ Front Office	3,333	9
Culinary	5,363	13
Food Service	7,678	21
Bar	4,553	15
Accommodation Service	5,941	16
Sales and Marketing	645	2
Other Skilled Service	2,096	6
Other non Service Area	1,241	3
Total	36,341	100



Table 18 – Hotels – Nationality of Year-Round Employees

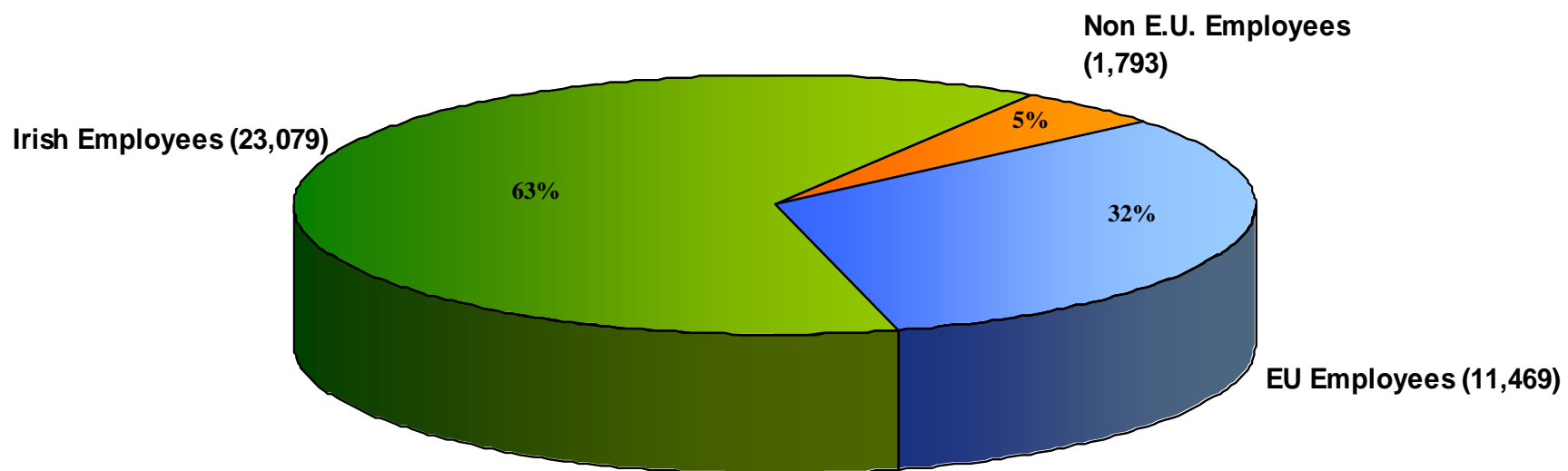




Table 19 – Hotels – Nationality of Year-Round Employees by Region

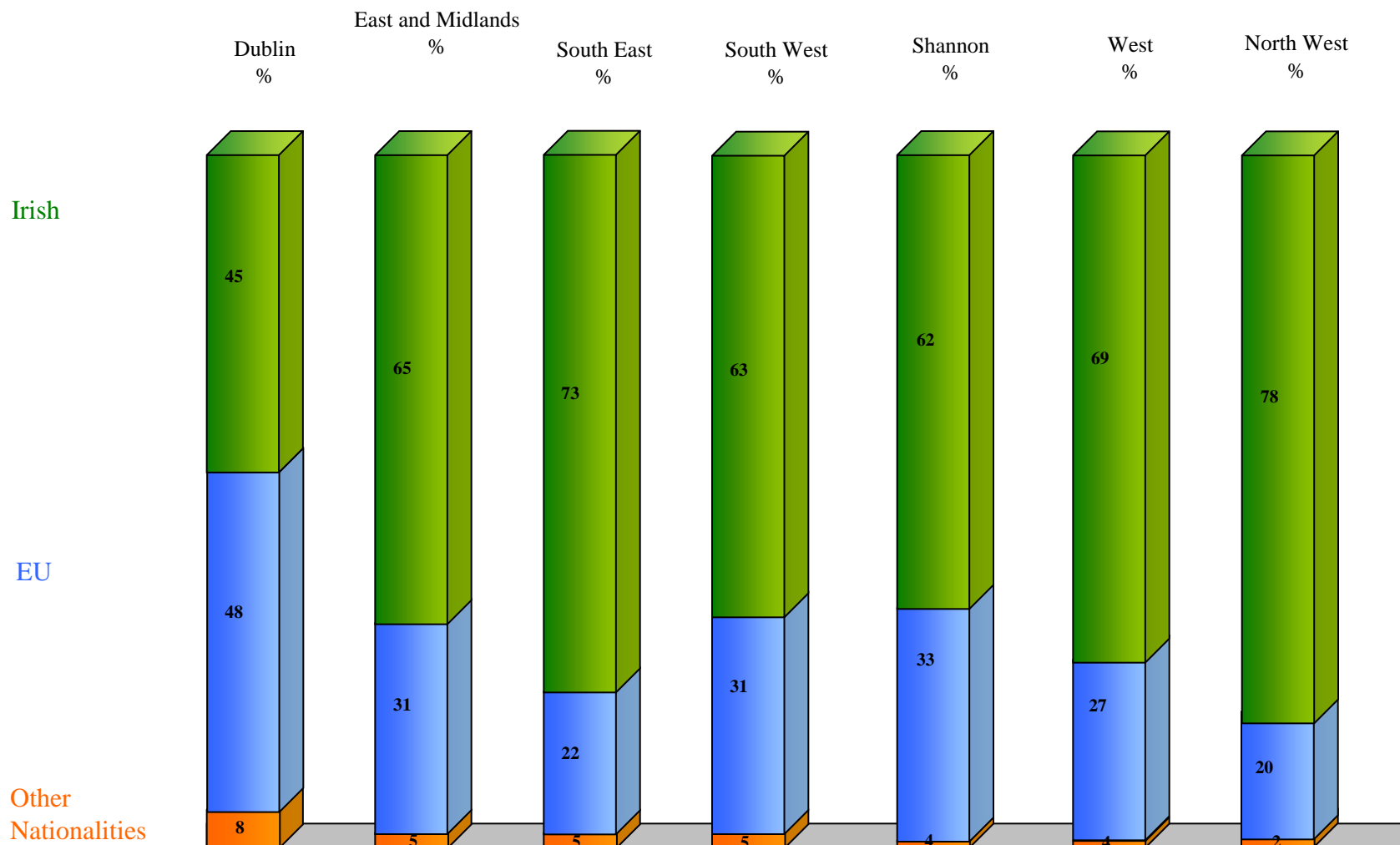




Table 20 – Hotels – Year-round Employment – Occupation by Nationality

Occupation	Irish	EU	Other Nationalities
Managers	13%	3%	6%
Supervisors	5%	7%	4%
Administrative/ Clerical/ Front Office	11%	6%	10%
Culinary	12%	19%	21%
Food Service	20%	22%	25%
Bar	15%	8%	8%
Accommodation Service	10%	28%	21%
Sales and Marketing	3%	<0.5%	<0.5%
Other Skilled Service	7%	4%	2%
Other non Service Area	3%	4%	2%
Total	23,079	11,469	1,793

GUESTHOUSES



Table 21 – Guesthouses – Employment by Status

Status	Employees	%
Full-time Year-round	791	44
Part-time Year-round	464	26
Full-time Seasonal	135	7
Part-time Seasonal	319	18
Unpaid Family	92	5
Volunteers/ Trainees	11	1
Total	1,812	101%



Chart 22 – Guesthouses – Employment Status by Region

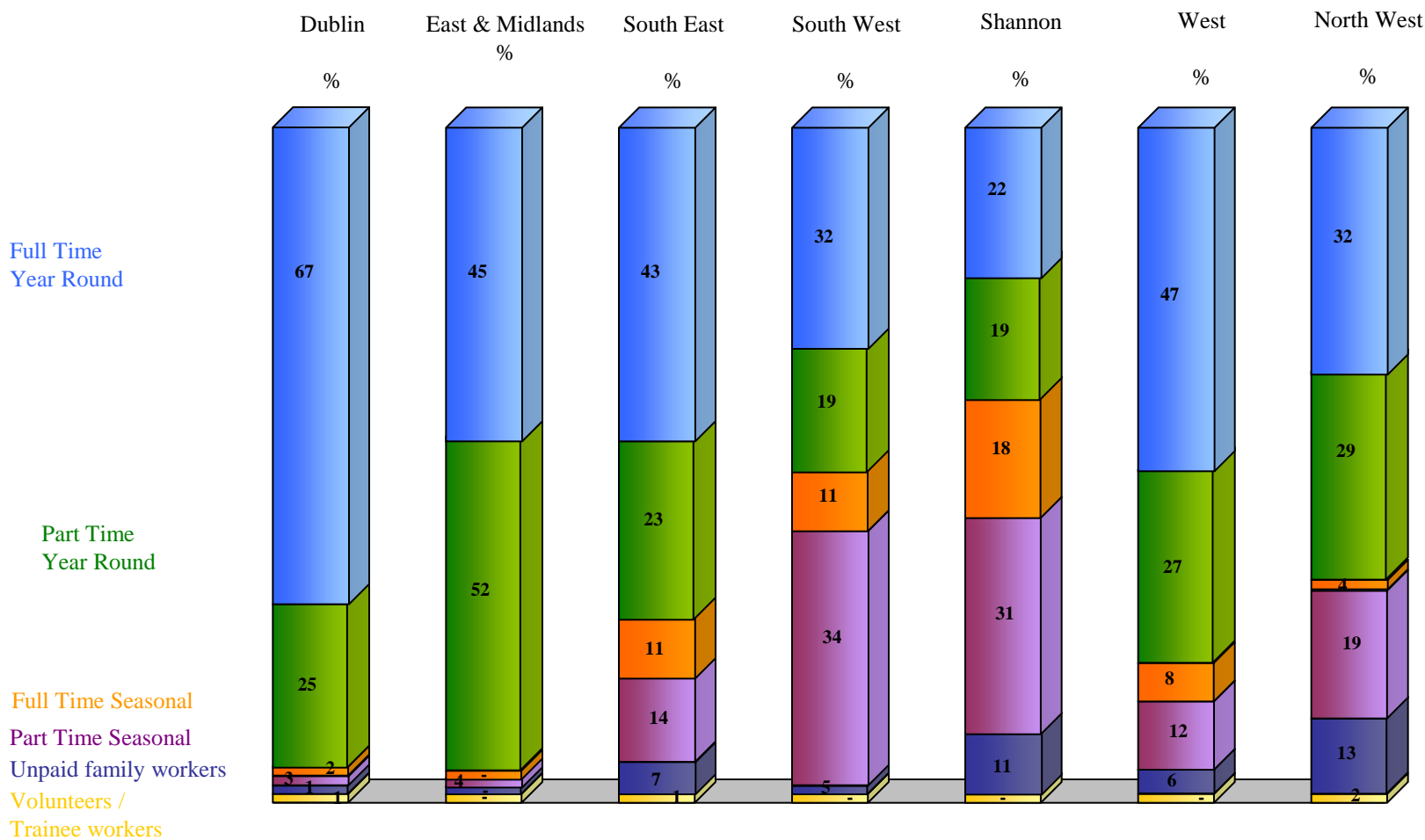




Table 23 – Guesthouses – Occupation of Year-round Employees

Occupation	Employees	%
Managers	303	24
Supervisors	42	3
Administrative/ Clerical/ Front Office	90	7
Culinary	139	11
Food Service	228	18
Bar	78	6
Accommodation Service	262	21
Sales and Marketing	39	3
Other Skilled Service	34	3
Other non Service Area	40	3
Total	1,255	100



Table 24 – Guesthouses – Nationality of Year-Round Employees

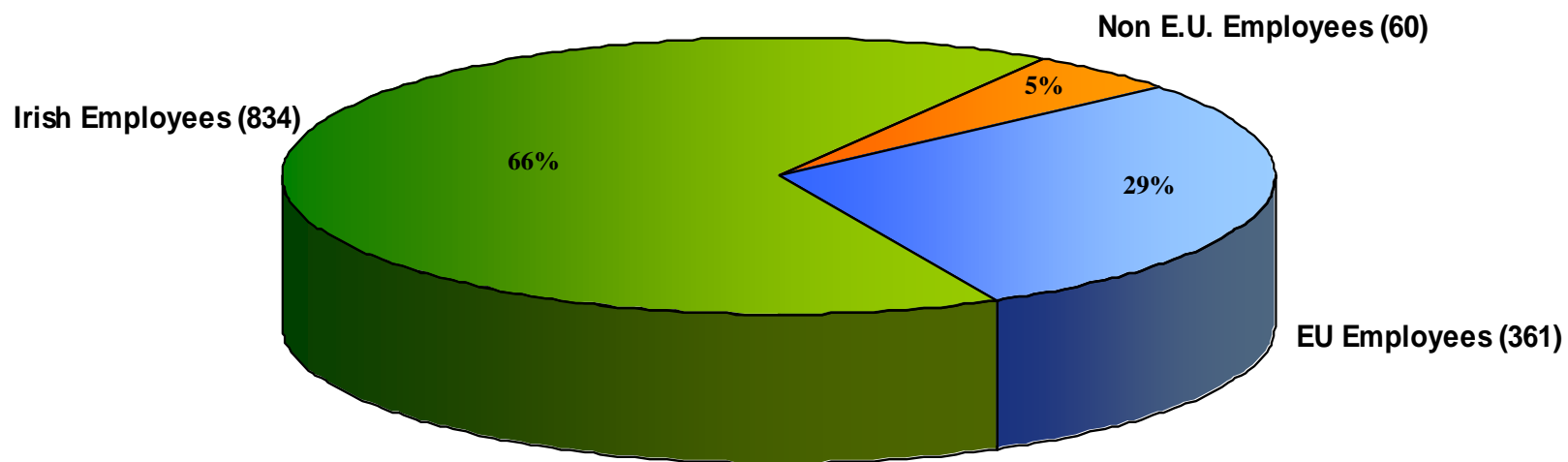




Table 25 – Guesthouses – Year-round Employment – Occupation by Nationality

Occupation	Irish	EU	Other Nationalities
Managers	34%	5%	5%
Supervisors	4%	3%	2%
Administrative/ Clerical/ Front Office	8%	4%	12%
Culinary	11%	13%	0%
Food Service	18%	19%	12%
Bar	9%	2%	0%
Accommodation Service	14%	36%	18%
Sales and Marketing	<0.5%	8%	12%
Other Skilled Service	1%	2%	23%
Other non Service Area	<0.5%	8%	17%
Total	834	361	60

B&Bs



Table 26 – B&Bs – Employment by Status

Status	Employees	%
Full-time Year-round	996	25
Part-time Year-round	201	5
Full-time Seasonal	682	17
Part-time Seasonal	353	9
Unpaid Family	1,566	40
Volunteers/ Trainees	140	4
Total	3,937	100



Table 27 – B&Bs – Employment Status by Region

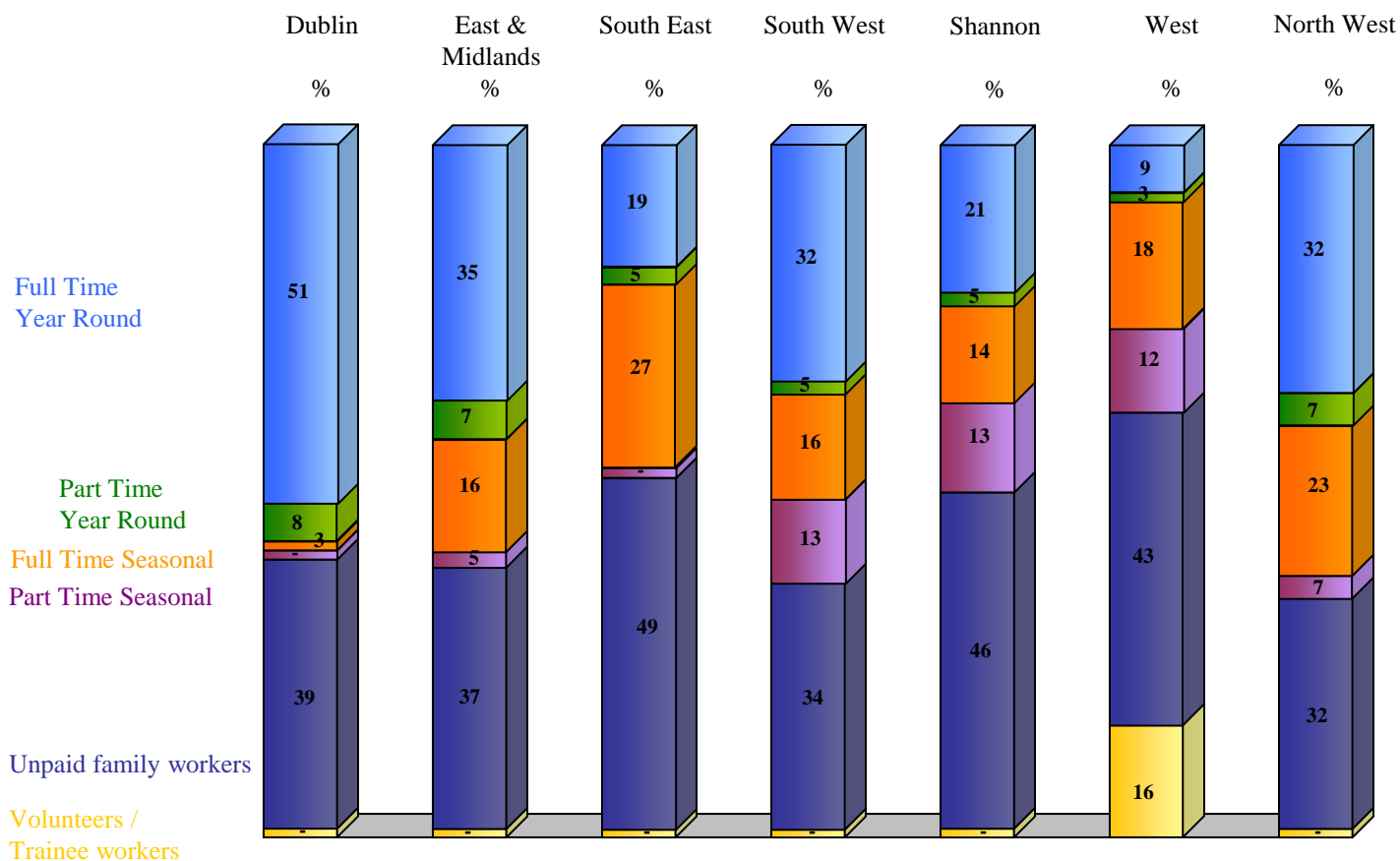




Table 28– B&Bs – Occupation of Year-round Employees

Occupation	Employees	%
Managers	983	82
Supervisors	18	2
Administrative/ Clerical/ Front Office	12	1
Culinary	19	2
Food Service	21	2
Bar	9	1
Accommodation Service	99	8
Sales and Marketing	-	-
Other Skilled Service	21	2
Other non Service Area	15	1
Total	1,198	100



Table 29 – B&Bs – Nationality of Year-Round Employees

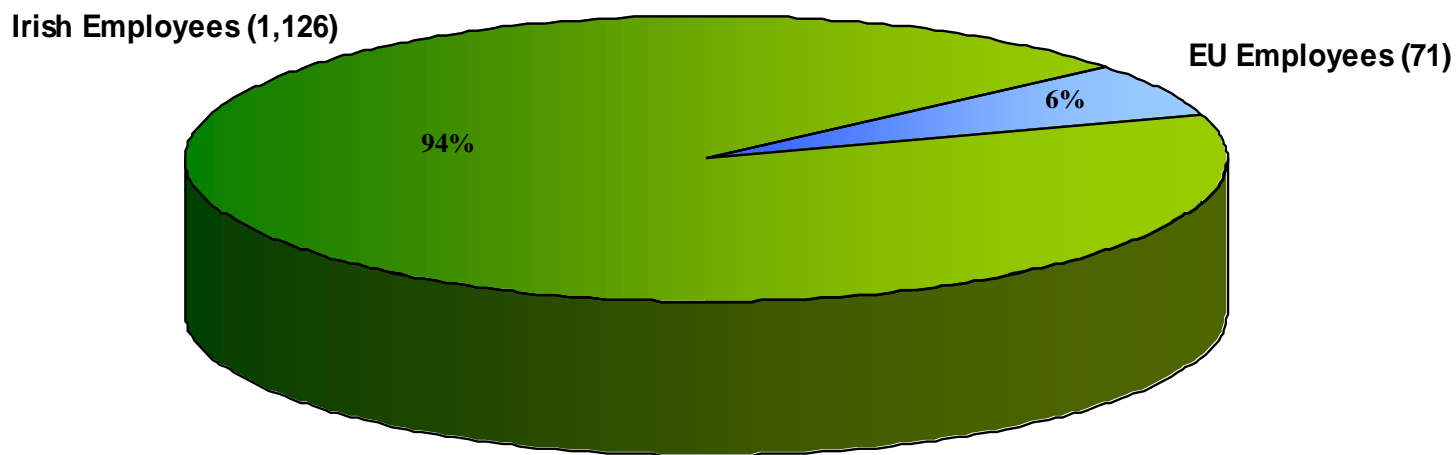




Table 30 – B&Bs – Year-round Employment – Occupation by Nationality

Occupation	Irish	EU
Managers	85%	44%
Supervisors	1%	17%
Administrative/ Clerical/ Front Office	1%	0%
Culinary	2%	0%
Food Service	2%	0%
Bar	1%	0%
Accommodation Service	6%	39%
Sales and Marketing	0%	0%
Other Skilled Service	2%	0%
Other non Service Area	1%	0%
Total	1,126	71

SELF - CATERING



Table 31 – Self-catering – Employment by Status

Status	Employees	%
Full-time Year-round	765	32
Part-time Year-round	705	29
Full-time Seasonal	236	10
Part-time Seasonal	521	21
Unpaid Family	119	5
Volunteers/ Trainees	81	3
Total	2,426	100



Chart 32 – Self-catering – Employment Status by Region

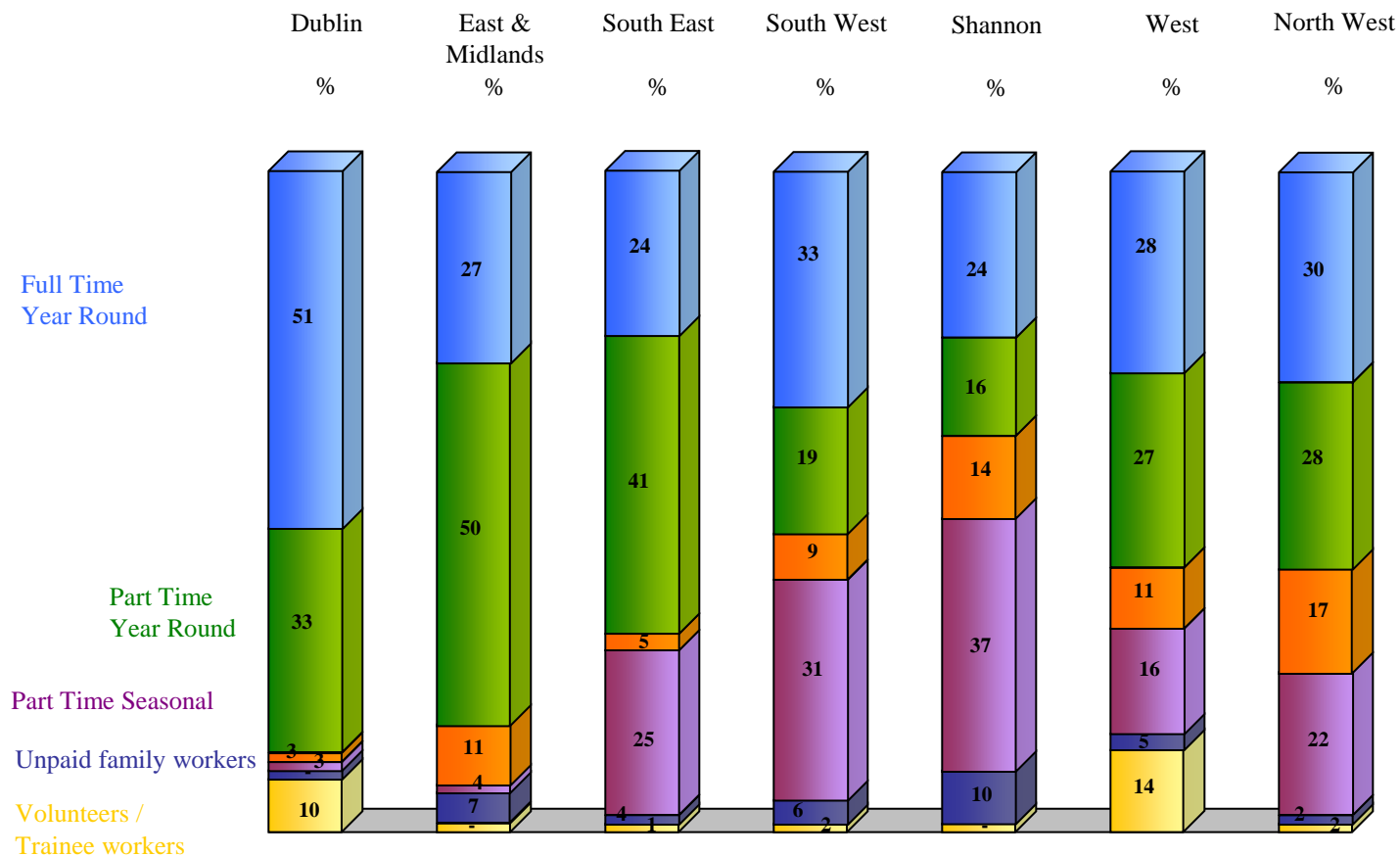




Table 33 – Self-catering – Occupation of Year-round Employees

Occupation	Employees	%
Managers	352	24
Supervisors	93	6
Administrative/ Clerical/ Front Office	172	12
Culinary	57	4
Food Service	104	7
Bar	65	4
Accommodation Service	481	33
Sales and Marketing	14	1
Other Skilled Service	83	6
Other non Service Area	50	3
Total	1,470	100



Table 34 – Self-catering – Nationality of Year-Round Employees

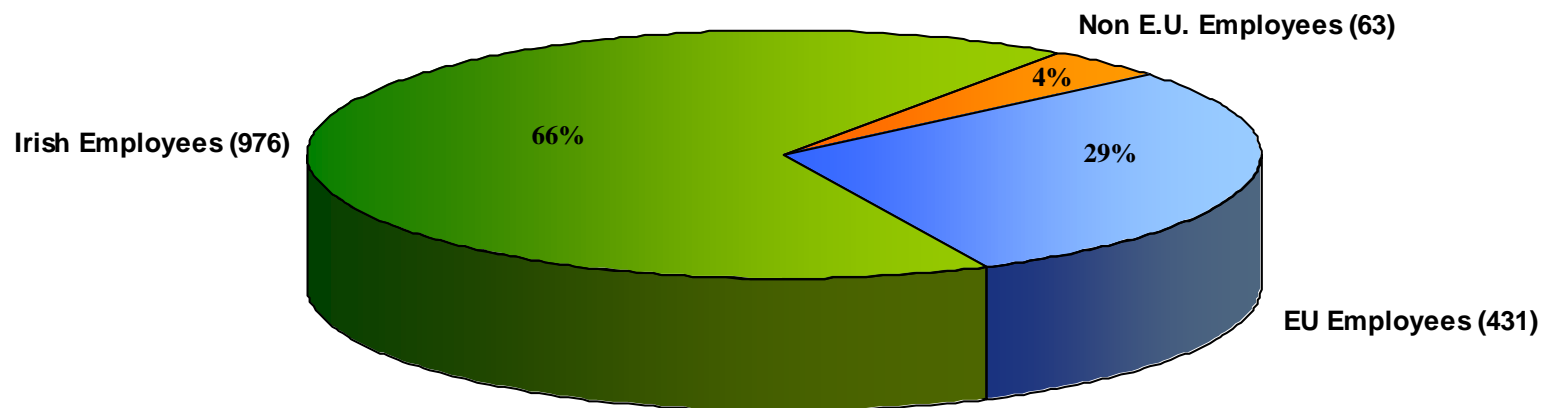




Table 35 – Self-catering – Year-round Employment – Occupation by Nationality

Occupation	Irish	EU	Other Nationalities
Managers	32%	7%	8%
Supervisors	7%	6%	5%
Administrative/ Clerical/ Front Office	11%	12%	14%
Culinary	3%	6%	0%
Food Service	7%	8%	3%
Bar	4%	5%	0%
Accommodation Service	27%	42%	67%
Sales and Marketing	1%	0%	0%
Other Skilled Service	3%	12%	0%
Other non Service Area	4%	3%	3%
Total	976	431	63

LICENSED RESTAURANTS



Table 36 – Licensed Restaurants – Employment by Status

Status	Employees	%
Full-time Year-round	17,165	44
Part-time Year-round	17,099	44
Full-time Seasonal	876	2
Part-time Seasonal	2,525	7
Unpaid Family	383	1
Volunteers/ Trainees	609	2
Total	38,657	100



Chart 37 – Licensed Restaurants – Employment Status by Region

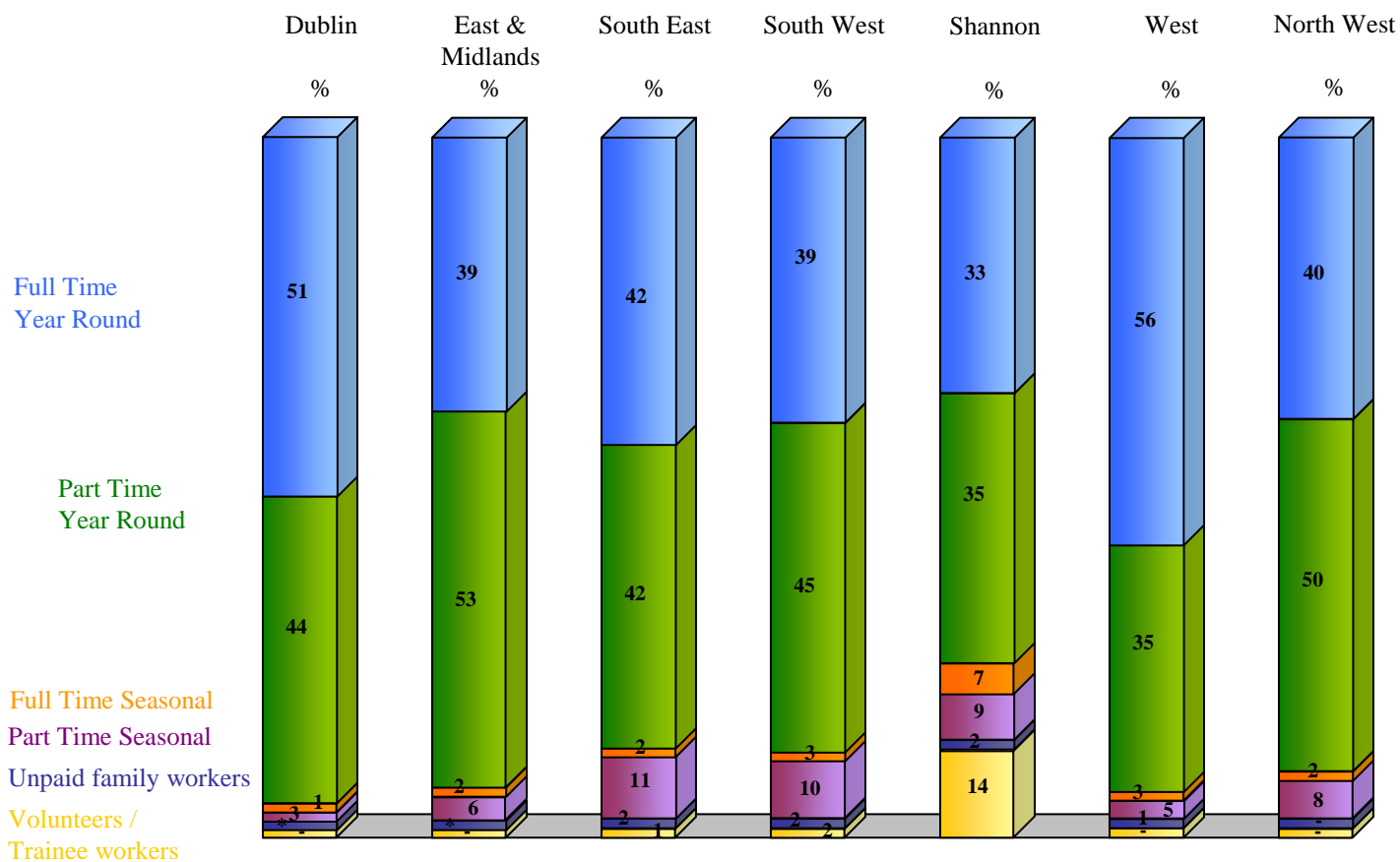




Table 38 – Licensed Restaurants – Occupation of Year-round Employees

Occupation	Employees	%
Managers	3,122	9
Supervisors	787	2
Administrative/ Clerical/ Front Office	536	2
Culinary	10,621	31
Food Service	16,075	47
Bar	1,890	6
Accommodation Service	83	<0.5
Sales and Marketing	35	<0.5
Other Skilled Service	308	1
Other non Service Area	806	2
Total	34,264	100



Table 39 – Licensed Restaurants – Nationality of Year-Round Employees

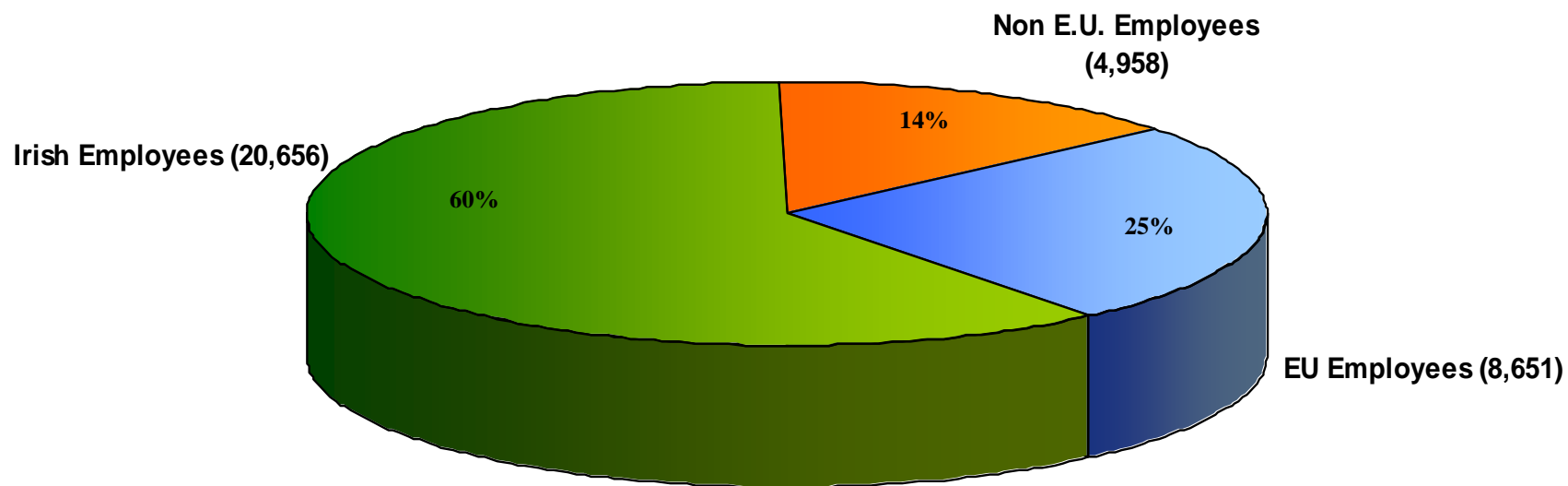




Table 40 – Licensed Restaurants – Year-round Employment – Occupation by Nationality

Occupation	Irish	EU	Other Nationalities
Managers	12%	5%	5%
Supervisors	2%	2%	3%
Administrative/ Clerical/ Front Office	2%	<0.5%	1%
Culinary	27%	34%	41%
Food Service	46%	49%	47%
Bar	7%	4%	3%
Accommodation Service	<0.5%	1%	<0.5%
Sales and Marketing	<0.5%	0%	0%
Other Skilled Service	1%	1%	1%
Other non Service Area	2%	4%	1%
Total	20,656	8,651	4,958

NON-LICENSED RESTAURANTS



Table 41 – Non-licensed Restaurants – Employment by Status

Status	Employees	%
Full-time Year-round	6,885	48
Part-time Year-round	6,244	44
Full-time Seasonal	98	1
Part-time Seasonal	646	4
Unpaid Family	462	3
Volunteers/ Trainees	0	0
Total	14,336	100



Table 42 – Non-licensed Restaurants – Employment Status by Region

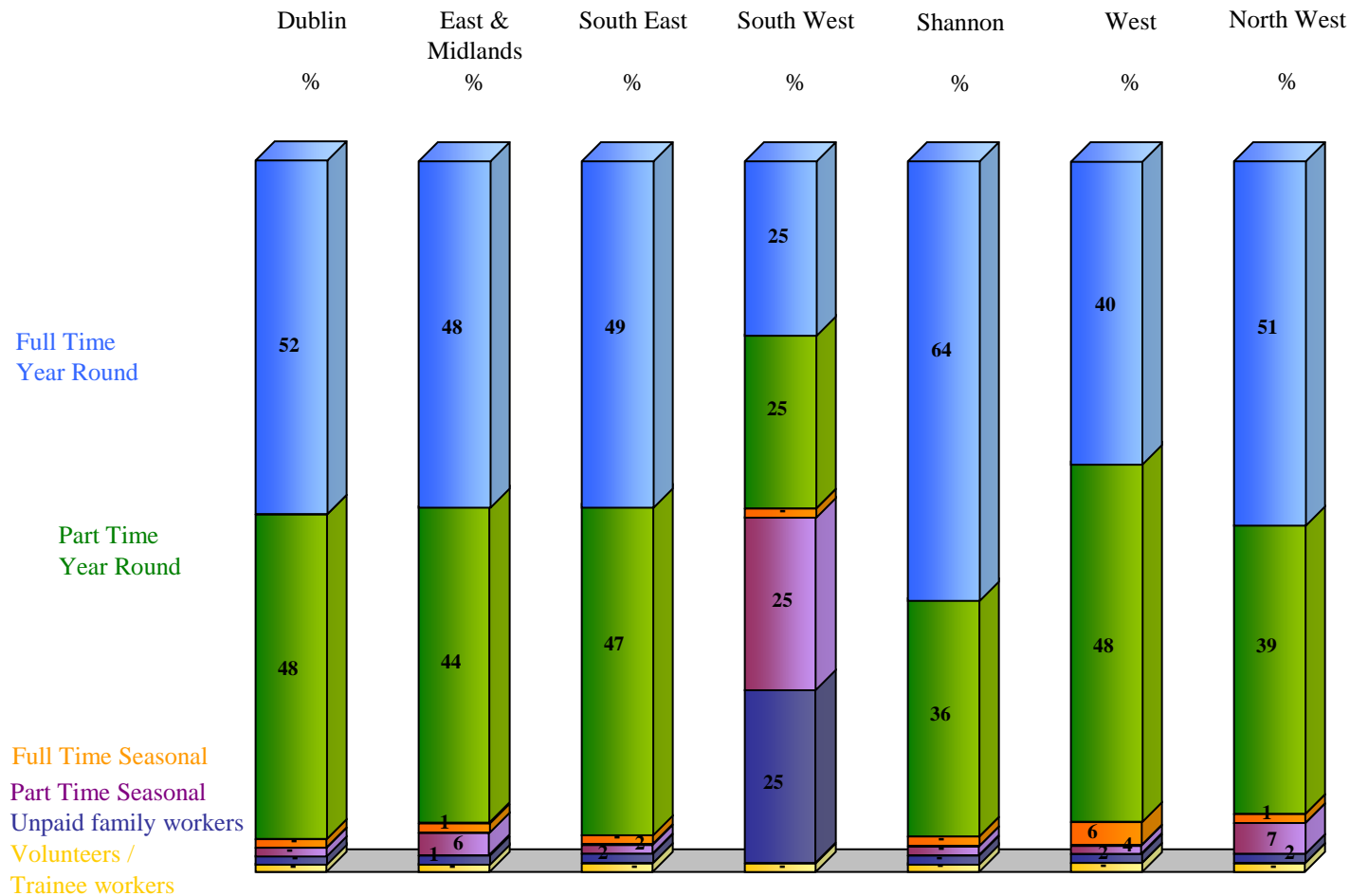




Table 43 – Non-licensed Restaurants – Occupation of Year-round Employees

Occupation	Employees	%
Managers	951	7
Supervisors	91	1
Administrative/ Clerical/ Front Office	18	<0.5
Culinary	2,098	16
Food Service	9,947	76
Bar	12	<0.5
Accommodation Service	0	0
Sales and Marketing	0	0
Other Skilled Service	13	<0.5
Other non Service Area	0	0
Total	13,129	100



Table 44 – Non-licensed Restaurants – Nationality of Year-Round Employees

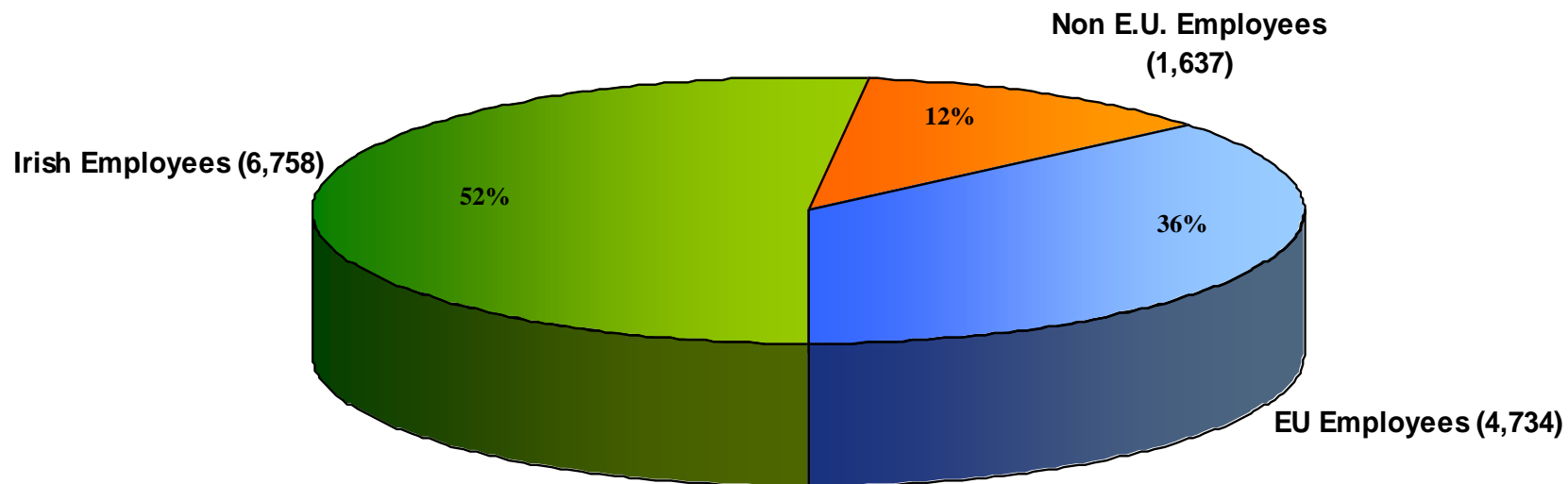




Table 45 – Non-licensed Restaurants – Year-round Employment – Occupation by Nationality

Occupation	Irish	EU	Other Nationalities
Managers	13%	2%	0%
Supervisors	1%	0%	0%
Administrative/ Clerical/ Front Office	<0.5%	0%	0%
Culinary	22%	3%	27%
Food Service	63%	95%	73%
Bar	<0.5%	0%	0%
Accommodation Service	0%	0%	0%
Sales and Marketing	0%	0%	0%
Other Skilled Service	<0.5%	0%	0%
Other non Service Area	0%	0%	0%
Total	6,758	4,734	1,637

PUBLIC HOUSES



Table 46 – Public Houses – Employment by Status

Status	Employees	%
Full-time Year-round	21,427	41
Part-time Year-round	24,330	47
Full-time Seasonal	888	2
Part-time Seasonal	4,585	9
Unpaid Family	420	1
Volunteers/ Trainees	42	<0.5
Total	51,693	100



Table 47 – Public Houses – Employment Status by Region

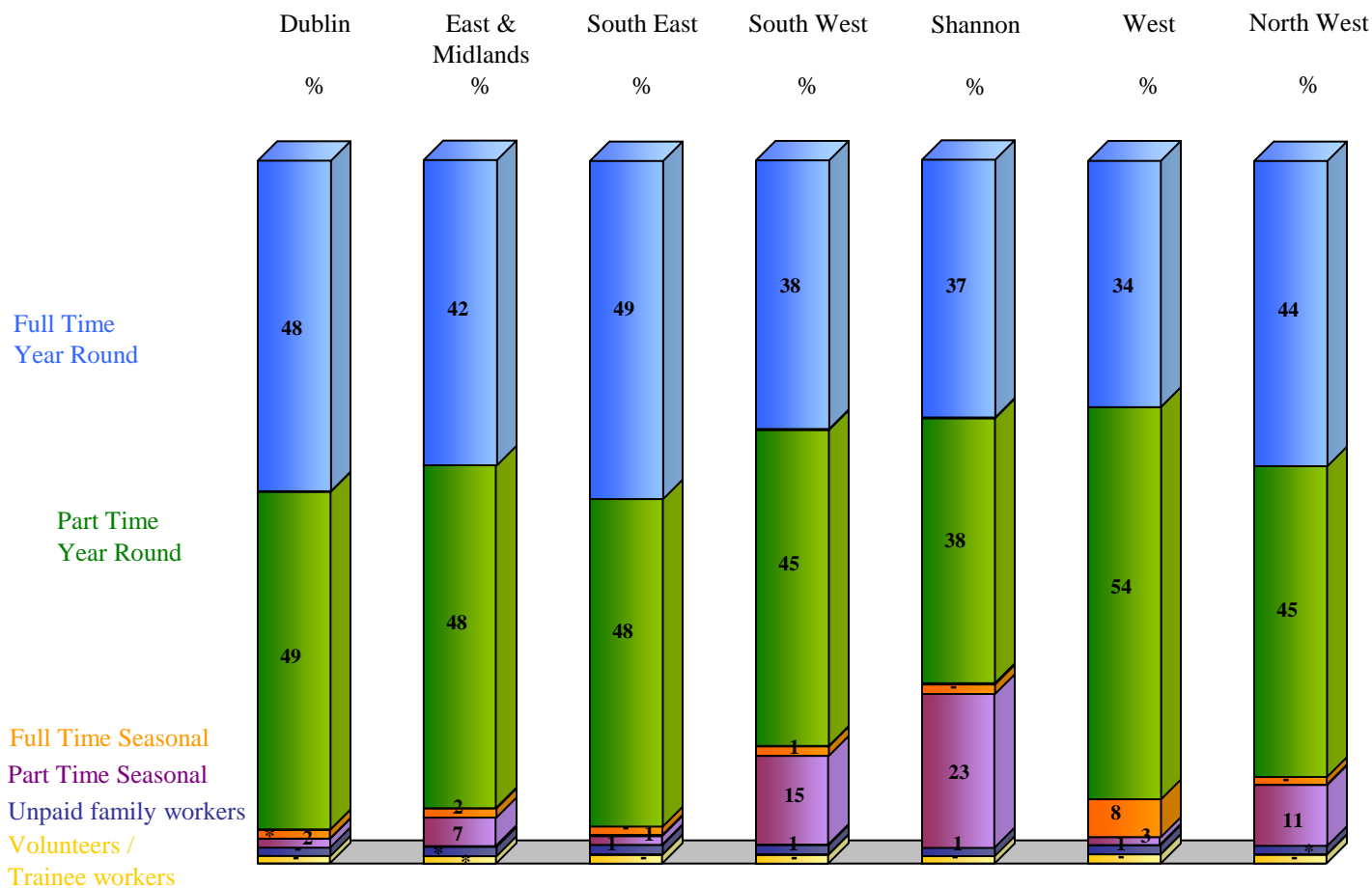




Table 48 – Public Houses – Occupation of Year-round Employees

Occupation	Employees	%
Managers	8,758	19
Supervisors	581	1
Administrative/ Clerical/ Front Office	212	<0.5
Culinary	3,027	7
Food Service	4,840	11
Bar	27,590	60
Accommodation Service	88	<0.5
Sales and Marketing	451	1
Other Skilled Service	87	<0.5
Other non Service Area	124	<0.5
Total	45,757	100



Table 49 – Public Houses – Nationality of Year-Round Employees

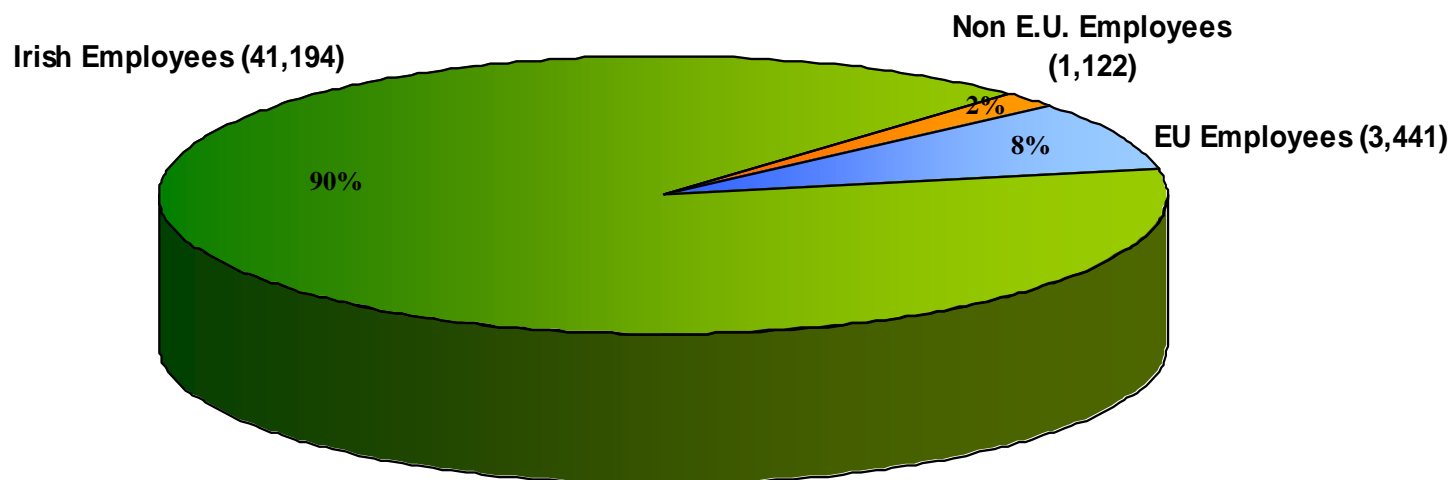




Table 50 – Public Houses – Year-round Employment – Occupation by Nationality

Occupation	Irish	EU	Other Nationalities
Managers	21%	3%	1%
Supervisors	1%	1%	0%
Administrative/ Clerical/ Front Office	<0.5%	1%	0%
Culinary	5%	18%	16%
Food Service	9%	22%	20%
Bar	61%	52%	60%
Accommodation Service	<0.5%	2%	0%
Sales and Marketing	1%	0%	0%
Other Skilled Service	<0.5%	1%	1%
Other non Service Area	<0.5%	1%	1%
Total	41,194	3,441	1,122

TOURISM SERVICES AND ATTRACTIONS (TSA)



Table 51 – TSA – Employment by Status

Status	Employees	%
Full-time Year-round	9,263	50
Part-time Year-round	4,221	23
Full-time Seasonal	1,699	9
Part-time Seasonal	2,066	11
Unpaid Family	481	3
Volunteers/ Trainees	971	5
Total	18,702	100



Table 52 – TSA – Employment Status by Region

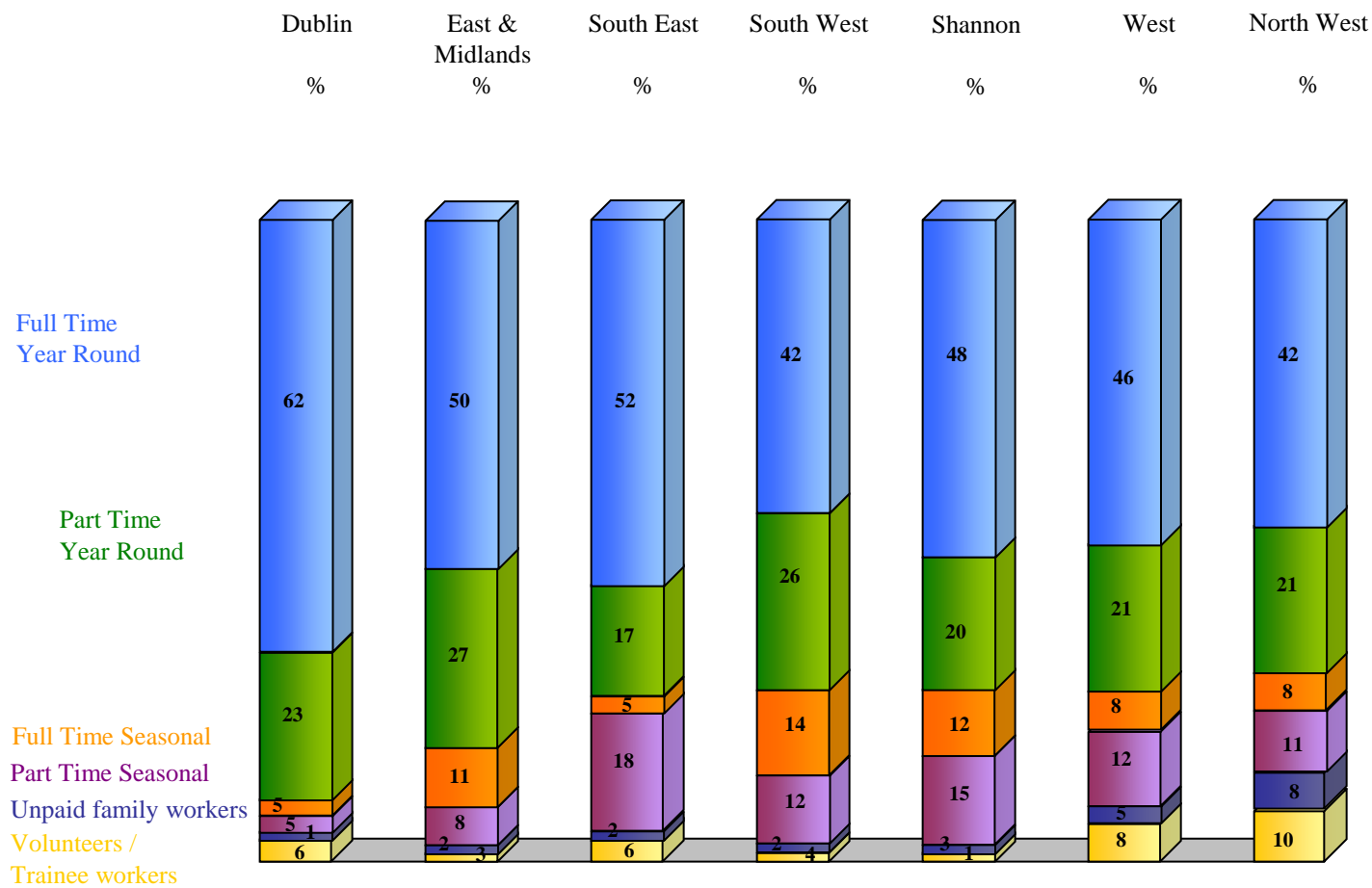




Table 53 – TSA – Occupation of Year-round Employees

Occupation	Employees	%
Managers	1,584	12
Supervisors	958	7
Administrative/ Clerical/ Front Office	2,462	18
Culinary	370	3
Food Service	542	4
Bar	691	5
Accommodation Service	330	2
Sales and Marketing	304	2
Other Skilled Service	3,492	26
Other non Service Area	2,750	20
Total	13,484	100



Table 54 – TSA – Nationality of Year-Round Employees

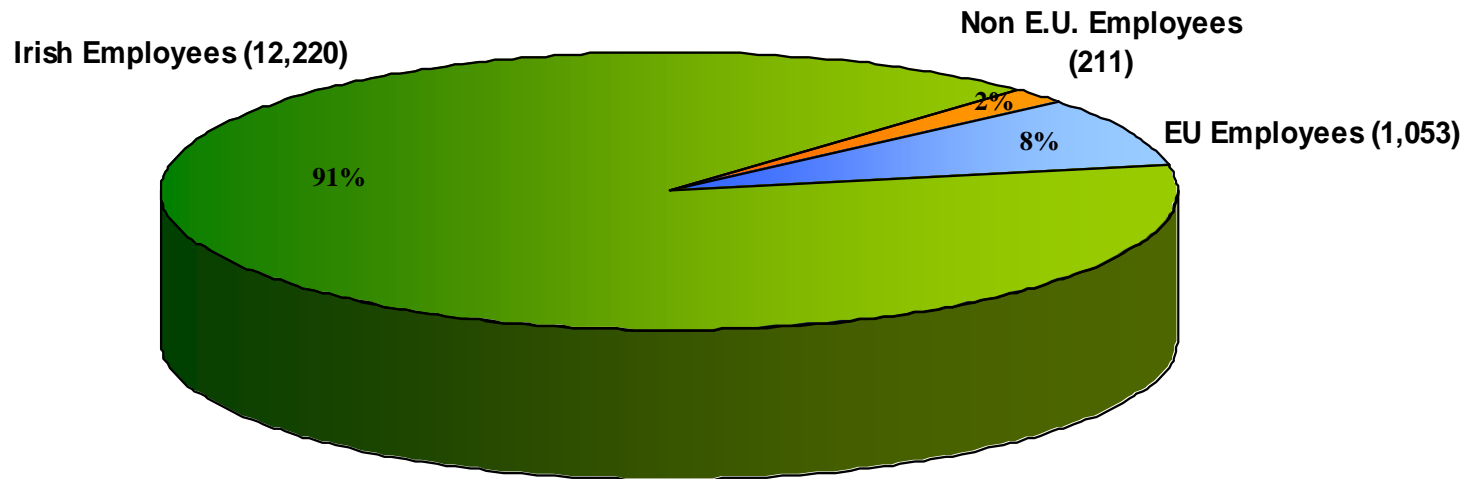




Table 55 – TSA – Year-round Employment – Occupation by Nationality

Occupation	Irish	EU	Other Nationalities
Managers	12%	12%	7%
Supervisors	7%	10%	11%
Administrative/ Clerical/ Front Office	18%	18%	14%
Culinary	2%	9%	13%
Food Service	3%	9%	15%
Bar	5%	4%	0%
Accommodation Service	2%	3%	2%
Sales and Marketing	2%	2%	4%
Other Skilled Service	26%	24%	27%
Other non Service Area	22%	9%	8%
Total	12,220	1,053	211