Analysis of the Education, Training and Business Support Needs of Companies in County Tipperary

Commissioned by: Tipperary Local Enterprise Office and Tipperary Education & Training Board

Research undertaken by: Márla Communications

Date: August 2017

etb
Bord Oideachais agus
Oiliúna Thiobraid Árann
Tipperary Education and Training Board

Comhairle Contae Thiobraid Árann
Tipperary County Council

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Local Enterprise Office

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1. Purpose of Research

This research study has been jointly commissioned by Tipperary Local Enterprise Office and Tipperary Education and Training Board, with the primary objective of ***"gaining a detailed understanding of the training and upskilling requirements of SME clients with more than 10 employees in the County of Tipperary that are domestically or locally traded and fall outside of the scope of Enterprise Ireland and LEO supports".***

This cohort of companies is of particular interest, as it falls outside the remit of both Tipperary LEO (due to company size) and Enterprise Ireland (as they are trading domestically with no plans to export). There exists very little detailed research and analysis into the education and training needs of this specific group of companies in the combined North & South County Tipperary.

Furthermore, there is a perceived lack of understanding of this group's education, training and development needs at a regional and indeed national level. Anecdotal evidence and the perception was that there were numerous firms in operation in the County without any form of support - an assumption which had to be verified in order to aid their growth potential and contribute to their sustainability prospects. A key driver for this research is therefore to test the assumption that this cohort is in need of development and training supports and to provide concrete, tangible, relevant and current insights into this business size and their related sectors.

Employer engagement is a key goal in SOLAS FET Strategy 2014-2019 and DES Education Plan, as well as in Action Plans for Jobs 2016. This research has been one way of assisting Tipperary ETB to fulfil that goal.

In addition, working with LEO on this research was an example of collaboration between ETBs and LEO, as outlined in the national Protocol between Enterprise Ireland and Education Training Boards Ireland (ETBI).

This objective is in line with the economic and enterprise objectives for the County set out in the Local Economic and Community Plan, *which include Tipperary LEO and ETB.*

Furthermore, the research seeks to address ***"the support deficiencies of existing enterprises, including the identification of training supports and upskilling required for both management and staff".*** It warrants mention that the LEO remit is microenterprise development (firms employing 10 or less staff) and their training focus is firmly on the owner manager with management development and business skills related programmes while the remit of the ETB covers both industrial, business and compliance related training and education across all areas.

The more detailed objectives of the research include:

- Identifying the development needs of companies, including training and up-skilling employees and management development.

- Confirming companies' awareness levels of the training supports offered by Tipperary Local Enterprise Office and Education & Training Board.

- Reviewing the current education and training supports provided by both Tipperary Local Enterprise Office and Tipperary Education & Training Board, and their ability to meet identified training gaps.

- Determining if 'accredited' training is important to employers.

- Obtaining the related banking perspective through direct dialogue with Business Advisors in the three pillar banks.

- Consulting with the 3rd level sector in the county in order to gain an understanding of their provision of possible courses and supports.

- Assessing the degree of interest in establishing a 'Tipperary Employer Engagement Network'.

2. Research Methodology

This section outlines the various methods of research used to ensure Tipperary Local Enterprise Office and Tipperary Education & Training Board (hereafter referred to as Tipperary LEO & Tipperary ETB) are provided with a robust and representative research output.

2.1 Sample Size

An estimated 800 companies were contacted by email, and asked to participate in this study (emails featured a Survey Monkey questionnaire link). These companies were sourced from a combination of existing databases, including Kompass, LEO and ETB. A target of a minimum of 100 company responses was agreed at project commencement stage, on the basis that this number of responses would provide an honest and representative reflection of the current status.

It is important at this point to highlight that the initial response rate from companies was disappointingly low.

After discussions between the research company, LEO and ETB, it was agreed that phone interviews were necessary in order to obtain the relevant data. While these calls did ensure the target number of companies was reached, the majority of companies required 2-3 phone-calls before engaging in the process. A number of companies were also met face to face in order to ensure completion of the survey.

Through the combination of online questionnaires, telephone interviews and face to face discussions, ***a total of 109 companies actively participated in this research***.

- 11% of these companies were clients sourced from the Tipperary LEO & Tipperary ETB databases.

- The remaining 89% of respondents were sourced from all other databases, primarily Kompass.

2.2 Areas of Interest

Three key areas of interest were identified as fundamental to this research. These areas, coupled with the research tools used, are highlighted in table 1.

Key Market / Area of Interest	Research Tool
Companies	On-line and Telephone Questionnaires
Banks	Telephone Interviews
LEO, ETB & Third Level Sector	Face-to-face Interviews

Table 1: Areas of Interest and Appropriate Research Tool

2.3 Research Approach & Method

2.3.1 Questionnaires

The questionnaires designed for the research with the companies and banks comprised of quantitative and qualitative questions (refer to Appendix 1 for all questionnaires).

In conjunction with Tipperary LEO & Tipperary ETB, a link to the online Survey Monkey questionnaire was emailed to businesses located in Tipperary. Companies could also download the questionnaire link from the social media platforms and websites of Tipperary LEO & Tipperary ETB. The questionnaires were made available to companies during Quarter 2.

Please note, the LEO and ETB requested that additional questions were included in the questionnaire specifically for their client databases. The output of these additional questions is captured in *Section 3.2, Area 2 - Specific Focus on LEO and ETB Training Offering, points (i – vi)*. All other data includes combined responses from the 109 companies.

The questionnaires for companies were divided into different sections focusing on:

- Respondents' business information e.g. number of years in business, number of employees, sector, training & supports availed of in the past.

- Respondents' development goals, current education and training requirements and supports required to grow their business.

- Supports respondents had availed of in the past.

- Respondents' willingness to participate in an 'Employer Engagement Forum'.

- Respondents' desire to receive information from Tipperary LEO and Tipperary ETB in the future.

The questionnaires for Banks covered the following areas:

- Types of business loans companies with 10+ employees are applying for, including the main uses of funding.

- Focus on business plans – degree to which the plans have been completed, including all problematic areas.

- Promotion by banks of bodies such as the LEO to companies seeking finance.

- Awareness of the education, training and other supports available from the LEO and ETB.

- Willingness to meet with LEO and/or ETB to discuss levels of support available.

2.3.2 Telephone Interviews

As highlighted, telephone interviews constituted the primary data collection tool for company feedback, due to the very low response rate from the online questionnaire.

An estimated 300 companies were contacted by telephone, the output of which fell into 3 categories: **(a)** companies declined to participate, **(b)** companies discussed the questionnaire over the phone, or **(c)** companies agreed to fill in the questionnaire when time allowed.

Telephone interviews were also used to capture the required information from the banking sector – researchers spoke to the Business Advisors from the three pillar banks – AIB, Ulster Bank and Bank of Ireland. A pre-determined list of questions was used as a reference guide during the telephone interviews to ensure all the required data was captured. A detailed discussion was then undertaken around the key areas of interest.

2.3.3 Face to Face Interview Guide

Face to face interviews were the primary research method used to gather the relevant information from the LEO, ETB and 3rd Level Sector. A key focus of this element of the research was to assess the current education and training programmes provided by each entity. Areas of interest included:

- Ability of each entity to meet the education and training requirements and shortfalls identified in this study.

- Ability of each entity to provide flexible attendance options.

2.4 Promotion of Study

Several initiatives were undertaken to promote this research, with a view to increasing awareness of the study, and to obtaining company buy-in and participation.

(i) Radio Advert

A 40 second radio advert featured on Tipp FM during the 'drive time' slot. The advert was aired over the course of ten days between Monday 20th of March 2017 and Friday 31st of March 2017 (Refer to Appendix 2 for radio advert script).

(ii) Press Advert and Press Release

A press advert (image 1) was designed to promote research participation, and featured in the following papers:

- Tipperary Star

- Nenagh Guardian

- Midland Tribune

- Clonmel Nationalist

HAVE YOUR SAY!
Market Research Study

✓ **Do you employ more than 10 employees?**
✓ **Do you wish to upskill your workforce?**
✓ **Do your employees have specific training needs?**

Tipperary Education & Training Board in conjunction with The Local Enterprise Office want to hear from you.

This study aims to identify the education, training and other supports required by businesses employing 10 or more staff in the County.

Companies will be contacted to participate in this study or can complete the questionnaire online at www.tipperaryetb.ie or www.localenterprise.ie/tipperary

Education, Training & Supports that Deliver Results

Image 1: Press Advert

In mid-March, a press release also featured in these papers (Refer to Appendix 3 for press release). The following image accompanied the press release:

Image 2: Image for Press Release

(iii) Social Media Badge, Website Graphic and Email Graphic

The study was advertised across the social media platforms of Tipperary LEO & Tipperary ETB; it also featured on both websites. Relevant staff members from both bodies included a link to the questionnaire within their email signature. Each promotional format consisted of a brief description of the study and a link to download the questionnaire (Refer to Appendix 4 for social media badge, website graphic and email graphic).

3. Research Findings

 For ease of reference, a summary of the key findings identified in this research are highlighted in Section 3.1 - Key Findings.

The more detailed results from the research are divided into 3 specific sections:

- Section 3.2 - Analysis of Feedback obtained from Companies.

- Section 3.3 - Analysis of Feedback obtained from the Banking Sector.

- Section 3.4 - Analysis of Feedback obtained from the Education & Training Sector.

Section 3.1

Summary of Key Findings

3.1 Key Findings

The following presents a summary of the key findings, presented under three sections:

3.1.1   Findings relating to the additional questions posed exclusively to clients of Tipperary LEO & Tipperary ETB.

3.1.2   Findings from all other questions addressed to the total Sample Size.

3.1.3   Presentation of key findings via a series of Infographics.

3.1.1 Findings relating to the Additional Questions posed to Clients of Tipperary LEO & Tipperary ETB

1.   50% of companies have a working 'Workplace Development Policy' in place.

2.   For the majority of companies, business developmental goals tend to be generic in nature.

3.   58% of companies confirmed they find it difficult to access relevant developmental training supports and grants.

4.   67% of companies have availed of at least one type of support.

5.   Only 30% of companies have availed of a course/programme provided by Tipperary LEO, with 27% having availed of a course/programme provided by Tipperary ETB.

3.1.2 Findings from Research Undertaken with the total Sample Size

1.   61% of companies confirmed they were aware of the services offered by Tipperary LEO, and 50% were aware of the services offered by Tipperary ETB (non-LEO & ETB clients).

2.   61% of respondents believed that access to finance through State support/grants was a key factor in scaling their business.

3.   73% of businesses confirmed they were willing to fund employee education and training.

4.   At the time of research, 62% of businesses confirmed they had not committed to any type of education and training programme for this calendar year.

5.   60% of companies believe 'Accredited Training' derived from a course/programme is desirable, but not necessary.

6.   When asked to identify the top education and training needs within their companies, 26% of respondents could not highlight any education and training needs.

7. 67% of the remaining companies identified at least 3 education and training requirements within their businesses (Refer to appendix 5 for list of education and training requirements).

8. 38% of businesses believe that a 'day release' format is the best option for employee participation on a course/programme.

9. A large proportion of companies confirmed that they are not considering 'Accredited Training'.

10. 84% of businesses would like to receive further education and training information from Tipperary LEO and ETB.

11. 69% of respondents confirmed they would be willing to attend an 'Employer Engagement Forum'.

12. Incomplete or unsubstantiated business plans may be hampering companies' ability to successfully secure finance from the Banking Sector.

13. A significant number of the education and training gaps identified from companies of 10+ employees can be met by either Tipperary LEO or ETB.

3.1.3 Presentation of Key Findings via a series of Infographics

The following infographics have been developed to present the key findings from this study:

1. Main infographic (all sectors).

2. Manufacturing sector infographic.

3. Food and Drink sector infographic.

4. Retail sector infographic.

5. Hospitality sector infographic (Hotels).

Research objective:

To review the training and up-skilling requirements of companies with more than 10 employees in the county of Tipperary.
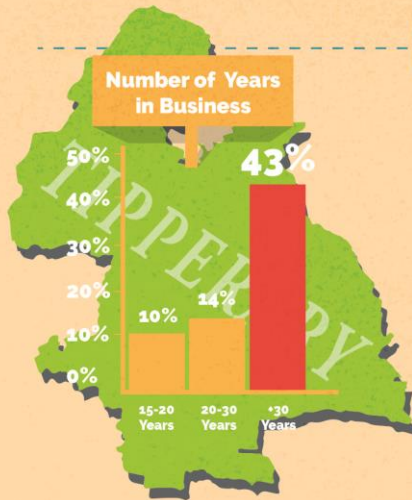
Research dates:

January - July 2017

Research Sponsors:

Oifig Fiontair Áitiúil
Local Enterprise Office

etb

Comhairle Contae Thiobraid Árann
Tipperary County Council

Company Profile

Number of Years in Business

- 50%
- 40%
- 30%
- 20%
- 10%
- 0%

43%
14%
10%

15-20 Years | 20-30 Years | +30 Years

Number of Staff Employed

- 30%
- 25%
- 20%
- 15%
- 10%
- 5%
- 0%

27%
15%
12%
25%

10-15 Staff | 20-30 Staff | 30-40 Staff | +50 Staff

Business Sector

- Tourism 9%
- Construction 4.5%
- Financial 2%
- Retail 16.5%
- Agriculture 5.5%
- Manufacturing 13%
- Other 33%
- Food & Drink 12%
- Motor Trade 4.5%

Key Findings

61% believe State support will help scale their business

62% have no formal training plan in place

73% will fund employee training

84% would like further information on education & training from LEO or ETB

69% would be willing to attend an 'Employer Engagement Forum'

76% believe a 'Training Accreditation" is essential or desireable

Training Brings Clear Company Benefits

"Because of our interaction with Tipperary ETB over the last number of years, our organisation has benefited hugely"

Comhairle Contae Thiobraid Árann
Tipperary County Council

"We found that the 'Skills for Work' programme really benefited our company and our employees alike"

abp

"Since we started working with the ETB, the feedback from employees has been excellent. The tutors are dedicated, and go above and beyond"

RibWorld

Manufacturing Sector

TIPPERARY

43% located in North Tipperary
57% located in South Tipperary

Key Findings

Supports Required:

State Supports
71%

Access to New Markets
64%

Employment Supports
57%

Recurring Training Requirements:

Lean Manufacturing

Health and Safety

People Management

Computer Literacy

15%
have committed to a training programme

92%
will fund employee training

Preferred Time for Employee Training:

31% Evening part-time

31% Day Release part-time

28%
haven't explored the range of courses on offer by LEO or ETB

25%
are considering 'Accredited Training'

54%
believe a 'Training Accreditation' is desirable

Future Engagement

86%
would like further information on education & training from LEO or ETB

66%
would be willing to attend an 'Employer Engagement Forum'

Food and Drink Sector

Research Objective:
To review the training and upskilling requirements of Food and Drink companies with more than 10 employees in County Tipperary.

Research Duration:
January - July 2017

Research Sponsors:
Oifig Fiontair Áitiúil
Local Enterprise Office

etb

Comhairle Contae Thiobraid Árann
Tipperary County Council

TIPPERARY

15% located in North Tipperary
85% located in South Tipperary

Key Findings

Supports Required:

JOBS

Employment Supports
39%

Access to Finance
31%

Standard & Compliance
31%

Recurring Training Requirements:

HACCP

Health and Safety

Manual Handling

38%
have committed to a training programme

75%
will fund employee training

Preferred Time for Employee Training:
38% Evening part-time
23% Day Release part-time

46%
haven't explored the range of courses on offer by LEO or ETB

31%
are considering 'Accredited Training'

69%
believe a 'Training Accreditation' is desirable

Future Engagement

92%
would like further information on education & training from LEO or ETB

54%
would be willing to attend an 'Employer Engagement Forum'

Retail Sector

TIPPERARY

56% located in North Tipperary
44% located in South Tipperary

Key Findings

Supports Required:

JOBS

Employment Supports
64%

State Supports
50%

Access to New Markets
35%

Recurring Training Requirements:

First Aid

Marketing

Manual Handling

Management Training

28%
have committed to a training programme

55%
will fund employee training

Preferred Time for Employee Training:
39% Evening part-time
33% Day Release part-time

50%
haven't explored the range of courses on offer by LEO or ETB

22%
are considering 'Accredited Training'

78%
believe a 'Training Accreditation' is desirable

Future Engagement

83%
would like further information on education & training from LEO or ETB

67%
would be willing to attend an 'Employer Engagement Forum'

Hospitality Sector - Hotels

Research Objective:

To review the training and upskilling requirements of Hotels with more than 10 employees in County Tipperary.

Research Duration:

January - July 2017

Research Sponsors:

Oifig Fiontair Áitiúil Local Enterprise Office

etb

Comhairle Contae Thiobraid Árann Tipperary County Council

TIPPERARY

50% located in North Tipperary
50% located in South Tipperary

Key Findings

Supports Required:

Access to Finance 50%

Employment Supports 33%

Access to New Markets 25%

Recurring Training Requirements:

Digital Marketing

Food Hygiene

Knowledge of Local Area

50% have committed to a training programme

58% will fund employee training

Preferred Time for Employee Training:
17% Evening part-time
33% Day Release part-time

50% haven't explored the range of courses on offer by LEO or ETB

0% are considering 'Accredited Training'

55% believe a 'Training Accreditation' is desirable

Future Engagement

92% would like further information on education & training from LEO or ETB

75% would be willing to attend an 'Employer Engagement Forum'

Section 3.2

Analysis of Feedback obtained from Companies

3.2 Analysis of Feedback obtained from Companies

The output of this part of the research is presented under the following areas of interest, with each area being examined in detail.

Areas of Interest

Area 1 - Business Overview

Area 2 - Specific Focus on the Education and Training Offering of Tipperary LEO and Tipperary ETB

Area 3 – Education, Training and Supports Required

Area 4 - Future Engagement

<u>Area 1: Business Overview</u>

(i) Business Location

Participation in this research study was promoted to businesses across the county of Tipperary. 64% of the companies contacted in South Tipperary and 36% of the companies contacted in North Tipperary took part in this study. Companies either completed the questionnaire online or with the researcher by phone. Please note, a top-line Education and Training Needs Analysis Study was undertaken in North Tipperary in 2013; the lower participation rate from North Tipperary may be due to the fact that some of the companies had already participated in this education and training research study, and therefore opted out of this particular piece of research.
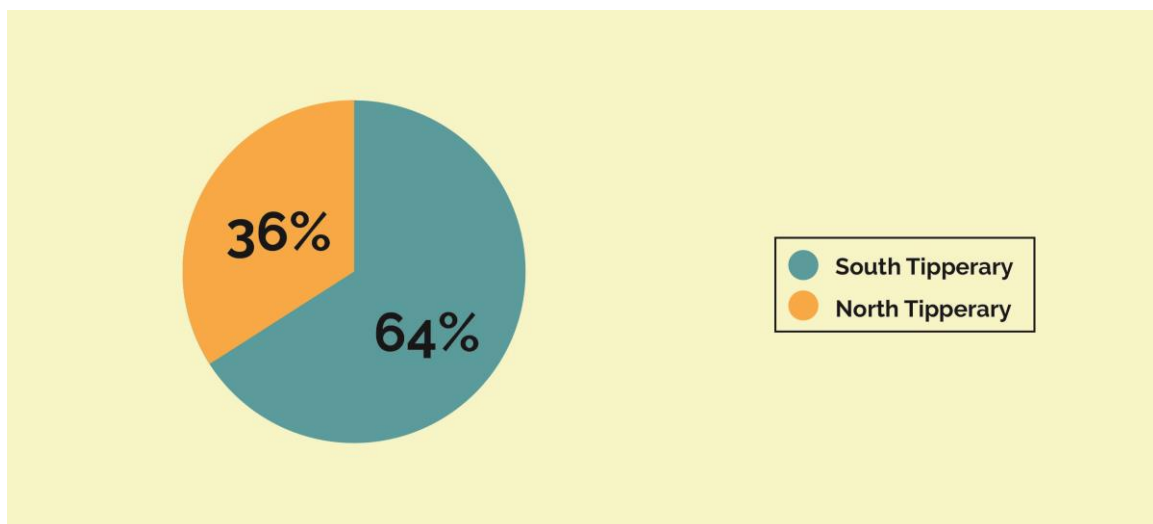
<u>Graph 1:</u> Location of businesses who participated in the study

(ii) Number of Years in Business

Businesses were asked to confirm how many years they were in operation; 43% of those surveyed confirmed to being in business for 30 years or over.
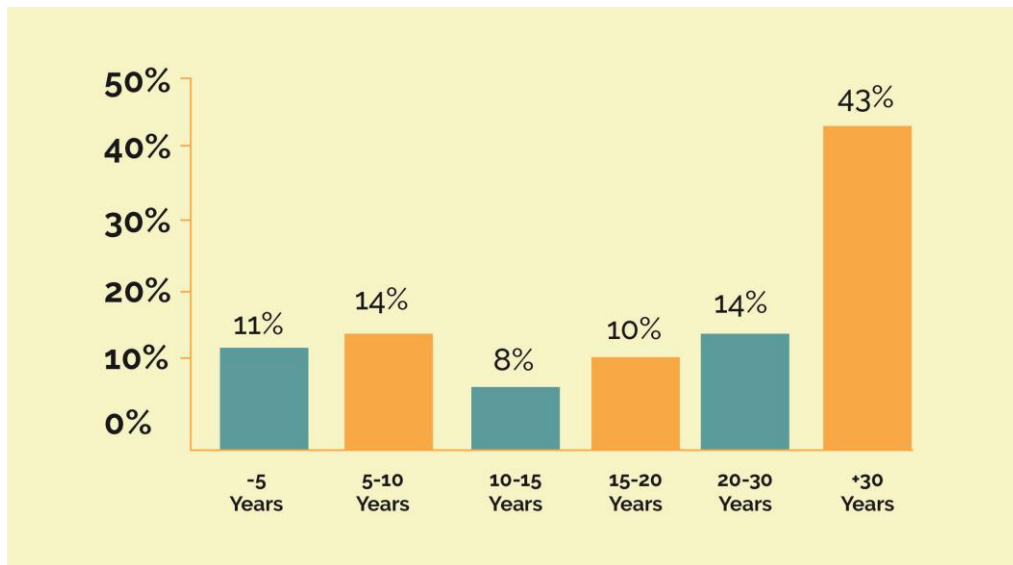
Graph 2: Number of years in business

(iii) Number of Staff Employed

27% of the businesses confirmed to employing between 10 and 15 staff members, with 25% employing more than 50 staff members.
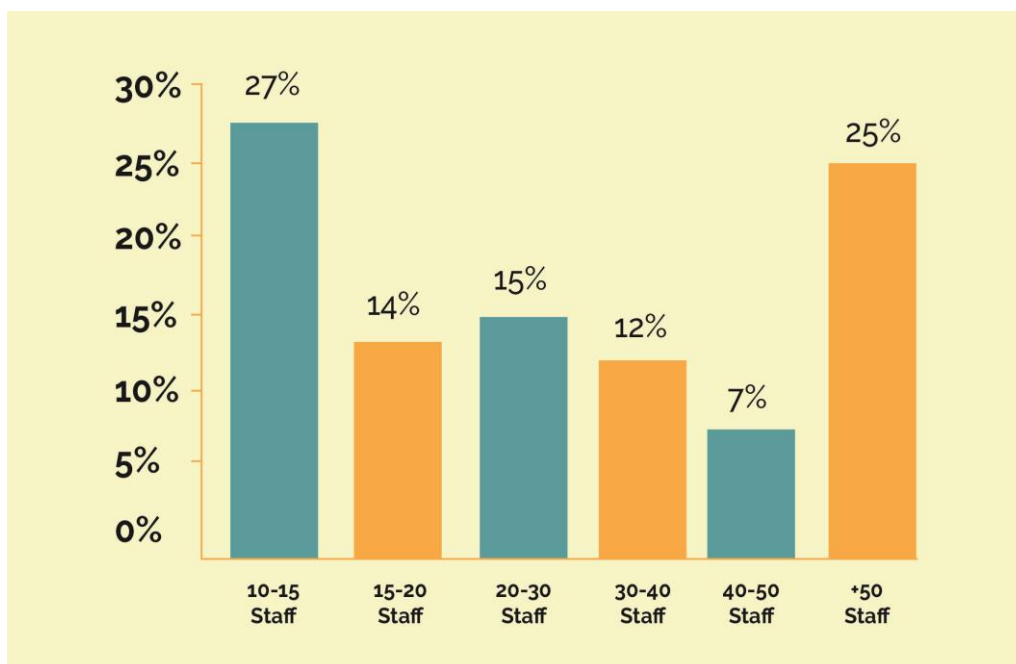
Graph 3: Number of staff employed

(iv) Business Sector

The participating businesses spanned a range of sectors, including manufacturing (13%), retail (16.5%), and food & drink (12%). Table 2 highlights all business sectors contacted.

Sector	Percentage
Manufacturing	13%
Retail	16.5%
Tourism	9%
Construction	4.5%
Financial	2%
Agriculture	5.5%
Motor Trade	4.5%
Food and Drink	12%
Other	33%

Table 2: Business Sectors

33% of businesses fell into the 'other' category, including, training & coaching, coach hire, hotels, IT services, waste management, engineering, nursing homes, childcare and community employment. It should be noted that 11% of companies contacted were hotels, some of whom selected 'Tourism' as the sector to which they belonged, with others selecting the 'Other' category.

Area 2: Specific Focus on the Education and Training Offering of Tipperary LEO and Tipperary ETB

As highlighted, 11% of the participating companies were clients of either Tipperary LEO or Tipperary ETB. These companies were asked 5 additional questions, focusing on the existence of a workplace development policy, business development goals, access to education / training supports and grants, grants availed of in the past and their past and present participation in programmes. Please note: Points (i-vi) focus exclusively on feedback obtained from current of Tipperary LEO & Tipperary ETB clients; the remaining 2 points refer to non-LEO and ETB clients.

(i) Existence of a Workplace Development Policy

50% of businesses confirmed to having a working Workplace Development Policy in place. Interestingly, 25% of the participants who did not have a Workplace Development Policy in place, confirmed they had one in the past, but became complacent about its implementation.
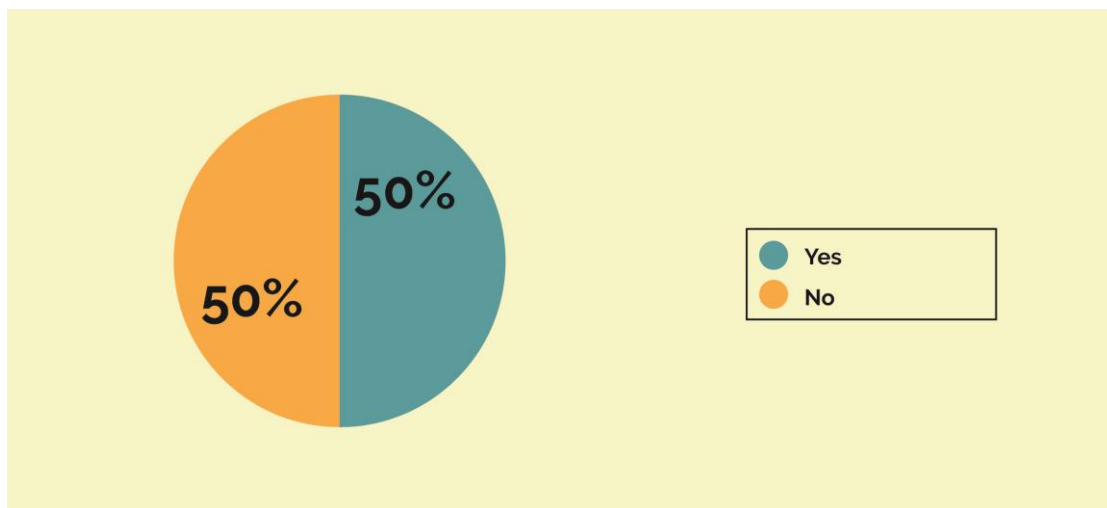
Graph 4: Presence of a Workplace Policy

(ii) Businesses Developmental Goals

Participants were asked to confirm the development goals they had set for their business for the coming year. Upon analysis, it was evident that the identified goals were very generic in nature and extremely difficult to measure; some of these goals are highlighted below:

(iii) Ease of Access to Education and Training Supports and Grants

58% of companies confirmed to finding it difficult to access relevant developmental training supports and grants. However, upon further discussion, it became evident that many of these companies had not explored the area in detail, or spoken to a representative of the LEO or ETB. Some comments noted during this discussion included:

"The cost of training is a barrier, as we do not receive any training grants"

"There is a lack of information on grant availability"

"I haven't actively pursued them, I am sure they are available but probably hard to find and identify"

(iv) Confirmation of Education and Training Supports and Grants availed of in the Past

Participants were asked to confirm if they had availed of any supports/grants in the past number of years. 67% of companies confirmed to availing of at least one type of support, with half of those surveyed availing of at least two supports.

Some of the supports which companies have availed of in the past included:

- LEO Company Development Scheme

- ETB Education and Training (certain clients referred to VEC training, now rebranded as ETB)

- Priming Grant

- Business Expansion

- Springboard

- Bord Bia Marketing Scheme

(v) Participation on Courses/Programmes provided by Tipperary LEO or ETB

Only 30% of businesses have availed of education and training programmes provided by Tipperary LEO, with 27% having availed of courses/programmes provided by Tipperary ETB. Courses/programmes mentioned included childcare, carpentry, carers and theory test.
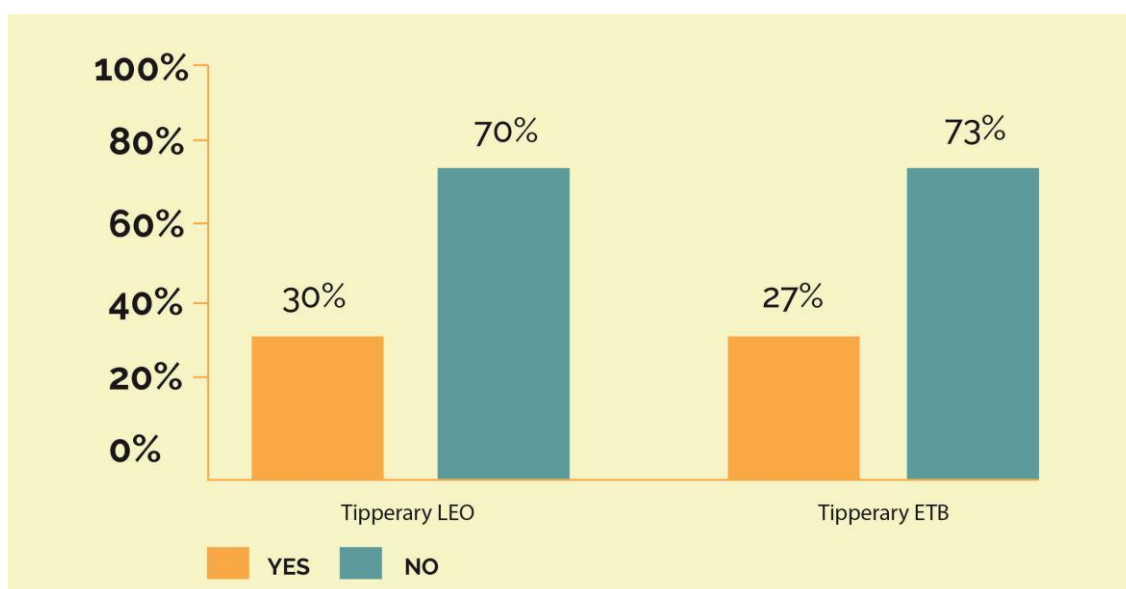
Graph 5: Participation on a LEO or ETB Education Training Course

(vi) Reasons as to why LEO & ETB clients have not availed of Courses/Programmes

Those who have not availed of any of the courses/programmes were asked to give an insight into why; 57% of participants stated that they simply hadn't explored the range of courses available, with 43% stating that there was no suitable course being delivered to suit the needs of their employees at the time in question.

Graph 6: Reasons as to why ETB and LEO clients have not availed of courses/programmes

(vii) Participation on Courses/Programmes provided by LEO & ETB (non-LEO & ETB clients)

Companies were asked if they were aware that the LEO and ETB provide numerous training and upskilling courses and programmes. 61% of participating companies confirmed that they were aware of the services offered by Tipperary LEO, and 50% were aware of the services offered by Tipperary ETB.
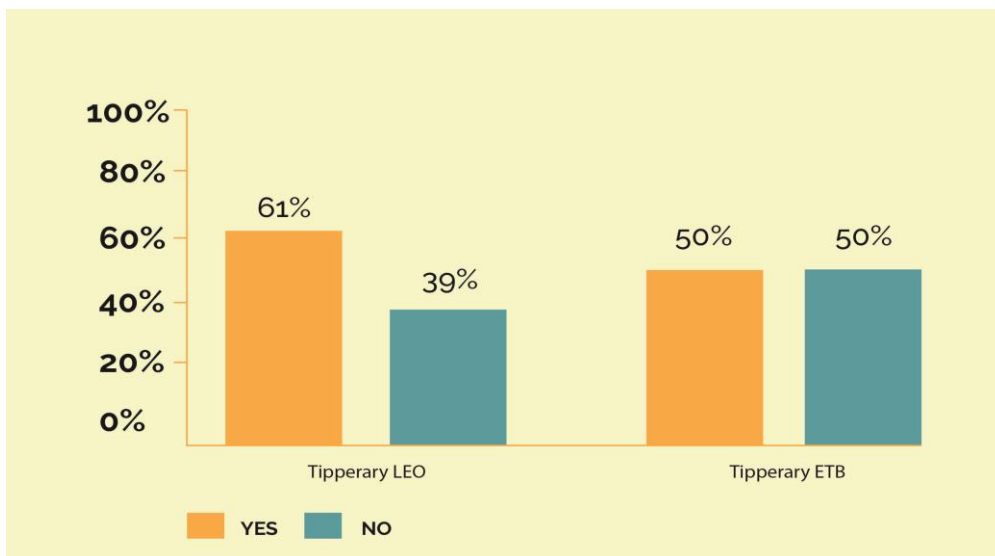
Graph 7: Awareness of the courses / programmes offered by LEO and ETB

(viii) Reasons as to why non-LEO & ETB clients have not availed of Courses/Programmes

The businesses that were aware of the courses/programmes offered by both bodies were asked to confirm why they haven't participated in any of these programmes to date. 58% stated that they hadn't explored the range of courses, 21% stated that there was no suitable course available at the time in question, with 12% confirming that they were unable to free up staff members at the time the course was being delivered.
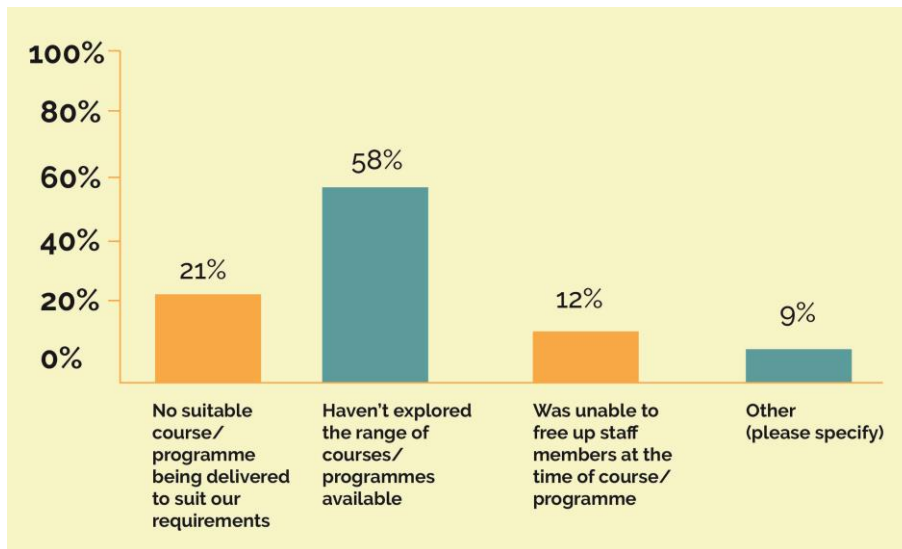
Graph 8: Reasons as to why non-ETB and LEO clients have not availed of courses/programmes

Area 3: Education, Training and Supports Required *(All Businesses)*

(i) Supports Required

Respondents were presented with a list of options and asked to confirm which supports would help them scale and grow their business (respondents could select more than one answer choice). 61% of respondents believed that access to finance and State supports/grants would be of significant help, with 51% believing employment supports such as Job Plus and PRSI exemption would be of considerable benefit. Interestingly, not one company highlighted education and training or upskilling their workforce as a vehicle to achieve growth. This insight is explored in more detail in the conclusion of this report.
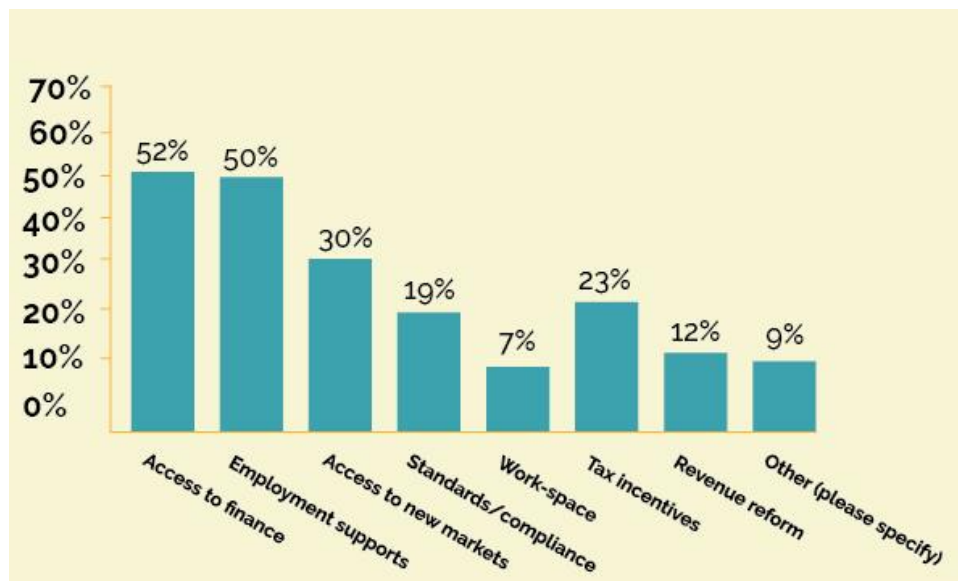
Graph 9: Supports required to scale business

Some direct comments noted in relation to this topic are highlighted below:

(ii) Willingness to Support Cost of Education and Training Programmes

73% of businesses confirmed they were willing to fund employee education and training, as long as the training was meeting the needs of their business. When asked how much they would be willing to fund, there was a mixed response, with a lot of respondents stating it would really depend on the course on offer, and how beneficial it would be to their work-force. However, many businesses did confirm that they would be willing to pay at least 50% towards the cost of a training programme. Some comments noted were as follows:

(iii) Commitment to Education and Training Programmes

Only 38% of participants stated that their business has committed to some type of education and training programme this year (already undertaken or planned within the year); it must be noted that some of these education and training programmes are in-house programmes delivered by internal staff and/or management.
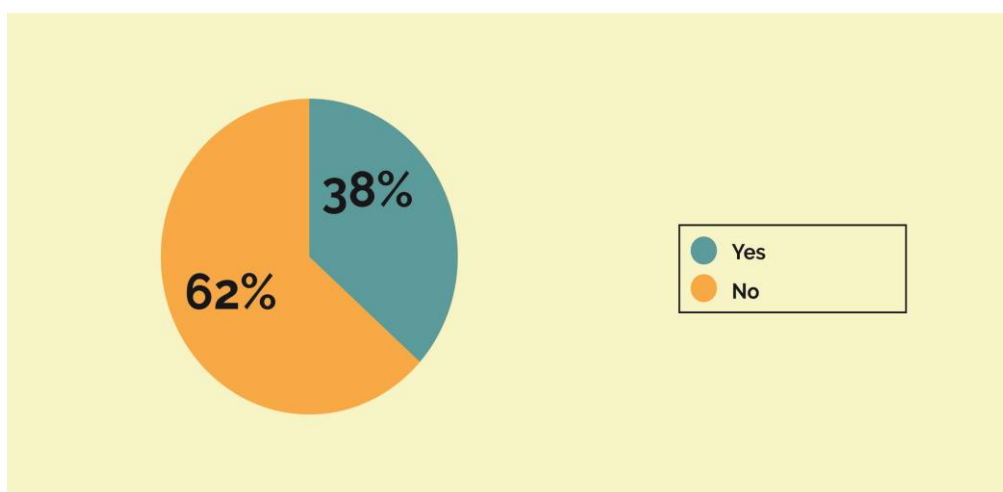
Graph 10: Current commitment to Education and Training Programmes

Training programmes companies have availed of included:

- Bord Failte course

- Health and Safety courses

- First Aid courses

- Project management

- Hygiene courses

- Communication courses

- Childcare courses

(iv) Importance of Accreditation

When questioned about the importance of some type of 'accredited' training, 60% of respondents felt it was desirable, with 16% suggesting it was essential.
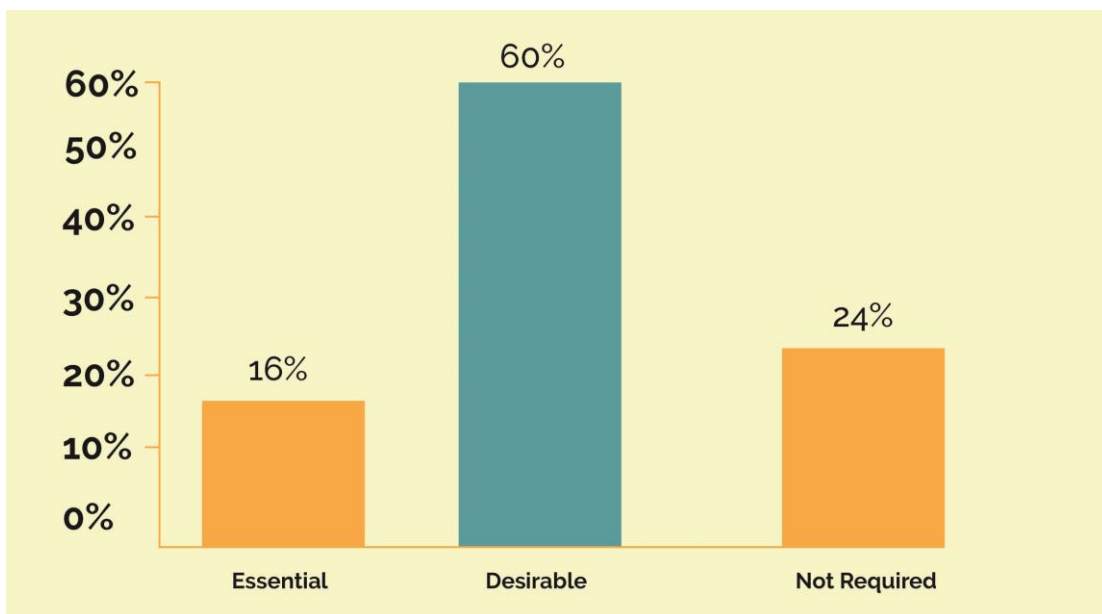
Graph 11: Businesses views on 'accredited' training

The 16% of respondents who felt it was essential were asked to confirm which Accreditation Providers were relevant to their businesses. Providers mentioned included the following:

- QQ1 (formerly FETAC)

- TUSLA

- ISCP

- City and Guilds

- Irish Sports Council

Within the 'desirable' category, there was a general consensus that the primary driver for education and training from the employer's perspective was the benefit such training provided to the employee in their organisational role. They felt accreditation was 'nice to have' but would be of more interest to the employee.

(v) Education and Training Requirements

Participating companies were asked to confirm their five most urgent education and training requirements. 26% of companies were unable to answer this question, stating that they could not think of any immediate education and training requirements. Of the remaining companies, 67% confirmed at least 3 education and training requirements. Due to the wide variety of companies taking part in this study, the education and training requirements noted were extremely varied (Refer to Appendix 5 for list of education and training requirements). However, what is interesting, is that a large portion of the courses mentioned were compliance related education and training programmes or upgrades which the companies are obliged to undertake by law.

Some education and training requirements which were mentioned frequently included:

- Health and Safety

- Manual Handling

- First Aid

- Customer Service

- Accounts

- Computer Skills (Excel)

(vi) Preferred Method of Release for Education and Training Programmes

To establish the most appropriate means of managing employee release for course participation, companies were asked to confirm which of the following methods of delivery best suited their business requirements:

- Day release part-time

- Evening part-time

- Block release (3-5 days at a time)

- Blended learning (combination of online and class contact)

Day release and evening part-time were the most favourable options for businesses, with 38% stating day release and 31% stating evening part-time.

Block release was the least favoured option with many participants stating that they would find it very difficult to release an employee for a 3-5 day period. Participants expressed concern that releasing an employee could negatively impact productivity and would incur additional expense and risk. This may very well suggest that there is greater emphasis placed on the short-term costs/risks of releasing staff, than there is on the longer-term benefits to be gained from up-skilling and training.
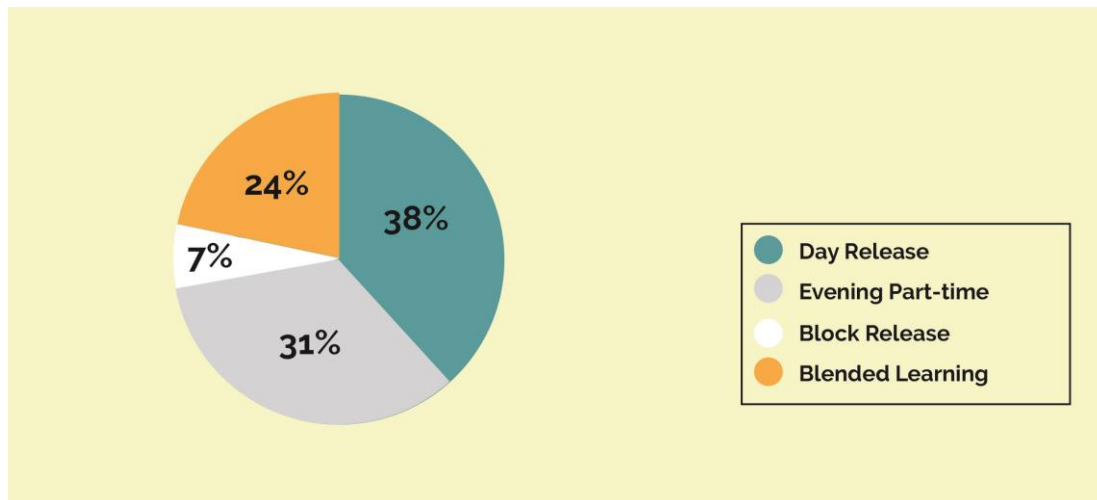

Graph 12: Preferred method of release for Education and Training Programmes

(vii) Future Education and Training Plans

Participants were asked if they are currently planning to send a member of their workforce on an accredited education or training programme during 2017 and 2018.

Surprisingly, over 80% of the participants which answered this question stated they are not considering any form of accredited training, of those that said yes – 19% are hoping to avail of Level 4-6 training for their employees. Some companies are also planning for their employees to acquire several different levels.
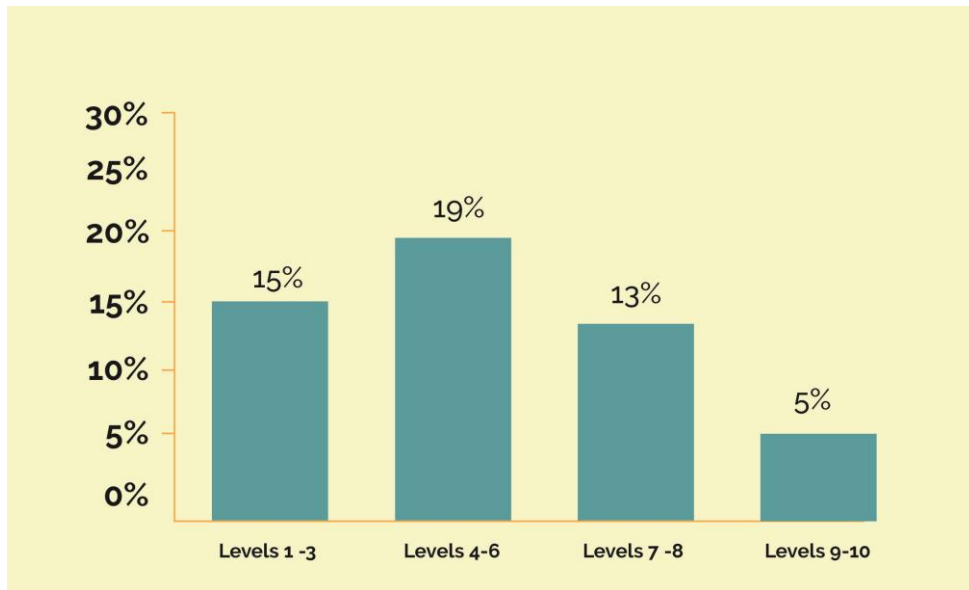
Graph 13: Businesses plans to undertake education and training which awards a specific Level

Courses/programmes falling under the Level 4+ courses included:

- BHS Level 4

- Diploma in Lean

- Diploma in Quality Management

- MSc in Information Technology

- Healthy & Safety and Supervisory Management

- Diploma in Environmental

- BA

- MBA

Area 4: Future Engagement

**(i) Request for Further Information**

84% of businesses confirmed they would like to receive further information in relation to the development of specific education and training programmes that might be of interest to their business. 93% of these businesses would like to be contacted by email (Refer to Appendix 6 for further details in relation to contact details for each company).
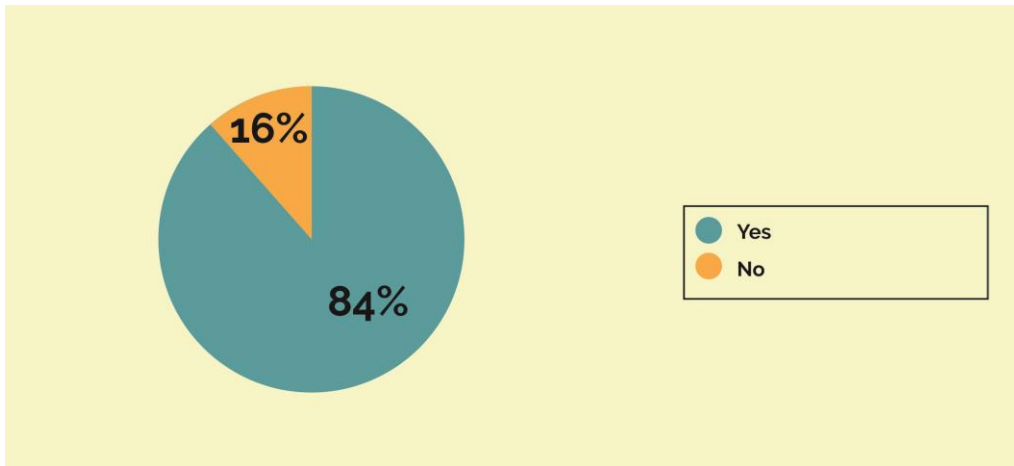
Graph 14: Consent for future engagement

(ii) Willingness to participate in an 'Employer Engagement Forum'

The research with the companies concluded by asking participating companies if they, or an appropriate staff member would be willing to participate in an 'Employer Engagement Forum' at some stage in the future. 69% of respondents said they would be willing to attend. However, it should be noted that the researcher felt some of these companies only confirmed their willingness to attend as they did not want to decline outright. Such companies were hesitant, saying it would depend on the time of year, where it was on and what was happening within their own businesses at the time of the proposed forum. We would suggest a formal follow up with these companies to discuss the Employer Engagement Forum in more detail.
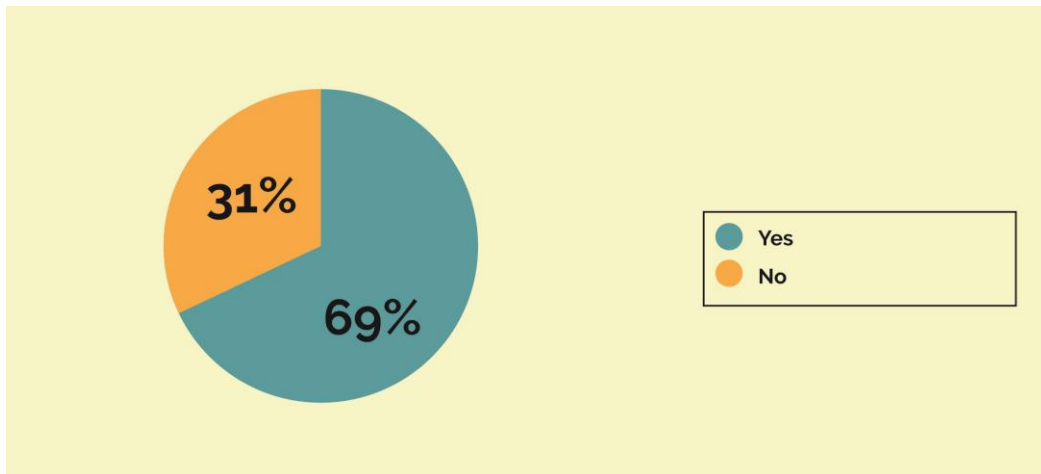
Graph 15: Businesses willingness to participate in an 'Employer Engagement Forum'

Section 3.3

Analysis of Feedback obtained from the Banking Sector

3.3.1 Background

A Business Advisor from each of the three pillar banks, AIB, Bank of Ireland and Ulster Bank were contacted to participate in this research study. The core objective of this phase of the research was to obtain the banking perspective in relation to the type of funding sought by companies to scale and grow their businesses. The output of this research is presented under the following areas, with each being examined in detail.

Areas of Interest

Area 1 - Business 'Life Stage' and resulting Finance Required

Area 2 - Business Plan Requirements

Area 3 - Promotion of Tipperary LEO by Business Advisors

Area 1: Business 'Life Stage' and resulting Finance Required

**(i) Source of Enquires for Financial Assistance**

Business Advisors confirmed that financial assistance enquiries generally come from people who have come up with an idea for a business, but need financial assistance to progress the idea further. Other businesses who frequently seek financial assistance comprise of expanding companies, who cannot grow their businesses any further without significant investment (the latter group is of more interest to this research study).

(ii) Type of Business Loans Sought

The most popular business loans in the 10+ employee category include general business loans and increased business overdraft facilities. Business Advisors confirmed that they believe the marketing efforts of the banking sector to promote their range of business loans has been successful, with one Business Advisor commenting, *"When a company comes in looking for a loan, they generally have read up on the various packages available, and will know which option suits the needs of their company best".*

(iii) Main Use of Funding

There was a consensus across the three banks that one of the principle drivers for funding for these businesses is to buy equipment to increase production output. Another important output of funding is that of new product development. When the topic of 'upskilling their workforce' was discussed, the Business Advisors stated that in their experience businesses do not seek funding from banks to upskill their workforce. They upskill on an ad-hoc basis rather than develop a specific education and training plan, which would require an investment.
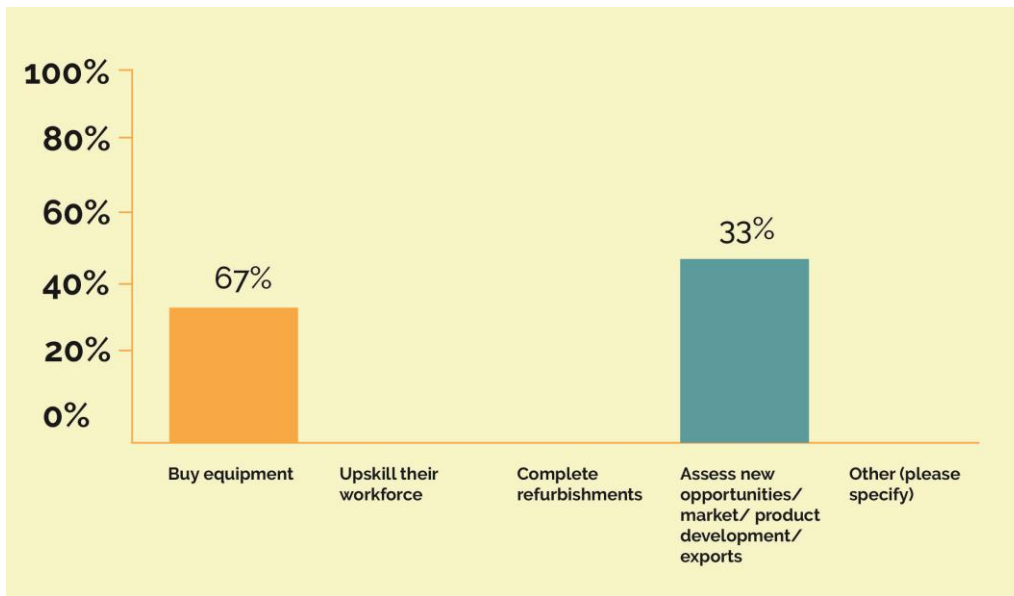
Graph 16: Funding use by businesses

**(iv) Banks' View on Funding for Education and Training**

Business Advisors were asked their view on providing funding specifically for employee education and training. Both the Business Advisors from Ulster Bank and Bank of Ireland agreed that this could be explored further, but reiterated it wasn't something businesses tended to go to banks to discuss. One Advisor put it, *"In general, businesses pay for education and training from cash-flow, as it is an on-going requirement; however, we would still be willing to look at investing in long-term educational and training requirements which would result in increased productivity and a financial return to the business"*.

Area 2: Business Plan Requirements

As a business plan is an essential part of any loan application, the researcher asked the Business Advisors if they felt companies spent enough time developing their business plans. The researcher then explored if there were certain areas of the business plan which the banks felt applicants consistently struggle with.

**(i) Provision of a Business Plan to Accompany a Loan Application**

Two of the Business Advisors agreed that they generally receive a business plan with an application for a business loan, whereas the third Advisor stated that he often must ask the applicant to return with a completed business plan.
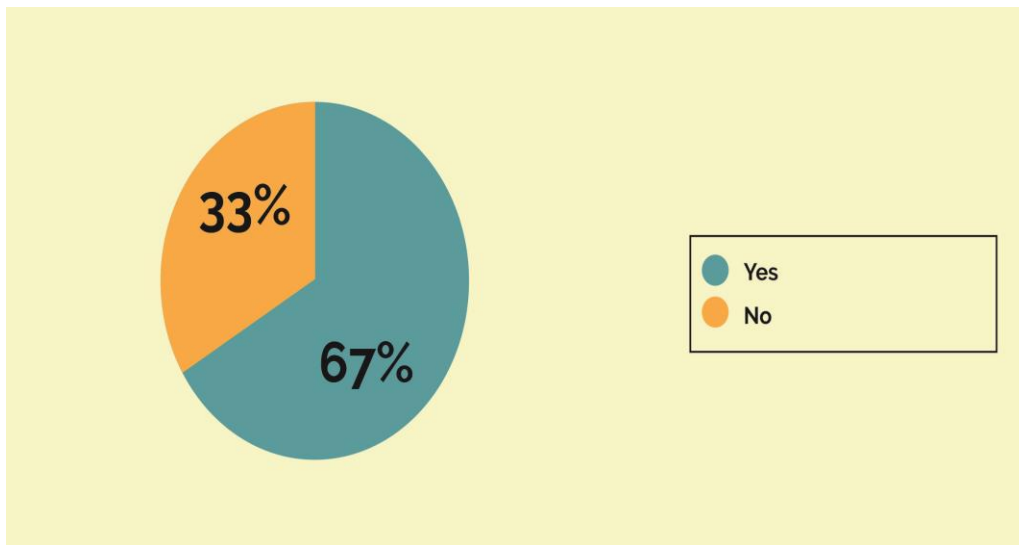
Graph 17: Provision of a business plan

(ii) Level to Which Business Plans are Completed

Business Advisors agreed that companies are getting better at completing their business plans.
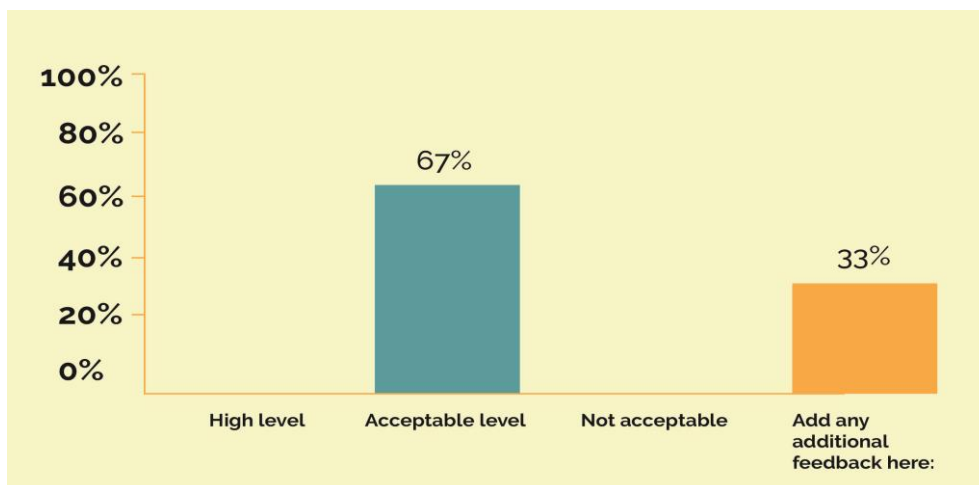

Graph 18: Level to which a business plan is completed

However, one Advisor stated that it was evident that the plan was not always completed by the business owner, as they did not appear to be knowledgeable on certain aspects of the document, stating *"The business plan is often completed by a 3rd party, or someone else within the business; this is clear when the applicant cannot answer simple questions in relation to the plan. This often leads to unsuccessful applications"*.

(iii) Problematic Areas of a Business Plan

Bank Advisors felt applicants had no issues with the softer elements of the plan, including their market, customers and marketing plans; however, a considerable number fall down on the provision of financial analysis and risk assessment.
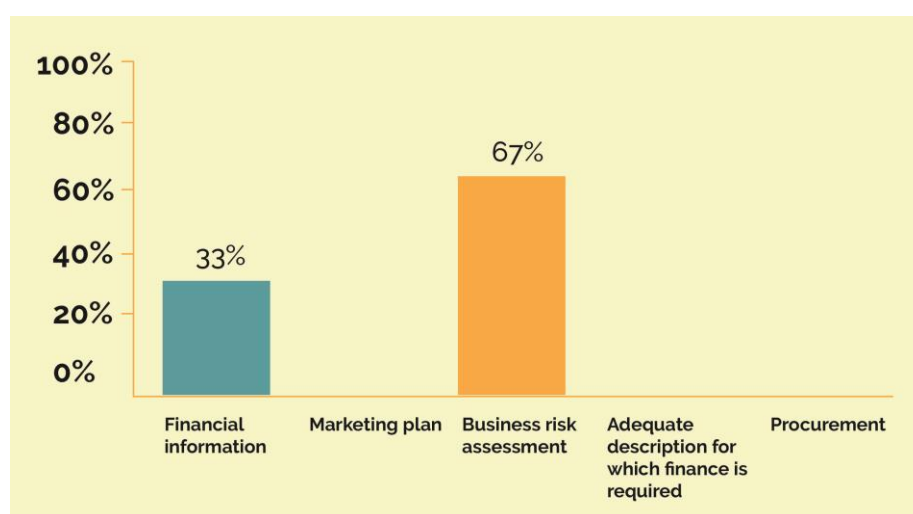
Graph 19: Problematic areas of a business plan

Area 3: Promotion of Tipperary LEO by Business Advisors

A key point of interest to this research with banks was to establish if Business Advisors suggest or discuss education and training supports and grants with businesses who are seeking support; the main education and training providers discussed included the LEO, EI and Leader. It should be noted that while ETBs do not provide direct funding to businesses, they can deliver subsidised training to companies, e.g. Skills for Work

During the course of these interviews, it became apparent that there was a considerable lack of awareness as to the role of, and supports provided by Leader; furthermore, while the Advisors were more aware of the LEO and Enterprise Ireland, they didn't have an in-depth understanding of the supports and assistance provided by either.

While this finding is somewhat troubling, it must be viewed in the context of the relatively recent national rebranding of the LEO's. Tipperary LEO, formerly two entities, North and South Tipperary Enterprise Boards, merged into one entity in 2014, while also merging concurrently with Tipperary County Council. The national Local Enterprise Office brand was only introduced towards the end of 2014. Therefore, it is not surprising that some confusion exists as to the role of both the Tipperary LEO.

This finding does however point to a need for frequent and consistent communication of the important role that the LEO provides to the business community.

	Tipperary Local Enterprise Office	Enterprise Ireland	Local Development / Leader Companies
Yes	67%	67%	
No	33%	33%	100%

Table 3: Promotion of Government Bodies

Section 3.4

Analysis of Feedback obtained from the Education & Training Sector –ETB, LEO and LIT

3.4.1 Background

Face-to-face interviews took place with the LEO, ETB and the Flexible Learning Department at LIT (Tipperary Campus). The core objective of this phase of the research was to assess the current education and training services/courses offered by each entity.

3.4.1.1 Ability to Meet the Education and Training Requirements identified in this Research

A wide variety of the education and training needs identified in this research can be met by either Tipperary LEO or Tipperary ETB, with the majority of the education and training needs falling within the Level 1-6 qualifications (Levels 1-6 fall within the remit of either ETB or LEO).

The key focus areas for the LEO include training and support for the owner/manager, particularly in relation to areas such as management development and LEAN. The remit of Tipperary ETB, is the provision of a comprehensive range of quality education programmes to meet the needs of the community.

Training needs that fell outside this remit were Level 7-9 qualifications, and can be met by LIT.

3.4.1.2 Output from Interviews with ETB, LEO and LIT

(i) Tipperary Education and Training Board

Tipperary Education and Training Board (ETB) is the statutory provider of Further Education and Training in the county. In 2016, there were 10,000 people engaged in Further Education and Training (FET) with the ETB. ETB currently offers 300 full and part-time courses, which can be viewed on the new national ETB course finder website - www.fetchcourses.ie

Courses provided by ETB range from Levels 1-6 on the National Framework of Qualifications (NFQ). Accreditation is by Quality Qualifications Ireland (QQI) and other industry-relevant awarding bodies, such as City and Guilds, CIBTAC, CISCO, etc.

A wide variety of employers currently engage with Tipperary ETB. Some of this engagement is related to TETB provision for the upskilling of employees on the Skills for Work Programme. The Skills for Work Programme is a national programme to deliver training courses for full time or part time employees. The programme is particularly targeted at low skilled workers who, without the opportunity to participate in this training, may not have the confidence to embrace change in the workplace. The initiative is funded by the Irish Government under the Department of Education and Skills, and delivered by the Education and Training Boards (ETB) across the country.

Skills for Work is part of the Government's National Skills Strategy that recognises that the nature of the workplace is constantly changing. Tuition options available include the following:

- Skills for Work aims to provide training and educational opportunities for those in full time / part time employment or those facing redundancy.

- Classes are run at times that suit individual groups.

- Classes are free and available to eligible employees.

- Tuition (35 hours) is delivered to small groups within a single company or to employees in a cluster of companies.

- Accreditation at QQI Level 3 is optional.

Employers of ETB learners offer essential work placements for learners. Learners gain on-the-job practical experience in their course of study, and may become valued employees for the host employer on successful completion of their course. Tipperary ETB strives to tailor their courses in response to national, regional and local needs of industry.

Tipperary ETB currently provides full and part-time courses in the following:

- English for Speakers of Other Languages (ESOL)

- Occupational First Aid

- Advanced Administration with HR

- Administration with Sales and Marketing

- Software Development

- Security Operations

- Safety and Health at Work

- Team Leadership Skills

- Employability Skills

- Construction and Engineering

- Business Administration and Finance

- Food, Beverage, and Hospitality, e.g. Culinary Skills, Restaurant Operations

- Hairdressing and Beauty

- Health, Family and Social Services, e.g. After School Supports. Palliative Care Support

- Information Technology, e.g. Web Page Design, Cyber Security, Software Development

- Manufacturing e.g. Good Manufacturing Practice

- Sport

- Security, e.g. Guarding Skills and Door Security Procedures.

- Transport, Logistics and Distribution

Tipperary ETB is also approved to train apprentices in Electrical, Electronic Security, and Construction Plant. Such training will take place in the new FET Centre which is located in Thurles. Co. Tipperary; this training is due to take place in the coming months.

Contracted Training and Traineeships are other options of provision. Traineeships are full-time courses with significant work placement.

Further information on all ETB courses can be found on the following websites:

- www.tipperaryetb.ie
- www.fetchcourses.ie – (FETCH - Further Education and Training Course Hub). The national website for ETB further education and training provision.

(ii) Tipperary Local Enterprise Office

The role of the Local Enterprise Office is to support the small and micro-enterprise sector through the start-up and expansion phases. The LEOs are the principal deliverers of State support to the micro-enterprise sector in Ireland and they provide targeted supports – both financial and non-financial. Local Enterprise Offices (LEOs), which are an office of the local authorities, act as a "First Stop Shop" for anyone seeking information and support relating to starting or growing a business in Ireland. LEOs support business start-ups and work to increase the job creation potential of new and existing micro and small businesses through the provision of information, advice, training, mentoring, management development, seminars and Local Enterprise Week. In addition, a series of selective financial interventions such as Feasibility, Priming, Business Expansion, On line Trading Vouchers and Technical assistance for Micro Exporters grants are made available.

LEOs undertake an annual programme of activities designed to promote and instil an enterprise culture in the County by encouraging and supporting enterprise at all levels. LEO Tipperary operates from two locations, Clonmel and Nenagh in addition to providing outreach clinics at various locations across the County. In 2016, 1,695 individuals (732 male and 962 female) participated in 158 separate Measure 2 - Entrepreneurial & Capability Development initiatives such as training courses, management development programmes, seminars,

workshops etc. 143 firms participated in 269 Mentor visits while a further 39 business promoters availed of Mentor clinics. In addition, over 40 firms benefitted from export market assessment, exhibition, training and website development grants. Dedicated programmes were designed and delivered to support target groups such as food, steel fabrication, women in business, ICT, young entrepreneurs etc.

LEO Tipperary has a very strong focus on female entrepreneurship and actively supports two Networks through the provision of financial and co-ordination supports. LEO Tipperary also supports the work of the Tipperary Food Producers and the Green Business Networks. An up to date register of all available land banks and enterprise centre space is maintained by the LEO for the benefit of potential and existing entrepreneurs.

(iii) LIT

LIT currently offers approximately 350 flexible learning courses ranging from Animation, Business Management, Engineering, Software Development, Quality Management to name but a few. These courses are offered at LIT campuses in Limerick and Tipperary. All programmes offered are accredited programmes on the National Qualifications Framework, providing recognised and high-quality awards. Flexible Learning programmes are provided through a combination of part-time, blended, online and evening modes.

In addition to the Flexible Learning programmes currently available at LIT, LIT can offer bespoke programmes for specific groups of company employees. These programmes can be delivered at LIT, at a company premises or through blended learning. Promotion of Flexible Learning programmes are limited to inclusion in LIT's Flexible Part-time & Evening Courses prospectus as well as on the following website www.flexiblelearning.lit.ie

The following LIT courses can potentially meet the Level 7-9 Education and Training needs which were identified in this study.

- Marketing

LIT provides two courses which fall under the remit of 'Advanced Marketing' – Web Analytics and Media Writing (Facebook, Twitter, Blogs, Press Releases). Both courses are offered on a part-time basis over the course of one semester (12-15 weeks), through blended learning programme. The cost for either course is approximately €500.

- Pharmacist Training

LIT has recently received Springboard funding for the delivery of the following two courses:

(i) Certificate in Biopharmaceutical Science – Level 8

(ii) Certificate in Medical Laboratory Support – Level 6

Although Springboard courses are normally targeted at people who are unemployed, companies can also avail of such programmes.

- HR

LIT does not currently have a specific course solely dedicated to HR, however many of the Business Management Courses at LIT include a module on HR. Companies can avail of this module for their employees, with the employee only attending the tutorials relevant to the topic of interest. If required, LIT can however develop a tailor-made programme for the company who confirmed that HR is one of their most urgent education and training requirements.

- Early Childhood Studies Level 7

LIT does not currently offer a course in Early Childhood Studies Level 7; this however is currently under review and LIT hopes to offer this course early next year.

- Business Management / Sales Training / Customer Service – High levels

There are several Business Management courses available at LIT within the flexible / part-time learning educational area. Such courses include:

(i) Business Management Higher Diploma

(ii) Business Studies Certificate

(iii) Business Studies Honours Degree

Sales Training and Customer Service is covered within these programmes. These courses are offered over a period of 1 to 2 years, with participants attending one evening per week, as well as availing of online tutorials and attending a number of workshops. Employers / employees can select the modules of interest to their organisation.

4. Conclusion & Recommendations

4. Conclusion & Recommendations

4.1 Conclusion

As highlighted in the research purpose of this report, the profile of the companies targeted for this particular piece of research 'fall between' two Government agencies, namely the Local Enterprise Office (servicing companies with less than 10 employees), and Enterprise Ireland (serving export companies).

No significant research has been undertaken into the education and training needs of this particular company demographic; this report is therefore the first concrete review of this area in the County of Tipperary, and will no doubt form the basis for debate at national as well as regional level.

While this research answers many questions in relation to the education, training and support needs of these companies, it also raises many additional questions, and highlights the need to challenge and debate the findings in some detail.

The specific research findings are highlighted and expanded upon in sections 3.2, 3.3 and 3.4. However, it is important to draw attention to some of the recurring underlying trends and insights that underpin the quantitative research findings; these insights were not derived directly from any specific research question, but rather, came through as significantly recurring themes when the overall analysis took place.

One of the critical insights is the suggestion that the role of employee training, as a vehicle to drive business growth and expansion, may not be appreciated by a large proportion of the sample size. This is evident across a number of key findings, namely:

4.1.1 The difficulty in obtaining buy-in from the initial 800 companies contacted would suggest a degree of apathy in relation to education and training; it also suggests that these companies did not see the value in engaging in the process. This may be driven by a number of factors, including time deficiency, perception that this may be only a box ticking exercise and a misconception that 'this doesn't really impact on me'. Whatever the key driver, the fact that the final 109 company responses required 2-3 follow up phone-calls in itself points to a perceived lack of appreciation as to the importance and value of employee education and training.

4.1.2 When asked to highlight the factors that would help drive company growth, not one company mentioned employee education, training or upskilling. While this may not be the first contributing factor that springs to mind, one would have expected a least some companies to suggest improving employee skills as a contributing factor to growth.

4.1.3 A significant number of education and training courses undertaken by these companies are of a regulatory or compliance nature; these courses are needed to ensure

the companies can continue trading from an audit or regulatory perspective, not necessarily to increase employee skills and/or strategic thinking.

4.1.4 Only 38% of companies had committed to an education and training programme during the calendar year, many of whom highlighted that it was internal training; 6 out of 10 companies had no external education and training plan.

4.1.5 Furthermore, it was clearly evident that the primary consideration for employers when releasing employees for education and training, was the short-term impact this would have on productivity on that day.

4.1.6 The research output would also suggest that there is a need for management education and training at middle-higher management level (owner/managers/HR directors); while the 'business goals' question was only put to the 11% of LEO and ETB clients, many of these struggled to articulate measurable and tangible goals; it is not a major leap to suggest that this is an issue for all companies, regardless of size. The goals mentioned were of a generic and unspecified nature - this may suggest that businesses are more focused on operational, day to day issues, rather than driving their business at a strategic level. This assumption is also backed up by the fact that most managers were concerned with the immediate/current impact of releasing staff for education and training, rather than the potential benefit such education and training could bring to the medium long term growth of the company.

In conclusion, there is strong global and national evidence that demonstrates that those companies who do engage in staff education, training and support reap the benefits in increased employee engagement, loyalty and productivity. It is hoped that one of the primary outcomes of this report will be the provocation of thought and debate between the various related Government bodies and industry, around the entire area of education, training and supports. The output of this report highlights that while there are deficiencies in the current education, training and supports available, the bigger concern may be the lack of engagement from industry on the importance of education and training to drive business growth. This report concludes with recommendations on how a new 'training appreciation culture' can be created within the Irish industry.

4.2 Recommendations

The report's recommendations fall into two distinct categories – recommendations for immediate action/follow up, and recommendations of a strategic nature. While the research team have studied the report findings in some considerable detail, any proposed future strategy and action plans are obviously at the behest of the clients, and the recommendations underneath are not intended to be exhaustive. We would however urge that those recommendations falling into the short-term/immediate category be given priority over the 8-10 weeks following the report publication.

4.2.1 Short-Term/Immediate Follow Up Recommendations

4.2.1.1 Ensure Contact is Made with Companies interested in receiving on-going Information

84% of companies confirmed that they would like to receive on-going information in relation to specific education and training programmes. In order to create an atmosphere of trust and efficiency, it is critical that these companies see a first 'follow up step' within 8-10 weeks of the research completion. We would recommend that this communication takes a number of forms:

- An acknowledgement of their involvement in, and time given to the research (email).

- An infographic highlighting the key findings from the research. The proposed infographic can also be used as a key communication tool at regional and national level (Refer to Appendix 7 for infographic).

- Going forward, it is imperative that all new/relevant courses are communicated to these companies. Not only does this maintain a level of engagement, it highlights the support that the LEO and ETB provide on an on-going basis to industry. Promotion of such courses/programmes can be communicated in the form of a personalised email, direct phone call or an e-newsletter.

4.2.1.2 Develop a Clear 'Next Steps' Plan in relation to an Employer Engagement Forum

69% of the participating companies stated they would be interested in attending an 'Employer Engagement Forum' at some point in the future. However, prior to organising such an event, it is recommended that contact is made with each of these companies to confirm that they are genuinely interested in attending (past experience has highlighted that companies may commit to an event in the future, but may not attend).

Such an 'Employer Engagement Forum' allows for the communication of the research findings, but more importantly, it affords the LEO and ETB the opportunity to showcase the actions which have already been undertaken post research, and the communication of the overall education and training plan for the future. With that in mind, we would recommend

that the 'Employer Engagement Forum' only takes place after certain actions have been taken following this reports publication, thus demonstrating that the LEO and ETB have listened to participants, and have acted on the information received.

4.2.1.3 Tipperary LEO to communicate the importance of financial analysis to all relevant bodies

Business Advisors from the three pillar banks confirmed that companies often do not receive funding from their institutions due to the lack of appropriate financial data, and/or the absence of a meaningful risk assessment.

Equipped with this knowledge, we recommend that Tipperary LEO communicate the importance of robust financial analysis and risk assessment to all relevant bodies/personnel, by undertaking the following immediate actions:

- Through the communication of this specific area of the report, instruct all business mentors and trainers to ensure all business plans are subjected to rigorous financial analysis and risk assessment prior to finalisation.

- Communicate the research findings and actions required to the Mid-West and South-East Regional Skills Forums.

- Through their links with service providers, the LEO to ensure this finding is also communicated to accountants and all such services who aid businesses in the development of business plans.

- It is highly recommended that Tipperary LEO explore the option of providing a course specifically focused on helping developing businesses develop robust financially sound business plans.

4.2.2 Strategic Recommendations

4.2.2.1 <u>Undertake a Detailed Review of the Current Education and Training Communication Mechanic and Process</u>

Perhaps the most striking aspect of the research undertaken was the lack of understanding on behalf of companies of the long-term benefits that education and training provides, coupled with the lack of awareness amongst participants on the services provided by both LEO and ETB. This together with the general reluctance to release staff for training and upskilling points to a significant requirement to substantially increase awareness and understanding among companies in general.

In this regard, we recommend the need for a comprehensive and cohesive communication strategy linking the key benefits of services available, together with a thorough review of how information is presented. This is not meant to be a criticism of the current offering in this regard but merely a reaction to the feedback received from the intended recipients of the service provision.

As an extension of the above point, over half of the current LEO/ETB companies confirmed that they find it difficult to access information in relation to the education and training supports and grants which are currently available. In order to develop a meaningful and lasting education and training programme for the future, it is critically important that a full review of the existing process is undertaken, looking at:

- <u>What</u> type of information is communicated; does this need to change?

- <u>How</u> is the information communicated; does this need to change?

- <u>Who</u> do we communicate with; does this need to change?

- <u>Who</u> within LEO and ETB takes responsibility for the revised strategy and ensures follow-up and follow-through?

4.2.2.2 <u>Develop a 'Training Benefits Communication Plan' for Employers</u>

While businesses in the region understand in principle the importance of upskilling and training employees, the fact that less than 40% of the companies have committed to any sort of education and training programme this year begs the question, "Do these companies really value education and training as a means to growing their businesses?"

It is clear that employers need to be re-educated on the value of education and training and engaging with employees. Such a communication must highlight the benefits that employee education and training will bring to the overall business, through increased motivation and application of new skills. It would be worthwhile show-casing a number of Tipperary companies who value education and training, provide on-going and consistent education and training to employees and that can demonstrate tangible benefits as a result.

However, it is important that any strategy to increase awareness and buy-in is linked to an overall communication plan that links information and benefits to participants. Past experiences have shown that the key to getting greater engagement is individual follow up and regular direct contact. If possible and if resources permit, any communication strategy that is undertaken should factor in the need for personal direct contact with potential participants. Benefits of any future plan in this regard can easily be measured by way of increased take-up or enquiry on supports available.

4.2.2.3 Explore Opportunities to Develop a Cross Region Multi-Functional Forum

It is highly recommended that the development of an inter-agency cross region multi-functional forum be explored to ensure a cohesive and consistent approach to the provision of training and support in the county. Such a forum will also allow for the sharing of insights, information and developments on training and supports within the various Government bodies.

This recommendation is made acknowledging the existence of a number of forums already in operation in the county, including Mid-West & South-East Regional Skills Forum, the Education and Training Board Committee and the County Council's Interagency group.

However, the purpose of this forum would be specifically on meeting the education, training and support needs of those companies employing 10+ employees, in particular in relation to areas such as training trends, training best practice and all related regulatory changes that companies need to be aware of.

Once set up, we would recommend this forum meet on a quarterly basis. As a guide, we would recommend the first such forum to focus on:

- Key Learnings and Insights from the research

- Review of Current Suite of Programmes & Services which already fill those gaps

- Review of the Current Education and Training Communication Strategy of the County – where do we go from here?

- Discussion on how to Engage with Employers

4.2.2.4 Develop more Effective Marketing Tools to Communicate Programmes/Courses to Employers

57% of LEO/ETB companies highlighted that one of the primary reasons they had not availed of the courses/programme, was that they simply did not have the time to explore the range of courses available; a similar percentage (58%) of companies outside the remit of the LEO and ETB confirmed the same.

A significant opportunity exists to encourage a better uptake on the programmes/courses which are currently available and most likely of interest to employers. It is suggested that

both Tipperary LEO and Tipperary ETB each develop a newsletter which presents new and popular courses/programmes. Once developed the newsletter should be emailed to employers/training managers.

In terms of creating impact with such a newsletter, it is important that the subject line of the email grabs the attention of the employer; the top section of the newsletter needs to communicate the benefits that a business will gain from employee participation on a course /programme. Furthermore, it may be possible to highlight companies who have benefited from taking up LEO and ETB services possibly including a Company Feature Section.

It is also clear that there needs to be a mechanism established that allows employers to feed into the on-going education and training provisions of the various Government bodies. A suggestion in this regard is to build on the already established *'Just Ask'* campaign as an on-going means of engaging with employers. What is of critical importance in the success of such a campaign is that employers feel they are being listened to. It would be worthwhile for the relevant bodies to consider setting up an employer suggestion email address, that is redirected to the relevant personnel looking after education and training – an example of such an address for the ETB is employersuggestions@etb.ie. For this to be effective, it is essential that this email is managed and that all emails are replied to within a number of days.

These are only a small number of suggested methods for communicating with potential participants; as previously indicated, it needs to form part of a cohesive action plan to promote services and increase awareness.

4.2.2.5 <u>Review Identified Training Gaps & Develop Specific Education and Training Courses</u>

A key objective of this research was to identify education and training gaps within the 10+ employee company sector. Recurring education and training gaps are highlighted in Appendix 5. These gaps need to be reviewed by all relevant agencies, with a view to developing a range of new courses currently not available, but very much in demand.

The most effective way to create engagement from employers in terms of employee attendance is to offer the programmes as 'day release' or 'evening part-time' basis. Companies should also be asked to contribute to the cost of employee participation on these programmes, as this study identified that 73% of companies are willing to contribute towards the cost of employee participation.

While this report highlights a number of education and training gaps, one which needs particular attention is that of the Tourism sector, with the need for tourism employees to be made more aware of the local area, local produce, local attractions as well as the Ancient East.

Once the education and training requirements have been reviewed by Tipperary LEO and ETB, both bodies need to agree on the programmes/courses they can potentially develop and offer. Once these have been developed, programme details need to be promoted to

companies using a number of communication mechanics. The 'Employer Engagement Forum' presents an ideal opportunity to launch the new education and training programme initiative (but must be in the context of the overall Communication Strategy as already highlighted).

As a final note in this regard, it is clear from the research that employers are more concerned with the tangible learning and application of skills from employee education and training, and are not overly concerned with accreditation. With that in mind, we would urge that the launch of relevant education and training programmes are not delayed due to appending accreditation.

4.2.2.6 Explore the Provision of 'Regulatory/Compliance' Courses through the LEO and ETB

In our discussions with companies, some highlighted a degree of frustration that certain compliance related courses had to be undertaken annually or very regularly regardless of their internal needs. While it is accepted that these courses are absolutely necessary from a legal/audit perspective, they do impose a financial burden on companies, and may result in less investment in longer term education and training programmes.

It is recommended that the LEO and ETB explore how they may be in a position to provide group training programmes for some of these key areas (e.g. Health and Safety, Safe Pass etc), thus allowing the companies to direct the education and training funding to longer term growth initiatives.

4.2.2.7 Engage with the Regional Managers from the three Pillar Banks

A somewhat surprising finding from the research undertaken was the lack of knowledge that the Bank Business Advisors had on any aspect of services/supports provided by both LEO and ETB. As a major on-going touch point for potential participants, there is a clear need to engage with banks and to assess how everyone could benefit from increased awareness. It would be worth exploring if it were possible to provide bank staff with bespoke education and training on the services/supports provided by both LEO and ETB and it may be possible that such training form part of Bank Staffs' CPD Requirements. (Under Central Bank Rules there is a requirement for all Business Advisors to complete a certain amount of accredited training in a calendar year).

In any case, there is an opportunity and a requirement to increase awareness, and there should be some form of engagement with Senior Management of the banks to identify what steps could be undertaken to address this.

Appendices

Appendix 1: Questionnaires

Appendix 2: Radio Script

Appendix 3: Press Advert and Press Release

Appendix 4: Social Media Badge, Website Graphic & Email Signature

Appendix 5: Education and Training Requirements

Appendix 6: List of Contact Details

Appendix 7: Tourism Trade Needs Analysis Infographic (August 2017)

Appendix 1 - Questionnaires

1.1 Questionnaire for Clients of LEO & ETB

1.2 General Questionnaire

1.3 Questionnaire for Banks

Please only answer this questionnaire if your business employs 10 or more employees

1. Please confirm the name of your Company

[   ]

2. Is your business located in North Tipperary or South Tipperary

○ North Tipperary

○ South Tipperary

3. Number of years in business

○ < 5 years

○ 5 - 10 years

○ 10 - 15 years

○ 15 - 20 years

○ 20 - 30 years

○ 30 years plus

4. Number of staff employed

○ 10-15

○ 15-20

○ 20-30

○ 30-40

○ 40-50

○ 50+

5. Which of the following sectors does your company belong to:

○ Manufacturing

○ Retail

○ Tourism

○ Construction

○ Financial / Legal

○ Agricultural

○ Motor Trade

○ Food / Drink

○ Other (please specify)

[   ]

6. Are you the correct person within your company to clarify your employees Training and Development needs

○ Yes

○ No

If no, can you please confirm correct contact

[   ]

7. Do you find it difficult to access relevant developmental, training supports or grants?

○ Yes

○ No

If yes, please let us know why

[   ]

8. Please list any supports/grants your company has availed of in the past

Support Availed	[ ]
Support Availed	[ ]
Support Availed	[ ]
Support Availed	[ ]
Support Availed	[ ]

9. List 3 development goals for your business for the coming year

Goal 1

Goal 2

Goal 3

10. List 3-5 of your most urgent training requirements / programmes

Training Requirement 1

Training Requirement 2

Training Requirement 3

Training Requirement 4

Training Requirement 5

11. Have you committed to any training programmes for the coming year

◯ Yes

◯ No

If yes, please confirm details here

12. What supports do you require to scale and grow your business

☐ Access to finance state supports/ grants

☐ Employment supports such as Jobs Plus/ PRSI exemption etc

☐ Access to new markets

☐ Standards / compliance assistance

☐ Work-space

☐ Tax incentives

☐ Revenue reform

☐ Other (please specify)

13. Does your company have a policy on 'Workforce Development'

◯ Yes

◯ No

14. Are you in a position to fund training for your employees, once it is meeting your needs

◯ Yes

◯ No

If you marked Yes, please state what percentage you would be willing to fund

[   ]

15. Is a 'Training Accreditation' for training received by your employees essential, desirable or not required

◯ Essential

◯ Desirable

◯ Not Required

If you marked Essential, please specify the Name of Accreditation Providers relevant to your business

[   ]

16. During 2017/2018 is your company planning to undertake any form of qualifications at

	Yes	No
Levels 1 -3	☐	☐
Levels 4-6	☐	☐
Levels 7 -8	☐	☐
Levels 9-10	☐	☐

If you answered yes, please elaborate here:

[   ]

17. What is your preferred method of delivery for staff participation in training

◯ Day release part time

◯ Evening part time

◯ Block release (3-5 days at a time)

◯ Blended learning (combination of online and class contact)

18. Within the last 3 years, has your company availed of any of the training / upskilling courses / programmes provided by your Local Enterprise Office or Tipperary Education & Training Board

	Yes	No
Local Enterprise Board:	☐	☐
ETB	☐	☐

If yes, please name the course / training obtained

[   ]

19. If you answered No to the previous question, please indicate why you have not availed of this service to date:

◯ No suitable course / programme being delivered to suit our requirements

◯ Haven't explored the range of courses / programmes available

◯ Was unable to free up staff members at the time of course / programme

◯ Other (please specify)

[   ]

20. Would you like to receive further information in relation to the development of specific training programmes to meet the needs of companies located in Tipperary

◯ Yes

◯ No

21. If you answered Yes to the previous question, please confirm how you would like to be contacted along with corresponding contact detail

◯ Phone

◯ Email

◯ Letter

Please confirm relevant contact detail here

[   ]

22. Are you, or the appropriate staff member, willing to participate in a employer engagement forum for the County?

◯ Yes

◯ No

1.2 General Questionnaire

1. Please confirm the name of your Company

[   ]

2. Is your business located in North Tipperary or South Tipperary

◯ North Tipperary

◯ South Tipperary

3. Number of years in business

◯ < 5 years

◯ 5 - 10 years

◯ 10 - 15 years

◯ 15 - 20 years

◯ 20 - 30 years

◯ 30 years plus

4. Number of staff employed

◯ 10-15

◯ 15-20

◯ 20-30

◯ 30-40

◯ 40-50

◯ 50+

5. Which of the following sectors does your company belong to:

- ⚪ Manufacturing
- ⚪ Retail
- ⚪ Tourism
- ⚪ Construction
- ⚪ Financial / Legal
- ⚪ Agricultural
- ⚪ Motor Trade
- ⚪ Food / Drink
- ⚪ Other (please specify)

  [   ]

6. Are you the correct person within your company to clarify your employees Training and Development needs

- ⚪ Yes
- ⚪ No

If no, can you please confirm correct contact

[   ]

7. What supports do you require to scale and grow your business

- ☐ Access to finance State supports / grants
- ☐ Employment supports such as Jobs Plus / PRSI exemption etc.
- ☐ Access to new markets
- ☐ Standards / compliance
- ☐ Work-space
- ☐ Tax incentives
- ☐ Revenue reform
- ☐ Other (please specify)

  [   ]

8. List 3-5 of your most urgent training requirements / programmes

Training Requirement 1 | |

Training Requirement 2 | |

Training Requirement 3 | |

Training Requirement 4 | |

Training Requirement 5 | |

9. Have you committed to any training programmes for the coming year

◯ Yes

◯ No

If yes, please confirm details here

10. Are you in a position to fund training for your employees, once it is meeting your needs

◯ Yes

◯ No

If you marked Yes, please state the percentage you would be willing to contribute

11. Is a 'Training Accreditation' for training received by your employees essential, desirable or not required

◯ Essential

◯ Desirable

◯ Not Required

If you marked Essential, please specify the Name of Accreditation Providers relevant to your business

12. During 2017/2018 is your company planning to undertake any form of qualifications at

	Yes	No
Levels 1 -3	☐	☐
Levels 4-6	☐	☐
Levels 7 -8	☐	☐
Levels 9-10	☐	☐

If you marked Yes, please elaborate here

[   ]

13. What is your preferred method of delivery for staff participation in training

◯ Day release part time

◯ Evening part time

◯ Block release (3-5 days at a time)

◯ Blended learning (combination of online and class contact)

14. Were you aware that your Local Enterprise Office and Tipperary Education & Training Board provide numerous training / upskilling courses / programmes

	Yes	No
Local Enterprise Board:	☐	☐
ETB	☐	☐

15. If you were aware of supports and have not availed of any - please let us know why

◯ No suitable course / programme being delivered to suit our requirements

◯ Haven't explored the range of courses/ programmes available

◯ Was unable to free up staff members at the time of course / programme

◯ Other (please specify)

[   ]

16. Would you like to receive further information in relation to the development of specific training programmes to meet the needs of companies located in Tipperary

◯ Yes

◯ No

1.3 Questionnaire for Banks

* 1. Please confirm name of Bank

[   ]

* 2. Please confirm your name and position held

Name - optional   [   ]

Position held - optional [   ]

* 3. In the last 2 – 3 years, which of the following business 'life stages' are most business banking enquires for financial assistance arising from

☐ An Idea

☐ Starting Up

☐ Expansion (SME)

☐ Corporate

☐ Changing Hands

☐ Facing Challenges

☐ Other (please specify)

[   ]

* 4. Which are the most popular business loans for SMEs

☐ Asset Finance

☐ Business Loans

☐ Business Overdraft

☐ Startup Loan

☐ Other (please specify)

[   ]

5. Would an applicant normally have a business plan completed

◯ Yes

◯ No

* 6. Are business plans normally completed to a:

◯ High level

◯ Acceptable level

◯ Not acceptable

◯ Add any additional feedback here:

[   ]

* 7. Which parts of a business plan do you feel companies generally need assistance with completing?

☐ Financial information

☐ Marketing plan

☐ Business risk assessment

☐ Adequate description for which finance is required

☐ Procurement

Please note additional information here:

[   ]

8. Do you believe business owners are aware of the range of finance options available

◯ Yes

◯ No

9. Are SME's using funding to

◯ Buy equipment

◯ Upskill their workforce

◯ Complete refurbishments

◯ Assess new opportunities/ market/ product development/ exports

◯ Other (please specify)

[   ]

10. When meeting with a 'start up' or an 'SME' do you ever suggest they contact any of the following in order to avail of support

	Local Enterprise Office	Education Training Board	Enterprise Ireland	Local Development/ Leader Companies
Yes	☐	☐	☐	☐
No	☐	☐	☐	☐

11. Are you aware of the education, training and other supports available through the Local Enterprise Office and Tipperary Education & Training Board

◯ Yes

◯ No

12. If you answered No to the previous question, would you like to meet with a representative from LEO and/or ETB

	Yes	No
LEO	◯	◯
ETB	◯	◯

Please add additional feedback here:

[   ]

13. Would banks looks favourably on loans for training

◯ Yes

◯ No

Please add additional feedback here:

[   ]

14. In your opinion should State Agencies be doing more to support companies employing 10 + staff.

◯ Yes

◯ No

If you answered yes, please specify

[   ]

15. Please do let us know if you have any additional feedback:

[   ]

Appendix 2 – Radio Script

Do you employ more than 10 staff? Do you wish to upskill your workforce? Have they specific education and training needs? If so, Tipperary Education & Training Board in conjunction with The Local Enterprise Office wants to hear from you. Over the coming weeks, we will be contacting you to participate in a study of training and development needs. This study aims to identify the education, training and development supports required by businesses employing more than 10 staff in Tipperary. For further information and to participate in the study please visit www.localenterprise.ie/tipperary or www.tipperaryetb.ie

Appendix 3 – Press Advert and Press Release

3.1 Press Advert

3.2 Press Release

Employers in Tipperary - Have Your Say!

Tipperary Local Enterprise Office (LEO) and Tipperary Education and Training Board (ETB) are collaborating on an Employer Training and Support Needs Analysis. The primary objective of this study is to identify the issues facing SME clients in Tipperary, who are employing greater than 10 employees, with the goal of assisting in achieving the economic and enterprise objectives for the County set out in the Local Economic and Community Plan. This needs analysis which will take the form of an online Survey, workshops, telephone interviews and employer engagement is being conducted with the assistance of Marla Communications and is launching this week.

Employers are being asked to complete an on-line Survey, the purpose of which is to capture the needs employers have for supports and/or workforce development of staff, as well as their awareness of what Tipperary ETB and Local Enterprise Office offers. Both organisa-

tions are hopeful that this can be the start of on-going and meaningful engagement with employers in specific sectors in Tipperary.

Employer engagement is mentioned in key national strategies including the National Skills Strategy, the Government's Action Plan for Education, the DJEI Action Plan for Jobs and the SOLAS Further Education and Training Strategy. Collaborating with employers to offer relevant education provision is also the main purpose of the DES Regional Skills Forums. Tipperary is represented on both the Mid-West and South East Regional Skills Forums.

This completion of this Survey by employers in the County will assist both organisations to plan effectively and respond as best they can to what is captured in the Survey.

Education and Training Boards (ETBs) are statutory authorities which have responsibility for education and training, youth work and a range of other statutory functions. ETBs manage and operate second-level schools, further education colleges, multi-faith community national schools and a range of adult and further education centres delivering education and training programmes. Further education and apprenticeship training is provided in ETB training centres nationally. ETBs are active in local communities through the direct provision of training and education programmes delivered in centres, colleges and other training and educational settings. In this way, ETBs seek to make a real difference to the lives of the people they serve.

The role of the **Local Enterprise Office** is to support the small and micro-enterprise sector through the start-up and expansion phases. The LEOs are the principal deliverers of State support to the micro-enterprise sector in Ireland and they provide targeted supports – both financial and non-financial – to the small and micro-enterprise sector to enable businesses in that sector to grow and to create sustainable employment within their local area.

The LEOs are the Government's 'first-stop-shop' through which all information on State supports for small and micro businesses can be accessed and where businesses with clear high growth potential can be fast-tracked to the next level of support from Enterprise Ireland. The LEOs operate as part of their respective Local Authority.

3.2.1 Image to accompany Press Release

Appendix 4 –Website Graphic, Email Signature Graphic & Social Media Badge

4.1 Website Graphic

4.2 Email Signature

4.3 Social Media Badge

Appendix 5: Education and Training Requirements

Companies were asked to confirm their most urgent education and training requirements. The following table presents the education and training requirements of businesses located in Tipperary. Please note, an additional version of this table has been provided to Tipperary Local Enterprise Board and Tipperary Education and Training Board which presents the name of each company beside their specific education and training requirements. The companies' names have not been included in this table for confidentiality reasons.

Training Requirement 1	Training Requirement 2	Training Requirement 3	Training Requirement 4	Training Requirement 5
First Aid	Disability Awareness	Child Protection		
Business by Referral	E-tendering			
Level 3 and Level 4 ride leader				
Certified Accountancy Pathway	Heavy Goods vehicle driving HGV	Web page design	Retail sales	
Incentive for school leavers	Rewards for employers			
Coaching	Leadership	Enterprise training	Social Media training	
Food Hygiene	Manual Handling	Chemical Training		
Accounting software - QuickBooks	Tax and Revenue	Business Development	Marketing	
Knowledge of local area (Ancient East)	Importance of Local Produce	Customer Service		
Leadership Skills	Time Management	People Management		
Social Media sales	Revenue Management	IT Skills, i.e. Excel, PowerPoint etc	Customer Service experience	

Marketing	Customer Care	Legislative Training example manual handling		
Management Communication	Systems Control process	Staff upskilling		
Production Operatives	Welding Training	Lean Training	Production Management/Planning	
Employee/employer relations	How best to relate with different cultures	Best care with difficult customers		
Computer Literary	Personnel	People Skills	Health and Safety Awareness	
Health & Safety	Horse Handling	Manual Handling		
Corporate Governance Compliance and Responsibilities	Client Relations / Customer Service	Health and Safety (Manual Handling/ Safety Officer/First Aid)		
HACCP	Customer Service Training	Manual Handling		
HACCP	Healthy and Safety			
HACCP	Food Safety	Manual Handling		
Pharmacist training	OTC - medicines training	Skin care training	Vitamin training	Retail training
Customer service and needs	Local attractions for guests	Skills based chefs front office service	Up selling	
Health and Safety	Information Technology			
Basic Excel courses	Advanced Excel training courses			
IT Training	Drawing	AutoCAD		
Health and Safety	Communication	Leadership	Auditing	Accident Reporting
First Aid -- Service Staff	HACCAP	Marketing - Social Media training		
Health & Safety Training	Machine Operatives Training	Supervisory Management		
Chefs	Health & safety	Wait-		

		er/waitress		
Computer Literacy (Word, Excel) etc	Lean Manufacturing	Safety in the work place		
Health & Safety Training	Deli - planning out hot counter			
Creating Customer Value	Customer Service Training	Care Optical Training	Managerial Development	
Design				
IT	Health & Safety Training	HR		
Manual Handling	Fork truck training	Power pallet truck training		
Lean manufacturing principles				
Hygiene etc. for new staff				
Health & Safety Training				
Chainsaw	First aid	Boom spray		
QQ1 Level 6 Supervision in Childcare	Early Childhood Studies Level 7	Occupational & Paediatric First Aid Training	Manual Handling	Health and Safety Training
Computer Aided Design and Drafting - CAD				
3D Drawing	AutoCAD Training	Quality Control	Microsoft package	Health and Safety
ISO9001:2015 Internal Auditing	MS Office - Excel	MS Office - Skype, SharePoint, One Drive	Safe-Pass	
Customer service	First aid	Manual handling	Retailing	
Health & Safety Training	Manual handling	Forklift		
Driver CPC	Marketing			
Access to New Business	Management Training			
Dementia				
HACCP Compliance	E Marketing			

CSCS Training (machinery)	First Aid Training	MEWP (Mobile Elevation Work Platform)	Quality Management Training	
Business Management	Accounts management			
Food Training Courses	Compliance	Innovative, natural food		
Primary Hygiene Course	Social Media Training	Health and Safety		
Manager Training	Business Controls	Equipment Training		
HR/ Employment Law	Tax Compliance/ Schemes	Managing 12 staff		
Manual Handling	Occupational First Aid	Product Knowledge		
Safety Induction, Manual Handling & Env. Awareness	Forklift Training	Loading Shovel	MEWP	Confined Space
Communication and customer interactive skills programme (basic to advance)	Online Sales Development - up-skilling (basic to advance)			
Bakery	Management	Butchery	Deli	Marketing
Management	Revenue Management	Staff Output		
Manual Handling	First Aid	Food Safety		
Standard and compliance	Research & Design			
Time Management				
Time Management	Accounting	Sales	Customer Service	
HACCAP training for new employees	Digital Marketing	Basic Hospitality Training similar to the old Cert courses		
Management development	Excel training for accounts and other areas	Sales training	Stock control training	Performance review training

Leadership	Communica-tions	Mentoring	Health & Safety	Lean
Career Planning Course	Self-Develop-ment/Confidenc e Building Course	Manual Han-dling Training	Receptionist Skills course	Driving Theory and Test
QQ1 level 5 for care assistants	QQ1 level 5 for care assistants	QQ1 level 5 for care assistants		
Manual Han-dling	HACCP	Pesticide Training	Chainsaw Train-ing	OFA
HR	Health & Safety	Managing Dif-ficult Behav-iours		
Career Planning	Carer Courses			
Health & Safety Training	Computer courses	Horticulture tools and equipment course		
Training of fruit harvesters in harvesting techniques	Training of equipment op-eratives on very specific bottling equipment			
Sales Training - high level.	Customer Ser-vice - high level.			
Tax Returns				
Staff upskilling				

Appendix 6: Contact Details

A list of businesses which confirmed that they would you like to receive further information in relation to the development of specific education and training programmes to meet their needs has been provided separately to Tipperary Local Enterprise Board and Tipperary Education and Training Board. The company contact details have not been included in this report for confidentiality reasons.

Appendix 7: Tourism Trade Needs Analysis Infographic (August 2017)

One of the key findings which was identified through this study is that significant training gaps exist within the Tourism sector which are not currently being addressed. Post this study an additional research assignment was commissioned by Tipperary LEO and Tipperary Tourism Company. The purpose of this second study was to delve deeper into the requirements of the Tourism sector and identify the specific training needs and supports required by businesses which benefit from the Tourism market.

The results from this further research will allow for the development of training and management development programmes exclusively for the Tourism sector which will further strengthen the Tourism offering.

The primary data collection tool used to gather the relevant information from the identified operators was that of an online questionnaire. The questionnaire along with a letter from the Chairman of Tipperary Tourism Company was emailed to a database of approx. 300 tourism product providers. The online effort was supported by follow up telephone calls to maximise participation levels.

For the purpose of this additional research study, two databases were used:

- The first database consisted of 240 operators ranging from restaurants to heritage centres to golf clubs etc.

- The second database consisted of 41 operators which form part of the Lough Derg Marketing Group

The following infographic overleaf presents some of the key findings from this specific research exercise.

Tourism Sector - Tipperary

Research Objective:
To identify the specific training needs and supports required by businesses operating in the tourism and hospitality sector in Tipperary.
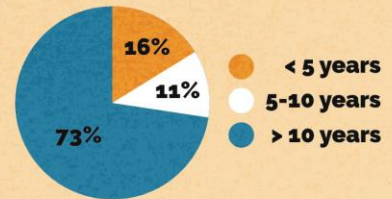
Research Duration:
July – August 2017

Research Sponsors:
TIPPERARY
Time to take it all in

Oifig Fiontair Áitiúil
Local Enterprise Office

Business Sector
- Other 9%
- Accommodation 37%
- Activities 10%
- Community 5%
- Food & Drink 5%
- Attractions 14%

Years in Business
- 16% < 5 years
- 11% 5-10 years
- 73% > 10 years

Key Findings

Training Requirements (1st choices)
- Digital Marketing 37%
- Sales & Marketing 45%
- Finance 33%

Training Requirements (combined 1st & 2nd choices)
- Digital Marketing – 83%
- Sales & Marketing – 77%
- Manager / Owner Development – 71%

9% have committed to a training programme

47% are willing to fund employee training

Preferred Time for Employee Training:
- 55% Morning
- 25% Evening
- 37% Q1
- 39% Q2

88% are willing to travel to a central location

Training services provided by Failte Ireland and LEO are most frequently availed of

54% haven't explored the range of courses on offer

84% would like to receive further information about relevant training programmes

73% said Tourists rely on their staffs knowledge for suggestions

59% provide staff with in-house training about the local area

83