

TOURISM & HOSPITALITY

Industry Research Debrief
9/11/22

PURPOSE OF THIS RESEARCH

The tourism and hospitality sectors were faced with a significant skills shortage when reopening in the wake of Covid 19. A campaign was launched by Tourism Northern Ireland and HATS with the aim of boosting job applications, however this was a short-term solution as the industry had many long-term skills issues.

In 2021 Tourism Northern Ireland, in partnership with HATS, commissioned research to identify the long-term challenges and opportunities for recruitment and retention in the tourism and hospitality industry.

The purpose of this research was to gain an in-depth understanding of public perceptions of the industry as well as of the experiences of employees, to help grow and develop the industry over the next 5+ years.

IN THIS DOCUMENT

- Recap on campaign from January
- Overview of research
- Key issues facing T&H
- Key benefits of working in T&H
- Differences and commonalties between employees
- Existing and desired benefits

Key takeouts

PREVIOUS CAMPAIGN

BACKGROUND & OBJECTIVES

The impact of the pandemic coupled with Brexit has exacerbated many of the skills issues faced with widespread staffing shortages currently reported across the sector.

Online job postings had increased by **+366%** (330 posting) in April 2021 compared with April 2020.

A campaign was commissioned to raise awareness of the fantastic job opportunities available in Tourism and Hospitality and to drive potential applicants to careerscope.uk.net/ni

COUNT ME IN

This campaign heroes people in a variety of different roles, doing what they love for a living.

The campaign featured in newspapers, magazines, social media, outdoor (e.g. bus shelters) and radio.



“ I practice mixology. It's like biology only with more gin. ”
Andy, Bartender

Discover amazing opportunities in Northern Ireland's tourism and hospitality industry.
Explain them any way you want.

SEARCH
careerscope.uk.net/NI



“ I'm the one who puts the life into live events. ”
Frances, Events & Promotions Manager

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SEARCH
careerscope.uk.net/NI



“ I am an artist and my medium is root vegetables. ”
Dawn, Chef

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CAMPAIGN RESULTS

There was much positive feedback from business owners and employers who noticed an increase in the quality of applicants. The number of visits to the CareerScope webpage also increased with the below results:

- 69,000+ page views of the campaign job search page (careerscope.uk.net/ni)
- 4,700+ unique opens of job opportunities (where job seekers have clicked on the apply button)



“ I figure out that, **yes,** you do have room for dessert. ”

Ryan, Waiter

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SEARCH
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RESEARCH OVERVIEW

IN-DEPTH NATIONWIDE **RESEARCH**

Interviews with industry stakeholders, employers, recruiters and provider reps

- **10 participants**

In-depth paired discussions with current employees, past employees, students and potential employees

- **34 participants**

Nationally representative survey with the public

- **664 responses**

Industry survey with employees

- **297 responses**

DEFINITIONS USED

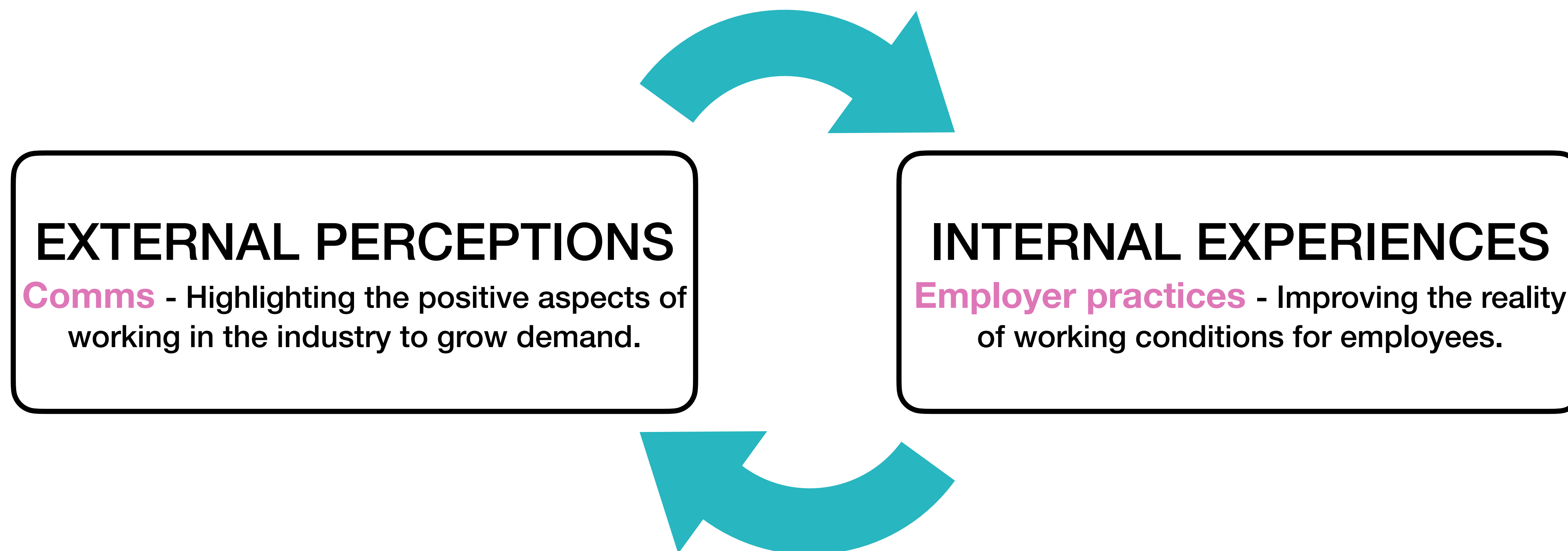
TOURISM

Tourism covers things like tour guiding and working in museums, visitor attractions, tourist transport or tourism marketing and sales.

HOSPITALITY

Hospitality covers things like working in hotels or holiday/short-stay accommodation, bars, restaurants, night clubs or events.

**COMMS CAN ONLY DO SO MUCH. IN ORDER TO SUCCEED
THE INDUSTRY MUST **CHANGE THE REALITY** OF WHAT IT'S
LIKE TO WORK IN TOURISM & HOSPITALITY**

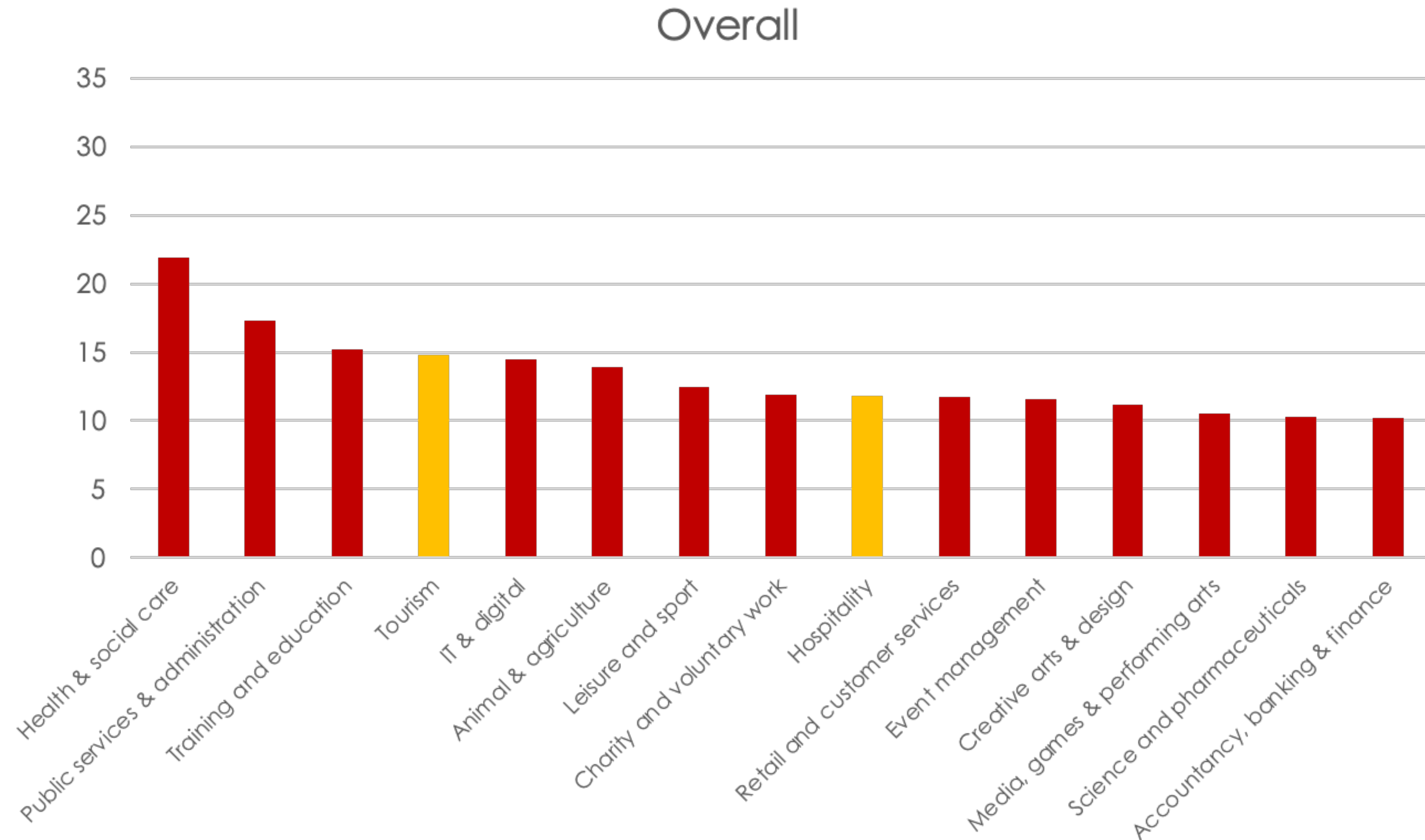


KEY ISSUES FACING T&H

FOR THE PUBLIC, **HOSPITALITY IS A LESS DESIRABLE** INDUSTRY TO WORK IN THAN TOURISM

Note:

This graph shows how 15% of the public believe Tourism is an appealing sector to work in, while 12% believe Hospitality would be appealing to work in.

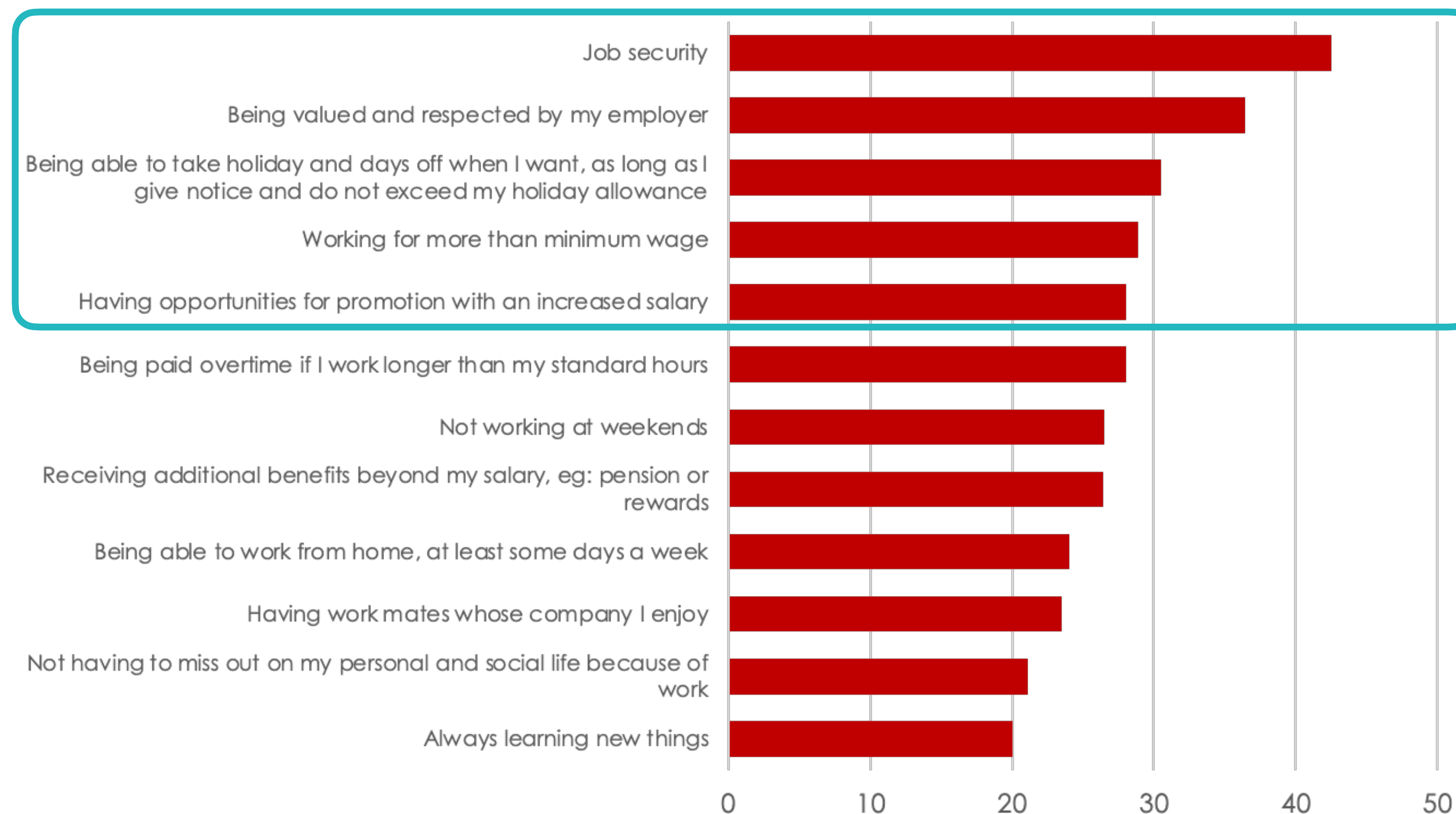


Q: Which of these sectors would be appealing to work in? Please pick at least two of the most appealing
Base: 604

THE MOST IMPORTANT ASPECTS OF WORK FOR THE PUBLIC

*Note:
This graph shows how important certain aspects of work are for a job to 'feel right'. The top 5 most important aspects are framed.*

Importance in making a job feel right for you



Q: How important would each of the following be in making a job feel right for you? Please pick your top 5
Base: 629

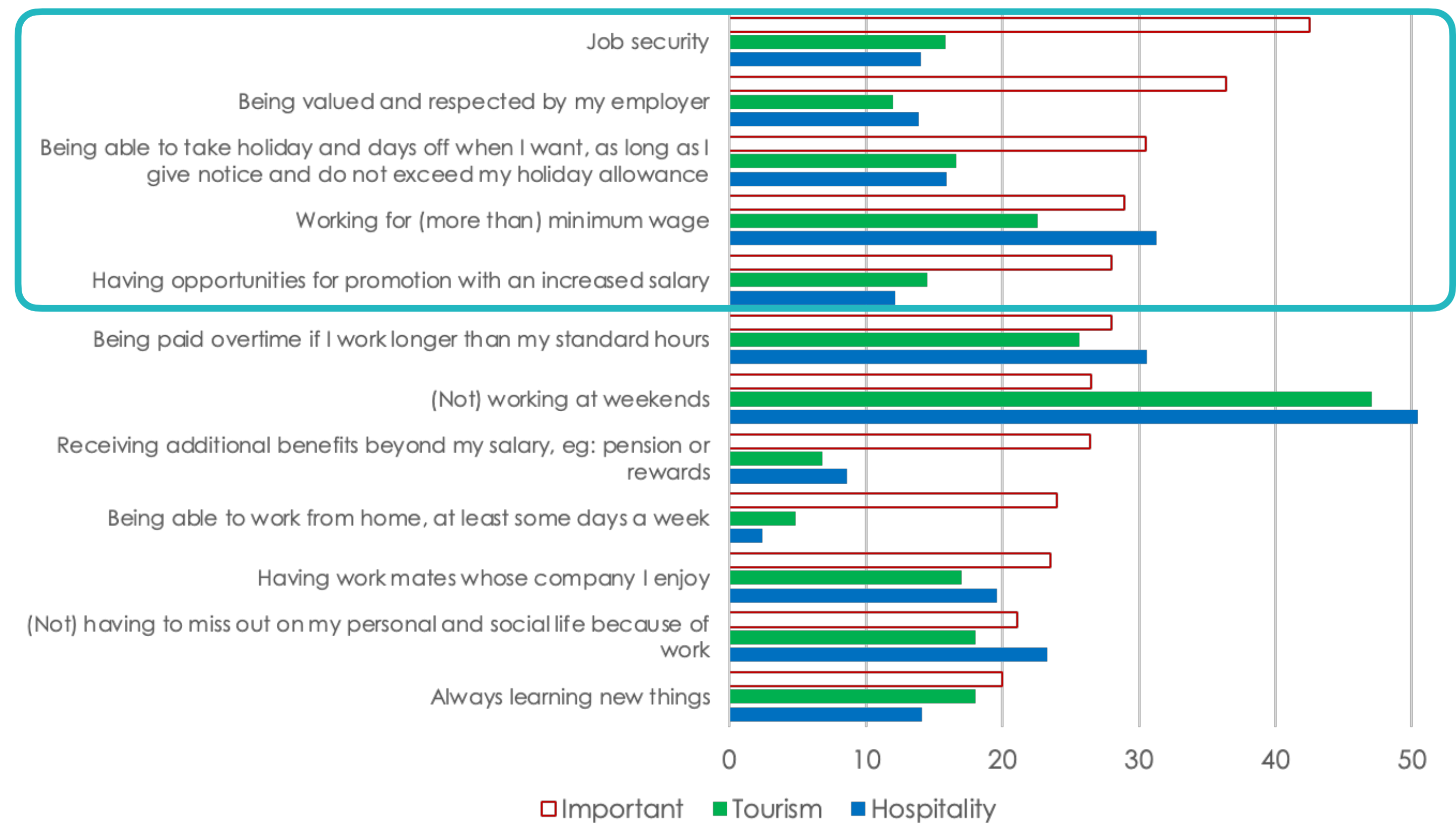
THE PUBLIC ASSUME THAT THE MAJORITY OF IMPORTANT ASPECTS **ARE MOSTLY ABSENT FROM T&H**

Note:

This graph shows to what extent the public believes each of these aspects would be the case in tourism (green) and hospitality (blue).

For ‘(Not) working at weekends’ the green and blue bars indicate the number of people who believe they would have to work at weekends.

Which would be the case working in T&H?



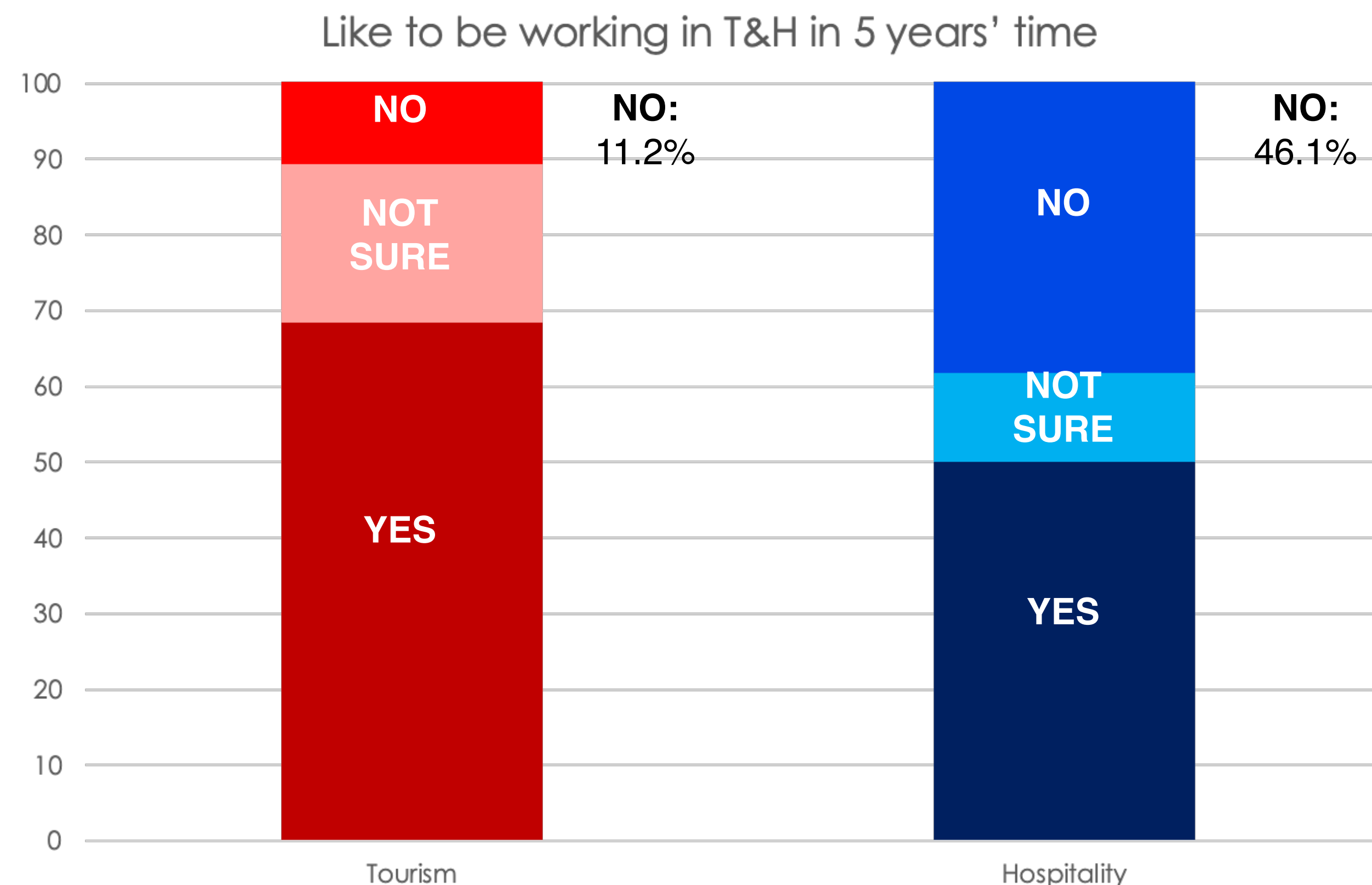
Q: Which of these do you think would be the case if you were working in Tourism/Hospitality?
Base: 604

RETENTION IS ALSO A **BIGGER ISSUE IN HOSPITALITY** THAN TOURISM

Note:

This graph shows that 11.2% of tourism employees would not like to be still working in the industry in 5 years time, while 46.1% of hospitality would not like to still be working there.

Although this is to be expected as the age profile of people working in hospitality is younger, it still reveals that that retention is a bigger issue for hospitality than for tourism.



Q: Would you like to still be working in Tourism and Hospitality in 5 years time?
Base: 319

TOP **NEGATIVES** FROM EMPLOYEES - *TOURISM*

1. Having to miss out on personal and social life because of work

36%

“I missed so many things, there’s so many photos I’m not in because I was working.” - Employee

2. Staff being paid minimum wage or a very low wage

31%

“Zero-hour contracts are a plague on society.” - Employee

3. An absence of proper training

27%

“If you’re good at what you do, they don’t want to move you up.” - Employee

Q: To what extent do you feel that each of these is a negative feature of working in Tourism and Hospitality?
Base: 274

TOP **NEGATIVES** FROM EMPLOYEES - *HOSPITALITY*

1. Having to work evenings

50%

*“She (Hospitality sector) takes you by the arm in public then gets you home and batters you.”
- Employee*

2. Staff being paid minimum wage or a very low wage

44%

“I haven’t had a Saturday to myself for 4 years.” - Employee

3. Having to work weekends

43%

“Entry-level hospitality is one of the least hospitable jobs you’ll find!” - Employee

“You can’t build a workforce and a team on £9.60 an hour.” - Employee

Q: To what extent do you feel that each of these is a negative feature of working in Tourism and Hospitality?
Base: 274

KEY BENEFITS OF WORKING IN T&H

TOP **POSITIVES** FROM EMPLOYEES - *TOURISM*

1. Helping people have an enjoyable experience

50%

“I love meeting all the other different people. You're not seeing the same people, You're meeting different people all the time. I should have done it a long time ago.” - Employee

2. Interacting with customers

46%

“Tourism is really about opening yourself up to people and opening yourself up to new experiences, trying new things and learning new things. And you learn a bit more about yourself.” - Employee

3. Meeting new people

42%

“I love talking to people about the town, about the history and stuff. There's so much history, so much culture, and people just don't know about it. We've a lot to be proud of.” - Employee

Q: To what extent do you feel that each of these is a negative feature of working in Tourism and Hospitality?
Base: 274

TOP POSITIVES FROM EMPLOYEES - HOSPITALITY

1. Not needing a degree or qualification

47%

“I just fell into it. You know, you’re a student, you need the cash, and it didn’t matter working weekends and things.” - Employee

2. Interacting with customers

44%

“It’s a good team, I love the people I work with. You’re all in it together and you support each other. And the social side is good too, they’re a good bunch.” Employee

3. Helping people have an enjoyable experience

38%

“I loved working in hospitality. I loved being around people. It was a job I grew up in and loved from day one.” Past employee

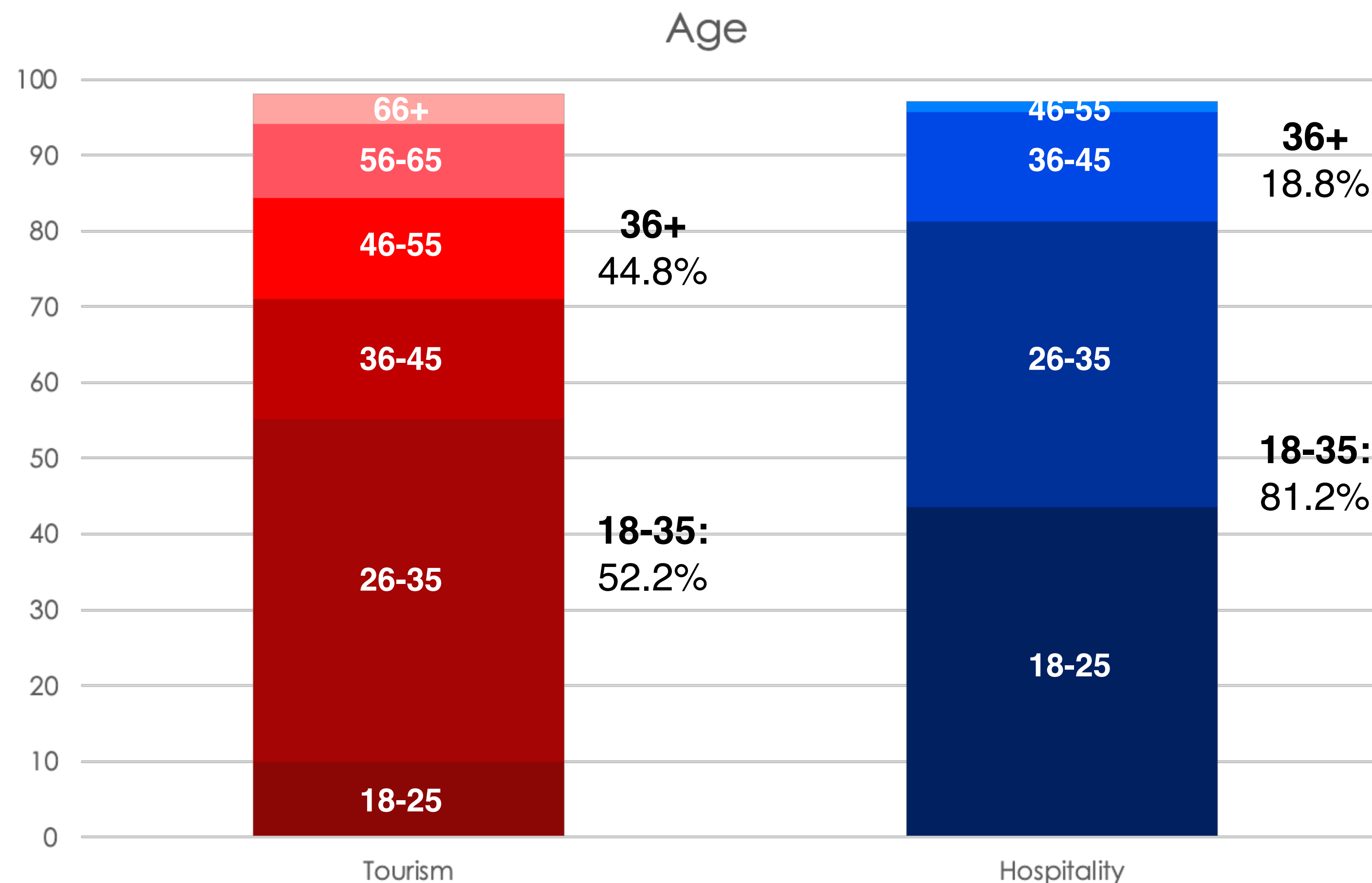
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Base: 274

DIFFERENCES & COMMONALITIES

THE **DEMOGRAPHIC SPLIT** ACROSS TOURISM AND HOSPITALITY IS VERY DIFFERENT

Note:

As would be expected, hospitality has a much younger age profile than tourism with 44.8% of tourism employees aged 36+ compared to only 18.8% of hospitality employees.



Q In which of these age groups are you?
Base: 272

PEOPLE AT **DIFFERENT LIFE-STAGES** HAVE DIFFERENT PRIORITIES

18-35 ARE MORE LIKELY TO VALUE

Opportunities for promotion and increased salary

Not having to miss out on personal and social life due to work

35+ ARE MORE LIKELY TO VALUE

Job security

Working for more than minimum / low wage

Receiving additional benefits beyond salary
e.g. pension and rewards

THE PUBLIC RECOGNISE THAT BEING A 'PEOPLE PERSON' IS THE COMMON THREAD BETWEEN T&H

1. Interacting with members of the public

T - 48%

H - 45%

"It's one big family. You'll make friends for life. It's a lifestyle." - Recruiter

2. Meeting new people

T - 39%

H - 37%

"Big personality. Bubbly. People person." - Employer

3. Interacting with clients

T - 35%

H - 27%

"You've got to be a people person, want to help people, People can be awkward sometimes, so you've got have some resilience too." - Employee

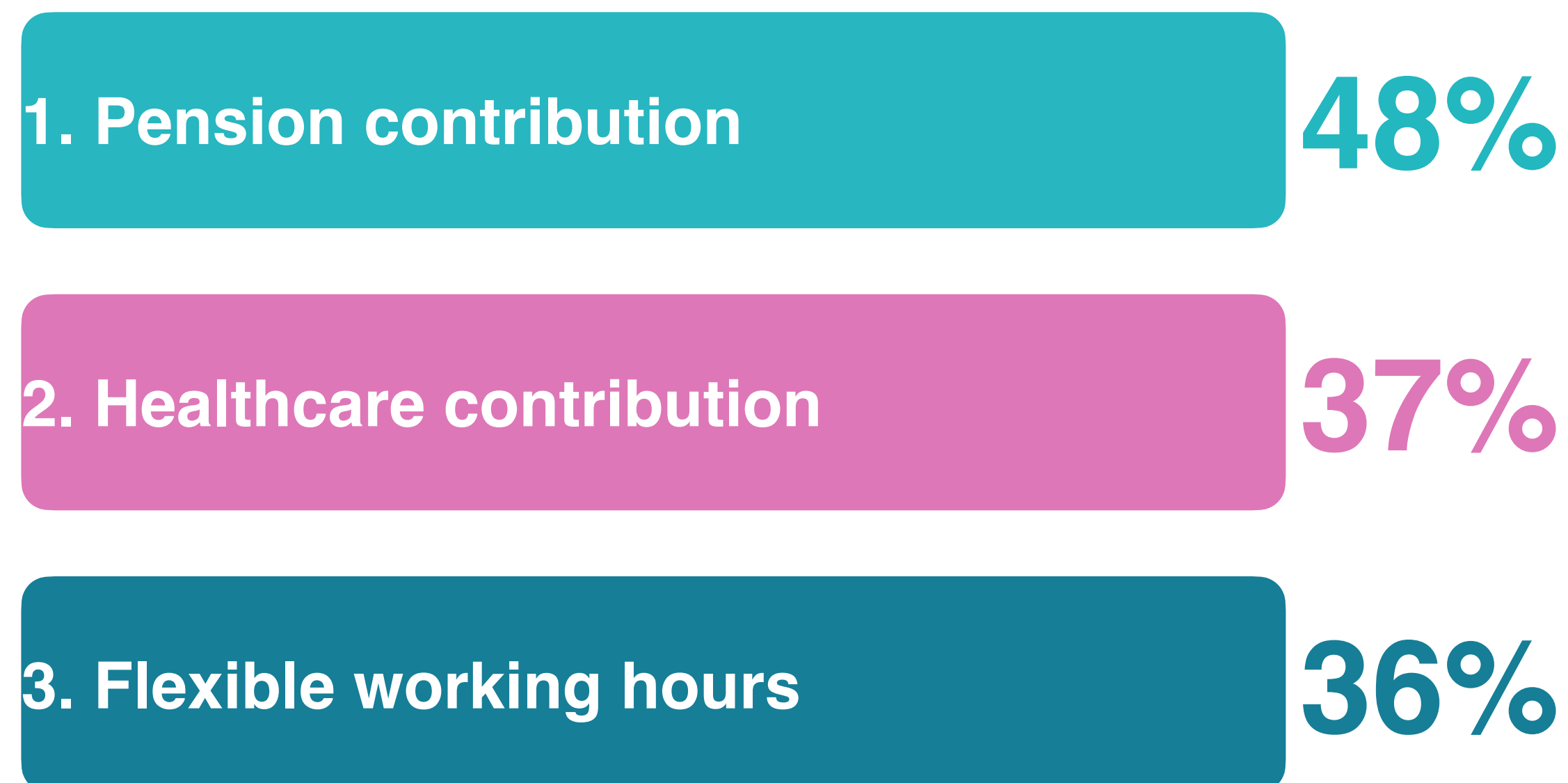
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Base: 604

**EXISTING & DESIRED
EMPLOYEE BENEFITS
(EXCLUDING PAY)**

EXISTING & DESIRED BENEFITS - *TOURISM*

EXISTING



Q: From this list of things employers could do to improve employee satisfaction, which does your employer provide currently?
Base: 275

DESIRED



Q: Which of these would you like to see your employer introduce?
Base: 275

EXISTING & DESIRED BENEFITS - HOSPITALITY

EXISTING



Q: From this list of things employers could do to improve employee satisfaction, which does your employer provide currently?
Base: 275

DESIRED



Q: Which of these would you like to see your employer introduce?
Base: 275

Note:

'Clear path for career progression' appears as an existing but also desired benefit, indicating that although some employees feel like their employer provides this, it is not done to the extent that they would like.

KEY TAKEOUTS

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- The public value careers in which they have **security**, feel **valued**, have **flexibility**, earn a liveable **wage** and have opportunities to **progress**.
- The main issues for existing T&H employees are around **flexibility**, **pay** and **training**, especially in hospitality.
- The core benefits of working in T&H are **helping people** have an enjoyable experience as well as **meeting and working with different people**.
- In tourism employees would like more career **progression**, **overtime** payments and additional **holidays**.
- In hospitality employees would like **healthcare** contributions, career **progression** and **discounts**.

USEFUL **RESOURCES**

- Tourism Northern Ireland recruit and retain supports
- HATS Network website
- HATS Hospitality & Tourism Commitment

THANK YOU