IRISH TOURIST INDUSTRY CONFEDERATION

ITIC is very grateful for the support provided by Fáilte Ireland.

REVIEW OF IRELAND'S COACH TOURISM SECTOR & FUTURE RECRUITMENT CHALLENGES

A REPORT

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Main Findings

The Coach Tourism Market

- The demand for coach touring holidays in Ireland increased by 56% between 2002 and 2006, more than double the overall inbound tourism growth rate. Strong growth continued in 2007 and the outlook for 2008 is good.
- The growth in demand has been concentrated in tour programmes combining air access transport with a coach tour; this has resulted in a steep increase in demand for locally supplied coaches, drivers and guides.
- The U.S. and Continental European markets have generated the most rapid growth and the demand for guides fluent in the main Continental languages has risen accordingly.
- At the time of the survey there were 53 members of the Coach Tourism and Transport Council (CTTC)***** operating a fleet of 977 coaches, 60% of which (c. 586) are full-size (i.e. 50-53 seat capacity). Not all of these coaches are committed to coach touring at any one time.
- It is estimated that CTTC members employed 1,360 tour coach drivers in 2007. Some 440 of these were seasonally employed and, of the 920 employed year-round, just 685 were full-time. Four-fifths of the drivers are Irish, with most of the remainder coming from Britain and Eastern Europe (mainly Poland).
- There were more than 200 vacancies for drivers among CTTC members in 2007. Few Irish people are attracted to the sector due to demand from other sectors, unsocial hours, the seasonal nature of the work and the amount of time spent away from home, particularly on days off. As a result, there is a growing need to recruit drivers from overseas.

(Current membership is 60)*

Tour Guides

- It is estimated that there is a peak season requirement for between 1,000 and 1,320 tour guides in Ireland. Most are self-employed and contract to incoming tour operators during the coach tourism season. About 60% of the available tour guides are Irish, with 30% from Western Europe and the balance from further afield.
- English is the guiding language most in demand, followed by French, German, Italian, Japanese, Scandinavian languages and Spanish. The demand for Continental European languages is rising steeply, and currently outstripping supply.
- Almost 90% of tour operators experienced difficulties in recruiting qualified tour guides in 2007, especially where specific foreign language skills are sought.

Recruitment and Training Issues

These are broadly consistent in relation to both coach drivers and tour guides. In summary:

- There is a growing shortage of supply.
- Irish people are not seeking employment as drivers or guides, and the extent of recruitment from abroad is increasing.
- Under-qualified and inexperienced drivers and guides are being used.
- Lack of appropriate language skills is becoming a pressing issue: English for foreign coach drivers, and the major Continental European languages for tour guides.
- Current training provision does not meet the range of needs for either drivers or guides.

Recommendations

Coach Drivers

i) ***Recruitment in Ireland:*** in order to attract more Irish drivers to the sector, the coach companies will need to present the jobs as attractive, rewarding, and competitive with similar jobs in other sectors.

ii) ***Overseas Recruitment:*** the approach to recruiting drivers from overseas needs to be more structured, both in identifying candidates with the necessary driving skills and qualifications, and by supporting their recruitment with an intensive training programme. It is recommended that a fresh initiative be jointly developed by the CTTC, FÁS and Fáilte Ireland as a matter of urgency.

iii) ***English Language Training:*** this is a vital issue with respect to the employment of drivers of non-English-speaking nationalities. Fáilte Ireland has indicated to CTTC that it is prepared to fund and facilitate language training for coach tourism drivers in 2008. A longer term solution is also required, and it would be appropriate for FÁS and Fáilte Ireland to engage with the CTTC at national level on resolving this issue.

iv) ***Work Permits:*** the difficulties in recruiting drivers would be eased if coach tour companies could recruit from outside the EU as well as from Bulgaria and Romania. In view of the urgent need and the high economic value of coach touring, especially for the regions outside Dublin, it is recommended that coach driving be recognised and listed by the Department of Enterprise, Trade and Employment as a skills shortage sector / strategically important occupation.

v) ***Skillnets Potential:*** subject to an assessment of viability, the CTTC members should also consider establishing a Skillnets training programme for tour coach drivers. The priority needs should be clarified by members and a course devised in conjunction with FÁS or independent training providers. It is recognised that the establishment of a new Skillnets programme would be contingent on resolving the problems of high administrative and operating costs incurred in a previous Skillnets initiative operated by CTTC.

vi) ***Continuous Professional Development:*** training services should be provided to drivers on a regular basis and jointly agreed continuous professional development courses should be delivered to drivers throughout their careers.

Tour Guides

vii) ***Expand Training Provision:*** the most urgent requirement is to expand the training provision for tour guides:

- The measures proposed by Fáilte Ireland to make their FETAC Level 6 guide training more widely available, and to permit candidates from other training courses to sit their exam, should be introduced as quickly as possible.

- Independent providers should ensure that their courses cover the prescribed curriculum for the Fáilte Ireland FETAC Level 6 award so that their students can sit the Fáilte Ireland exam.
- While the FETAC Level 6 award should be continued as the prime qualification, the introduction of a foundation level should be considered as a 'junior' qualification suitable for training guides to meet the minimum guiding standards. Foundation level guides would be accredited to then complete the FETAC Level 6 badged guiding course.
- The guiding course offered by Dublinia, if it achieves accreditation for a full FETAC Level 6 award, should be developed as an alternative, recognised qualification for tour guides.
- Greater emphasis must be placed on language training for guides, and including languages as an essential component of guiding courses.

viii) ***Recruitment in Ireland:*** to attract more Irish applicants, the terms and conditions of employment of guides, including pay, will need to be improved.

ix) ***Recruitment from Overseas:*** as with coach drivers, a campaign to recruit guides from overseas could be devised, with emphasis on sourcing guides with appropriate language skills. This would need to be supported by an intensive training programme.

x) ***Certification of Existing Guides:*** a mechanism to enable the certification of existing guides who have long experience but no formal guiding qualification should be devised. The criteria to be considered should be established by the ITOA, in consultation with Fáilte Ireland. The existing Accreditation for Prior Learning (APL) programme should be more widely used.

xi) ***Use of Technology:*** the potential to make greater use of video and audio guides in appropriate circumstances - e.g. day and city tours - should be explored; a key benefit would be the ability to deliver information in multiple languages on the same tour.

1. INTRODUCTION

1.1 Background and Objectives

The Coach Tourism and Transport Council of Ireland (CTTC) is the representative body for Independent Coach Operators who are dedicated to providing passenger transport to domestic and overseas visitors. CTTC currently has some 60 members. A first class service is dependent on the quality and availability of the driving and guiding personnel. In the current market, the recruitment, training and turnover of drivers has become increasingly challenging and there is a pressing need to introduce appropriate measures to address these problems.

A further problem for the group tour business is a growing shortage of tour guides. This is becoming a serious constraint on the future development of this sector, with tour operators experiencing difficulties securing suitably qualified and experienced guides during the peak months of the season.

Against this background, the Irish Tourist Industry Confederation commissioned CHL Consulting to conduct a review of the coach touring and guided tour sectors with specific reference to the recruitment and training of coach drivers and tour guides. The objectives of the review are as follows:

A. Coach Drivers

- Establish the existing extent of the coach touring fleet in Ireland.
- Attempt to quantify the annual shortfall of suitably qualified drives for tourism related business.
- Identify reasons for the apparent difficulty in attracting recruits.
- Recommend an appropriate support/intervention programme to recruit, train and retain an adequate supply of drivers.
- Estimate the future growth trends in coach related tourism.

B. Tour Guides

- Establish the extent of the tour guide 'panel' in Ireland, and attempt to identify the level of present and projected shortages.

- Assess the extent to which the tour guide demand can be satisfied from Ireland, and the extent to which it may be necessary to recruit from overseas.
- Examine the present recruitment and training programmes operated by Fáilte Ireland and recommend any changes thought to be necessary.

1.2 Methodology

The review involved two essentially separate studies, one of the coach touring sector and one of the guided tour sector. We conducted two separate on-line surveys during November, 2007, as the main method of data collection:

- A survey of the members of the Coach Tourism and Transport Council, of whom there were 53 at the time of the survey. We received 32 responses representing a response rate of 60%. Information on fleet size was obtained from a further 10 respondents, bringing the response rate on this question to 79%.

- A survey of 30 members of the Irish Tour Operators Association to which we received 24 responses, representing a response rate of 80%.

The surveys collected data, views and opinions of specific relevance to the objectives of the review. The high response rates mean that the survey findings are robust and representative of the two sectors. Copies of the questionnaires are provided in Appendix One.

The surveys were augmented by consultations with coach and tour operators, leading members of the CTTC and ITOA, Fáilte Ireland, tour guide supply companies and the Association of Approved Tour Guides in Ireland. We also made contact with FÁS and obtained relevant information from them.

We are pleased to present the findings, conclusions and recommendations of our review of this report. We wish to acknowledge gratefully the helpful cooperation received from the members of the CTTC and ITOA who responded to our surveys, and the assistance generously given by all those with whom we consulted.

2. THE COACH TOURISM SECTOR

2.1 Introduction

The private bus and coach industry in Ireland has experienced significant growth over the past 15 years. A study by Goodbody Economic Consultants[1] found that the industry comprised almost 1,800 operators with a total combined fleet of 4,859 vehicles. These operators provide services to a number of markets including coach tourism, schools transport, scheduled passenger road services and private hire. The vast majority (82%) provide services to at least two of these markets.

Our focus in this review is specifically on the coach tourism business, and we have excluded the other types of service. However, it may be noted that there is a considerable level of interdependence between coach tour operating and the other services, both for the operating companies and the drivers. The seasonality of coach tourism means that drivers and coaches are used for other services at other times of the year.

On the one hand, this can be of benefit in achieving higher utilisation rates of coaches and drivers; on the other hand, the overlapping of seasons means that, inevitably, there is a requirement for part-time and seasonal drivers for coach tourism activity, which also involves extended trips away from home. The latter positions are less attractive than full-time, home-based jobs, and this gives rise to some recruitment difficulties. These and other issues are explored in the following sections.

2.2 The Coach Tourism Market

The demand for coach touring holidays in Ireland has grown significantly during the past 5 years - see Table 2.1 and Chart 2.1 overleaf. In 2006, an estimated 356,000 overseas tourists travelled by coach in Ireland. This number represented an increase of 56% on the total of 228,000 recorded in 2002. During the same period, the overall number of overseas tourists visiting Ireland increased by 25% while the number on holiday in Ireland increased by just 15%. It is evident that coach tourism has outperformed the market average by a large margin.

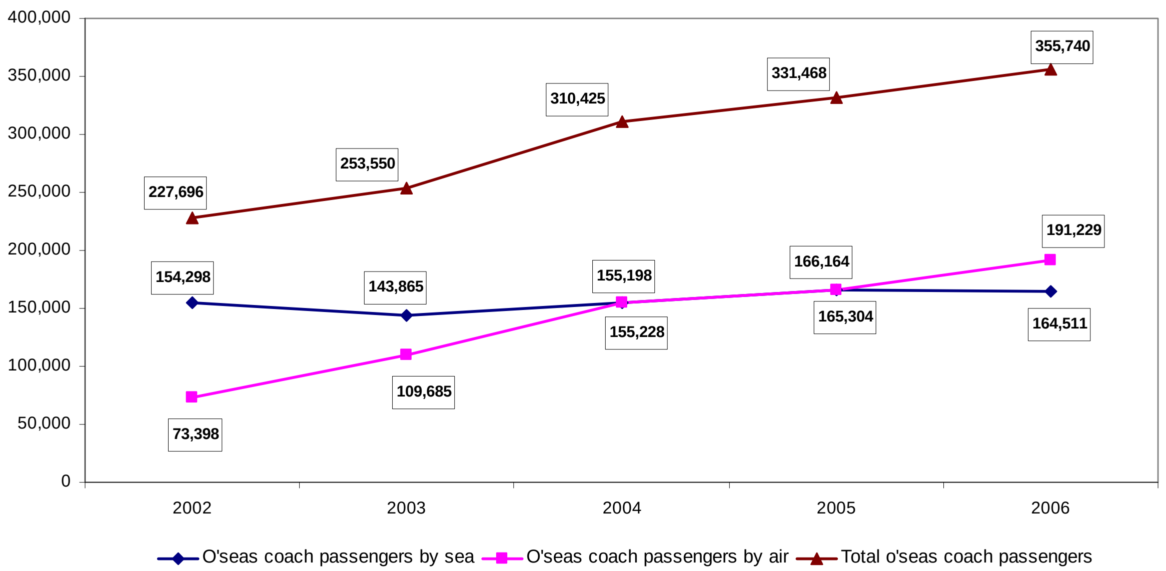
[1] Goodbody Economic Consultants: '*The Private Bus and Coach Industry in Ireland*', January 2005

Table 2.1: Coach Tourism in Ireland, 2002-2007

	(000's pax)					Growth
	2002	**2003**	**2004**	**2005**	**2006**	**'02-'06 %**
Arrivals by sea	154	144	155	166	165	+7%
Arrivals by air	73	110	155	165	191	+162%
Total	**227**	**254**	**310**	**331**	**356**	**+57%**
Total Overseas Visitors	5,919	6,178	6,384	6,763	7,417	+25%
Total Overseas Holidaymakers	3,216	3,291	3,367	3,365	3,711	+15%
Coach Tourists % Holidaymakers	7.1	7.7	9.2	9.8	9.6	

Source: Fáilte Ireland, 2007

Chart 2.1: Demand for Coach Touring Holidays, 2002-2006



Source: Fáilte Ireland, 2007

The growth in demand has been concentrated in tour programmes combining air transport with a coach tour - as illustrated in Chart 2.1, this market has increased by 160% during the past 5 years. On the other hand, the number arriving by sea has increased by only 7%. The implication of this trend is that there has been a steep increase in demand for locally-supplied coaches, drivers and guides.

The market distribution of demand is shown in Table 2.2 and Chart 2.2 overleaf. While Britain is the largest individual source market, as it is for Irish tourism overall, the North American market is almost as large and has been expanding at a faster rate. The most rapidly growing markets are those in Continental Europe - in 2006 alone, there was an increase of 30% in demand from the Continent. This has generated a need for many more guides with European languages.

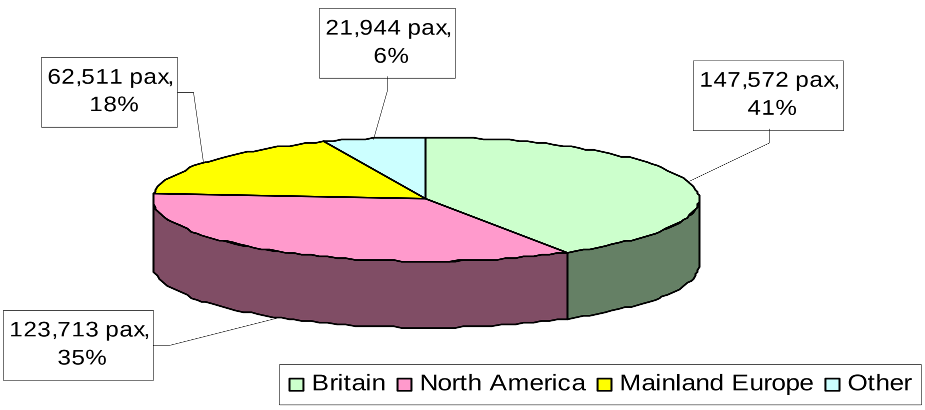
In addition to the coach tour programmes involving overnight stays, there is also a sizeable demand for day coach tours. Fáilte Ireland's Visitor Attitudes Survey (VAS) for 2006 indicates that 11% of respondents took a day coach tour. The VAS samples overseas holidaymakers only during the June - September period. While it is probable that during the rest of the year a lower proportion of holidaymakers take day coach tours, if the proportion remained constant it would suggest that up to 400,000 holidaymakers took day coach tours in 2006. Adding this number to the estimate for tours with overnight stays would suggest that the coach tourism industry handled up to 756,000 overseas tourists in 2006.

Table 2.2: Total Coach Tour Passengers by Market (000's)

Market	2002	2006	Growth '02-'06 %
Britain	113	148	+31%
N. America	76	124	+63%
C. Europe	23	62	+170%
Other	16	22	+38%
Total	**228**	**356**	**+56%**

Source: Fáilte Ireland, 2007

Chart 2.2: Total Coach Passengers by Market, 2006

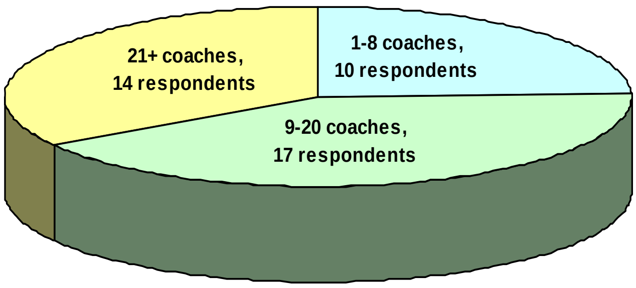


2.3 Coach Touring Companies

The members of the Coach Tourism and Transport Council operate in conformity with criteria agreed between the CTTC and Fáilte Ireland. These criteria include compliance with specified quality standards for coaches and with all relevant licensing and other statutory requirements. The membership comprises the vast majority of touring coach operators in Ireland

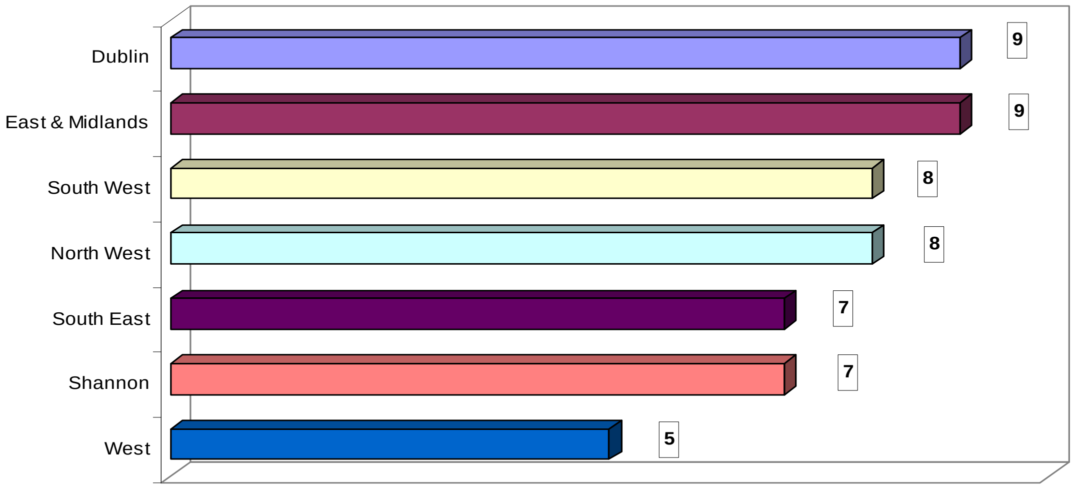
CTTC members vary widely in scale of operation. As illustrated in Chart 2.3, the majority operate fleets of less than 20 coaches, with just one-third having fleets larger than this.

Chart 2.3: Distribution of Respondents by Fleet Size



The companies are spread widely throughout the country, with headquarters located in some 20 counties. The distribution by region is shown in Chart 2.4.

Chart 2.4: Geographical Distribution of CTTC Members (Fáilte Ireland Regions)

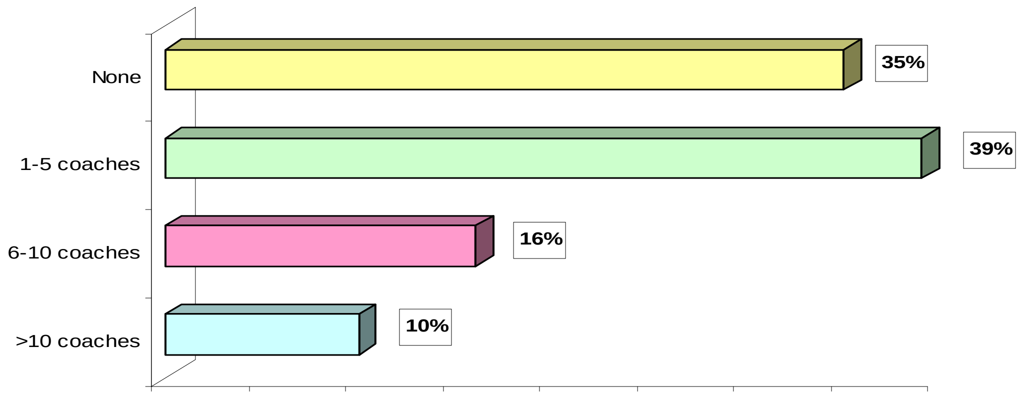


2.4 Fleet Size

Respondents to the survey currently operate 810 coaches. Grossing up for non-respondents gives an estimated total fleet of 977 coaches being operated by CTTC members. Of these, some 60% - an estimated 586 coaches - are full-size, i.e. 50/53 seat capacity. Most of the rest range between 14 and 36 seats. Not all of this fleet would be assigned to coach tours at any one time - as the report by Goodbody Economic Consultants[2] showed, companies providing coach tourism services invariably provide at least one other form of service as well - i.e. one or more of scheduled services, private hire and school transport.

In addition to the coaches owned by members, almost two-thirds of the survey respondents augment their fleets with additional coaches during the peak tourism season. The majority of these operators source an additional 1 to 5 coaches during the season, but one-quarter source more than this - see Chart 2.5. There were an additional 305 coaches hired by CTTC members during 2007. This would suggest that the CTTC coach fleet peaked at about 1,280 vehicles in 2007.

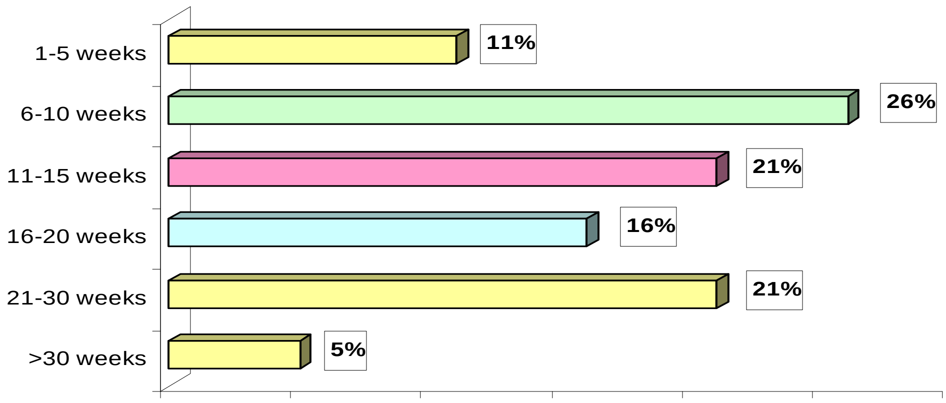
Chart 2.5: Additional Coaches Hired by Respondents during 2007



When asked to indicate the duration of hire of these additional coaches, respondents answered anything from one week to 52 weeks (Chart 2.6). Some 37% of all respondents stated that they hired additional coaches for 1 to 10 weeks during the year. A further 58% stated they hired additional coaches for between 11 and 30 weeks.

[2] Goodbody Economic Consultants: '*The Private Bus and Coach Industry in Ireland*', CTTC, 2005.

Chart 2.6: Duration of Additional Coach Hiring During 2007 (Hire Weeks)



2.5 Coach Drivers

2.5.1 Number

Respondents to our survey stated that they employed some 955 drivers in 2007, of whom 614 (64%) were year-round employees, and 341 (36%) were employed on a seasonal basis. Grossing up on the basis of data supplied by respondents, it was estimated that there was a total of 1,360 drivers employed by CTTC members in 2007.

Drivers are employed either on a full-time or part-time basis, and may also be either permanent (i.e. year-round) or seasonal. Based on the survey responses, the distribution in 2007 was as set out in Table 2.3.

Table 2.3: Employment Basis for Touring Coach Drivers, 2007

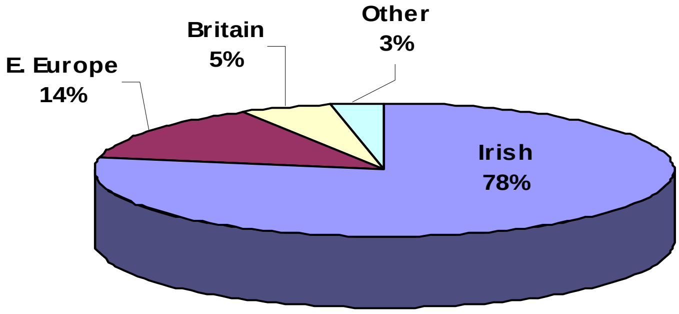
	Full-Time	Part-Time	Total
Permanent	685	235	920
Seasonal	293	147	440
Total	**978**	**382**	**1,360**

The key points to note are that two-thirds of the drivers are employed on a permanent or year-round basis, but only three-quarters of these are full-time. One-third are employed on a seasonal basis and, of these, two-thirds are full-time. Overall, a substantial proportion of coach-tour drivers are employed only on a seasonal or part-time basis and just half of the total number are employed full-time on a year round basis.

2.5.2 Nationality

As with many other parts of the Irish tourism industry the coach tour sector employs staff of various nationalities. However, the survey found that the vast majority of drivers - almost 80% - are Irish. The remainder come from Eastern Europe (14%), Britain (5%) and Western Europe (2%). A very small proportion (1%) come from further afield, mainly from African countries. The distribution of drivers by nationality is summarised in Chart 2.7.

Chart 2.7: Nationality of Drivers



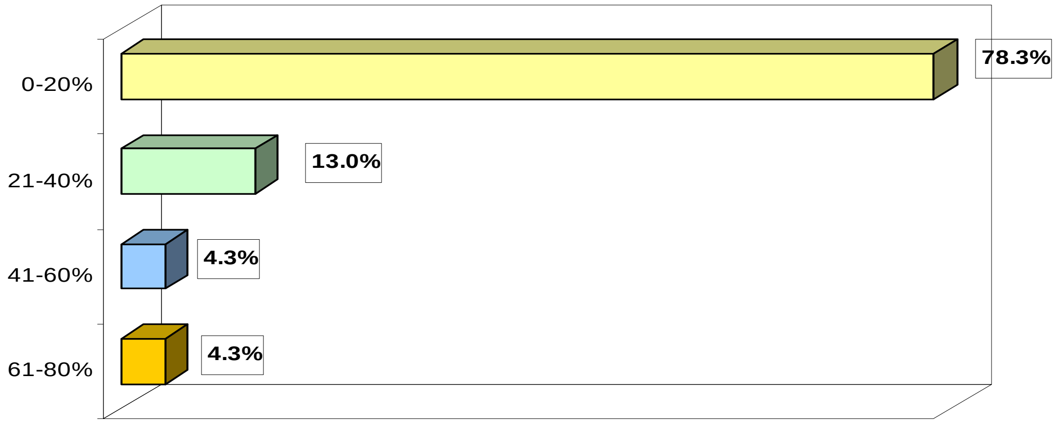
During the course of our research, CHL interviewed a wide range of industry representatives and all but a few stated that it was becoming more difficult to recruit Irish drivers. However, when surveyed, 42% of respondents stated that 100% of their drivers were Irish. Another 45% of respondents stated that between 75% and 99% of their drivers were Irish.

It is evident from our research that, while it appears to be becoming more difficult to recruit Irish drivers for the Coach Tourism industry, the vast majority of drivers currently employed in the industry are Irish.

2.5.3 Driver Guides

When asked if they use driver guides in their company, 71% of respondents stated that they did. However, four out of five of these companies stated that less than 20% of their drivers were driver guides. Therefore, while driver guides are employed by a large proportion of companies, they account for a very small proportion of the overall number of drivers. Fáilte Ireland advised that many of the drivers attending their tour guiding training programme were city drivers employed by one or two of the larger city tour coach companies.

Chart 2.8: Proportion of Driver Guides by Company

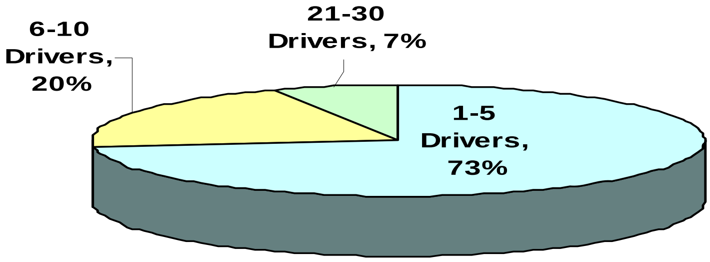


2.5.4 Driver Demand Trends

- **Vacancies in 2007**

In our survey we asked CTTC members to indicate the number of vacancies for drivers that they had during 2007. Over 80% of the respondents stated that they had vacancies. As can be seen from Chart 2.9, the vast majority had vacancies for a relatively small number of additional drivers during the year.

Chart 2.9: Companies with Driver Vacancies, 2007

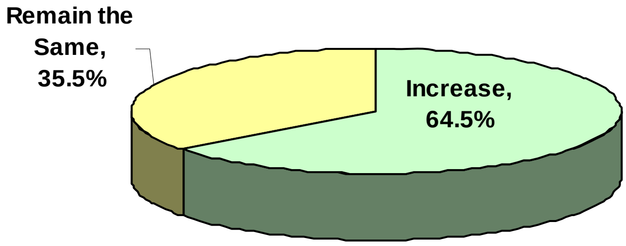


In total, respondents reported that they had 140 vacancies in the 2007 season. This would suggest that there were more than 200 vacancies in the CTTC sector as a whole.

- **Outlook for 2008**

Survey respondents were generally optimistic about the market outlook in 2008. Almost two-thirds stated that they expect to increase the number of tour coach drivers that they employ in 2008. The balance said that their complement of drivers would stay at the same level as in 2007. No respondents expected to reduce their employment in 2008.

Chart 2.10: Driver Employment Outlook for 2008



It may be noted that the group of respondents expecting to increase their driving staff includes most of the larger companies.

- **Impact of Working Time Directive**

One of the factors driving the growth in demand for drivers is the EU Transport Working Time Directive (2002/15/EU). This directive was transposed into Irish law in 2006, and is supplemented by new regulations (EC 561/2006) on drivers' hours, breaks and rest periods which came into effect in April 2007. The purpose of the regulations is to improve road safety and the health and safety of persons working in the sector. However, they have particular impacts on coach touring. Key provisions of the regulations in this respect are:

- Daily driving time limit of 9 hours (extendable to 10 hours twice a week)
- Maximum fortnightly driving limit of 90 hours
- 48 hours maximum average weekly working time; working time includes driving, loading, unloading, cleaning, technical maintenance, assisting passengers boarding / disembarking, and time which the worker cannot dispose freely of his or her time and is required to be at his or her workstation (i.e. including time spent waiting to load / unload).
- Weekly rest of 45 hours (which can be reduced to 24 hours but the shortfall must be compensated by an equivalent rest taken in bloc before the end of the third week)
- A weekly rest period must be taken after no more than 6 daily driving periods.

These regulations mean that a relief driver must be available for tours of longer than 6 days and, potentially, to drive to evening entertainments / events where the main driver is 'out of hours'. As a result, the demand for drivers has risen, and there is upward pressure on tour prices.

A further regulatory change will come into force in September 2008 when all coach drivers throughout the EU will be required to have certificates of professional competency in addition to their basic driving licence. The basic requirement for this will be a period of training, practical experience and a test. There will also be a requirement for drivers to continuously maintain their certificates by taking 35 hours training over 5 years - effectively, one day a year. The introduction of the new certification process is expected to cause a major temporary shortfall in driver availability over a period of 3-4 months. However, the longer term impact will be an enhancement of driver skills and road safety, and consistent standards between EU member states.

3. RECRUITMENT AND TRAINING OF COACH DRIVERS

3.1 Recruitment

3.1.1 Number

The survey findings showed that there were more than 200 vacancies for tour coach drivers in 2007 (Section 2.5). They also showed that the vast majority (almost 80%) of drivers are Irish but that there is a growing number being recruited from Eastern Europe and elsewhere.

Survey respondents were asked to identify their sources of drivers. The majority stated that they recruit all or most of their drivers in Ireland either from within the industry or from other sectors. Only 6 respondents mentioned any overseas recruitment at all, but these include a number of the largest employers in the sector.

As is shown in Table 3.1 below, 43% of respondents recruit all of their drivers in Ireland from within the industry. An additional 3% recruit all their drivers within Ireland but from other industries. As mentioned above, very few companies hire drivers from overseas and only one of these recruited all of their drivers from overseas.

Table 3.1: Driver Recruitment Sources, %

Proportion of Drivers Recruited	Coach Tourism Industry Ireland	Other Industries in Ireland	Overseas
	% of Respondent Companies		
100%	43%	3%	3%
75-99%	10%	3%	3%
50-74%	13%	7%	3%
25-49%	3%	10%	7%
1-24%	10%	10%	3%
0%	10%	57%	70%
Unknown/n.a.	10%	10%	10%
Total	**100%**	**100%**	**100%**

3.1.2 Driver Recruitment Processes

When interviewed, most companies stated that they use a mix of recruitment options to try to find suitable drivers. These options range from using the services of FÁS to newspaper advertisements to the internet and word of mouth. One respondent relies exclusively on the internet, and two rely exclusively on their local newspapers.

Many companies indicated that they get very few applications from drivers in Ireland and the reasons given vary widely. They include:

- Lack of trained Irish drivers available
- Lack of experienced Irish drivers
- Seasonality of work
- Competition with State bodies and other transportation sectors for drivers
- Unsocial working hours – long periods away from home
- Ageing driver population - young people not attracted to sector
- Lack of guiding knowledge.

3.1.3 Obstacles to Recruitment

Survey respondents identified a number of obstacles to driver recruitment. The principal issues are as follows:

Problem	**% respondents**
Very poor or no English (overseas applicants)	37
Unsocial working hours	30
Lack of experience / training (Irish applicants)	30
More attractive job opportunities in other transportation sectors	23
Poor quality of applicants*	17
Seasonality of work	17
Poor driving skills (overseas applicants)	10
Inadequate knowledge of Ireland	7

* Poor work ethic, difficult to get reliable people with pride in their work, poor communication skills.

3.2 Driver Training

3.2.1 Needs

With the exception of the PSV licensing training, there is no co-ordinated industry training programme available to drivers or coach tourism companies. There have been a number of ad hoc training initiatives instigated by the CTTC and these have been organised on a membership demand basis. There are no accredited training courses for tour coach drivers but there is a recognised need for training and for continuing professional development courses within the industry.

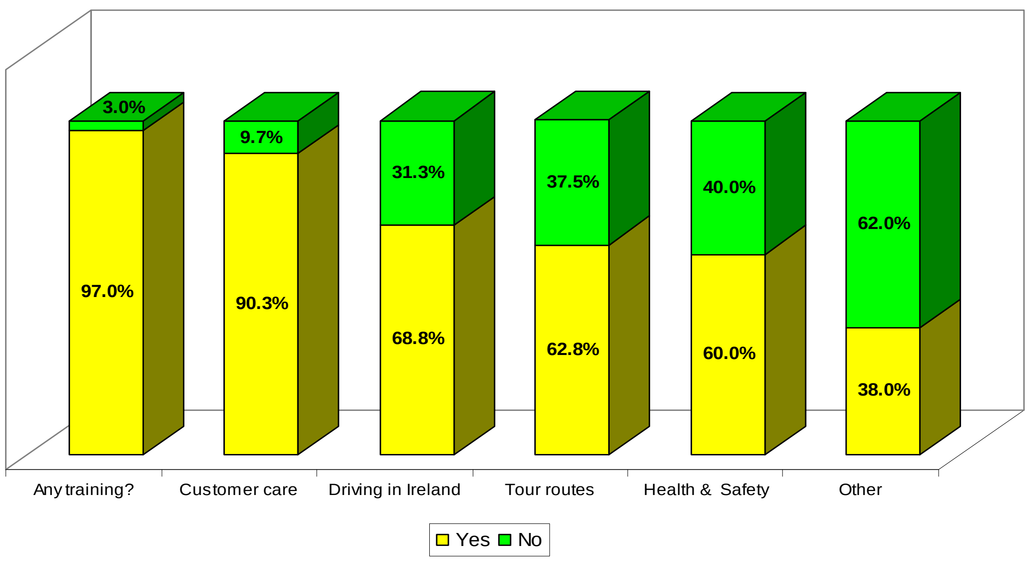
Survey respondents were asked to identify the principal training need for their drivers. Their responses are summarised below. Some of the courses which are seen as being required by the industry as a whole include (with % of survey respondents):

- Customer care training (48%)
- Driving skills (driving in Ireland/defensive driving) (41%)
- Driving guiding skills/country knowledge (30%)
- English language training (26%)
- Health & Safety (incl. disability awareness and first aid**)** (17%)
- Tachograph training. (13%)

3.2.2 Current Position

When asked if they provide training on specific topics, a large proportion of respondents indicated that they do provide some training for their drivers. It is interesting to note that while many coach tourism companies identify language training as one of the primary difficulties in recruiting drivers from overseas, very few organise language training for drivers or prospective drivers. The cost and availability of language training is one of the factors affecting this.

Chart 3.1: % of Companies Providing Training for Drivers, by subject



The other subjects mentioned by respondents include first aid, manual handling, defensive and advanced driving, tacograph, vehicle familiarisation and tour guiding.

About one-third of respondents said that external providers of training are available to them. However, a wide range of different providers were identified, highlighting the absence of effective sectoral initiatives in this area. Five respondents mentioned CTTC and four mentioned FÁS. Most of the other external providers identified are private organisations, including driving schools.

3.3 Key Issues

Survey respondents and people consulted for this review identified a number of key issues that the sector must confront. These can be drawn together under six headings:

- Attracting new Irish recruits
- Training and education
- Communications
- International recruitment
- English language training
- Hire rates.

These are discussed in the following paragraphs. Further details are provided in Appendix One.

- **Attracting New Irish Recruits**

  This is a problem facing most of the Irish tourism industry. Young Irish people are not interested in joining the coach tourism sector due to unsocial hours and difficult working conditions. There is a shortage of qualified drivers, and even fewer with actual tour coach driving experience. The existing stock of drivers is ageing, and some are being kept on beyond retirement age. However, they ultimately will have to retire and the shortage will become even more severe.

  The issue of seasonal demand is a particularly difficult hurdle to overcome in the coach tourism sector. The peak season for tour coach drivers begins in May and runs through September - a period of only five months. One-third of the drivers in the sector are employed on a seasonal basis and have to seek work elsewhere during the off-season.

Unfortunately, when drivers seek alternative work during the off-peak season, they often find more reliable and more rewarding full-time employment outside the tourism industry and hence do not return to coach touring.

- **Training and Education**

The coach tourism industry requires a level of sophistication, knowledge and client interaction from its drivers. However, much is left up to the drivers themselves as employers generally hope to recruit people with adequate knowledge, skills and experience. The sector as a whole does not have a co-ordinated approach to education and training and therefore relies heavily on external training providers and public training courses. These are not geared towards the sector's specific requirements and therefore offer only partial solutions.

Skillnets might offer a possible mechanism for a sectoral training initiative. The Skillnets Network Training programme is funded by the EU and enables the development and implementation of training programmes oriented to the requirements of specific groups. Although the current Skillnets Network training initiative is closed for applications, it is likely that a second round of applications could become available to the CTTC over the coming year(s). However, it must be noted that the CTTC have previously operated a Skillnets programme and that it proved to be very costly in its operation and administration. These obstacles would need to be resolved if any new Skillnets programme were to be considered.

- **Communications**

An awareness campaign is required for drivers to inform them of the needs and requirements of a range of group tour sectors. The needs of a general tour group are somewhat different from the needs of an incentive group or that of a conference group. As such, the service provided to each different type of group should be tailored to these needs.

In addition to recognising the needs of differing group types, drivers need to communicate with both the guide (if present) and the client. Strong interpersonal communications skills are required to ensure that coach tours are successful and that the client's needs are fully satisfied. Furthermore, an end of tour briefing is required for both drivers and guides for the client's (tour operator) benefit.

- **International Recruitment**

Unless there is a sudden upsurge in interest in the sector in the domestic employment market, coach tour companies will have to recruit more drivers from overseas. A more structured approach is required. In 2006, CTTC and FÁS jointly organised a recruiting mission to Poland but only three companies participated. While they were successful in recruiting a number of drivers, no support training programme was put in place to develop language skills, driving in Ireland and knowledge of Ireland and its tourism sites.

It would be desirable to develop a structured programme of recruitment and training to ensure that people recruited from Eastern Europe could be developed into good coach tour drivers in Ireland. Apart from language and driving skills, the training programme should address customer care, health and safety, knowledge of Ireland and communication skills.

- **English Language Training**

This is a critical issue for CTTC members with respect to the recruitment of drivers from non-English-speaking countries. English language training is not only essential to enable communication between the driver and the passengers and guides, it is vital for safety and tour operations - e.g. the ability to read road signs and directions. A mechanism for providing language training to drivers needs to be established, and FÁS should have a role to play in this. The response from FÁS on this issue has varied from region to region and it has, to date, proved impossible to establish a consistent approach throughout the country. Fáilte Ireland have indicated to CTTC that they are prepared to facilitate the sourcing and delivery of English language training for coach drivers in 2008.

- **Tour Coach Hire Rates**

  CTTC members believe that tour coach hire rates have been kept at unsustainably low levels. Over the past number of years, the cost of finance for new coaches has been considered relatively cheap and it has been easy to enter the coach tourism business. New operators can enter the market with relatively low costs and compete with larger more established companies. The advent of higher costs of finance over the last year will impact on these new entrants and hire rates are likely to rise as a result. Moreover, the very rapid growth in tour group demand, and the possible removal of the rebate on excise duty on fuel, are also likely to push prices up.

4. THE TOUR GUIDE SECTOR

4.1 Size of the Sector

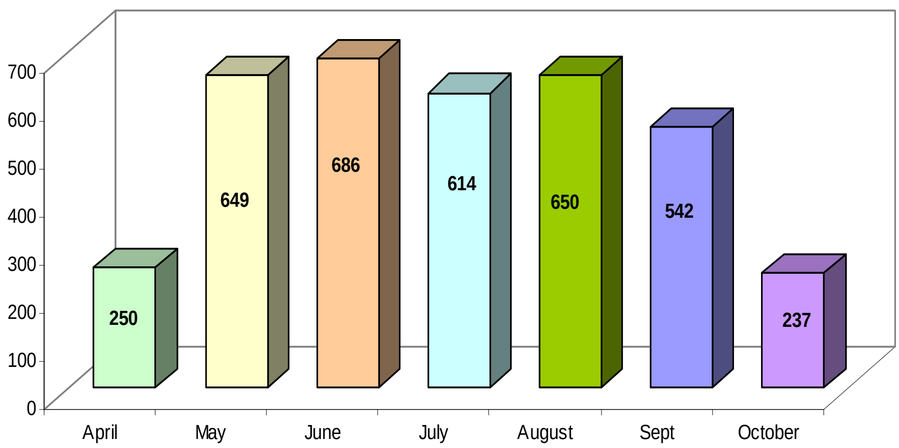
In order to quantify the needs of the industry, we asked Tour Operators how many guides they used during the 2007 season. As would be expected, the responses involved a great deal of double counting as guides work for a number of operators and would have multiple engagements with each tour operator. This estimate does however give some indication as to the demand for guides in a given season.

The demand for guides is spread between May and September. Based on survey findings, the peak month in 2007 was June, closely followed by August and May – see Chart 4.1. This question was answered by 22 of the 24 respondents to the survey and they employed 780 guides in the peak month of June, 2007. If this number is grossed-up to cover non-respondents.

An alternative approach is to add together the peak monthly demands of each of the respondents, as not all peak in June. This produces a combined peak demand of 1,034 and grossed-up figure of 1,322. On this basis, the total number of guides required could be considered as ranging between 1,000 and 1,320.

Chart 4.1: Seasonal Spread of Demand for Guides 2007

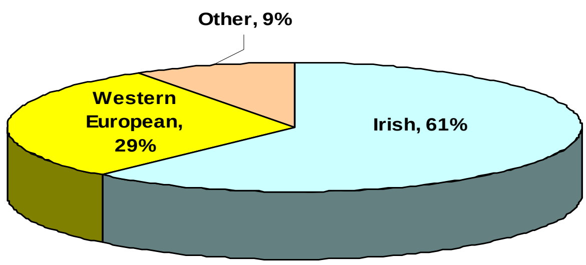
(22 Survey Respondents)



4.2 Guide Nationalities and Languages

All of the respondents use Irish guides, with 3 reporting that all of their guides are Irish. Most of the rest said that more than 50% of their guides were Irish, with the overall average being 66%. If the respondents to this question are weighted by scale of activity in terms of number of guides employed, the distribution of guides by nationality is as follows:

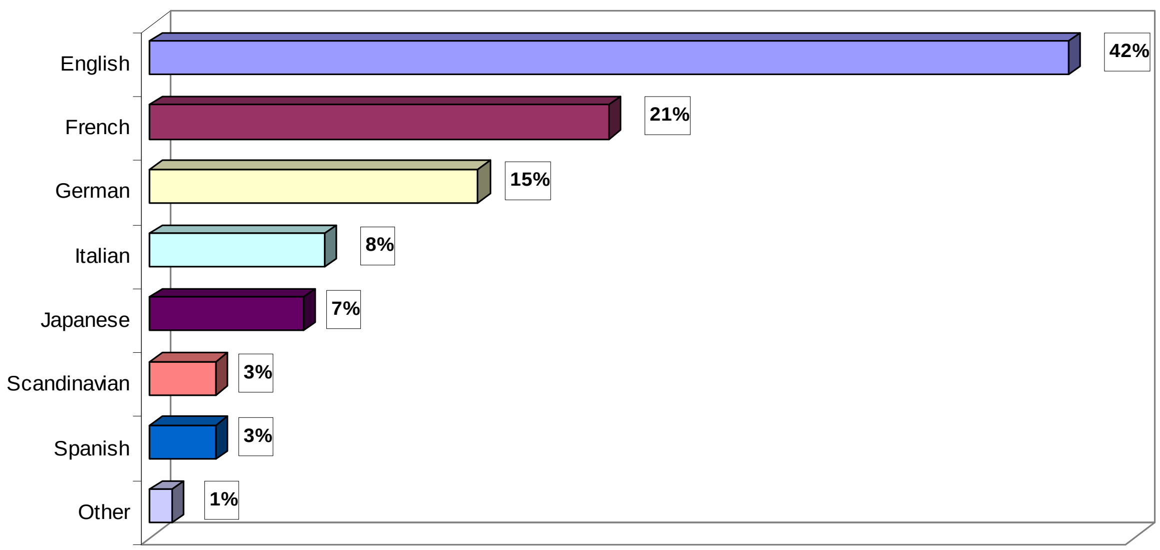
Chart 4.2: Distribution of Guides by Nationality



'Other' includes Russian and Eastern European, Chinese, Japanese and South American.

Tour operators have a requirement for guides who are fluent in languages other than English. The most frequently sought languages are French, German and Italian, with a growing demand for Japanese. Other languages mentioned include Spanish, Scandinavian languages, Chinese and Russian. The responses to this question were weighted by the number of guides employed by respondents to produce the distribution of guide demand by language illustrated in Chart 4.3.

Chart 4.3: Distribution of Guide Demand by Language



As is evident, English is the most requested language by ITOA members as a guiding language. However, demand for Continental European languages is growing and is currently outstripping supply for most of these languages. Failure to resolve this problem will, in the short term, lead to a loss of business from Continental European markets. In seeking to alleviate the shortfall, Fáilte Ireland are undertaking a "Short Course" guide training initiative this winter in order to meet demand for French-speaking guides in the 2008 season.

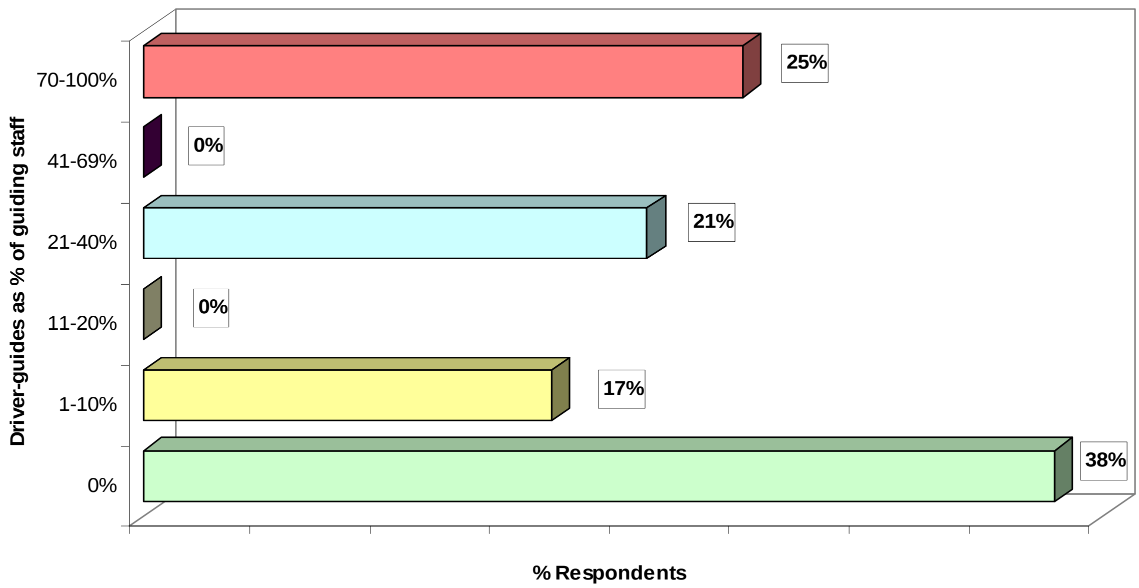
The principal difficulty for ITOA members is securing guides with Continental European language skills during the peak season. Interviews with tour operators indicate that they are now having to offer guides guaranteed work for the coming season without necessarily having the tour contracts secured, in order to ensure their supply.

4.3 Driver-Guides

Fifteen (63%) of the respondents stated that they currently use driver-guides. There is a very wide variation between these respondents in terms of the proportion of their guides who are drivers as well – see Chart 4.4. For 4 of the 15, driver guides make up less than 10% of the total number of guides that they use; a further 5 rely on driver-guides for 20% to 40% of their total guiding complement; the remaining 6 engage driver guides to fulfil 70% to 100% of their needs.

Chart 4.4: Utilisation of Driver Guides

(% of respondents)



4.4 Pay Rates

The 2007 pay rates published by the Association of Approved Tour Guides of Ireland (AATGI) are indicative only. By comparison, guides in other countries have significantly higher published rates, as shown in Table 4.1. The relatively low rates of pay for guides in Ireland is a disincentive for people who might seek jobs in this field.

Table 4.1: Comparative Published Tour Guiding Rates 2007

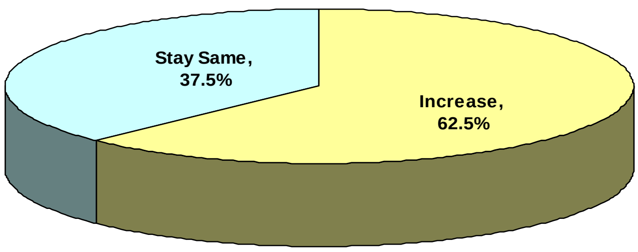
	Full Day	Language Guide
Irish Guide	€130	€160
UK Guide	€243	€243 +
Danish	€163	€163 +
French	€258 + VAT	€258 + +VAT

Source: Registered tour guide associations in selected countries, 2007

4.5 Future Demand Trends

We asked ITOA members to indicate their expected demand for guides in the 2008 season. As with the tour coach companies, the level of positive response to this question highlights the strength of the group tour segments of Ireland's overseas tourism markets. Some 63% of all respondents stated that they expect the number of guides they contract directly to increase over the coming year. The balance expect the situation to remain the same during 2008, while no respondents stated that they expect the number of guides they contract directly to decrease.

Chart 4.5: Future Outlook – Guiding Requirements (%)



One of the principal issues with the guiding industry is the seasonality of demand. In the peak tourism season tour operators experience real difficulties in obtaining guides for any form of tour. During the 2007 season, 88% of the survey respondents experienced difficulties in securing tour guides. When asked what the primary difficulties were, the vast majority of respondents (67%) stated that it was difficult to get guides with appropriate languages during the peak season and, as a direct result, they were forced to use less competent guides which in turn had a negative impact on their clients' experience.

5. RECRUITMENT AND TRAINING OF TOUR GUIDES

5.1 Guide Sourcing

The survey of tour operators inquired as to whether they sourced guides directly, through agencies or through associations. 42% of respondents recruit **all** of their required guides directly and, in total, three-quarters of all respondents source between 70% and 100% of their guides directly.

54% of all respondents source some proportion of their guides through agencies. About half of these source about 50% or more of their requirement through agencies, and the other half use agencies for a very small proportion of their overall requirement. Weighting the responses by the number of guides employed by respondents indicates that 80% of tour guides are contracted directly and 20% through agencies.

One of the initial issues raised by respondents is the difficulty they encounter in identifying qualified guides. Guides are self-employed in the main and are therefore not easily identifiable. Currently, there is only one association for qualified guides (the Association of Approved Tour Guides in Ireland) and membership is on a voluntary basis.

According to Fáilte Ireland, approximately 32 guides graduate from their national tour guide training programme each year. In addition to these national guides, there are approximately 28 city guides trained each year. However, due to data protection considerations, the contact details for these guides are not in the public domain and only those guides willing to join the Association of Approved Tour Guides of Ireland (AATGI) can be readily located. This Association has a current membership of 219 guides, a proportion of whom no longer actively guide tours.

5.2 Guide Qualifications

Survey responses indicated that two-thirds of the guides used by ITOA members are qualified under Fáilte Ireland's Guiding Badge programme. A further 9% have certificates obtained from other training sources, mainly the guiding agencies.

The responses suggest that some 25% of the guides used by tour operators have no formal guide certification. Many of these guides have been working in the industry for some considerable time and therefore their experience stands to them when applying for guiding jobs. However, along with these experienced guides inevitably are some less qualified and experienced guides.

The shortage of available qualified guides means that tour operators have no option but to use guides who do not have any formal guiding certification. Half of the respondents said that they use uncertified guides, and it is likely that this proportion will grow in the absence of adequate measures to increase the supply of qualified guides.

5.3 Training Needs

Respondents identified the following subjects as the priorities for guide training (with percentages of respondents selecting each one):

- customer care and communication skills (79%)
- knowledge of Irish history, geography, culture etc. (71%)
- tour management (58%)
- languages (genuine fluency required) (58%)
- sectoral knowledge / understanding of tourism (6%)

While there is an element of on-the-job training, tour operators generally do not have structured training programmes for guides.

5.4 Current Training Provision

In order to become a certified tour guide in Ireland, candidates must complete a FETAC Level 6 accredited Tour Guide training programme. Currently, this training programme is administered by Fáilte Ireland who recruit the candidates and award the Guiding Badge. It is run in selected locations, usually Dublin, Cork, Galway or Limerick. The programme involves 232 hours of classroom instruction added to which is an additional 150-200 hours of course work and presentation preparation. The culmination of the classroom phase of this training programme is the FETAC certificate exam.

Candidates who pass the FETAC exam are then obliged to undertake work experience in the form of six four-day guided tours. Their performance on these tours is assessed by the employer and assessments are returned to Fáilte Ireland. If the assessments are deemed acceptable, the guide then receives final certification by way of a Fáilte Ireland Tour Guide Badge.

While this programme trains guides to a high standard, and is broadly consistent with such programmes in other countries (see Appendix Two), a number of issues were identified during the course of this review:

- **Location:** the programme is run once a year and only in one location for that year. Thus, if a course is being offered one year in Cork, applicants from Dublin and other areas of the country are at an immediate and significant disadvantage.

- **Duration:** the programme offered by Fáilte Ireland is run on three evenings per week a scheduling that can prove very awkward for participants.

- **Cost:** the course fees are considered high, at €1,700.

- **Languages:** the Fáilte Ireland training programme does not include any language training as a part of the course - those registering on the Fáilte Ireland training programme are expected to have a language skill.

- **Small numbers:** the programme produces 30-35 graduates per annum, which is below the replacement rate for the industry, and does not meet growing demand.

Apart from the Fáilte Ireland programme, there is a number of private guide training courses in Ireland. These courses offer candidates an opportunity to undertake the training required to become a tour guide, but do not have the benefit of Fáilte Ireland / FETAC accreditation. The graduates are therefore not considered 'qualified' as national tour guides.

These training programmes are delivered by private organisations involved in guiding services and visitor attractions. Almost all of these organisations would welcome the opportunity to access the national guide accreditation process for their trainees.

One of the organisations, Dublinia, currently offers a one-year course for people who wish to work in the heritage sector. This is a FÁS Local Training Initiative, and FETAC Level 5 accreditation has been secured for a number of the subjects. Dublinia is now seeking FETAC accreditation for a full Level 5 major award for a more comprehensive course that will include tour management, French, communications, customer care and other subjects of relevance to tour guiding. A leading tour operator has agreed to assist with this and provide practical work experience.

Fáilte Ireland have advised us that they regularly discuss needs and requirements with industry representatives. For example, according to industry sources, the demand for French-speaking guides for 2008 is exceptionally strong and, as a direct response to this need, Fáilte Ireland have introduced a short course for French-speaking tour guides. This course will involve training guides but without the full FETAC certification. These guides will be given credits towards the certified course should they seek to continue training as a guide in 2008/2009.

Fáilte Ireland are currently investigating the development of an Open Learning training programme for tour guiding. It is proposed that candidates will complete an on-line training component and will then attend a block release training course followed by the FETAC exam. This open learning training programme is currently in the development stages and is expected to be operational for the 2008/09 academic year.

Fáilte Ireland are also assessing the potential of an open exam for tour guides, whereby anyone will be eligible to sit the FETAC Level 6 Tour Guiding exam without having to have completed the Fáilte Ireland training programme. This development would allow existing, un-certified guides to become certified and would allow other guide training programmes to send their trainees to become Fáilte Ireland accredited tour guides, should they pass the exam. (Courses offered by independent organisations may need to be adjusted to cover the curriculum prescribed for the FETAC award.) These initiatives would go a long way to resolving the existing shortcomings with the Fáilte Ireland training programme.

5.5 Issues in Recruiting and Training Guides

Many of the key issues have been highlighted in the preceding paragraphs. The following is a summary of the main points made by respondents to the survey of tour operators and by those with whom we consulted:

- There is a growing shortage of guides and annually rising competition for the available stock, with operators signing them up earlier each year, even before the tours themselves are guaranteed.
- the job is unattractive to many due to its seasonality, unsocial hours, relatively low pay and frequently very demanding working conditions and tourists.

- there is an under-supply of guides who are fluent in the main European languages as well as in languages more recently in demand such as Japanese, Chinese, Russian, Scandinavian and East European languages.

- there is a marked increase in requests for driver-guides but a very limited supply.

- the current Fáilte Ireland provision, while of a high standard and comparable with official guide training courses in other European countries (see Appendix Four), is inadequate in terms of its output of graduates, and access is restricted by location and cost; the Fáilte Ireland provision needs to be expanded and other courses accredited.

- the existing courses need to teach students the differences between the various types of group (i.e. overseas, local, incentive etc.) and how best each should be handled.

- it is difficult to identify and locate guides other than those on the AATGI list.

6. CONCLUSIONS AND RECOMMENDATIONS

6.1 Summary of Main Findings

The Coach Tourism Market

- The demand for coach touring holidays in Ireland increased by 56% between 2002 and 2006, more than double the overall inbound tourism growth rate. The share of total overseas holidaymakers accounted for by coach tourists has risen from 7% to 9.6% during the same period.

- Overall, there were an estimated 356,000 overseas tourists on coach tour holidays in Ireland in 2006. Up to 400,000 more took day coach tours, which suggests that the coach tourism industry handled up to 756,000 tourists in 2006. Respondents to our surveys indicated that further growth occurred in 2007.

- The growth in demand has been concentrated in tour programmes combining air access transport with a coach tour; this has resulted in a steep increase in demand for locally-supplied coaches, drivers and guides.

- The U.S. and Continental European markets have generated the most rapid growth and the demand for guides fluent in the main Continental languages has risen accordingly.

Coach Touring Companies and Drivers

- There are 53 members of the Coach Touring and Transport Council. Based on survey responses, it is estimated that the members operate a fleet of 977 coaches, 60% of which (c. 586) are full-size (i.e. 50-53 seat capacity). Not all of these coaches are committed to coach touring at any one time.

- We estimate that CTTC members employed 1,360 tour coach drivers in 2007. Some 440 of these were seasonally employed and, of the 920 employed year-round, just 685 were full-time.

- Four-fifths of the drivers are Irish, with most of the remainder coming from Britain and Eastern Europe (mainly Poland).

- Driver-guides account for a very small proportion of the overall number of drivers.

- The market outlook for 2008 is good; almost two-thirds of the survey respondents expect to increase the number of drivers that they employ, with the rest maintaining their existing complement.

- There were more than 200 vacancies for drivers among CTTC members in 2007. The companies seek to fill vacancies with Irish drivers but this is becoming increasingly difficult as few Irish people are attracted to the sector due to more attractive opportunities in other industries, unsocial hours and the seasonal nature of the work. As a result, there is a growing need to recruit drivers from overseas.

Tour Guides

- It is estimated that there is a peak season requirement for between 1,000 and 1,320 tour guides in Ireland. Most are self-employed and contract to incoming tour operators during the coach tourism season.

- About 60% of the available tour guides are Irish, with 30% from Western Europe and the balance from further afield.

- English is the guiding language most in demand, followed by French, German, Italian, Japanese, Scandinavian languages and Spanish. The demand for Continental European languages is rising steeply, and currently outstripping supply.

- As also indicated by coach-tour companies, the market outlook is good: almost two-thirds of Irish tour operators expect the number of guides that they contract to increase in 2008, with the rest maintaining 2007 levels. None expect demand to fall.

- Almost 90% of tour operators experienced difficulties in recruiting qualified tour guides in 2007, especially where specific foreign language skills are sought; as a result, there has been a growing use of inadequately qualified and inexperienced guides which, in turn, has had a negative impact on the quality of the tour experience.

Recruitment and Training Issues

These are broadly consistent in relation to both coach drivers and tour guides. In summary:

- There is a growing shortage of supply.
- The extent of recruitment from abroad is increasing.

- Under-qualified and inexperienced drivers and guides are being used.
- Lack of appropriate language skills is becoming a pressing issue: English for foreign coach drivers, and the major Continental European languages for tour guides.
- Current training provision is inadequate: many of the coach companies offer some training to drivers, either in-house or using external resources but this does not meet all of the needs; tour operators generally do not offer more than basic 'on-the-job' training to guides and, while the main external provider (Fáilte Ireland) operates a good guide training programme, it has been restricted in its output by capacity limitations, structure, location and cost.
- Both coach companies and tour operators would like to recruit Irish staff as drivers and guides, but are finding that Irish people are not attracted to these positions due to poor terms and conditions of employment, competition in the labour market, the seasonality of employment, and unsocial hours.

6.2 Recommendations

Coach Drivers

i) ***Recruitment in Ireland:*** in order to attract more Irish drivers to the sector, the coach companies will need to present the jobs as attractive, rewarding, and competitive with similar jobs in other sectors. Coach companies will also have to become more innovative with regard to the overall employment package - for example this could include a training programme and other incentives.

ii) ***Overseas Recruitment:*** the approach to recruiting drivers from overseas needs to be more structured, both in identifying candidates with the necessary driving skills and qualifications, and by supporting their recruitment with an intensive training programme which should cover, interalia:

- English language
- customer care
- health and safety
- driving in Ireland
- communication skills.

It is recommended that a fresh initiative be developed by CTTC and FÁS as a matter of urgency.

iii) ***English Language Training:*** this is a vital issue with respect to the employment of drivers of non-English-speaking nationalities. It is essential for passenger welfare and road safety that drivers have adequate knowledge of English to enable communication with guides and passengers, and so that they understand road signs and directions. Fáilte Ireland has indicated to CTTC that it is prepared to fund and facilitate language training for coach tourism drivers in 2008. A longer term solution is also required, and it would be appropriate for FÁS to engage with CTTC at national level on resolving this issue – at present, FÁS are providing language training for drivers in one region, and this should be replicated across all regions.

iv) ***Work Permits:*** the difficulties in recruiting drivers would be eased if coach tour companies could recruit from outside the EU (e.g. from South Africa, where the issue of English language training would not arise) as well as from Bulgaria and Romania. It is evident that there is a shortage of skilled coach drivers in Ireland, and equally evident that there are significant skills involved - the latter point is emphasised by the requirements of the new EU Certificate of Professional Competency. In view of the urgent need and the high economic value of coach touring, especially for the regions outside Dublin, it is recommended that coach driving be recognised and listed by the Department of Enterprise, Trade and Employment as a skills shortage sector / strategically important occupation. This occupation should be removed from the list of Ineligible Job Categories listed in Appendix A of the Guide to Work Permits published by the Department in January, 2007. [It is noted that Heavy Goods Vehicle drivers are already excluded from this list.]

v) ***Skillnets Potential:*** subject to an assessment of viability, the CTTC members should also consider establishing a Skillnet training programme for tour coach drivers (see www.skillnets.ie). This programme should address the priority training needs for existing drivers and new recruits. The key areas include:

- customer care
- driver guiding skills / knowledge of Ireland
- health & safety
- defensive driving
- health and safety
- tacograph training.

The priority needs should be clarified by members and a course devised in conjunction with FÁS or independent training providers. Although the current Skillnets Network training initiative is closed for applications, it is likely that a second round of applications will become available to the CTTC over the coming year(s). It is recognised that the establishment of a new Skillnets programme would be contingent on resolving the problems of high administrative and operating costs incurred in a previous Skillnets initiative operated by CTTC.

vi) ***Continuous Professional Development:*** ideally, training services should be provided on a regular basis and continuous professional development courses should be delivered to drivers throughout their careers. Drivers should also be obliged to undertake some skills refresher and updating courses on a periodic basis. It is noted that the new EU certificate of professional competency for drivers carries a mandatory requirement for a minimum of 35 hours training every 5 years.

Tour Guides

vii) ***Expand Training Provision:*** the most urgent requirement is to expand the training provision for tour guides:

- The measures proposed by Fáilte Ireland to make their FETAC Level 6 guide training more widely available, and to permit candidates from other training courses to sit their exam, should be introduced as quickly as possible.
- Independent providers should ensure that their courses cover the prescribed curriculum for the Fáilte Ireland FETAC award so that their students can sit the Fáilte Ireland exam.
- While the FETAC Level 6 award should be continued as the prime qualification, the introduction of a foundation level should be considered as a 'junior' qualification suitable for training guides to meet the minimum guiding

standards. Foundation level guides would be accredited to then complete the FETAC Level 6 badged guiding course.

- The guiding course offered by Dublinia, if it achieves accreditation for a full FETAC Level 6 award, should be developed as an alternative, recognised qualification for tour guides.
- Greater emphasis must be placed on language training for guides, and including languages as an essential component of guiding courses.

viii) ***Recruitment in Ireland:*** to attract more Irish applicants, the terms and conditions of employment of guides, including pay, will need to be improved. Targeted recruitment campaigns could be conducted, for example, to attract candidates from older age-groups (empty-nesters) who are not seeking year-round or full-time employment.

ix) ***Recruitment from Overseas:*** as with coach drivers, a campaign to recruit guides from overseas could be devised, with emphasis on sourcing guides with appropriate language skills. This would need to be supported by an intensive training programme, covering:

- English language
- knowledge of Ireland
- customer care
- communication skills
- tour management.

An innovative approach in this respect is being taken by one of the private guiding agencies who has made contact with an adult education centre in Paris with a view to tutoring French speaking guides for the coming season. The proposal is that, as a part of their further education, these mature students would take on guiding in Ireland as an additional course. When completed, these students would undertake a practical tuition in guiding in Ireland and would then contract their services to the agency in Dublin for the summer period.

x) ***Certification of Existing Guides:*** a mechanism to enable the certification of existing guides who have long experience but no formal guiding qualification should be devised. The criteria to be considered should be established by the ITOA, in consultation with Fáilte Ireland, and would include years of experience, type of experience, references from tour operators, language skills and other education and training awards. Guides should be encouraged to maintain log-books recording their experience.

xi) ***Use of Technology:*** the potential to make greater use of video and audio guides in appropriate circumstances - e.g. day and city tours - should be explored; a key benefit would be the ability to deliver information in multiple languages on the same tour.

7. APPENDICES

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APPENDIX ONE – COACH DRIVERS QUESTIONNAIRE

The Future Requirements and Staffing Implications for Ireland's Coach Tourism Sector

This confidential survey is being conducted by CHL Consulting Co. Ltd. as part of a wider scale study on the future requirements and staffing implications for Ireland's coach tourism sector which we are carrying out on behalf of the Irish Tourist Industry Confederation (ITIC), the Coach Tourism and Transport Council (CTTC) and the Irish Tour Operators Association (ITOA).

The survey is strictly confidential. CHL will not release completed questionnaires to any other person or organisation under any circumstances. The findings will be aggregated in our analysis and our report will not identify any individual or company.

Please return the questionnaire directly to CHL Consulting by email, fax or post by Thursday, 8th November, 2007. Please call Michael Counahan or Siobhán McMahon at CHL (tel: 01 284 4760) if you have any queries.

1) Company Name: ____________________

2) Questionnaire completed by: ____________________

3) How many coaches do you have in your fleet? Full Size __________ Other __________

4a) Do you source coaches from elsewhere? Yes ☐ No ☐

4b) If Yes, how many coaches and for how many weeks on average? No. Coaches __________ No. Weeks __________

5a) How many drivers have you employed in 2007?

Year Round	**No.**	**Seasonal**	**No.**
Full-time	__________	Full-time	__________
Part-time	__________	Part-time	__________

5b) In 2008, do you expect this to: Increase ☐ Decrease ☐ Stay the Same ☐

6) What is the nationality of your drivers?

Nationalities	**%**	**Nationalities**	**%**
Irish	__________	Other *(please specify)*	__________
English	__________		__________
Continental European	__________		__________
Eastern European	__________	**Total**	**100%**

7) From where do you recruit your drivers?

Channel	**%**	**Channel**	**%**
from within the industry in Ireland	__________	Other *(please specify)*	__________
from other industries in Ireland	__________		__________
from overseas	__________	**Total**	**100%**

8) How many vacancies for drivers did you have in the 2007 season? __________

9) What are the main obstacles to recruiting drivers?

____
____
____
____

10a) Do you use driver-guides? Yes ☐ No ☐

10b) If so, what % of your drivers are guides as well? ______%

11) Do you provide training for your drivers in the following areas?

		Yes	**No**	
a)	Driving in Ireland	❐	❐	a)
b)	Tour routes	❐	❐	b)
c)	Customer care	❐	❐	c)
d)	Language	❐	❐	d)
e)	Other	❐	❐	e)
f)	....	❐	❐	f)

12) What other providers of training are available to you?

13) What are the principal training needs of your drivers?

14a) In the 2007 season, did you have any difficulty sourcing drivers? Yes ☐ No ☐

14b) If *Yes*, what were the principal difficulties in sourcing drivers?

15) Looking to the future, what are the key issues facing your company regarding recruitment and training of drivers over the coming years?

Thank you for your time and co-operation

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APPENDIX ONE – GUIDING QUESTIONNAIRE

The Future Requirements and Staffing Implications for Ireland's Coach Tourism Sector

This confidential survey is being conducted by CHL Consulting Co. Ltd. as part of a wider scale study on the future requirements and staffing implications for Ireland's coach tourism sector which we are carrying out on behalf of the Irish Tourist Industry Confederation (ITIC), the Coach Tourism and Transport Council (CTTC) and the Irish Tour Operators Association (ITOA).

The survey is strictly confidential. CHL will not release completed questionnaires to any other person or organisation under any circumstances. The findings will be aggregated in our analysis and our report will not identify any individual or company.

Please return the questionnaire directly to CHL Consulting by email, fax or post by Friday, 9th November, 2007. Please call Michael Counahan or Siobhán McMahon at CHL (tel: 01 284 4760) if you have any queries.

1) Company Name: --

2) Questionnaire completed by: --

3a) How many guides did you require from April to October on a monthly basis in 2007?

Month	No.	Month	No.
April	----------	August	----------
May	----------	September	----------
June	----------	October	----------
July	----------		

3b) What percentage did you contract directly? (i.e. not through agencies) ---------- %

3c) In 2008, do you expect this to: Increase ☐ Decrease ☐ Stay the Same ☐

4a) In the 2007 season, did you have any difficulty sourcing guides? Yes ☐ No ☐

4b) If *Yes*, what were the principal difficulties in sourcing guides? (e.g. language, time of year etc.)

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5) Where do you source your guides?

Channel	% of no. of guides	Channel	% of no. of guides
recruit directly	----------	Other *(please specify)*	----------
through agencies	----------		----------
		Total	**100%**

6) What are the nationalities of your guides?

Nationalities	%	Nationalities	%
Irish	----------	Other *(please specify)*	----------
English	----------		----------
Continental European	----------		----------
Eastern European	----------	**Total**	**100%**

7) What languages are those most requested by your clients?

Languages	%	Languages	%
English	----------	Spanish	----------
French	----------	Other *(please specify)*	----------
German	----------		----------
Italian	----------		----------
		Total	**100%**

8a) Do you use driver-guides? Yes ☐ No ☐

8b) If so, what % of your guides are drivers as well? ______________%

9) What proportion of your guides have:

Qualifications	%	Qualifications	%
Fáilte Ireland qualifications	______________	Other *(please specify)*	______________
FETAC qualifications	______________		______________
None	______________		______________
		Total	**100%**

10) What do you consider are the training requirements for guides? (e.g. languages, tour management, customer care, history, geography etc.)

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11) Looking to the future, what are the key issues regarding recruitment and training of guides facing your company over the coming years?

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12) Are there any other comments that you would like to add?

THANK YOU FOR YOUR TIME AND COOPERATION

Appendix 2: Guiding Courses in Selected European Countries

Country	Qualification	Recognising Body	Course Duration	Course Cost	Course Content	Guiding Rates 07/08
England	Blue Badge Guides	• The Guild of Registered Tourist Guides is the national professional association for Blue Badge Tourist Guides. • Represents some 1,700 guides throughout the British Isles • Founded in 1950	• 18 months approx. • Class size of 20 students approx.	• £3,800 / €5,430	• Pre-entry test (2 hour quick question paper). • 5 course components comprising: Background knowledge (wide cultural background to Britain); London knowledge; Regional knowledge (of sites frequently visited from London in a day); Guiding techniques (communication & presentation skills) and Business skills • Course is part time, with evening lectures & practical training sessions at weekends.	• Starting from £110-£126 per half day and • £170-£196 per full day approx. (English language only) • Higher rates apply if guiding in other languages required.
Scotland	STGA (Scottish Tourist Guide Association) Blue Badge Guides	• Scottish Tourist Guides Association • Run by University of Edinburgh	• 2 years, part time • Minimum of 1,300 hours	• £225 (introductory course) • £5,250 for main 2 year course	• Interview & language screening, followed by 4-day introductory course, (must gain 60% to proceed). • Course content comprises 3 components: Core Knowledge, (128 hrs) Practical Skills and Regional Studies (280 hrs) • Course is mixture of web based distance learning, tutorials, lectures & field visits	n/a

Country	Qualification	Recognising Body	Course Duration	Course Cost	Course Content	Guiding Rates 07/08
Denmark	National guides	• The Tourist Guide Association of Denmark (Turistforerforeningen) • Oldest tourist guide association in the world - established in 1933 • Represents some 250 members	• 1 year full time course at Roskilde University • course for mature students	• n/a	• Course comprises 2 modules; Danish Knowledge (history, art, culture, geography, social structure, tourism) and practical experience and guiding skills.	• Starting from €163 for up to 3 hours (tour of museums, guiding in coach etc.) • Language and translation supplements are extra.
France	Regional guides/interpreters National guides/ interpreters	• French National Federation of Guides-Interpreters (FNGI) • Represents approximately 500 qualified guides throughout France	• 1 year full time course at one of registered institutions of higher education for national guides	• n/a	• Prerequisites for national qualification: EU citizen, fluent French & 2 other foreign languages, 2 yrs university education in art history, archaeology, culture, communications or tourism OR relevant professional experience. • Modules comprise: History & culture, languages, cultural mediation and tour management.	• Starting from €140-€163 per half day plus VAT and • €258-€269 per full day approx. plus VAT • Higher rates apply if guiding in other languages required.
Greece	National guides	• The School of Tourist Guides in Greece (state run school run by the Ministry of Development), based in Athens & Thessalonica	• 2.5 years full time • Course run every 3 years	• n/a	• Must be EU citizen, interview, language screening and written test (must obtain 80% to proceed). • Course comprises Greek history, Greek geography, art, architecture, ecology, tourist law, first aid and practical skills. • in addition to above is 110 hrs of museums' visits re archaeology and 260 hrs site visits and practical experience.	• n/a