



PROFESSIONAL
ACADEMY

Driving Growth & Impact.

Understanding the Irish
Professional
Education Landscape

Market Report
November 2023



Foreword.

I am pleased to introduce *Driving Growth and Impact: Understanding the Irish Professional Education Landscape*, the third annual study commissioned by UCD Professional Academy.

Since 2019, UCD Professional Academy has achieved remarkable growth within the Irish professional education market as a leading destination for workforce upskilling focusing on shorter skills-based training for working professionals. Now with over 27,000 learners enrolled, we have rapidly evolved to a prominent position in the sector.

With the increased rate of change in the world of work over recent years, the need for regular professional upskilling has become even more apparent. The European Union has declared 2023 as the Year of Skills, providing a much needed and fresh impetus to adult learning and participation. It targets 60 percent of adults engaging annually in education by 2030. For Ireland to retain its competitive advantage, we welcome this ambition of workers across all sectors and at all levels within businesses to be well trained and properly qualified.

Over half of those surveyed in our latest report have expressed positive interest in engaging in professional development courses, with many seeing upskilling as a way to improve skills and capabilities, aid career progression or become more specialised in their field. Furthermore, not only is upskilling important in a professional context, but learning a new skill or taking a course improves your self-confidence and mental well-being.

It is in this context that the research illuminates the growing need for professional education which has a real and meaningful impact on learners.

UCD Professional Academy is committed to educational excellence, accessibility, and responsiveness to the evolving needs of today's learners. We have embraced a forward-thinking approach, recognising the pivotal role of professional education in shaping both the lives of our students and the competitiveness of Irish and global organisations, both small and large.

This research sheds new light on the changing nature of professional education in Ireland in 2023 as UCD Professional Academy continues to define and lead the way in this evolving landscape.



A handwritten signature in white ink, which appears to read 'Siobhan McAleer'. The signature is fluid and cursive.

Siobhan McAleer
CEO, UCD Professional Academy

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2023 context for the research.

When we last ran this survey in 2022, Covid wasn't that far behind us...

June 2021-July 2021

The Government launched a €3.5 billion Economic Recovery Plan, with the COVID-19 Pandemic Unemployment Payment and the Employment Wage Subsidy Scheme extended until September 2021.

The Government agreed to increase the self-isolation period for travelers from 5 to 10 days for those who are not fully vaccinated amid Delta variant concerns.

Outdoor hospitality only green-lighted. Indoor hospitality remained shut.

By December, the Omicron variant brought a raft of restrictions back into place.

The 2022 survey was conducted in quite a different context.

While now, thankfully, lockdown restrictions are behind us, the world has continued to change and move at pace.



Cost of living is still an issue, however, inflation is slowly coming under control

According to the CSO, the cost of basic items that input into inflation figures (e.g. clothing and household staples) have been falling back and the original energy price shock has faded.

However, the underlying rate, estimated to be now at 4.8% in September, which strips out volatile energy and food prices, remains still higher than domestic and European government targets. This is keeping a continuous squeeze on household budgets.

Irish corporate tax revenues are

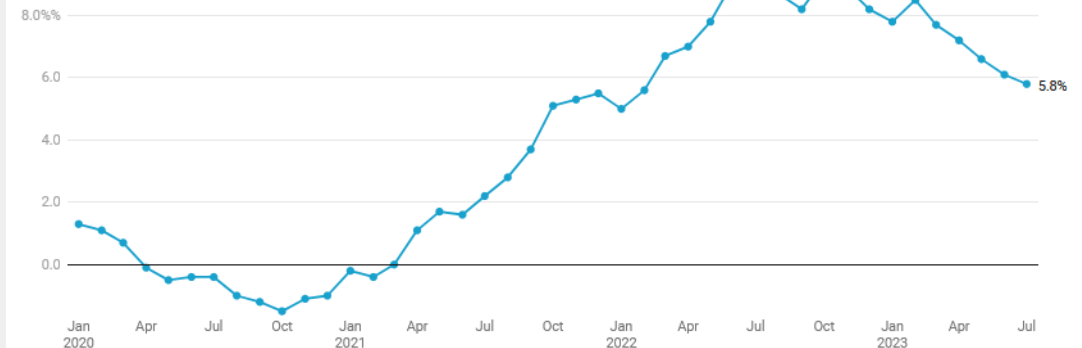
down 12%, mirroring the broader slow down amongst the multinational players.

Tom Woods, head of tax at accountants KPMG, cautioned that this could be “the year that the known vulnerabilities in our corporation tax receipts start to bite”.

There is both increased financial pressure at an individual level, as well as at a corporate level, which may impact overall willingness and ability to invest in education and training in the short to medium term.



Consumer Price Index - 12-month change



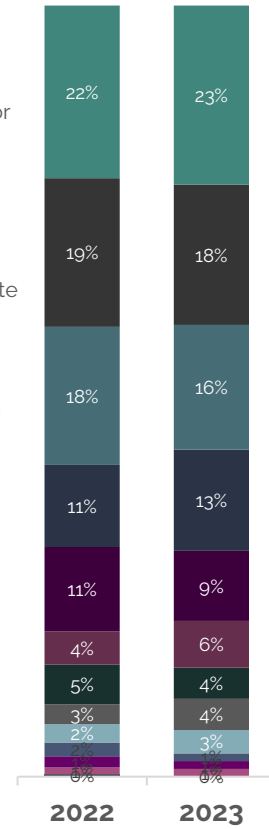
Fieldwork details

Nationally-representative quantitative survey, with 1001 adults 18+. Fieldwork conducted between 28th September 2023 – 6th October 2023.

	2022		2023	
N	1001		1006	
Age				
18 to 24	113	11%	115	11%
25 to 34	167	17%	149	15%
35 to 44	206	21%	211	21%
45 to 54	180	18%	187	19%
55 to 64	143	14%	148	15%
65+	193	19%	196	19%
Total	1001	100%	1006	100%
Social Class				
ABC1	440	44%	438	44%
C2DEF	561	56%	568	56%
Total	1001	100%	1006	100%
Region				
Dublin	289	29%	299	30%
Leinster Ex Dublin	268	27%	278	28%
Munster	268	27%	253	25%
Connaught/Ulster	176	18%	176	17%
Total	1001	100%	1006	100%
Gender				
Male	491	49%	479	48%
Female	510	51%	524	52%
Transgender	0	0%	2	0%
I do not identify above	0	0%	1	0%
Total	1001	100%	1006	100%

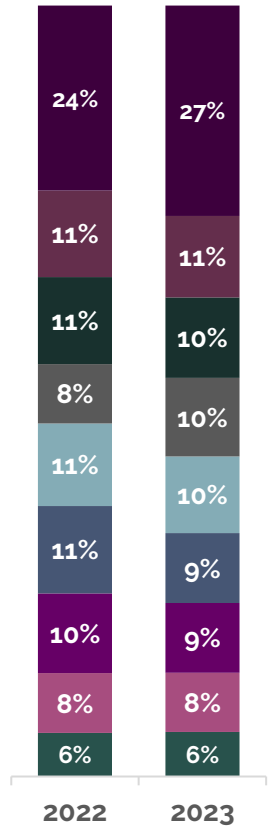
Occupation

- Skilled manual worker
- Supervisory or clerical/junior managerial
- Intermediate manager/professional
- Semi or unskilled manual worker
- Retired and living on the state pension
- Higher managerial/professional
- Unemployed or not working due to long term sickness
- Student
- Housewife/Homemaker
- Casual worker – not in permanent employment
- Full-time carer or other household member
- Farmer 50acres+
- Farmer 50acres-



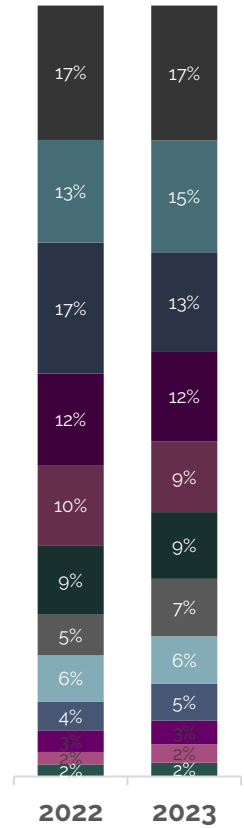
Years in workforce

- 31 years or more
- 16-20 years
- 1-3 years
- 7-10 years
- 11-15 years
- 4-6 years
- 21-25 years
- 26- 30 years
- Less than 1 year



Income

- €20,000 - €29,999
- Up to €19,999
- €30,000 - €39,999
- €40,000 - €49,999
- Prefer not to say
- €50,000 - €59,999
- €60,000 - €69,999
- €80,000 - €99,999
- €70,000 - €79,999
- €100,000 - €124,999
- €150,000 or more
- €125,000 - €149,999





Total addressable market, and
serviceable addressable market.

2023 vs. 2022

2023 TAM: the **next 12 months...**

226,685
people

Claim to have signed up to a short professional ed course which is due to start.
(vs. 264,467 in 2022, a decline of 14%)

528,933
people

Claim that they are very likely to take a short professional ed course **(vs. 642,276 in 2022, a decline of 17%)**

1,662,361
people

Claim that they would possibly take a short professional course, if the right one was available **(a 22% increase)**

*The 2023 TAM 12 month total stands at **2,417,979** (vs. 2,266,856), which is an overall **increase** of 151,123 / ~7%. While there are more people overall coming into the learning market, **they are doing so much more tentatively.***



SAM 2023.

There is a slight softening of demand across the *serviceable* addressable market vs. last year.

In 2022, the SAM stood at 1,624,580. This was composed of learners who –

- wanted to take a short professional course in an area currently covered by the UCD PA
- Were self / employer / or co-employer funded

The SAM figure for **2023** now stands at **1,510,233**, a decline of 114,347 (40% of the sample, down from 43%) based on 12 month claimed consideration.



One-fifth of the population are in the final purchase stages for short professional courses.

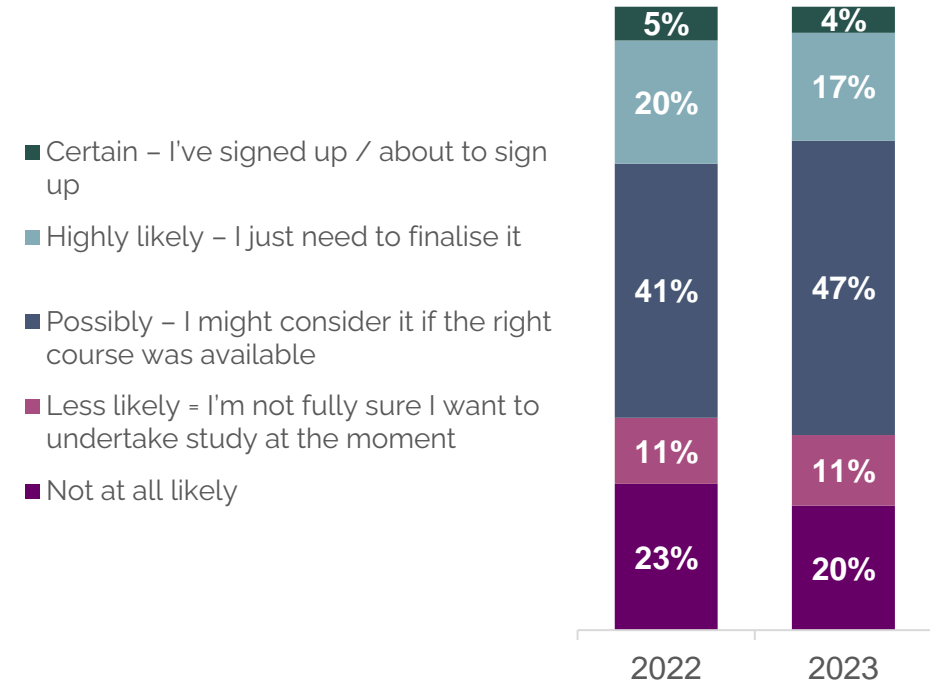
Last year in 2022, this number was a quarter of the population. There is a 4% decline for next 12 month immediate consideration .

44% are 'possibly' considering a course in the next 12-month period, which is an increase from 2022 from 36%. This would suggest some softening in the market of more immediate consideration and purchase. 24-36 month consideration follows a similar pattern, with a 4% decline in those more 'certain' about taking a course, and an increase of 6% of those who are 'possibly' considering a course.

Next 12 months.

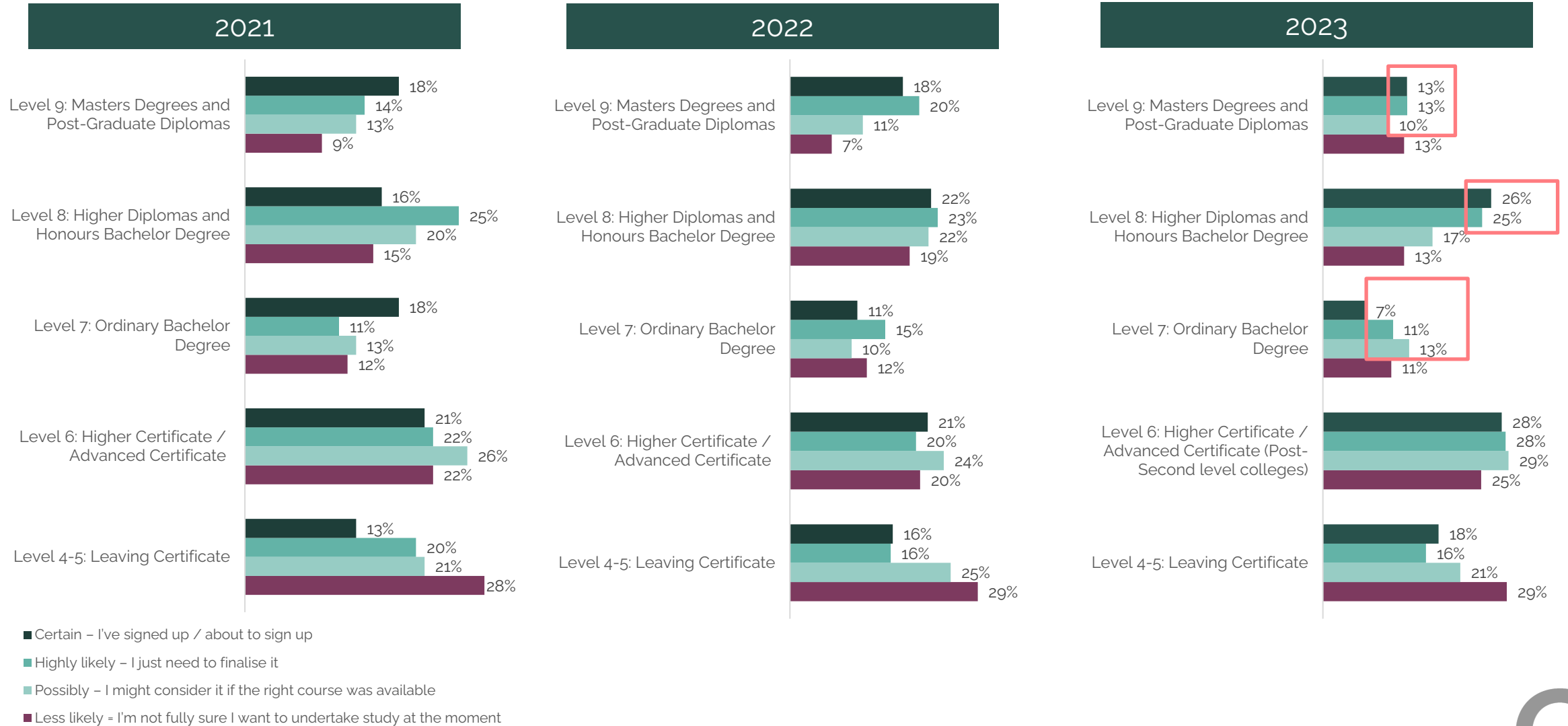


Next 24-36 months.



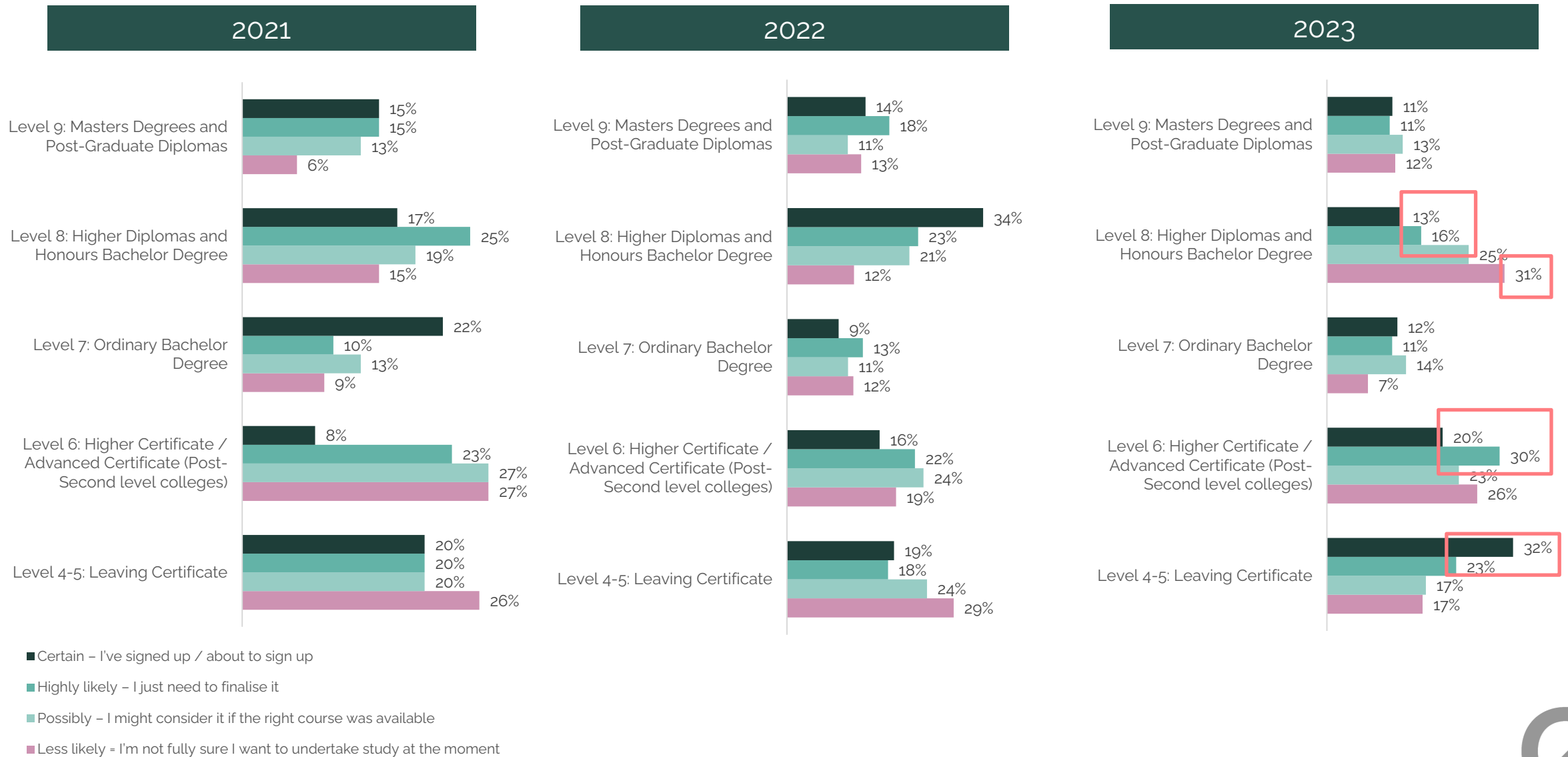
Course consideration within the next 12 months (by past educational attainment).

We can see some decline in consideration amongst those with higher level degrees (Level 9), as well as Level 7, however, a slight increase amongst those with Level 8 degrees.



Course consideration within the next 24-36 months (by past educational attainment).

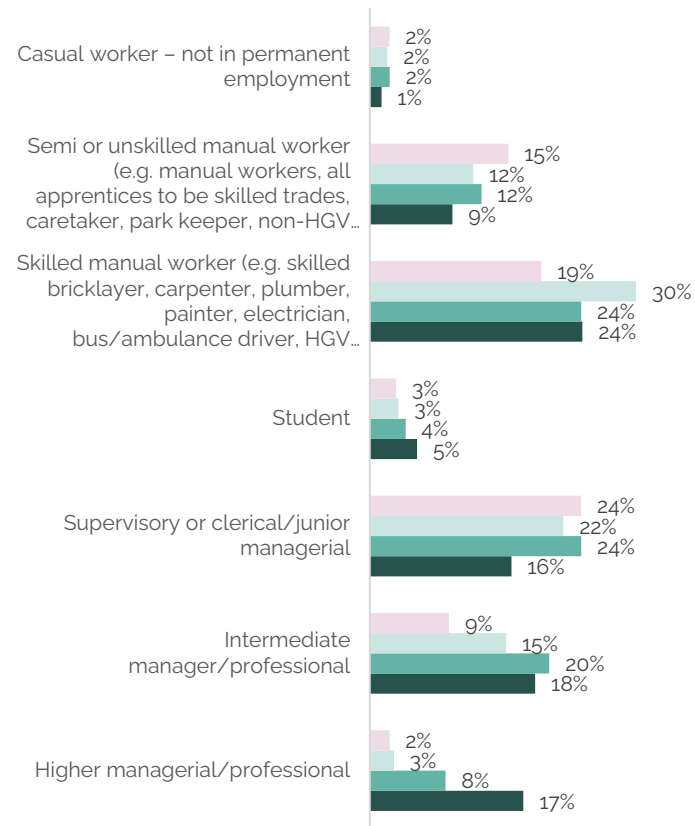
A similar trend appears over a longer period, with lower consideration rates at Level 8. Furthermore, there is a far higher number of Level 8s who are 'less likely' to consider a course, vs. 2022 (an increase of 19%). There is some growth amongst Level 6s, and Levels 4-5.



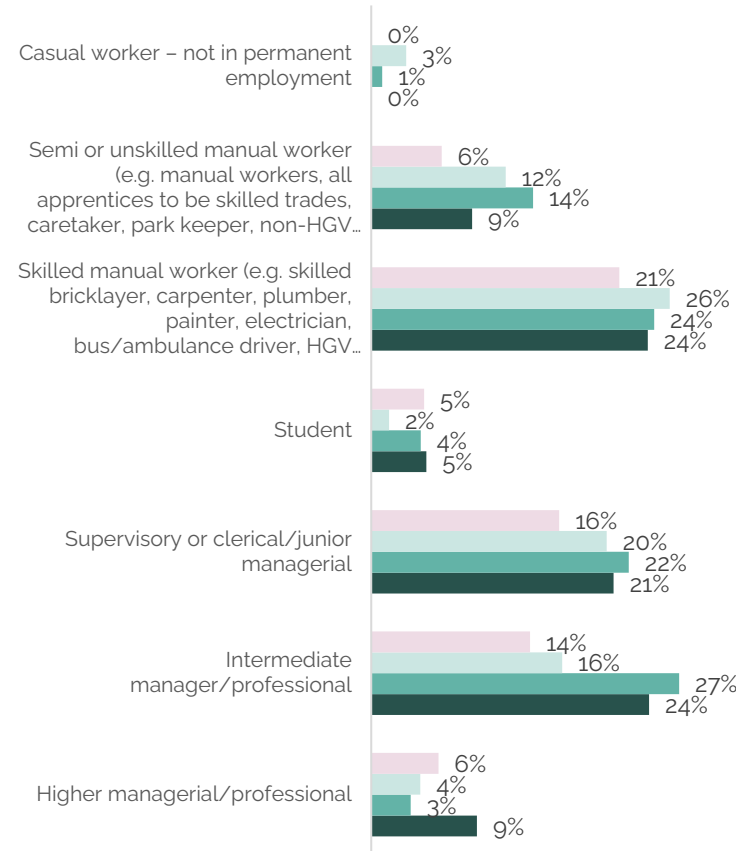
Course consideration within the next 12 months (by occupational level).

Aligning to higher level degree holders, we can see some declines in 'higher managerial / professionals' who are 'certain' about taking a course, although balanced out by those 'highly likely'. There is an increase of 9% who are 'less likely' to study. A similar trend is noted for 'intermediate professionals'.

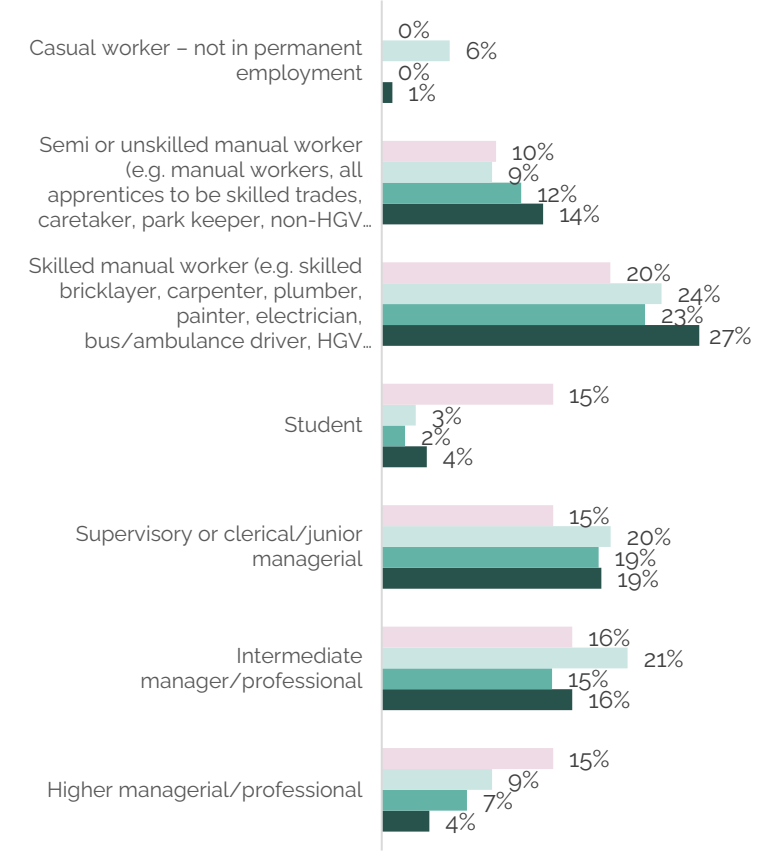
2021



2022



2023



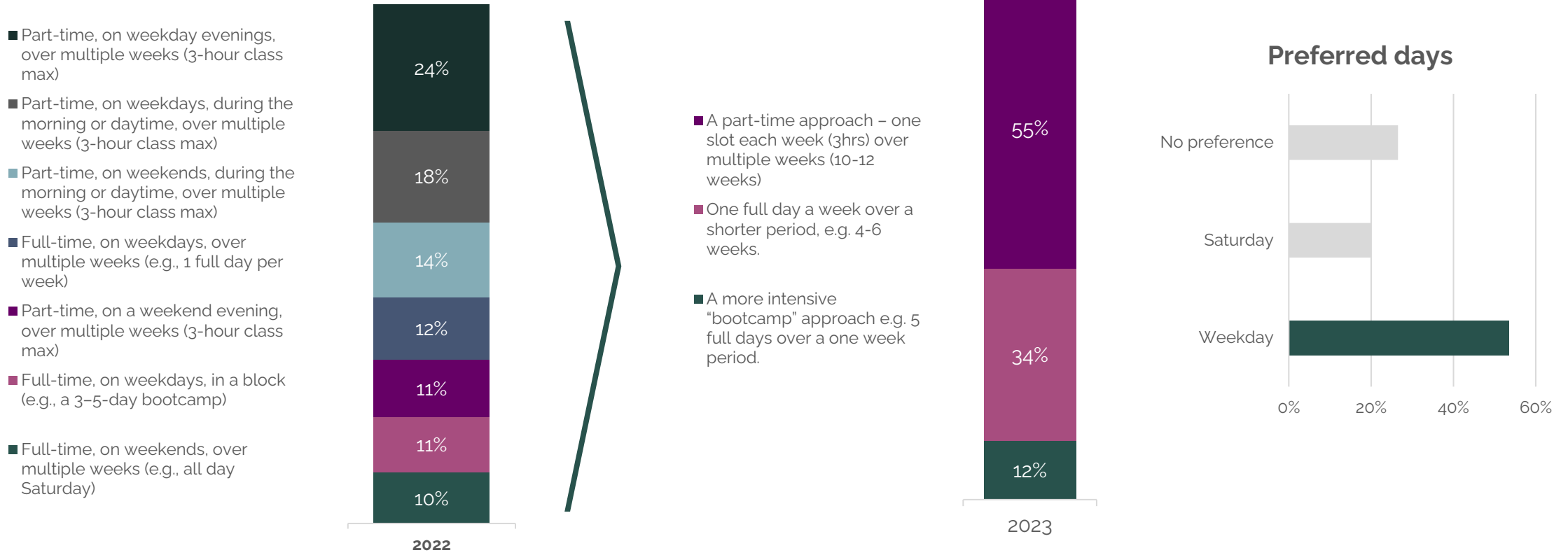
- Less likely - I'm not fully sure I want to undertake study at the moment
- Possibly - I might consider it if the right course was available
- Highly likely - I just need to finalise it
- Certain - I've signed up / about to sign up



Preferred Course Delivery

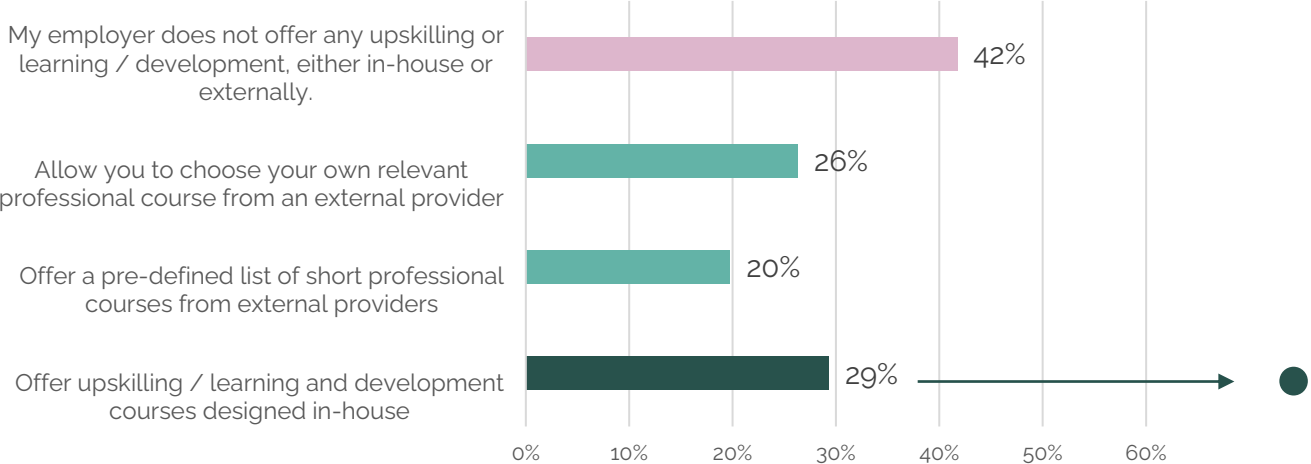
For 2023, we **restructured the question** to simplify, as well as to better reflect the current approaches being taken by UCD PA.

In 2022, **part-time, during the week for a 3hr max class is clearly the sweet-spot, and this has been confirmed again this year.** We can see that over half prefer a part-time approach (one-slot per week for up to 3hrs, over a 10-12 week period). However, it is interesting to note **that a third would appreciate a 'full-day' approach, over a shorter period of time** (4-6 weeks).

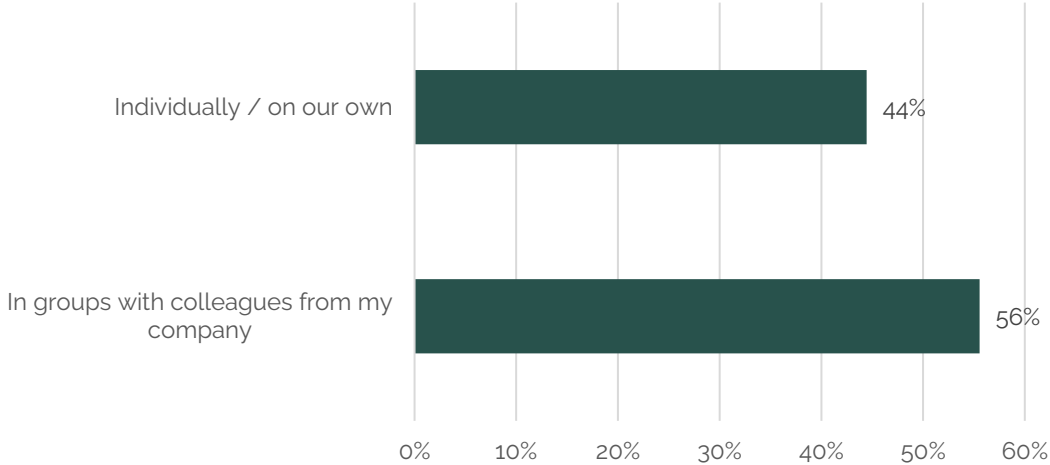


Nearly a third of employers are offering their own in-house learning and development, with just under half of employers not offering any upskilling / learning or development.

Employer influence on course offers or availability.

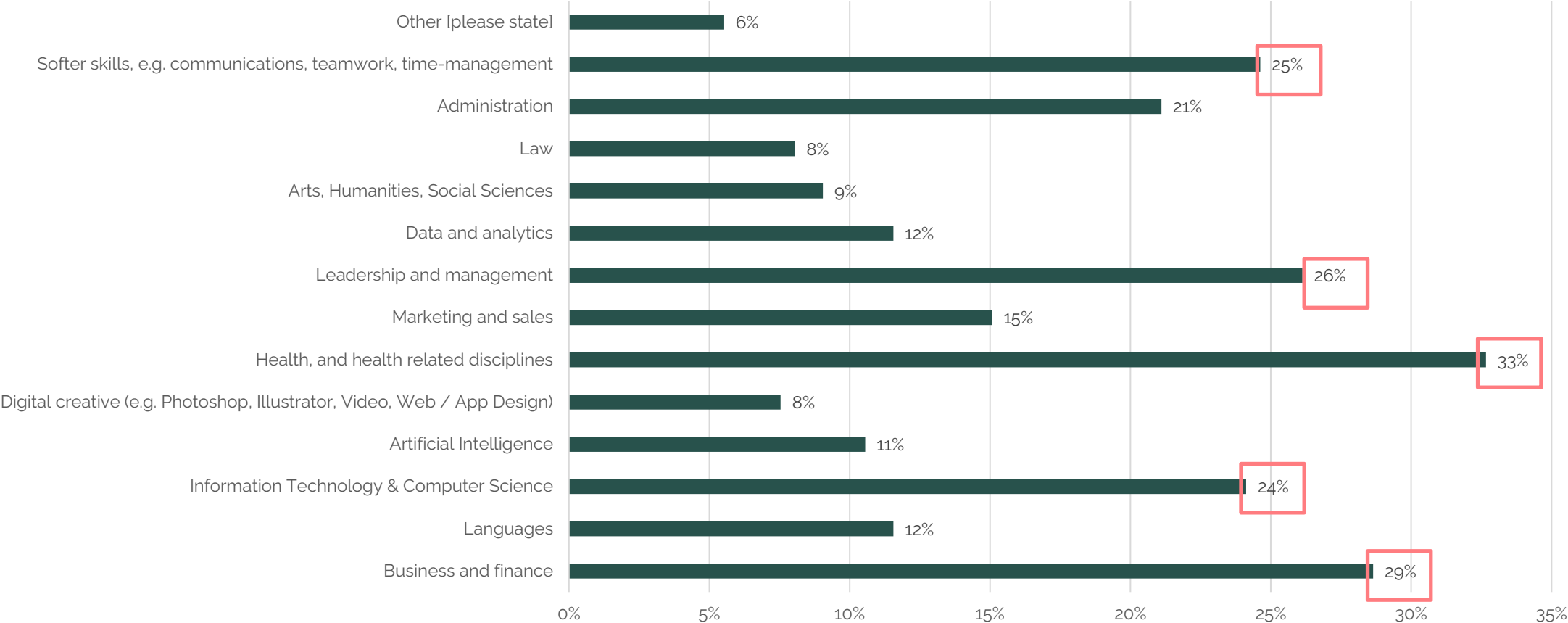


Do courses happen individually, or in groups?



The top 5 subject areas that employers offer in-house are in the UCD PA's core proposition space.

Subject areas offered in-house by employers.

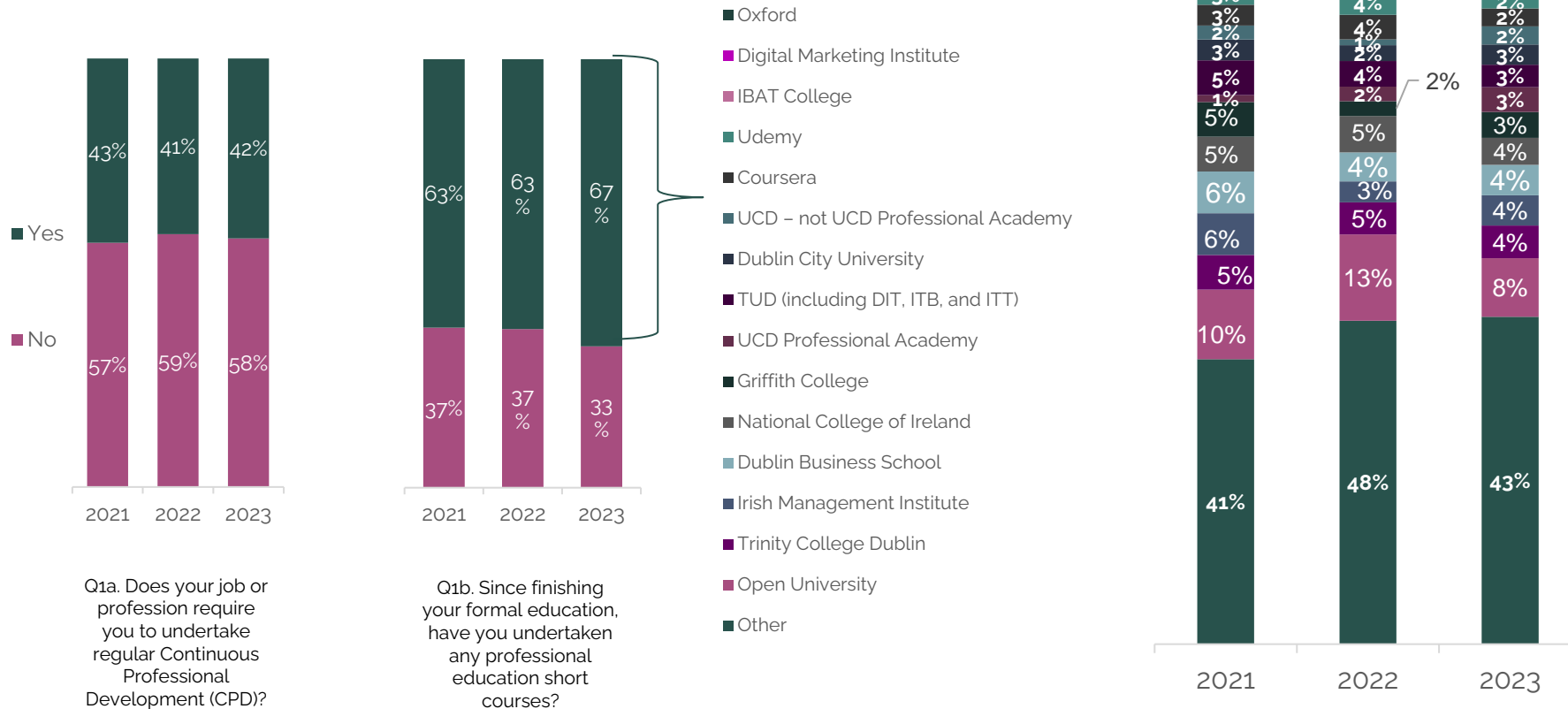




Past course takers in more detail

Taking a course in the past has a strong influence on propensity to take a course again in the future...

Again we can see a majority of respondents are not required to complete any formal CPD, yet **67% have undertaken professional education** short courses. This figure has held relatively steady over the three years.

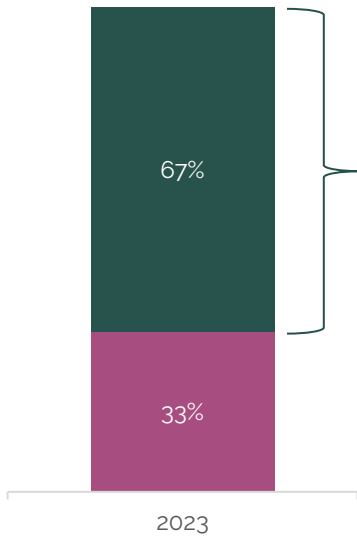


At 43%, the 'other' category makes up the largest grouping of where people chose to take their most recent course, again showing the market is still quite fractured and disparate.

UCD PA stands at 3% of this market. Open University has the highest singular ranking at 8% (a position it has held each year).



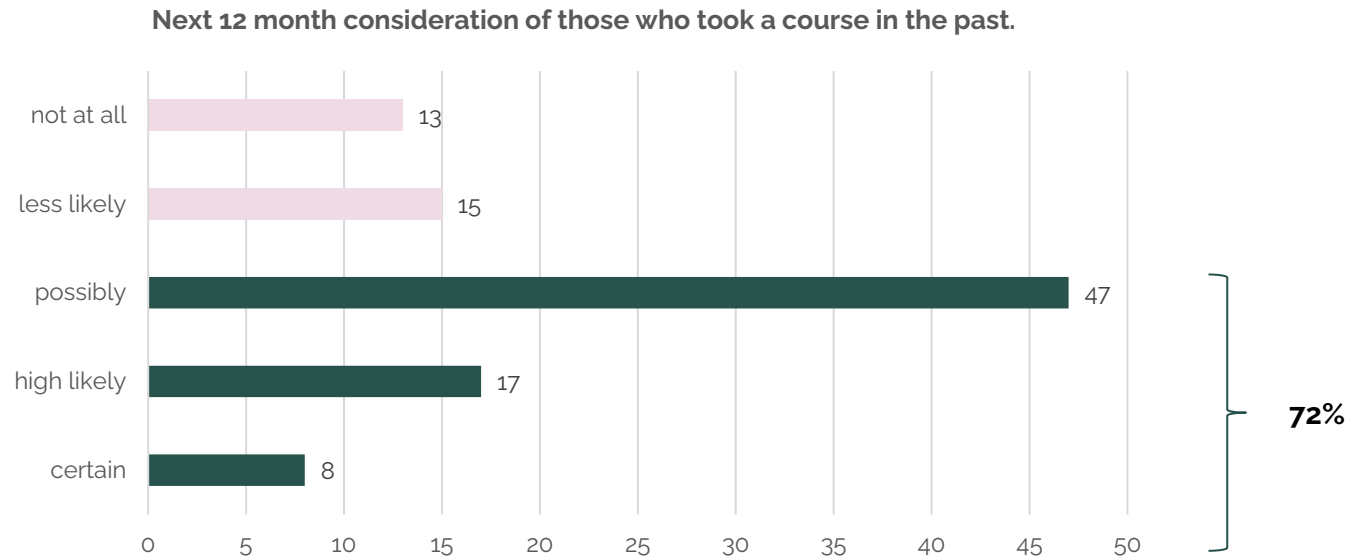
As in previous years, past course taking is still a strong indication of likelihood to take more courses in the future.



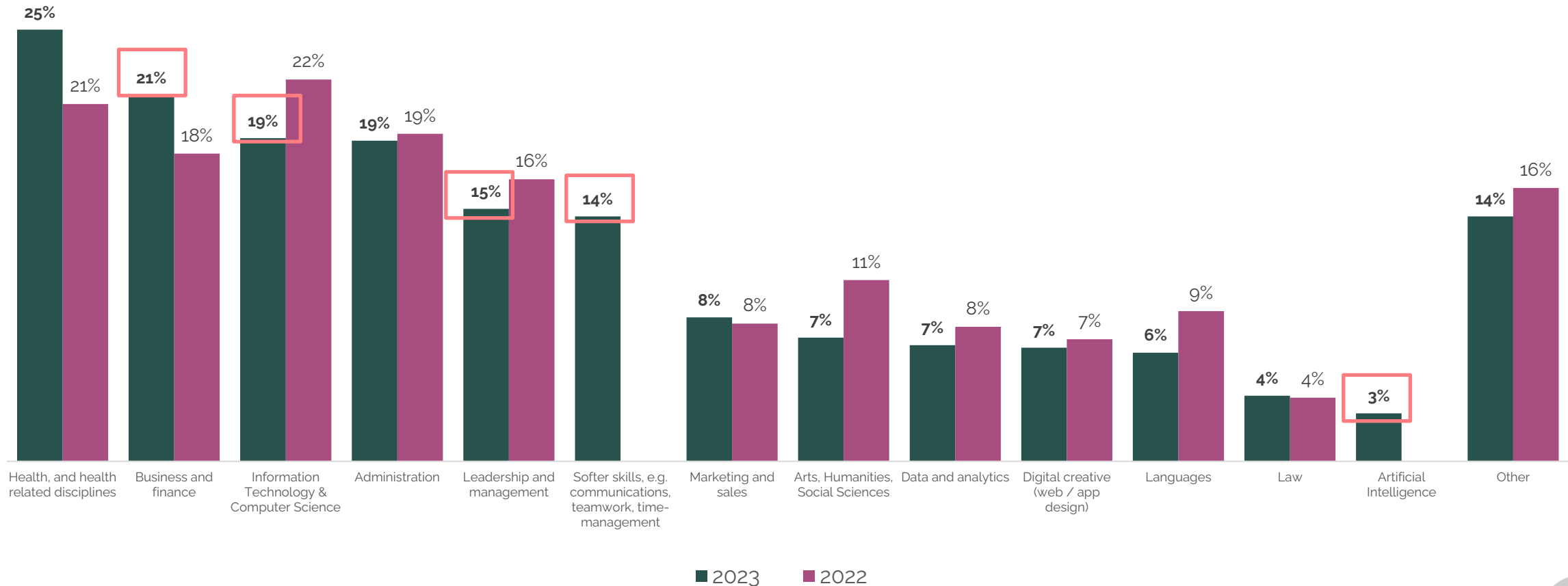
68% of this cohort are under the age of 54.
However, about **1 in 5 are 65+.**

There is an almost 50/50 split on SEGs (ABC1s vs. C2DEF)

Q1b. Since finishing your formal education, have you undertaken any professional education short courses?

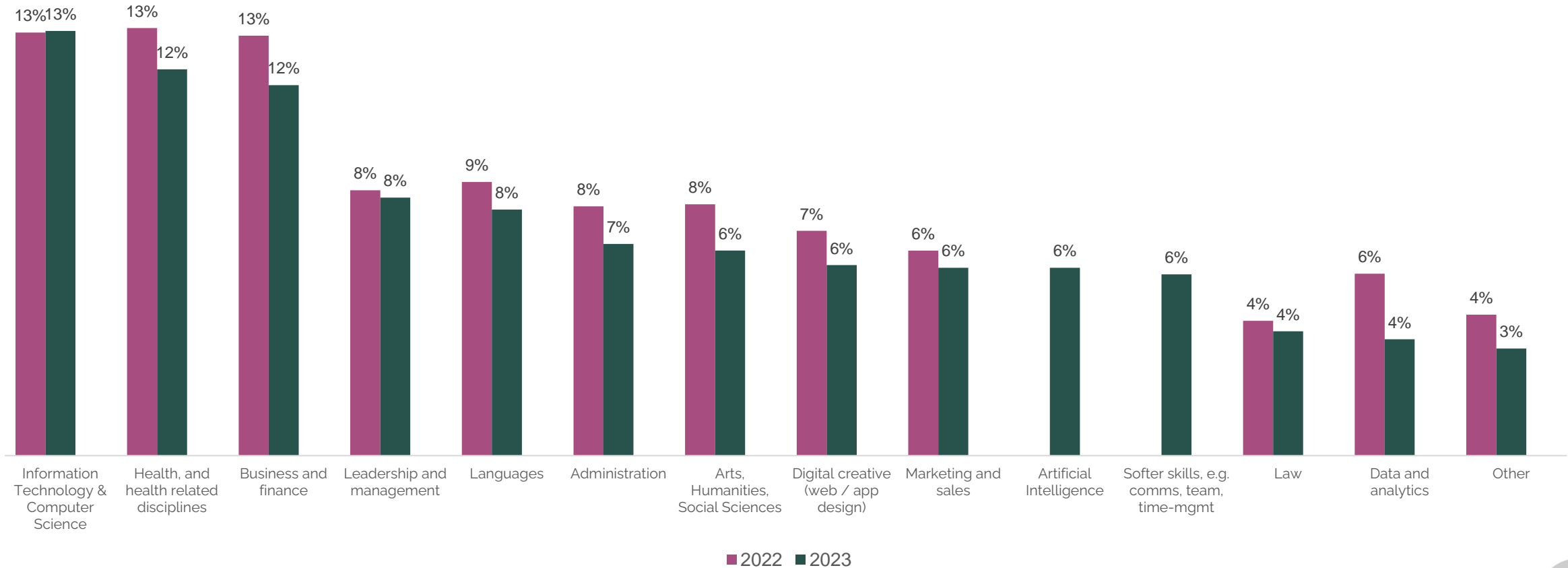


For the 67% cohort who have taken a course in the past, we can see that the UCD PA is covering off **2 out of the top 3 courses**. Interesting to note that 'Softer Skills' – a new addition for 2023 has been taken by almost 14% of respondents. AI, another new category for the survey stands at 3%.



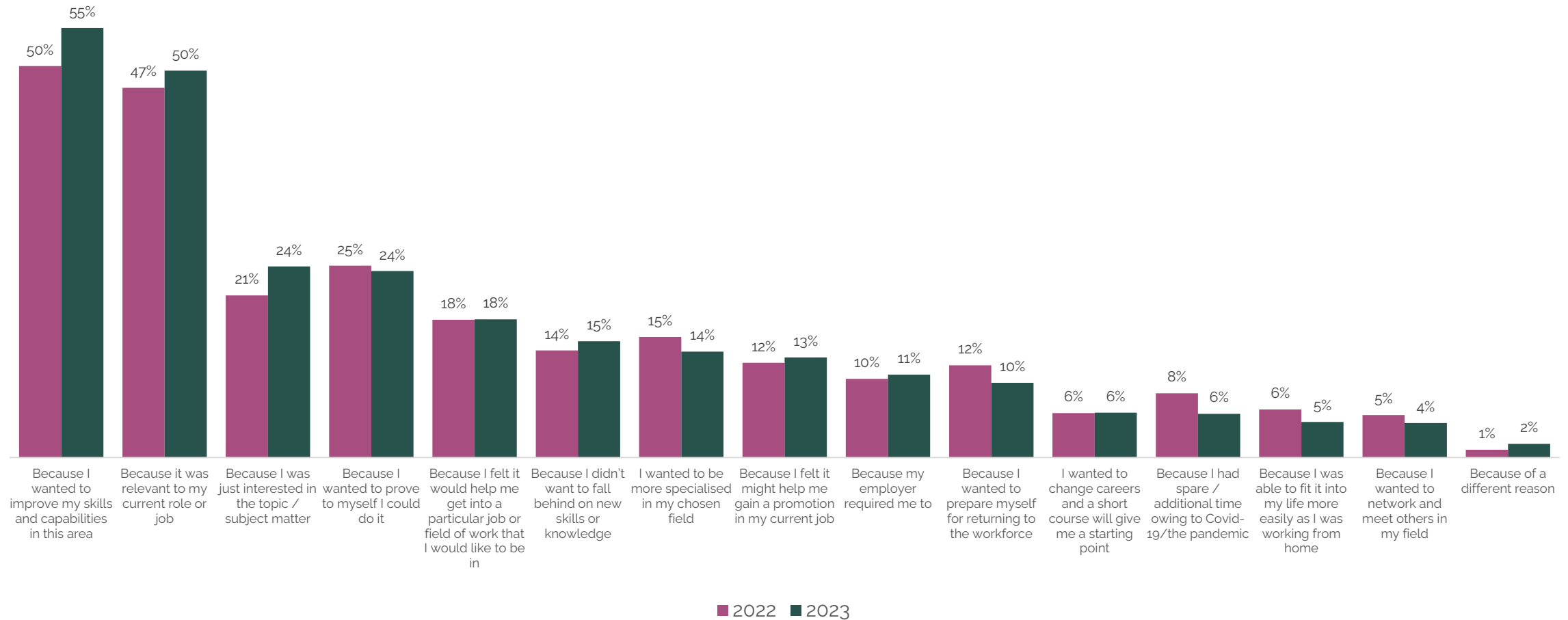
Future course consideration.

When asked to think about **potential future consideration**, a similar trend emerged, where the top courses under consideration are covered by the UCD PA. Note that while only 3% have previously taken a course in AI, the demand currently stands at 6%, however potentially competing now with 'data and analytics' which sees a slight decline.



Reasons for taking a short professional education course.

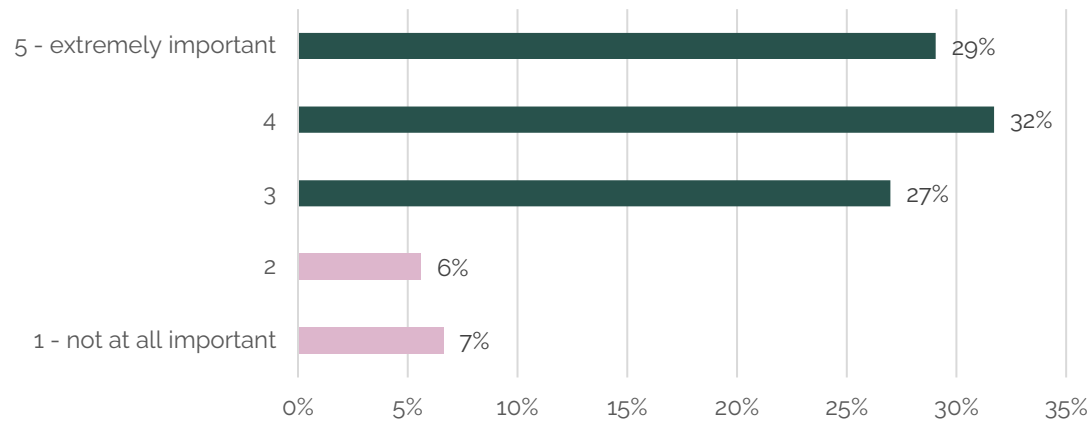
Improving skills / capabilities, and '**relevance** to current job' have **increased** in importance for taking a course since 2022. For nearly **one-fifth**, there is a view that a course will help them **get into a particular job** or field of work, with **1-in-10** believing it will help them get a **promotion**.



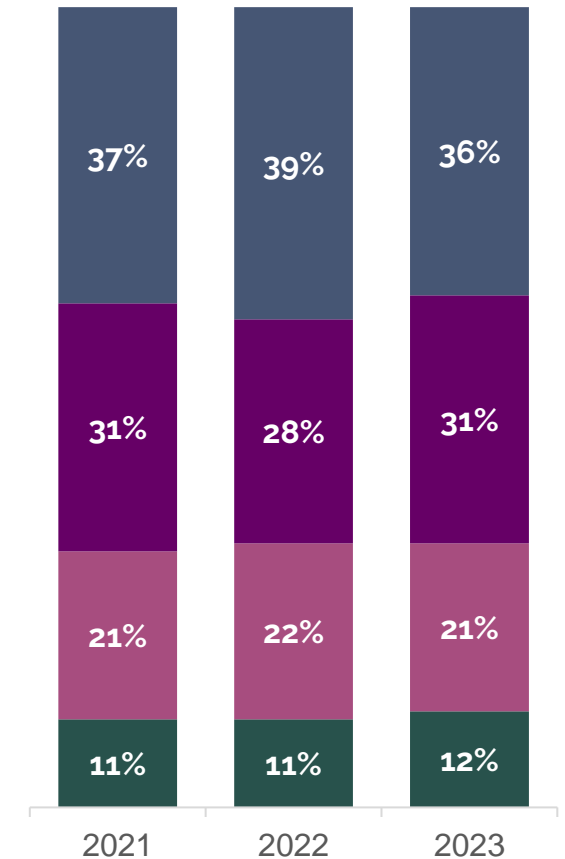
Importance of NFQ Certification.

We can see that **claimed importance** is relatively **high with 61%** saying it is **extremely or very important**. However, over a three-year period there is little movement with regards those **choosing to take an NFQ course**, vs. those uncertain that the course was NFQ accredited (one-third of our sample). For one fifth of learners, again, they knew their course was not NFQ accredited.

Claimed importance of a 'formal' qualification



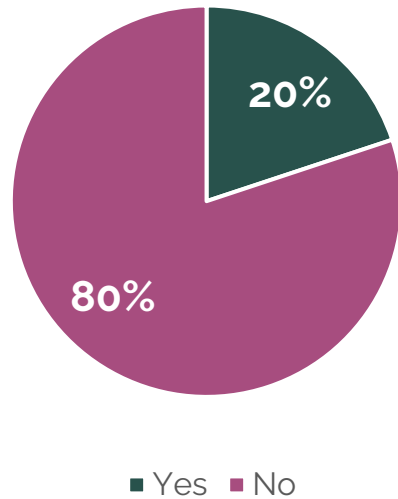
- It was part of the National Framework of Qualifications (NFQ)
- I don't know if the course certification was part of National Framework of Qualifications (NFQ)
- It was not part of the National Framework of Qualifications (NFQ)
- I did not receive any certification from completing the course



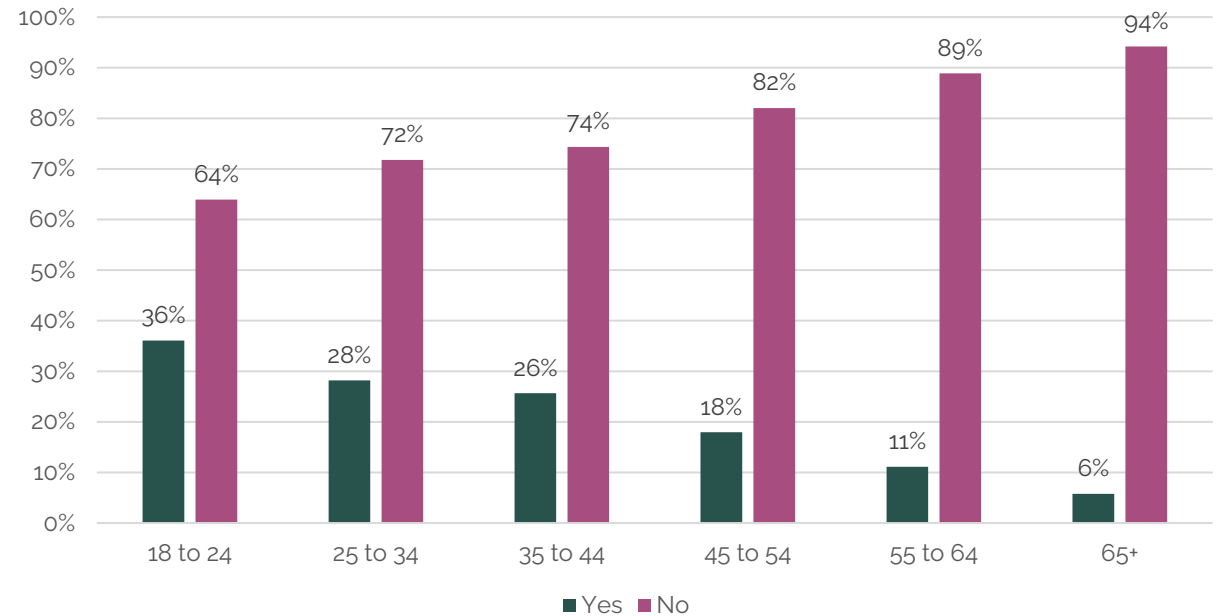
Micro-credentials – still niche, but relative higher awareness amongst younger cohorts.

While there is generally a low level of awareness for micro-credentials, it's clear that there is greater awareness amongst 18-24s, who are perhaps becoming more exposed to the concept as third-level and further education evolves and incorporates new ways of credentialling.

Awareness of micro-credentials



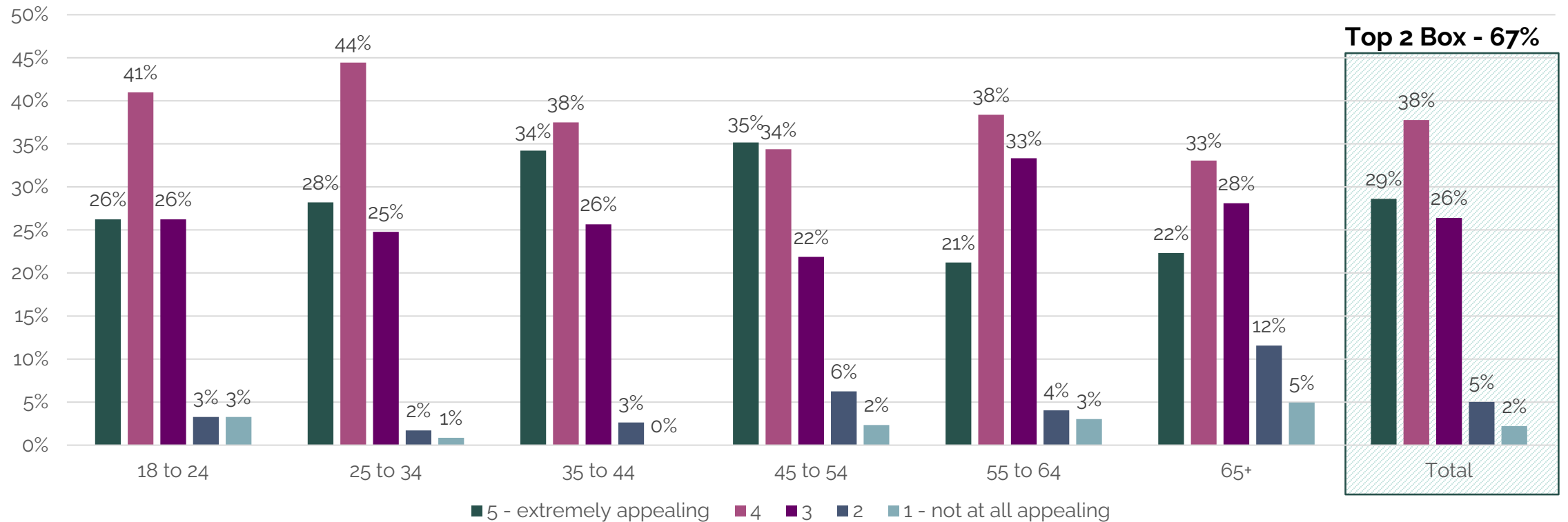
Awareness of micro-credentials by age



Micro-credentials have strong appeal across the board.

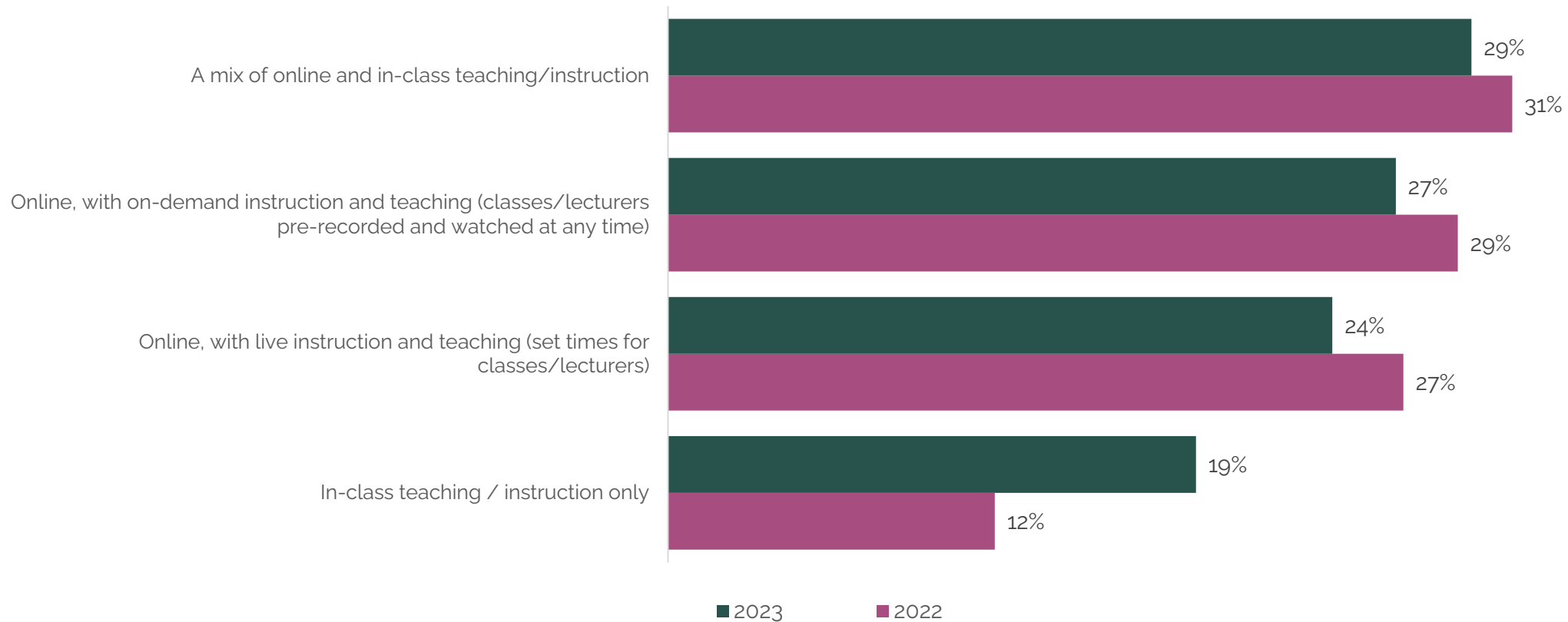
There is strong appeal, with 67% of the total sample scoring it extremely or very appealing. It seems to have stronger appeal amongst younger cohorts, which is unsurprising given their higher awareness. With additional understanding of potential benefits, 'micro-credentials' could score higher here.

Appeal of micro credentials



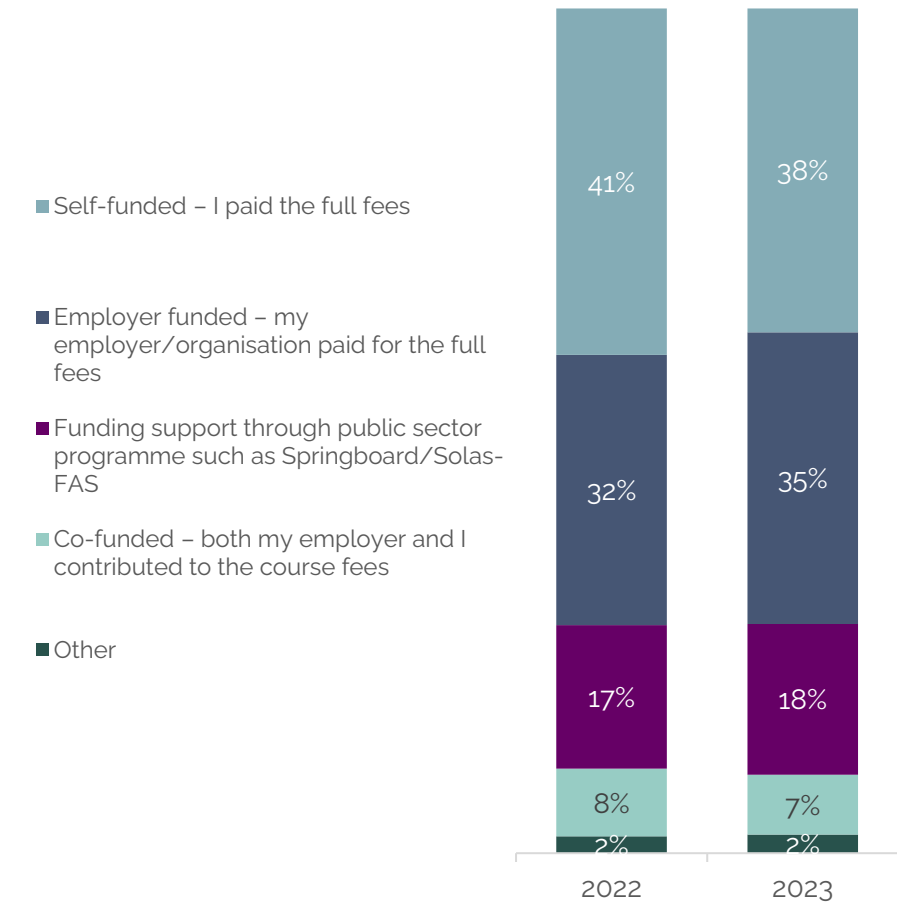
Preferred course delivery.

We can see that the hybrid approach is still most preferred and holding steady, however, there is an increase in students looking for in-class teaching only, rising from 12% to 19%, suggesting that for some, there is potential 'virtual fatigue'.

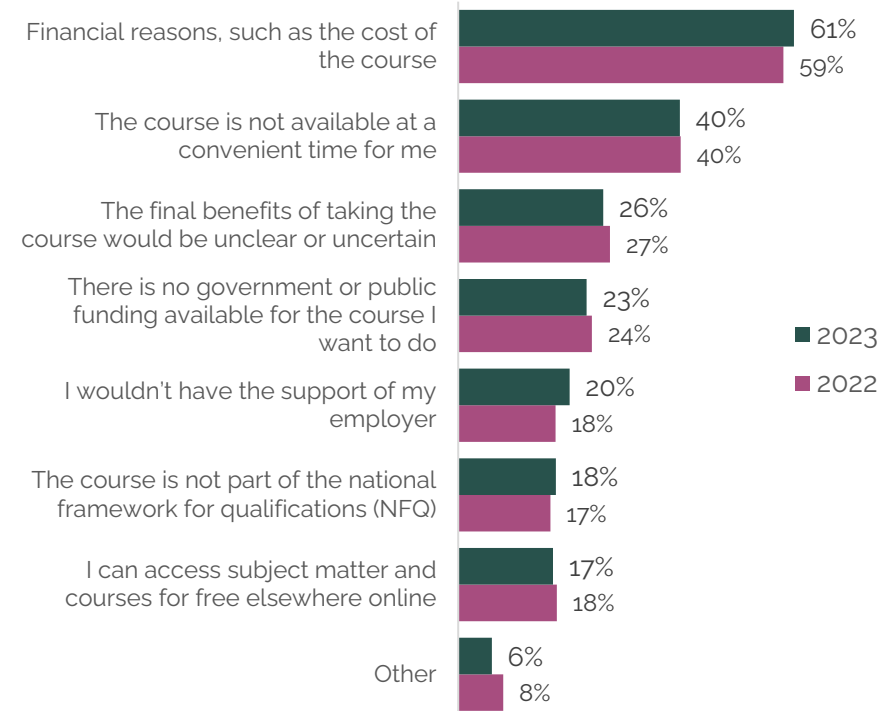


Funding pathways.

We can see that funding pathways have remained broadly consistent since last year, with a marginal decline of those being 'self-funded', in favour of employer funded. Financial reasons, and time commitments are the top two reasons for not potentially taking a course in the future. Again, nearly a quarter feel that a lack of government or public funding may prevent them from continuing with a professional education course.



All answers (multiple-choice).

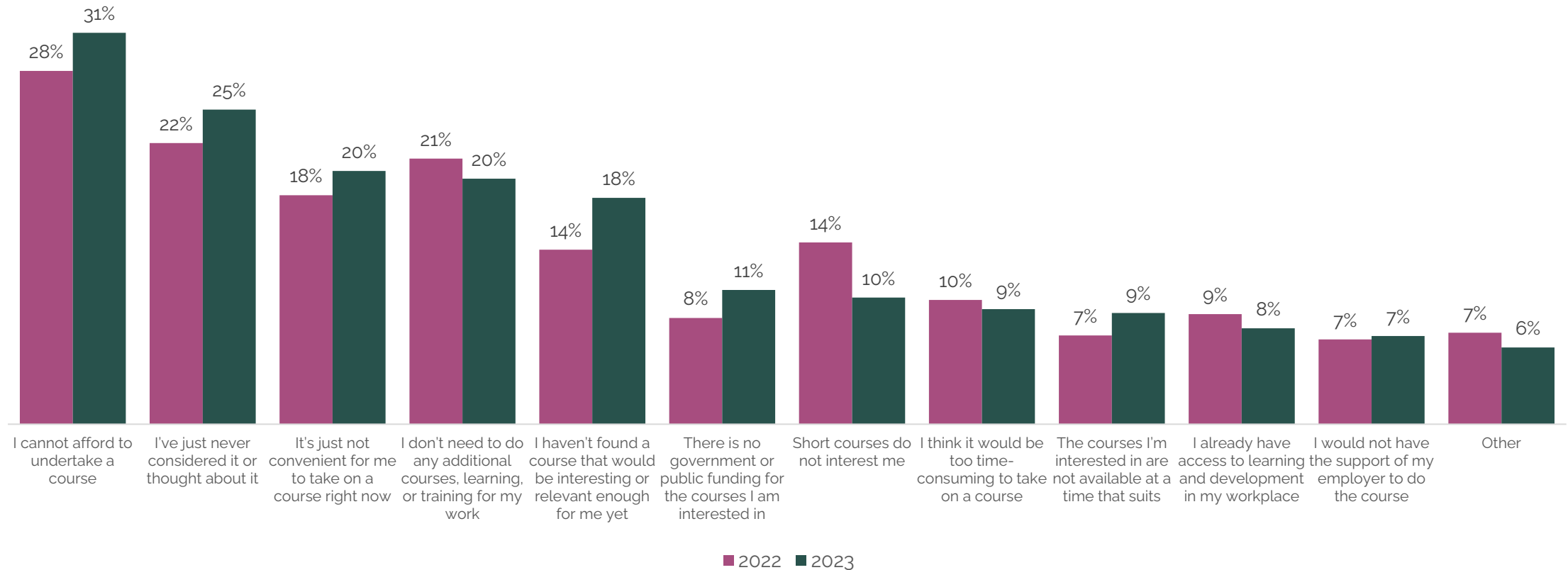




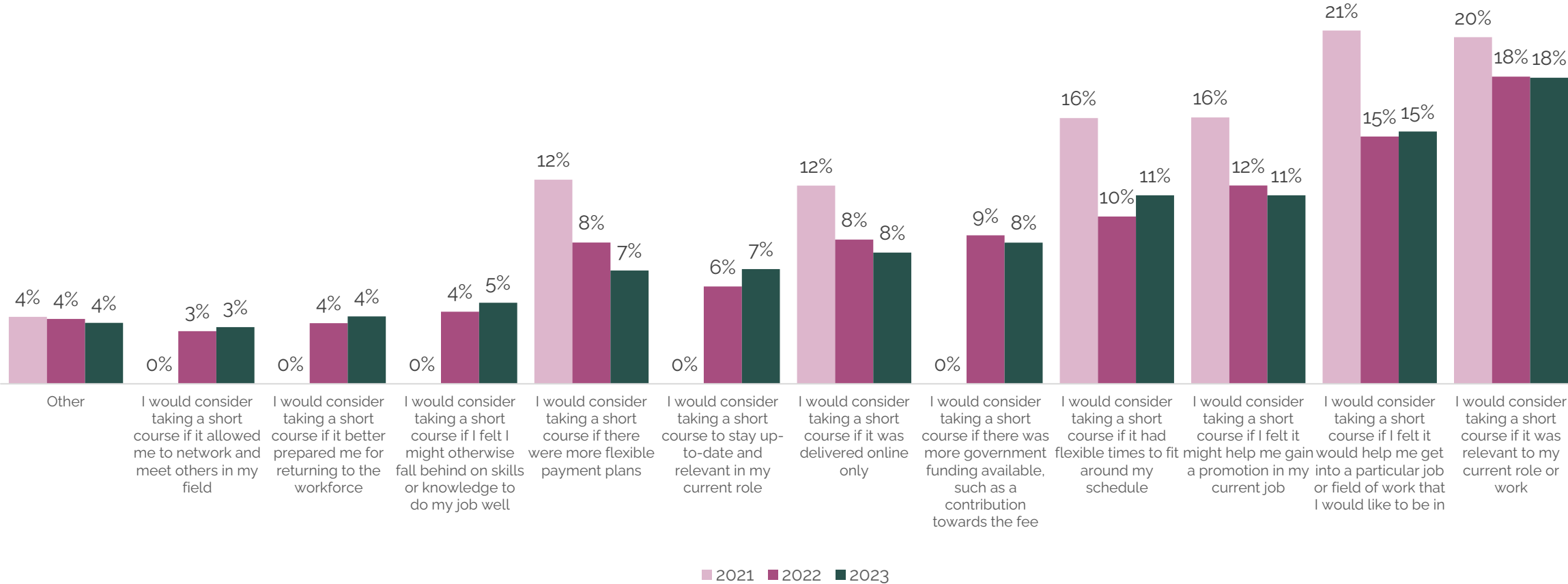
Non-course takers.

Reasons for not engaging: non-course takers.

Affordability has increased 3 points to 31%, with one-in-ten saying there is no government or public funding available to them for study. **A quarter of the sample (up from 22%) have simply not considered a course**, and **one-fifth believe it is not convenient to take one on**. The groups may suggest that more could be done to alleviate concerns about work-load and commitment, as well as potentially outlining course affordability, potential payment options, and benefit-led messaging about impact of a course on career progression and promotion.



Relevance to current role, and 'helping to get into a particular job' are the key reasons why a non-course taker would consider a short professional education course.





Implications & conclusions

Conclusions and implications

- In **2022, we started to see an emergent sense of a softening market**. The **trend line for 2023 has shown that this softening continues**, as inflation and the 'cost of living crisis' has firmly embedded itself in the public psyche. Even for those whom it would be reasonable to assume are more insulated from fluctuations (degree holders, higher managerial professions), it seems **'caution' is being applied**.
- **Despite this, the overall trend of consumer interest in learning and development is growing**, with the **TAM increasing by 151k people**. However, **they are entering the market with greater caution**, as there is a **decline of 4% for immediate consideration**, with an increase of 8% of those only 'possibly' considering a course.
- For the UCD PA specifically, the **serviceable addressable market** has seen a **slight softening with a loss of a little over 100k** potential learners from the market (circa 3% from last year).
- **Financial reasons, at 61% is the main reason that would deter a potential learner** who had previously taken a course before. For those who had not taken a course in the past, the key reason is also affordability.
- While a majority of respondents are not required to complete any formal CPD, **67% have undertaken** professional education short courses.
- **UCD PA continues to cover the key courses that students and learners are interested in** - Business and finance, IT, Administration and Leadership and management. Emerging Growth is apparent in **Soft Skills** and **Artificial Intelligence**.
- The list of **potential providers** continues to be long, meaning the market remains highly fragmented with plenty of specialists.
- 42% of employers are not offering employees any upskilling / learning or development.
- There appears to be **some desire for more face-to-face interactions** in relation to learning and education, however, there is also a **continued desire to learn 'on my terms', in a way that suits 'my life, and my commitments'** (on-demand online, and live online instruction).
- The **overall runway for the UCD PA is strong**, despite current **headwinds** – economic instability and inflation being a critical one.





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Understanding the Irish
Professional
Education Landscape

Research Commissioned by UCD Professional Academy
Research Undertaken by Genesis
2023.