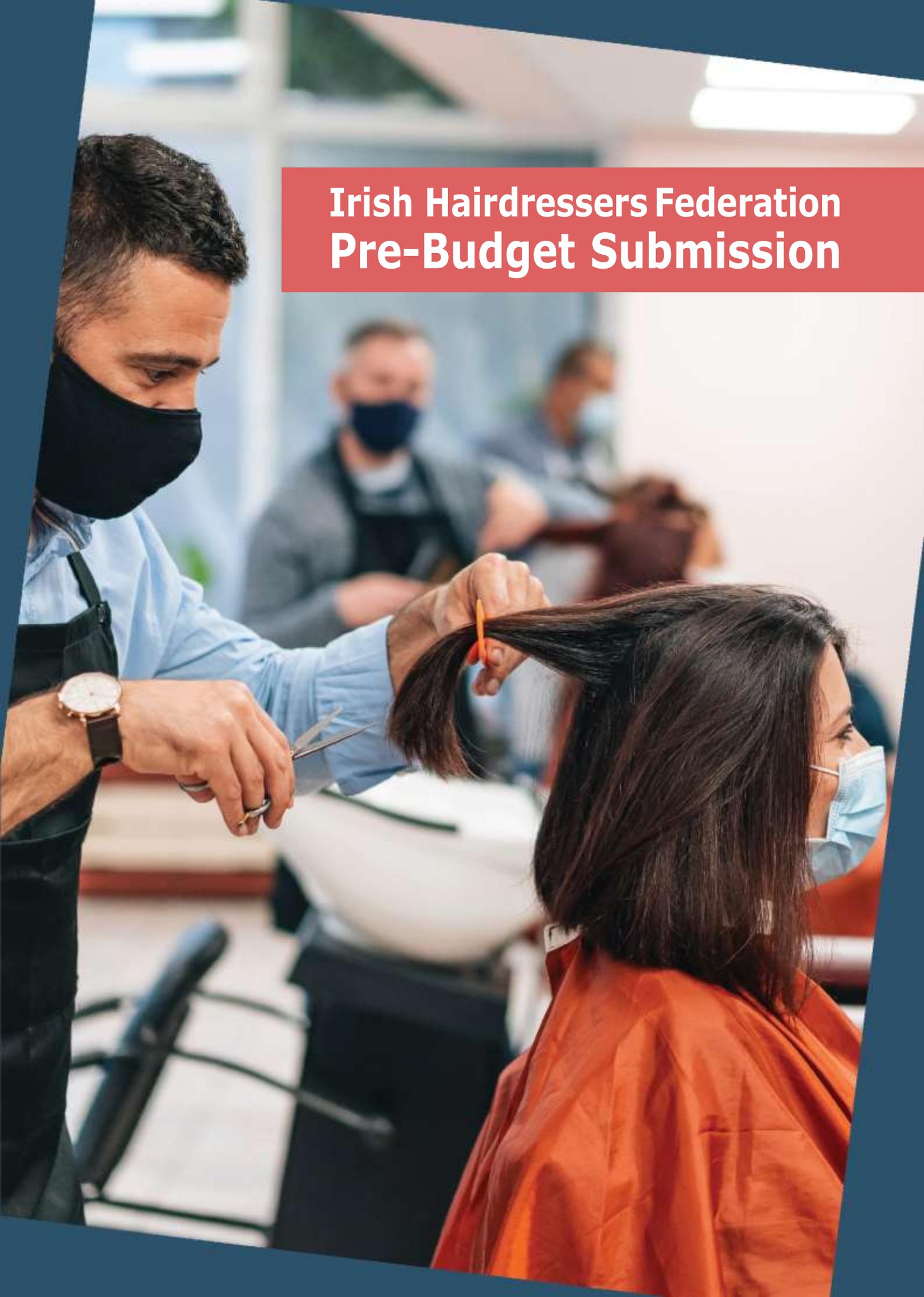


Irish Hairdressers Federation Pre-Budget Submission





IHF President Danielle Kennedy with Vice President Lisa Eccles and Executive Committee Member Mark O'Keeffe

IHF PRE-BUDGET SUBMISSION FOREWORD

The Irish Hairdressers Federation is the oldest hairdressing industry representative body in Ireland, and we pride ourselves on our collaborative and results-driven approach to representing the interests of our sector.

Since our establishment in 1974, the Federation has worked tirelessly to achieve our mission of raising the status of hairdressing as a profession in Ireland. Our daily activity includes providing advisory services to our members, helping to develop the professional skills of our members, promoting professional standards of service within the industry, developing a standardised system of professional training and offering a space for like-minded professionals to discuss issues that affect the industry and their business.

Over the past seven months, our industry has faced enormous challenges. We were one of the first sectors of the economy to close our doors to protect our staff and customers. During this time, we brought together other hairdressing industry bodies and led the way in developing an extensive set of expert health & safety guidelines and spearheaded a successful campaign which saw hairdressers reopen early.

However, the impact of Covid-19 on our industry has been severe, with reduced spending in salons, reduced customers, excessive extra costs such as PPE and staffing pressures.

Even before the onset of the pandemic, our industry was struggling and faced a number of serious challenges. The abolition of Trainee Rates in 2019 was a hammer blow to the hairdressing industry and put huge pressure on the costs of operating a salon. The number of people employed in the industry also declined by 7.9% in 2019 alone.

In response to these challenges, our Federation has once again come together to be proactive and positive in facing down the many obstacles which lie ahead. We have developed this extensive pre-budget submission with the input of noted economist Jim Power to provide the Government with an overview of what assistance they can provide in helping our sector rebound and continue to contribute to the Irish economy.

One thing which the lockdown has taught us is just how important hairdressers are to their local communities in cities, towns and villages across Ireland. Our Federation will continue to endeavour to assist our members in facing the tough times ahead, and we appeal to the Minister for Finance and the Government to consider our proposals.

Danielle Kennedy

President, Irish Hairdressers Federation



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THE IRISH HAIRDRESSERS FEDERATION

The Irish Hairdressers Federation (IHF) was formed as a voluntary group in 1974. Since its establishment, the Federation has worked tirelessly to raise the status of hairdressing as a profession in Ireland, to provide advisory services to its members, to provide creative and competitive platforms through which their members' skills can be developed, to promote professional standards of service within the industry, to promote a standardised system of hairdressing training in Ireland and to offer opportunities for members to get together with like-minded professionals to discuss issues that affect their everyday working lives.

The IHF is the only representative body that represents salon owners exclusively.

It is the longest established hairdressing industry representative body in Ireland. It has a proven track record of successfully collaborating with representative bodies from other industries.

The Federation provides an Advice Line whereby members can get help or advice relating to trade or employment issues.



EXECUTIVE SUMMARY

- The economic and financial background against which Budget 2021 is being prepared and presented is very challenging. As a result of COVID-19, economic growth has slowed significantly; the labour market has deteriorated in dramatic fashion; and the fiscal situation has deteriorated in an alarming fashion, as the Government is spending large amounts of money to support the economy, and maintain the health service. There is no other choice.
- The overall economic environment in 2021 is likely to be challenging. Unemployment will be much higher than in recent years; the public finances will be in significant deficit; the external economic environment will be more challenging; and Brexit still represents a serious threat to the wellbeing of the Irish economy.
- A likely general government deficit more than €25 billion in 2020 is justifiable and unavoidable, as it is necessary to support the economy, business, and ultimately employment in the face of an unprecedented and totally unexpected economic shock. Such support will also be required in 2021.
- The stance of Budget 2021 must be focused on supporting economic recovery and employment creation.
- It is estimated that in 2019, Irish consumers spent around €1.1 billion on Hairdressing services, and €360 million on Health and Beauty treatments. In total, expenditure of €1.46 billion is equivalent to 1.3% of total consumer expenditure.
- Employment in the sector expanded by 25.9% from a low of 20,500 in the second quarter of 2011 to 25,800 in the final quarter of 2019. This is equivalent to 1.1% of total employment in the economy. During 2019, there was a decline of 2,200 or 7.9% in the numbers employed. The largest single cause of this decline in employment during 2019 was the abolition of trainee rates. Trainee employment was ceased due to the high additional costs of employing them, and new trainee hires ground to a standstill during 2019. Unfortunately, trainees are deemed the most expendable costs in a salon when financial difficulties are experienced, because they are basically non-earning staff members. Other factors that contributed to the decline in employment included the increase in the VAT rate from 9% to 13.5% in Budget 2019; a more cautious consumer; and the ongoing growth in the 'informal' economy in the hairdressing sector.
- COVID-19 has had a very negative impact on the Hairdressing sector. Hairdressing is based on human contact, so there will inevitably be a reluctance by some customers to visit the salon. In addition, operators are applying strict health protocols, including PPE equipment, sanitisers, and social distancing. The net result is that costs have been increased and customer turnover has been reduced. This is likely to remain a feature of the market in 2021. Sustaining employment in the sector and ensuring business survival will be a significant challenge.
- Budget 2021 has got to be cognisant of the challenges facing the Hairdressing sector and employment all over the country.

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The following measures are recommended for the Hairdressing sector in Budget 2021:

- In the context of all of the pressures on the sector at the moment and the very uncertain outlook, it would be very supportive of the Hairdressing sector to cut the VAT rate to 5% until the end of 2021, and then revert to the 9% that prevailed prior to the increase in Budget 2019 on a permanent basis. The cost of reducing the VAT rate to 5% is estimated at €57 million in a full year. Depending on the incidence of the tax cut, such a move could help business margins; increase consumer demand; sustain employment; and crucially remove some of the competitive advantage of the informal sector, which is operating outside of the tax system. The main benefit of the last VAT reduction was that salons reduced their prices and this created increased consumer demand, and more regular visits to the salon.
- The abolition of trainee rates in March 2019 because of the Employment (Miscellaneous Provisions) Act 2018 has made it much less attractive for hairdressing businesses to take on trainees. So rather than taking on the extra costs associated with trainees, many operators are now seeking to recruit more experienced staff, which in turn is pushing up wage costs. Taking in trainees has become significantly less attractive for many operators, and the lack of trainees in the sector is becoming problematical and will get worse in the future. To address this problem, the Government should introduce a flat rate subsidy per trainee, which would be administered in the same way as Employment Wage Subsidy Scheme. It could be monitored the same way Workplace Relations Commission monitored the trainee rates, and Government resources are already in place to manage it. This is a temporary measure to bridge the gap while the National Apprenticeship becomes fully operational. In a sector where wage costs are 60-70% of turnover, the loss of trainee rates and the increased costs of wages as a result has greatly damaged the sector, caused over 2,000 job losses and forced many salons out of business.
- The rollout of the National Hairdressing Apprenticeship needs to be prioritised and fast tracked. There are only 5 centres seeking expression of interest in January 2021 – Tallaght, Finglas, Kilbarrack, Waterford and Limerick.
- Employing and training a young and inexperienced stylist is a significant investment in time and money on behalf of the salon owner. Trainees cost considerably more to employ than if they were just employed as a salon operative on the minimum wage. Due to the introduction of The Employment (Miscellaneous Provisions) Act 2018 and the abolition of training rates under the National Minimum Wage Acts, a new trainee costs the employer over €5,000 extra per annum than previously, which is unaffordable for most salons. As a result, the number of young people entering the sector has dropped dramatically since the beginning of 2019. Therefore, we recommend either exempting hairdressing from The Employment (Miscellaneous Provisions) Act 2018 or re-establishing the exemptions for JLC agreements on hairdressing.
- Removing the National Training Fund levy for salons who employ and train apprentices as they are already making significant contributions through their own education expenditure.
- A significant issue in the Hairdressing sector is that there is a lack of professional recognition for those who work within it. This is leading to skill shortages and skill gaps. There is an immediate requirement to boost the professional status of the industry, so that people will consider it as a valuable and worthwhile career choice, and that professionals will be retained within the sector. There is a longer-term requirement for the Government to support the introduction of a CPD framework for hairdressing professionals, and the business management side of the industry, which will drive sustainable development of the sector and to stimulate job creation into the future.

ECONOMIC BACKGROUND TO BUDGET 2021

The economic and financial background against which Budget 2021 is being prepared and presented is the most challenging in a decade. The impact of COVID-19 on the economy and the public finances has been dramatic. GDP contracted by 6.1% in the second quarter, which is the largest quarterly decline since records commenced.

Large swathes of the economy were forced to close in March and economic activity contracted sharply. As the economy has gradually re-opened, activity in most sectors is recovering, but activity levels are being constrained by the various COVID-19 protocols and restrictions in place. This is likely to remain the case until a safe and effective vaccine is delivered.

The most recent economic projection from the Department of Finance suggests that GDP could contract by 10% in 2020, before expanding by 6% in 2021. However, trying to forecast the economic future currently is very difficult, such is the level of uncertainty engendered by COVID-19.

There is justifiably an explicit recognition by all economic forecasters that the outlook will be heavily driven by the path of the virus. Ongoing waves of the virus and the threat of new local restrictions will continue to pose a massive threat to the wellbeing of the economy. The constant threat of further lockdowns will continue to undermine fragile consumer and business confidence.

The labour market has been the most noteworthy economic casualty of COVID-19. Coming in to 2020, there was concern about the challenges posed by an economy approaching full employment. These concerns have been replaced by very different and much more worrying ones since the beginning of March.

In the year to the end of June, total employment declined by 77,500 or 3.4% to 2.22 million. The greatest rate of decrease was in accommodation and food services (29.6% or 53,600); administration and support services (17.2% or 18,900); construction (12.1% or 17,800); and retail (5.2% or 15,600).

The CSO also estimates COVID-19 adjusted employment totals. The estimate for the end of Q2 2020 is calculated by subtracting those who were in receipt of the Pandemic Unemployment Payment (PUP) at the end of June from the numbers in employment during Q2 2020. On this adjusted measure, the level of employment stood at 1.78 million at the end of June, and 1.95 million at the end of July.

In the week up to 31st August, 225,000 people were on the COVID-19 Pandemic Unemployment Payment (373,000 lower than 5th May); and 69,500 employers were registered for the COVID-19 Wage Subsidy Scheme, representing 365,000 workers. In addition, 244,562 people were on the Live Register at the end of July, which represents an increase of 38,166 on July 2019.

It is clear that the economic, social and political imperative is to get as many people back to work as quickly and as sustainably as possible. In this context it is essential that a longer-term perspective will be the key theme in Budget 2021 and the National Economic Plan.

The overall economic environment in 2021 is likely to be challenging. Unemployment will be much higher than in recent years; the public finances will be in significant deficit; the external economic environment will be more challenging; and Brexit still represents a serious threat to the wellbeing of the Irish economy.

The fiscal challenges informing Budget 2021 are clear. In 2019 the General Government surplus was equivalent to around 0.4% of GDP or €1.3 billion. Following the response seen to date by Government and the slowdown in economic activity, a deficit more than €25 billion looks realistic for 2021.



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In the first 8 months of the year, the Exchequer ran a deficit of €9.5 billion, compared to a deficit of €625 million in the same period in 2019.

In the circumstances, such a deficit for the full year is justifiable and unavoidable, as it is necessary to support the economy, business, and ultimately employment in the face of an unprecedented and totally unexpected economic shock. Such support will also be required in 2021.

The stance of Budget 2021 must be focused on supporting economic recovery and employment creation.

The Hair and Beauty sector has been very seriously impacted by COVID-19. It is a labour-intensive sector that supported 25,800 jobs at the end of 2019, and those jobs are spread throughout the country. The sector is now on its knees and many businesses are struggling to survive.



ECONOMIC CONTRIBUTION OF HAIR AND BEAUTY SECTOR

The Hair and Beauty Services sector is a very labour-intensive area of economic activity, and it has a broad regional footprint, with salons in most villages, towns, and cities around the country.

Its value as a personal service both at an economic and social level was highlighted during the forced closure of the sector from March until 29th June 2020. The economic and employment contribution is very important, but the positive impact on mental health and wellbeing should not be ignored.

Based on the consumer expenditure weightings contained in the Consumer Price Index (CPI), it is estimated that in 2019, Irish consumers spent around €1.1 billion on Hairdressing services, and €360 million on Health and Beauty treatments. In total, expenditure of €1.46 billion is equivalent to 1.3% of total consumer expenditure.

Table 1: Breakdown of Employment & Number of SALONS by County

	NUMBER OF EMPLOYEES	NUMBER OF SALONS
Carlow	289	138
Dublin	6,965	2,131
Kildare	1,184	416
Kilkenny	555	161
Laois	462	155
Longford	201	97
Louth	753	316
Meath	1,145	331
Offaly	480	183
Westmeath	482	198
Wexford	877	288
Wicklow	885	269
Clare	632	232
Cork	2,910	1,048
Kerry	810	344
Limerick	1,037	413
Tipperary	913	383
Waterford	573	256
Galway	1,331	533
Leitrim	183	95
Mayo	746	280
Roscommon	320	116
Sligo	359	158
Cavan	441	194
Donegal	921	392
Monaghan	348	145
Not Stated	0	16
TOTAL	25,800	8,288

Source: CSO Labour Force Survey, Revenue Commissioners & Census 2016.

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The Hair and Beauty sector has a very strong and broad regional footprint, with a significant number of businesses and considerable employment in every county of the country. Data compiled from the CSO and the Revenue Commissioners estimate that there were around 9,286 Hair and Beauty salons in Ireland in 2019. Salons have a strong presence on the streets of Ireland's villages, towns and cities, and they are instrumental in driving footfall.

CSO labour force data estimate that in the final quarter of 2019, 25,800 people were employed in the Hairdressers & Related Services. Table 1 provides a breakdown of the salons and employment by county.

Figure 1 shows the trend in employment in Hairdressing and Related Services in recent years. Employment has grown by 25.9% from a low of 20,500 in the second quarter of 2011 to 25,800 in the final quarter of 2019, which is equivalent to 1.1% of total employment in the economy.

However, during 2019, there was a decline of 2,200 or 7.9% in the numbers employed. The largest single cause of this decline in employment during 2019 was the abolition of trainee rates. Trainee employment was ceased due to the high additional costs of employing them, and new trainee hires ground to a standstill during 2019. Unfortunately, trainees are deemed the most expendable costs in a salon when financial difficulties are experienced, because they are basically non-earning staff members. Other factors that contributed to the decline in employment included the increase in the VAT rate from 9% to 13.5% in Budget 2019; a more cautious consumer; and the ongoing growth in the 'informal' economy in the hairdressing sector.

Figure 1: Employment in Hairdressers & Related Services



Source: CSO

Figure 2 shows the trend in average consumer prices for all items in the CPI; Hairdressing; and Health and Beauty Treatments.

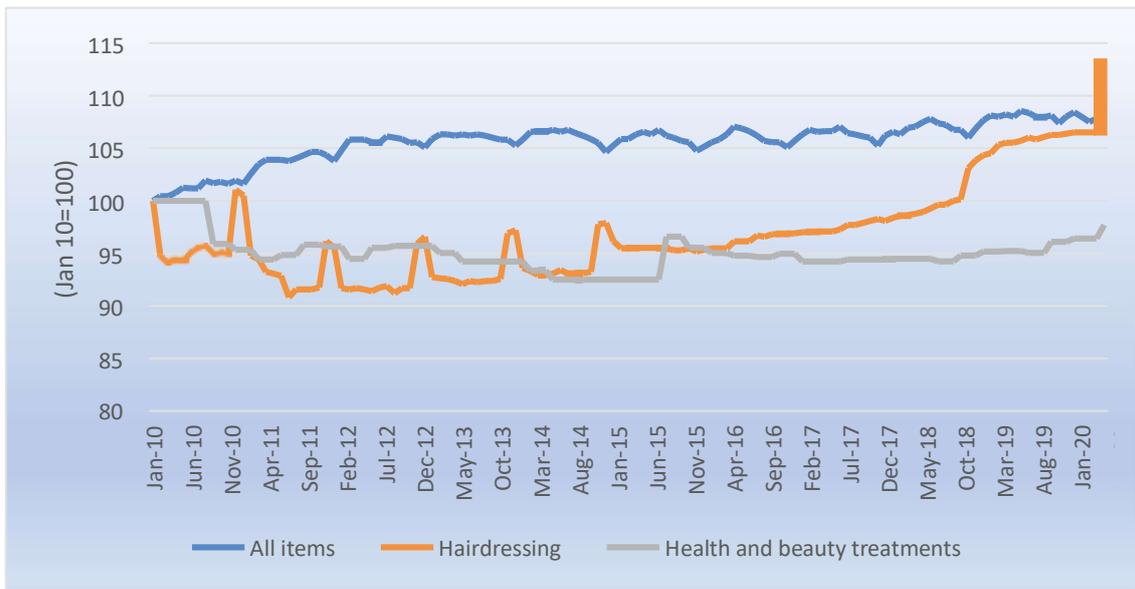
The average price of hairdressing services increased by 13.3% between January 2010 and July 2020. There were two occasions over that period when there were significant increases. Firstly, following the increase in the VAT rate for hairdressing services from 9% to 13.5% in Budget 2019, the average price of hairdressing services increased by 3% in January 2019. Secondly, in July 2020, CSO inflation data show that average prices for hairdressing services increased by 6.4%, most probably in response to the increased costs and reduced capacity as a result of COVID-19 health and safety protocols. Post-COVID

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wages have not fallen in the sector. In addition, margins have been squeezed in recent years due the increase in trainee rates of pay; higher supplier costs; and higher rents and insurance costs. So for many businesses owners in what is a low-margin sector, it was necessary to increase prices to maintain business sustainability and survival.

The average price of health and beauty treatments declined by 2.3% between January 2010 and July 2020.

Figure 2: CONSUMER Price TRENDS



Source: CSO Statbank

For many consumers, expenditure on hairdressing services is a discretionary form of spending, and is heavily influenced by the health of the economy. Despite the recovery in the economy since 2014, the personal sector has been financially stretched as a result of the high personal tax burden; low growth in wages; and more precarious employment. The net result is that seeking increased value for money has become a significant characteristic of the personal sector. This has resulted in significant growth in the 'informal' economy component of hairdressing, and a lack of pricing power by legitimate operators.

COVID-19 has exacerbated these pressures. Hairdressing is based on human contact, so there will inevitably be a reluctance by some customers to visit the salon. In addition, operators are applying strict health protocols, including PPE equipment, sanitisers, and social distancing. The net result is that costs have been increased and customer turnover has been reduced. McKinsey has suggested that the global beauty market of \$500 billion will decline by 30% in 2020 as a result of COVID-19. Apart from the economic impact, more people are working from home, so there is less demand for beauty care.

BUDGET 2021 AND THE HAIRDRESSING SECTOR

Budget 2021 must recognise the significant economic and financial contribution that the Hairdressing sector makes all over the country; the current business environment in which it operates; the unfair competition from the 'informal' sector; and the impact of COVID-19 on business operations, revenues, and profitability.

Given the labour market challenges facing the economy at the moment, it is imperative that policies are put in place to preserve employment in a sector that has a very strong regional footprint. This is particularly important in the context of the job pressures that the rural regions in particular are facing as a result of the impact of COVID-19 on the tourism sector.

The following initiatives and policies should be included in Budget 2021 to support legitimate businesses and employment in the Hairdressing sector.

REDUCED VAT RATE

To boost employment in the aftermath of the 2007/08 economic and financial shock, the Department of Finance cut the VAT rate from 13.5% to 9% for a range of activities, including Hairdressing on 1st July 2011. Research conducted by the Department of Finance (2018) shows that between 2011 and 2016, employment in the Hairdressing & Beauty sector increased by 25%. CSO data show that between the second quarter of 2011, just before the 9% VAT rate was introduced and the final quarter of 2018, just before the VAT rate was increased, employment in the sector expanded by 36.6%. In the 12-month period following the increase in the VAT rate, employment declined by 7.9%.

The main benefit of the last VAT reduction was that salons reduced their prices and this created increased consumer demand, and more regular visits to the salon. This helped business survival and employment levels. Indeed, in July 2011 the average consumer price of hairdressing services declined by 2.2% compared to the previous month.

In terms of boosting employment in the sector, the VAT reduction was effective and contributed to the significant growth in employment that occurred. In Budget 2019, a decision was taken to increase the VAT rate for the sector back to 13.5%. This is even though the sector accounted for less than 4% of the 9% VAT activities. The increase of 50% in the VAT burden resulted in an increase of 3% in the average price of hairdressing services in January 2019. This price increase elicited a negative consumer reaction and pushed more customers towards the informal operators who pay no VAT or any other taxes. The evidence suggests that the higher the tax burden on the Hairdressing sector, the more operators will be pushed into the informal segment of the industry.

Between 2012 and 2016, the average annual cost of the VAT reduction for the Hairdressing sector was €26 million.

In the context of all of the pressures on the sector at the moment and the very uncertain outlook, it would be very supportive of the Hairdressing sector to cut the VAT rate to 5% until the end of 2021, and then revert to the 9% that prevailed prior to the increase in Budget 2019 on a permanent basis.

The cost of reducing the VAT rate to 5% is estimated at €57 million in a full year. Such a move would help business margins and/or boost consumer demand, depending on the incidence of the tax reduction. This would sustain employment, and crucially remove some of the competitive advantage of the informal sector, which is operating outside of the tax system.

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TRAINING RATES

In March 2019, under the Employment (Miscellaneous Provisions) Act 2018, the payment of training rates to trainee hairdressers was abolished.

Trainees over the age of 20 are now legally entitled to the National Minimum Wage. For trainees under the age of 20, lower hourly rates of pay can be paid. For those aged 18 or under, the minimum hourly rate of pay is €7.07; for those aged 18, it is €8.08; and for those aged 19, it is €9.09.

Availing of the previous trainee rates assisted salons in carrying the financial cost of a 3-4 year training program to develop the trainees into qualified stylists.

The changes introduced in the Employment (Miscellaneous Provisions) Act 2018 has made it less attractive for operators to take on trainees. So rather than taking on the extra costs associated with trainees, many operators are now seeking to recruit more experienced staff, which in turn is pushing up wage costs.

Taking in trainees has become significantly less attractive for many operators, and the lack of trainees in the sector is becoming problematical and will get worse in the future.

To address this problem, the Government should introduce a flat rate subsidy per trainee, which would be administered in the same way as Employment Wage Subsidy Scheme. It could be monitored the same way Workplace Relations Commission monitored the trainee rates, and government resources are already there to manage it. The sector fully supports the Apprenticeship scheme, which will ultimately benefit the industry, but during the transition period direct cash support to safeguard and generate trainee rates will be required. There is currently only one test group running in one class in the Limerick and Clare ETB. Finglas is not starting until January 2021. Another group is not due to start until June 2021 This scheme needs to be speeded up as quickly as possible.

Many salons already have their own structured training programmes. Trainees were training in 3 to 4-year programmes. The intake of these trainees has now largely stopped since the trainee rates were abolished in March 2019. This is going to lead to a shortage of newly qualified stylists in future years which will be detrimental to the industry.

The hairdressing sector has always been an attractive career choice for women, and this is for a great variety of reasons. One of these is that it offers great flexibility for mothers returning to work after having a baby, as hairdressing offers a great deal of flexible working hours. The removal of the trainee rates and the slow rollout of the National Hairdressing Apprenticeship means many young women are not being given the opportunity to enter the sector or advance their careers and professional development with recognised qualifications.

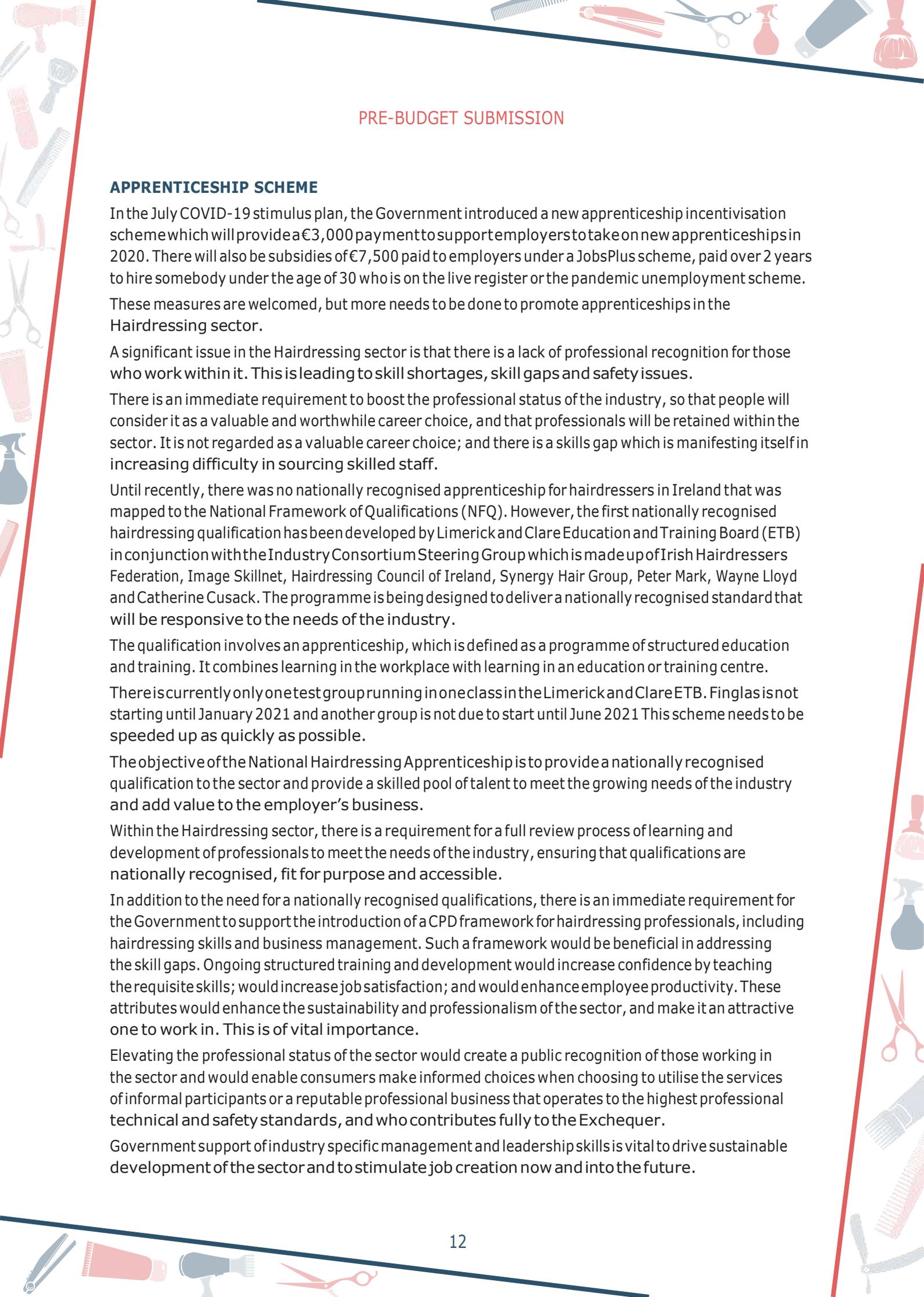
IMPACT OF TRAINEE RATES

	Trainee Rates 01.01.19	Pay Rates 04.03.19	Increase
1st year	7.35	10.10	2.75
2nd year	7.84	10.10	2.26
3rd year	8.82	10.10	1.28

Effect:-

1. Job losses
2. Salon closures

Average salon	No.	Hours	Rate Increase	€ Increase	Weeks	Annual Gross	Er Prsi	Annual Total Cost
1st year	1	39	2.75	107.225	52	5,577	491	6,068
2nd year	1	39	2.26	88.114	52	4,583	403	4,987
3rd year	1	39	1.28	49.92	52	2,596	228	2,824
								13,879



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APPRENTICESHIP SCHEME

In the July COVID-19 stimulus plan, the Government introduced a new apprenticeship incentivisation scheme which will provide a €3,000 payment to support employers to take on new apprenticeships in 2020. There will also be subsidies of €7,500 paid to employers under a JobsPlus scheme, paid over 2 years to hire somebody under the age of 30 who is on the live register or the pandemic unemployment scheme.

These measures are welcomed, but more needs to be done to promote apprenticeships in the Hairdressing sector.

A significant issue in the Hairdressing sector is that there is a lack of professional recognition for those who work within it. This is leading to skill shortages, skill gaps and safety issues.

There is an immediate requirement to boost the professional status of the industry, so that people will consider it as a valuable and worthwhile career choice, and that professionals will be retained within the sector. It is not regarded as a valuable career choice; and there is a skills gap which is manifesting itself in increasing difficulty in sourcing skilled staff.

Until recently, there was no nationally recognised apprenticeship for hairdressers in Ireland that was mapped to the National Framework of Qualifications (NFQ). However, the first nationally recognised hairdressing qualification has been developed by Limerick and Clare Education and Training Board (ETB) in conjunction with the Industry Consortium Steering Group which is made up of Irish Hairdressers Federation, Image Skillnet, Hairdressing Council of Ireland, Synergy Hair Group, Peter Mark, Wayne Lloyd and Catherine Cusack. The programme is being designed to deliver a nationally recognised standard that will be responsive to the needs of the industry.

The qualification involves an apprenticeship, which is defined as a programme of structured education and training. It combines learning in the workplace with learning in an education or training centre.

There is currently only one test group running in one class in the Limerick and Clare ETB. Finglas is not starting until January 2021 and another group is not due to start until June 2021. This scheme needs to be speeded up as quickly as possible.

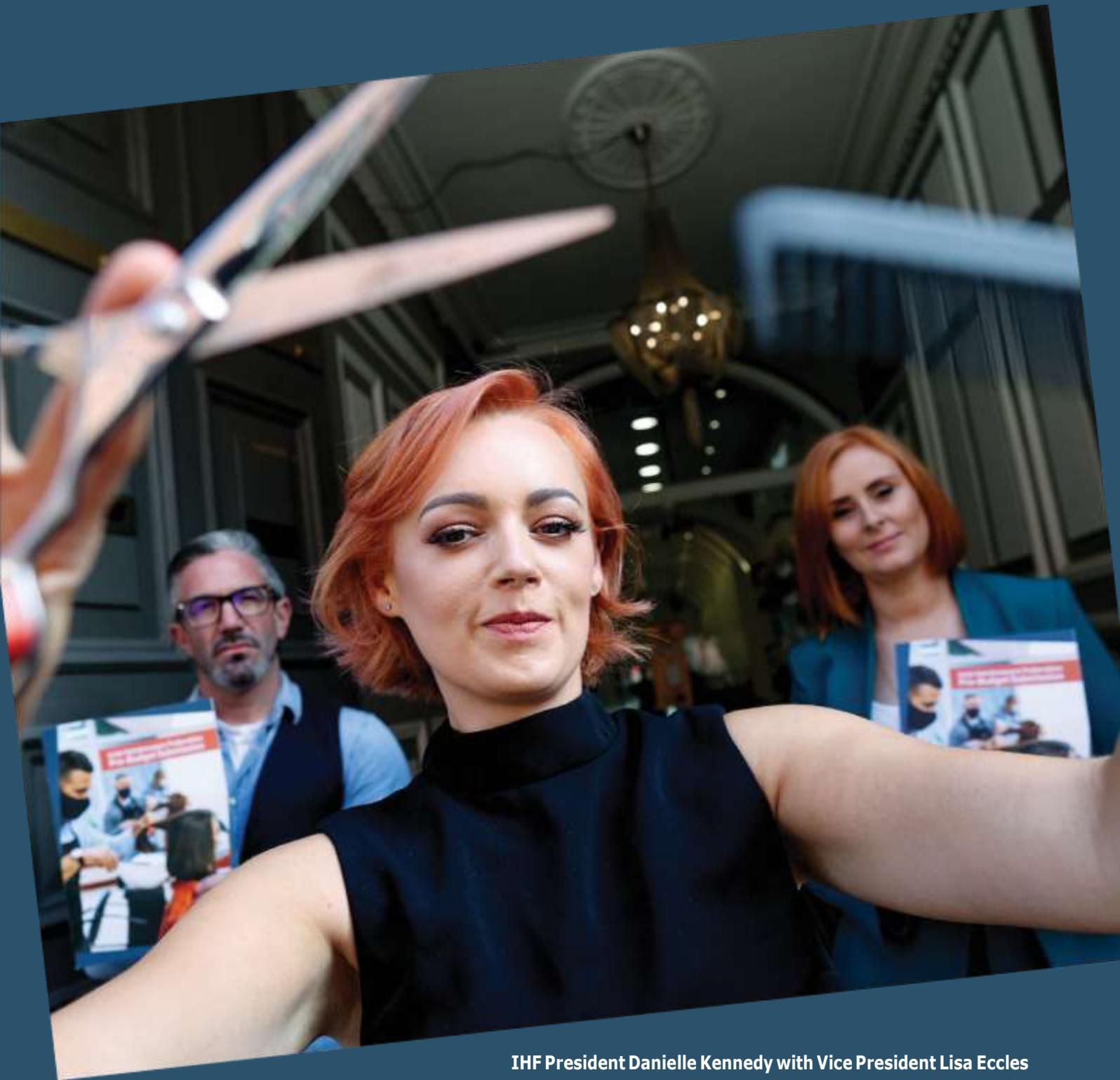
The objective of the National Hairdressing Apprenticeship is to provide a nationally recognised qualification to the sector and provide a skilled pool of talent to meet the growing needs of the industry and add value to the employer's business.

Within the Hairdressing sector, there is a requirement for a full review process of learning and development of professionals to meet the needs of the industry, ensuring that qualifications are nationally recognised, fit for purpose and accessible.

In addition to the need for a nationally recognised qualifications, there is an immediate requirement for the Government to support the introduction of a CPD framework for hairdressing professionals, including hairdressing skills and business management. Such a framework would be beneficial in addressing the skill gaps. Ongoing structured training and development would increase confidence by teaching the requisite skills; would increase job satisfaction; and would enhance employee productivity. These attributes would enhance the sustainability and professionalism of the sector, and make it an attractive one to work in. This is of vital importance.

Elevating the professional status of the sector would create a public recognition of those working in the sector and would enable consumers make informed choices when choosing to utilise the services of informal participants or a reputable professional business that operates to the highest professional technical and safety standards, and who contributes fully to the Exchequer.

Government support of industry specific management and leadership skills is vital to drive sustainable development of the sector and to stimulate job creation now and into the future.



IHF President Danielle Kennedy with Vice President Lisa Eccles and Executive Committee Member Mark O'Keeffe

