



SESSION III: EMPLOYMENT IN THE TOURISM INDUSTRIES: MEASUREMENT ISSUES AND CASE STUDIES



Chair
Mr. Peter Laimer

Deputy Director, Directorate Spatial Statistics, Statistics Austria

After finishing two University Courses related to Export and Tourism at the University of Economics Vienna 1990 and the study in Geography at the University of Vienna in June 1992, Mr. Laimer has been started working at Statistics Austria in May 1993 and since 1998 he is responsible for the official "Tourism and Travel Statistics" (i.e. Tourism Satellite Accounts, Travel Balance of Payments).

Mr. Laimer is presently Deputy Director of the Directorate "Spatial Statistics" at Statistics Austria, which involves apart from Tourism and Travel Statistics, Motor Vehicles Registration Statistics, Road Safety Statistics, Environmental and Energy Statistics and Agriculture and Forestry Statistics.

Since mid 1990ies he is Austrian delegate of several Working Groups and Task Forces at EUROSTAT, OECD and UN/ UNWTO, 1999-2003 he was/is participating as a technical expert in the EUROSTAT MedTour-program (MedStat I) related tourism statistics (Jordan; doing TES-courses), continuing the work within MedStat II since 2007 (Lebanon; in particular related Tourism Satellite Accounts).

Between 2000 and 2002 Mr. Laimer was working as a consultant on methodological issues related to "Tourism Statistics" and "Tourism Satellite Accounts" (TSA) for EUROSTAT (i.e. co-author of the "European Implementation Manual on TSA"). Since 2008 he is working as a consultant for the European project 2008/2009 related TSA.

Since 2004 Mr. Laimer is doing consultancies in several countries (i.e. Croatia, Slovenia, Hungary, Taiwan, Cyprus) related Tourism Statistics in general and Tourism Satellite Accounts in particular.

Between 2001 and 2006 he was chairman of the "Statistical Working Party" of the OECD Tourism Committee; since 2006 he is "statistics expert" of the OECD Tourism Committee.

Since 2000 Mr. Laimer is teaching at the University of Linz (University Course in Tourism Management) and at the Bachelor's Programme in Tourism Management in Vienna, giving regular lectures in Statistics with particular stress on tourism.

Since 2003 he is member of the "International Association of Scientific Experts in Tourism" (AIEST).



Keynote speaker
Mr. Igor Chernyshev

Senior Statistician, Bureau of Statistics, International Labour Organization (ILO)

Mr. Igor Chernyshev is a Senior Statistician at the Bureau of Statistics, ILO Policy Integration and Statistics Department. He is in charge of the developmental work on statistical measures of decent work and quality of employment within the context of the Bureau's work programme. His major areas of expertise also include preparation and implementation of the Labour Force and Enterprise Labour Flexibility Surveys, development of the ILO-comparable employment and unemployment estimates, and recommendations on the reconciliation of data from different sources.

Mr. Chernyshev largely contributed to the preparation and has been responsible for the implementation of the statistics initiatives launched within the context of the ILO/UNWTO Joint Project on Employment in the Tourism Industries. As a member of the United Nations Expert Group on Tourism Statistics, he was in charge of the preparation of Chapter 7: Employment in the Tourism Industries included for the first time in the International Recommendations for Tourism Statistics 2008 (IRTS 2008). Also, he initiated, conceived and guided the preparation of the joint ILO/UNWTO Publication Sources and Methods in Labour Statistics – Employment in the Tourism Industries (Special Edition).

Mr. Chernyshev participated in and contributed to the work of the 14th - 17th International Conferences of Labour Statisticians (ICLS) and was Assistant Secretary-General of the 18th ICLS (24 November- 5 December 2008).



Prior to joining the ILO in November 1986, Mr. Chernyshev worked for many years at the Central Bureau of Statistics of Ukraine as a Deputy Head, Statistical Information Department. He is the author and co-author of 11 manuals and technical guides, as well as over 40 articles and conference papers.

Keynote session III “EMPLOYMENT IN THE TOURISM INDUSTRIES: MEASUREMENT ISSUES AND CASE STUDIES”

Abstract:

As in any other sector of the economy, employment is an important dimension to characterise and acknowledge the importance of tourism from the productive, social and strategic points of view.

Tourism offers a wide variety of types of occupation, from low-skilled, low-value-added to very high-skilled and very high-value-added. The tourism industries attract top level managers specialised in hotel, catering and tourism-characteristic activities.

The tourism sector is therefore a source of potential economic growth, job creation, relatively simple access to income and a means of poverty reduction.

However, the employment in the tourism industries, in general, and the economic value of tourism in terms of employment, as a source of productive labour in particular, remain inadequately measured and insufficiently studied.

To fill this gap, the International Labour Organization (ILO) and the World Tourism Organization (UNWTO) are collaborating in the measurement of employment and decent work in tourism. This collaboration was formalised through the agreement on cooperation signed between the two organisations, which is also known as the *ILO/UNWTO Joint Project on Employment in the Tourism Industries*.

The paper presents the project's statistics initiatives, highlights the challenges and suggests a roadmap for the project's implementation.



Panellist
Mr. Michel Dubreuil

Senior Market Analyst, Canadian Tourism Commission

Michel Dubreuil is a Senior Market Analyst with the Canadian Tourism Commission in Vancouver. The objective of the Research Unit is to provide the CTC and its partners with the most relevant business intelligence to support effective and strategic business marketing and investment decisions. Within the CTC Research Unit, Dubreuil is responsible for the management of core surveys and macro-economic projects with Statistics Canada, for market research projects related to European markets, and the design and development of market investment models.

Dubreuil holds a graduate degree in Agricultural Economics from the University of British Columbia. Prior to joining the CTC in February 2007, Dubreuil worked in British Columbia as a bio-economic analyst in the salmon aquaculture industry and later in Ottawa as an economist in the poultry sector.

The CTC is a national marketing organization whose vision is to convince the world to explore Canada. With its partners in the tourism industry and all levels of government, the CTC advertises and markets Canada in 12 countries around the world; conducts industry research and studies; and promotes product and industry development.

Abstract:

The Human resource module (HRM) of the Tourism Satellite Account, developed by Statistics Canada in Partnership with the Canadian Tourism Human Resource Council and the Canadian Tourism Commission, provides detailed information on employment related to tourism at the national level. The HRM provides information on the number of jobs, hours worked, and employment earnings according to whether jobs are full-time or part-time, by occupation, age, gender and immigration status. The HRM presents a snapshot of the tourism industry and the associated tourism occupations, as well as, insights into trends over time. It provides a resource for training and planning for tourism.



This presentation will outline the initial objectives that inspired the development of the HRM and will explore its contribution in strengthening the recognition of the importance of tourism employment to the Canadian economy by both the public and policy makers. Next, the presentation will highlight the role of the HRM as an instrument for shaping human resource policies and for making adjustments to tourism training. In particular, it will discuss how the HRM data is incorporated into the labour supply-and-demand projection models, how it serves as a conceptual framework to the development of supplementary regional and sector labour market evaluations initiatives and how it provides benchmark indicators to assess the productivity and competitiveness of tourism occupations. Finally, the presentation will comment on various avenues for improvement related to occupational classification and module extensions at the provincial and territorial levels



Panellist
Mr. Bruce Bassett

Research Manager, Ministry of Tourism, New Zealand

Bruce Bassett is the Research Manager within the New Zealand Ministry of Tourism. Bruce manages Ministry's Research Team that is responsible for the delivery of New Zealand's core tourism dataset, including five statistical collections, the Tourism Satellite Account and forecasts. The team also conducts analysis of the data and undertakes a number of research projects to address more specific knowledge requirements. The outputs are disseminated through its website at www.tourismresearch.govt.nz.

Bruce has been involved in this area for more than a decade, initially from a policy perspective and latterly in managing the team to deliver and improve the statistical resources and to put in place further information and research for the New Zealand tourism sector.

Bruce has tertiary qualifications from Otago and Lincoln Universities in New Zealand and resides in Wellington.

Abstract:

Over 2006 and 2007, industry and government partners collaborated to develop the New Zealand Tourism Strategy 2015 (NZTS 1015) to provide a long term perspective to guide the sector's development and to identify any constraints to this development.

In preparing the NZTS 2015, considerable attention was paid to the workforce requirements of the tourism sector given the critical importance of high calibre personnel to the operation of a high quality industry. At the time, the sector was facing work-force constraints, particularly for certain skills in particular regions and over the peak season. In the wider context, the New Zealand economy was experiencing near full employment, with high levels of engagement in paid employment and low levels of unemployment.

To inform the Strategy development process, analysis was undertaken using employment data from the Tourism Satellite Account for measures of total tourism employment and the compensation of employees. This information was compared to employment information from the wider economy, particularly the National Labour Force Projections prepared by Statistics New Zealand. Also considered was the Tourism Workforce and Skill Projections prepared by an economic consultancy that provided expectations of tourism workforce needs to 2010.

These sources of information enabled the team developing the NZTS 2015 to test the employment requirements of the tourism sector under different scenarios against the expected growth of the overall New Zealand workforce.

The analysis undertaken found that at a base level growth of 4% for international visitors and 1% for domestic travel, tourism employment requirements would grow at 2.4% per annum compared to 1.4% for the total New Zealand workforce. At scenarios with higher rates of tourism growth, for instance 8% for international tourism, the discrepancy between tourism employment needs and the total workforce increased to a point where it was clear that the workforce would be a serious constraint to sector growth unless mitigating actions are taken.

The significance of the potential of tourism workforce constraints was compounded when TSA data on the compensation of workers was considered. This found that the compensation of tourism-characteristic and tourism-related industries was significantly below that of non-tourism related industries indicating that attracting quality staff into the sector would be increasingly difficult.

In recognition of this, the NZTS 2015 contained a number of recommendations designed to ensure that the sector



would be able to attract and retain appropriately skilled and trained staff. These include focussing on improving productivity of employees (such as through technology, developing less labour intensity visitor experiences) that in turn can lead to better remuneration levels, better career options and more flexible work options. Seeking targeted migration to fill critical skill gaps was also recommended. Funding from the NZTS 2015 Implementation Fund has been made available to support the delivery of a number of the Strategy's workforce recommendations. Note that in the period since the NZTS 2015 was launched, tourism demand has grown at a lower level than even the low scenario used in the strategy development analysis. Together with the overall weakening of the economy due to the global financial crisis, much of the pressure generated by a constrained workforce has been significantly reduced. However, it is the view of the Ministry of Tourism that in the long term, workforce constraints will continue to be a real and serious issue for the sector to address.



Panellist
Mr. Roberto Zamboni

Técnico en Planificación, Institute of Applied Economic Research (IPEA)

Roberto Aricó Zamboni, nacido en São Paulo en 1947.

Economista formado por la Universidad de Sao Paulo - USP y posgraduado en Sociología del Desarrollo en el Instituto de Estudios de Desarrollo Económico y Social de la Universidad de París I.

Técnico en Planificación del Instituto de Pesquisas Económicas Aplicadas – IPEA, vinculado a la Presidencia de la República.

Coordina las investigaciones que dan apoyo al Sistema Integrado de Informaciones a Cerca del Mercado Laboral en el Sector Turismo

Abstract (Spanish):

El Sistema de estadísticas del turismo de Brasil cuenta con dos iniciativas destinadas a medir la importancia socioeconómica del turismo. Una es desarrollada por el Instituto Brasileño de Geografía y Estadística - IBGE y, la otra, por el Instituto de Investigación Económica Aplicada – IPEA. El IBGE desarrolla la Cuenta Satélite del Turismo de Brasil, que abarca un conjunto de informaciones de naturaleza estructural y periodicidad anual, relacionadas a las Actividades Características del Turismo – ACTs. El IPEA implantó el Sistema Integrado de Informaciones a respecto del Mercado de Trabajo del Sector Turismo – SIMT, que presenta estimativas mensuales, desagregadas por estado (provincia), acerca de la importancia socioeconómica y la evolución del turismo, desde la óptica de su mercado de trabajo.

Las estimativas del SIMT son elaboradas con base en dos registros administrativos del Ministerio del Trabajo y Empleo, la Relación Anual de Informaciones Sociales - RAIS y la Rol General de Empleados y Desempleados - CAGED, en la Investigación Nacional por Muestra de Residencias – PNAD, del IBGE, y en una investigación de campo realizada por IPEA, en ocho mil establecimientos que operan en siete grupos de ACTs: alojamiento, alimentación, transporte, auxiliar de transportes, agencias de viaje, alquiler de transportes y cultura y ocio. La investigación de IPEA objetivó conocer la percepción de los gerentes de esos establecimientos sobre la composición de su clientela, o sea, el porcentual de turistas y de residentes atendidos, en los doce meses del año. Los resultados de esa investigación posibilitaron la construcción de coeficientes de demanda turística en las siete ACTs, para cada estado brasileño.

Las estimativas de empleo formal del turismo son elaboradas a partir de la combinación de los coeficientes de demanda turística con los datos de la RAIS, que informan el total de empleados en las siete ACTs, para los doce meses del año anterior. Con los datos mensuales de contrataciones y exoneraciones levantadas por el CAGED, el IPEA divulga, mensualmente, estimativas preliminares del empleo en las ACTs, por estado, con diferencia de treinta días.

Las estimativas de la ocupación informal del turismo son elaboradas, inicialmente, para el mes de septiembre de cada año, a partir de datos de la PNAD, para cuatro grupos de ACTs: alojamiento, alimentación, transporte y otros (que incluye auxiliar de transportes, agencias de viaje, alquiler de transporte y cultura y ocio). Se hace una compatibilización entre los datos de la PNAD y los de la RAIS, y, pronto se hace el cruce de esos datos con los coeficientes de demanda turística. Se elaboran también estimativas de la ocupación informal en los otros meses del



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año, con base en la evolución mensual estimada para la ocupación formal.
Las estimativas de la ocupación en las ACTs, los indicadores de importancia relativa, evolución y formalidad de la mano de obra en las ACTs, el perfil individual y ocupacional de los empleados en las ACTs y los estudios realizados en el ámbito del SIMT se encuentran disponibles en la dirección: www.ipea.gov.br, en el *link* "Empleo en el Turismo"



Panellist
Mr. Eduardo Nunes

President, Brazilian Institute of Geography and Statistics

PhD in Economics
President of the Brazilian Institute of Geography and Statistics (IBGE), since February 2003
Economist of IBGE, since 1980

Chief of National Accounts (1982-1987; 1992 – 1995 and 2000 – 2003)

Chief of Regional Accounts (1996 – 2000)

Professor of Economics in PUC University of Rio de Janeiro – Brazil, since 2004

Professor of Economics in Cândido Mendes University of Rio de Janeiro – Brazil (1980-2004)

Consultant of World Bank and UNDP for National Accounts – Mozambique (1987 – 1990)

President of 17th International Conference of Labor Statistics (ILO, Geneve, 2003)

President of Rio Group on Poverty Statistics (UNSC, NY, 2003 – 2006)

President of Committee on Tourism Statistics (WTO, Madrid, 2006 – 2010)

Member of the Bureau of the Conference of European Statisticians (Geneve, 2006-2009)

President and Member of the Bureau of the Conference of American Statisticians (Santiago, 2003-2006)

No abstract is available



Panellist
Mr. Frédéric Tardieu

Chief, Tourism Statistics, National Institute for Statistics and Economic Studies

Frédéric Tardieu est responsable du système d'enquêtes sur le tourisme à l'Institut National de Statistiques et des Etudes Economiques depuis janvier 2009, date à laquelle l'Institut statistique national a repris la conduite de ces travaux. Auparavant il assumait cette fonction, depuis 2005, au sein de l'administration du Tourisme en tant que chef du bureau des Etudes, des Statistiques et des Comptes Economiques. Le système d'enquêtes français, relevant de la statistique publique, comprend des enquêtes auprès des hébergements, une enquête auprès des ménages sur le tourisme des personnes résidant en France et une enquête aux frontières sur le tourisme international.

De 2006 à 2008 Frédéric Tardieu a conduit le projet de refonte des comptes satellites du tourisme pour les rendre conformes au cadre conceptuel promu par l'Organisation Mondiale du Tourisme, l'Organisation de Coopération et de Développement Economique, et Eurostat. La France publiera à partir de 2009 son compte satellite dans cette nouvelle forme.

Il a aussi participé à des travaux d'étude sur la part de l'emploi lié au tourisme, sur l'économie présentielle : approches qui proposent des synthèses de sources administratives et d'enquêtes sur le tourisme.

Frédéric Tardieu a organisé le 9eme Forum International des Statistiques du Tourisme qui s'est déroulé à Paris les 19, 20 et 21 novembre 2008. Evènement qui se tient tous les deux ans, sous l'égide de l'OCDE et d'Eurostat.

Abstract:

The repercussions of tourism on a territory can be multiple. The number the paid employment generated by the tourist frequentation in is an essential component. To estimate this manpower is however a delicate exercise. A first approach consists in deducting the present employment in the activities which are completely related to tourism: thus all the jobs related to hotel trade or the ski lifts, are tourist. For the other activities, it's the addition of population induced by the presence of tourists which causes a surplus of employment and we can consider that only part of the employment is related to the tourist frequentation. Thus, for activities such as the restoration or the food trade, which offer their services to the local population and to the tourists, it is relevant to include part of employment in the tourist employment.

A study of the Management of Tourism showed how this population presents and the economy that it generates varied according to places' and the seasons.

The INSEE developed a method which helps to estimate a manpower of the paid employment related to the tourist frequentation, declinable temporally (according to the month or seasons') and by group of activities.

In 2003, in the whole of the Metropolitan France, we estimate thus that 894.000 paid employment (representing 661 000 full time equivalents) is directly generated by the presence of tourists.

The weight of tourism in the paid employment is however very variable, in the space as well as in time (during the year).



Panellist
Mr. Raj Nath Pandey

Additional Director General, Ministry of Tourism, India

After attaining the Ph. D. in Statistics, he joined the Indian Statistical Service (official statistician) of the Government of India in 1980. In about 28 years of service, he has served various Ministries/organization such as National Statistical Office, National Sample Survey Organisation, Ministry of Energy, Ministry of Industry, etc. He has also worked with the United Nations Population Fund (UNFPA) in Mongolia and with UNDP in Afghanistan. He has published about 60 research papers in the reputed national and international research journals. He also represents India in the Committee on Statistics of the UN World Tourism Organisation.



In his current assignment, as Additional Director General, he is in-charge of Statistics and Market Research Division of the Ministry of Tourism. The work involves the release of monthly estimates of foreign tourist arrivals and foreign exchange earnings from tourism in India, release of annual publication India Tourism Statistics giving time series data on various aspects of tourism, undertaking/sponsoring studies to get important inputs for preparations of plans and policies to promote tourism in the country.

The work relating to the first Tourism Satellite Accounts (TSA) of India for the year 2002-03 was handled in his Division. Through TSA, contribution of tourism sector in the country's GDP and total employment is worked out. Now work has started for preparation of the 2nd TSA for India. In this connection, Survey on domestic tourism has started from July 2008 and will be over in June 2009. International Passenger Survey is also likely to start from May 2009. To improve the data regarding the tourist visits (both nationals and foreigners) at sub-national level, a new methodology has been developed which will be used in the surveys to be conducted in 5 States from April, 2009

Abstract:

Employment in various sectors of the economy is one of the most affected segments due to the current global financial meltdown. It is anticipated that employment in tourism sector has been most serious hit because expenditure on tourism is generally the first casualty in such situation. However, measuring the exact impact of the financial meltdown on employment in tourism sector has its own problems.

Tourism Satellite Account (TSA) framework has been well recognized to assess the employment in the tourism sector. However, preparation of TSA with regular periodicity has been a problem area in most of the developing country. In India, first TSA was prepared in 2006 for the reference year 2002-03. Estimation of the employment in tourism sector, limited to estimating the number of jobs, as a whole and its various components was attempted in the following manner.

- The principal as well as subsidiary status of workers was taken into account, as done by National Statistical Office (CSO) for estimating the total employment in the country.
- Total employment (jobs) in the economy in 2002-03 was obtained by using the data of National Sample Surveys Organization (NSSO)'s surveys of 1993-94 and 1999-2000.
- The employment estimates were worked out separately for Tourism characteristic industries and Tourism related industries.
- For Tourism characteristic industries, labour to output ratio of 57th Round of NSSO survey on Unorganized Service Sector, conducted in 2001-02, was used.
- The ratio obtained from this survey was applied to the output of these industries obtained on the basis of National Accounts Statistics (NAS) and other data sources to get the total jobs in these industries.
- The same ratios were also applied on the Tourism Demand obtained from the Domestic Tourism and International Passenger Surveys to get the tourism specific jobs in these industries.
- For tourism related industries, employment estimates prepared by CSO for the year 1999-2000 were used.
- The total jobs in 2002-03 in the economy were apportioned for the tourism related industries in the same ratio as observed in 1999-2000.
- To get the tourism specific jobs in each of these industries, the respective tourism industry ratios (TIR) were applied to the total jobs in each industry.
 - TIR for an industry is the ratio of tourism demand and value of output of that industry.
- The total of jobs in tourism characteristic industries and tourism related industries gave the total jobs, as well as tourism specific jobs in these industries.
- The total of tourism specific jobs in tourism characteristics industries and tourism related industries gave the total jobs in the tourism sector in the country.
- As done for value added, multiplier analysis was done for employment also to get the direct and indirect impact of tourism in employment.
- Employment coefficient, which is the labour to output ratio, was computed for each of the 115 sectors included in the Input Output Table to get the indirect employment in the tourism sector.
- Results are summarized in the following Table

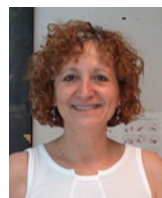


Total Employment (Million)	468.7
Total Tourism Employment (Million)	21.5
Tourism Employment Multiplier	1.8
Share of Tourism in Employment	
Direct	4.59 %
Direct and Indirect	8.27 %

Measurement Issues

Being the first exercise of its kind in India, TSA exercise did face a number of procedural and technical issues. Some of the important ones are listed below:

1. As the Domestic Tourism and International Passenger Surveys (IPS) were conducted by two agencies, putting the data in TSA format, particularly of IPS posed some problems. Data collected in IPS was not as detailed as that done in Domestic Tourism Survey.
2. Data on the supply side of the TSA was taken from the National Accounts Statistics (NAS). This comprised production accounts of tourism characteristics and tourism related industries. For most of these industries, data were not readily available as per the TSA framework. The related sectors of the NAS are at aggregated level which, only when further disaggregated, provided the information for required sector of tourism. This was done using ratios available from different surveys conducted by NSSO which is likely to affect the accuracy of the estimates. For example, for Hotel and Restaurant sector, NAS provide aggregate estimates of value added but in TSA this is taken as two different sector namely, accommodation services and food & beverage services.
3. In preparing the estimates of jobs in tourism sector, only one subsidiary economic activities of an individual was considered. In big cities, some of the persons may be engaged in more than one subsidiary activity. However, its prevalence may be very small.



Panellist
Ms. Teresa Guardia

Technical responsible of tourism statistics, Institute for Tourism Studies

Teresa Guardia, studied economics in Madrid and, through a Fulbright Scholarship, extended her education in Maryland and Washington DC. Ms. Guardia is being working as an Assistant Manager at the Institute for Tourism Studies (Instituto de Estudios Turísticos), during the last five years.

At the present moment she is the from the demand side:

- Spanish Inbound Tourism Survey (Frontur)
- Spanish Domestic and outbound Tourism Survey (Familitur)
- Spanish Inbound Expenditure Tourism Survey (Egatur)
- Tourism Employment
- Low Cost Companies
- Visitors to the Prado Museum

At the same time, Ms. Guardia takes part in the Working Group for non residents Expenditure and coordinates the technical team on statistics at the Institute. She also attends to several national and international meetings regarding to tourism statistics

Abstract:

1. Introduction. How touristic flow affects employment.
2. The empirical analysis was carried out by:
 - Macroeconomic analysis developed from the touristic demand perspective.
 - Sources: EPA (labor force survey), ECL (Update labor survey), Familitur (Spanish domestic outbound tourism survey) and Frontur (Spanish Inbound tourism survey).



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- Explanation of the variables used.
 - The effect of each explanatory variable on the fixed variable - employment -.
3. Study of cases:
 - Four touristic municipalities (analyzes the correlation between the main variables and compares the results obtained in these four municipalities)
 4. Main conclusions