

***DG EMPL - Sectoral Social Dialogue –***

**Plenary session of the HORECA committee**

**10 December 2007, Centre Borschette, Brussel**

## **Employment data in tourism statistics**

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Tourism Statistics

## Outline of the presentation

- Short introduction to tourism statistics
- Labour Force Survey & tourism employment
- Tourism Satellite Accounts & tourism employment

## Current legislation on tourism statistics **references**

- **Council Directive 95/57/EC** of 23 November 1995 on the collection of statistical information in the field of tourism
- **Commission Decision** of 9 December 1998 on the procedures for implementing Council Directive 95/57/EC
- Minor **updates** in 2004 and 2006, mainly due to enlargement

## Tourism Statistics Directive: **contents**

### **Part A: Capacity** of collective tourist accommodation

- ✓ Establishments, bed places, bedrooms

### **Part B: Occupancy** in collect. tourist accommodation

- ✓ Arrivals and nights spent (residents, non-residents)
- ✓ Occupancy rates for bed places

### **Part C: Demand:** domestic & outbound

- ✓ Number of tourism trips and nights (by destination country)
- ✓ Length of stay, organisation, principal mode of transport used, type of accommodation, expenditure

## New tourism statistics legislation: **main objectives of the revision**

- ✓ **Adapt to new or changed user needs**
  - improved timeliness
  - update list of variables
  - change data collection frequency
  
- ✓ **Further harmonisation of variables & methods**
  - improvement of comparability and completeness
  
- ✓ **Tourism Satellite Accounts (TSA)**
  - include some basic elements necessary for TSA compilation

## Tourism statistics: **derived and related fields of work**

- ✓ **Indicators on sustainability**
  - Includes employment-related indicators
  
- ✓ **Employment in the tourist accommodation sector**
  - Currently a by-product of the Labour Force Survey
  - Not covered by the legal act on tourism statistics
  
- ✓ **Tourism Satellite Accounts (TSA)**
  - A set of 10 tables, of which 1 gives employment data

## Statistics on employment in tourism: **relevance**

✓ **Tourism is an *important* and *fast growing* sector of the economy**

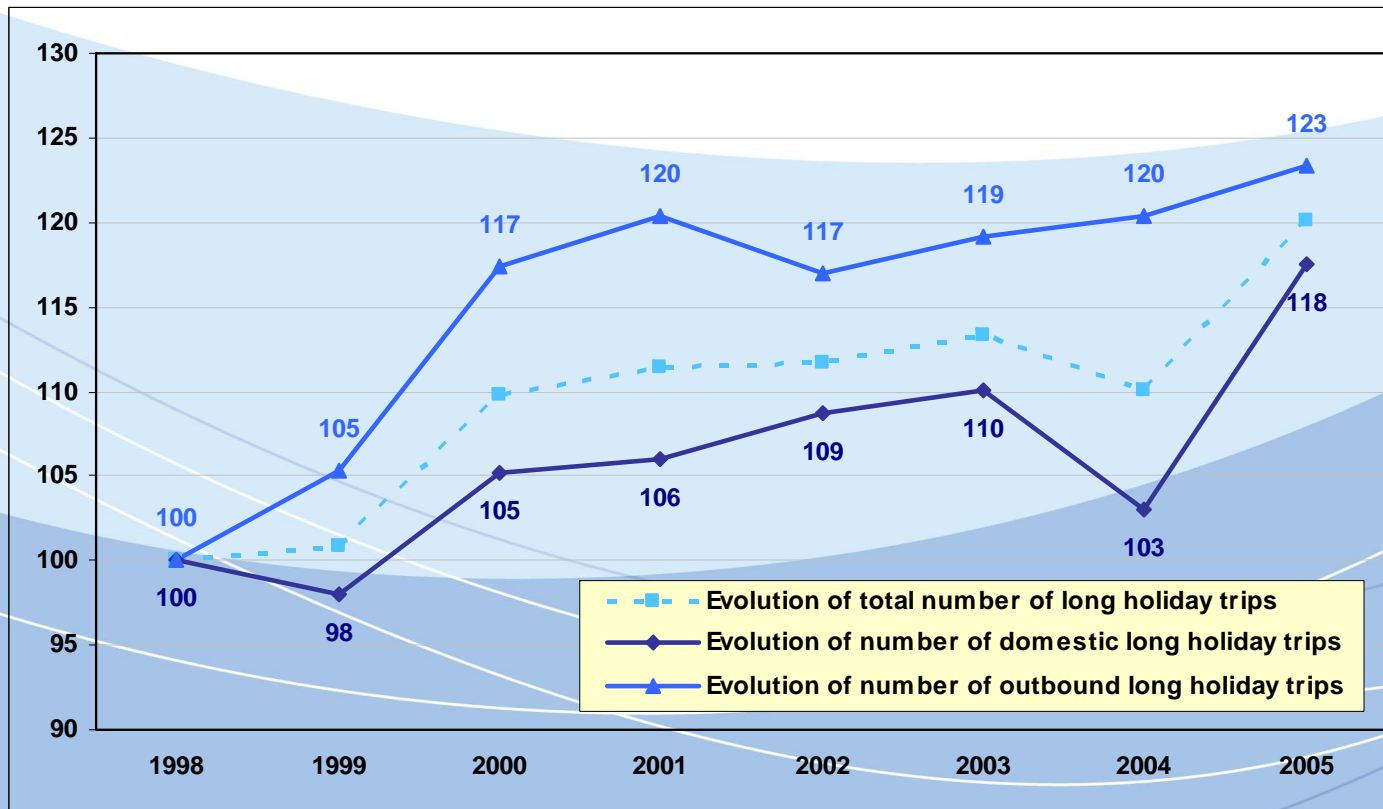
Estimates by DG ENTR:

- 4% of the EU GDP,
- about 2 million enterprises,
- about 4% of the labour force  
(representing approximately 8 million jobs)

When including indirect effects for other sectors: up to 11% of the EU GDP, about 12% of the labour force (24 million jobs)

# Growth of European tourism participation

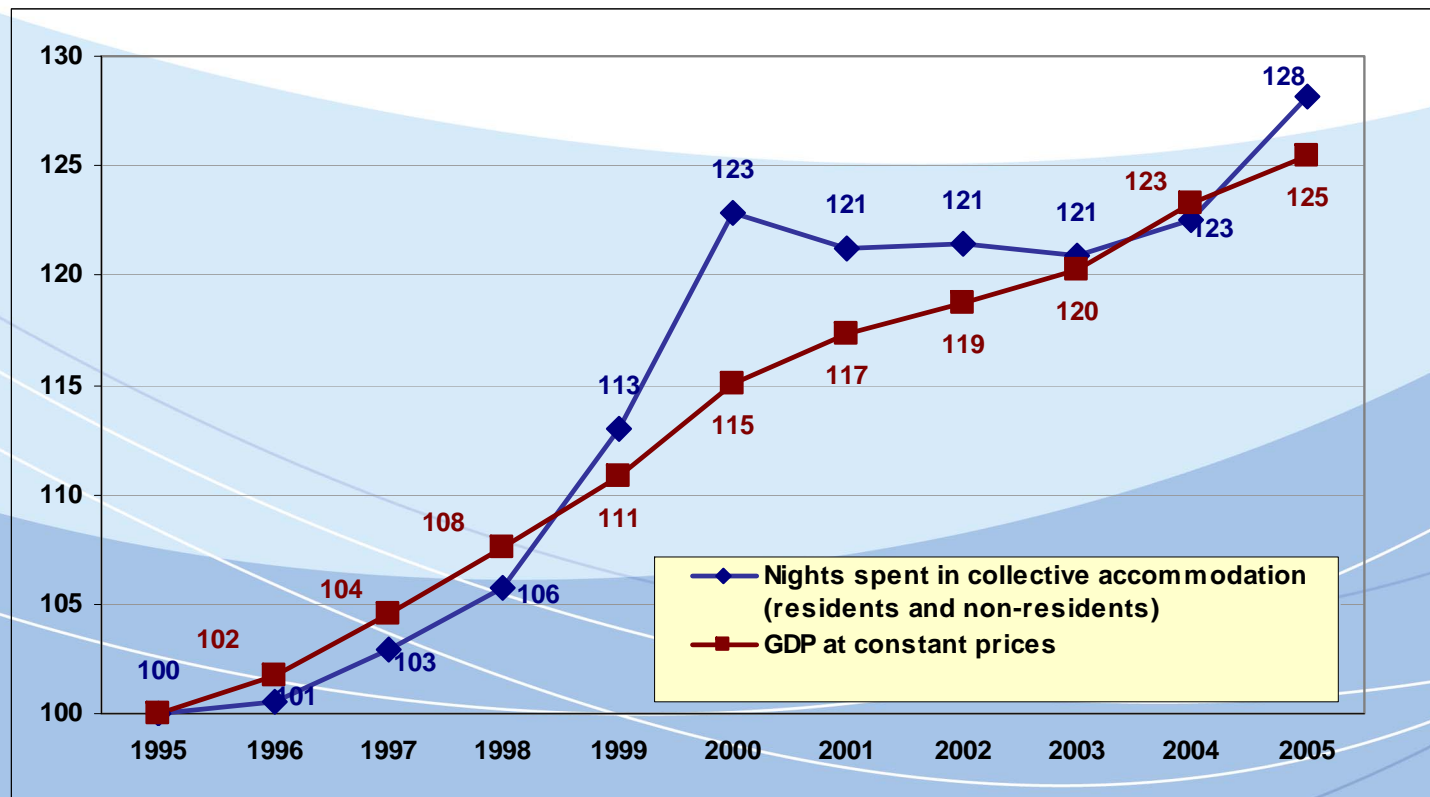
**From 1998 to 2005, the number of long trips made has increased with 18% (aggregate based on BE, DK, DE, IE, EL, ES, FR, IT, LU, NL, AT, PT, FI, UK)**





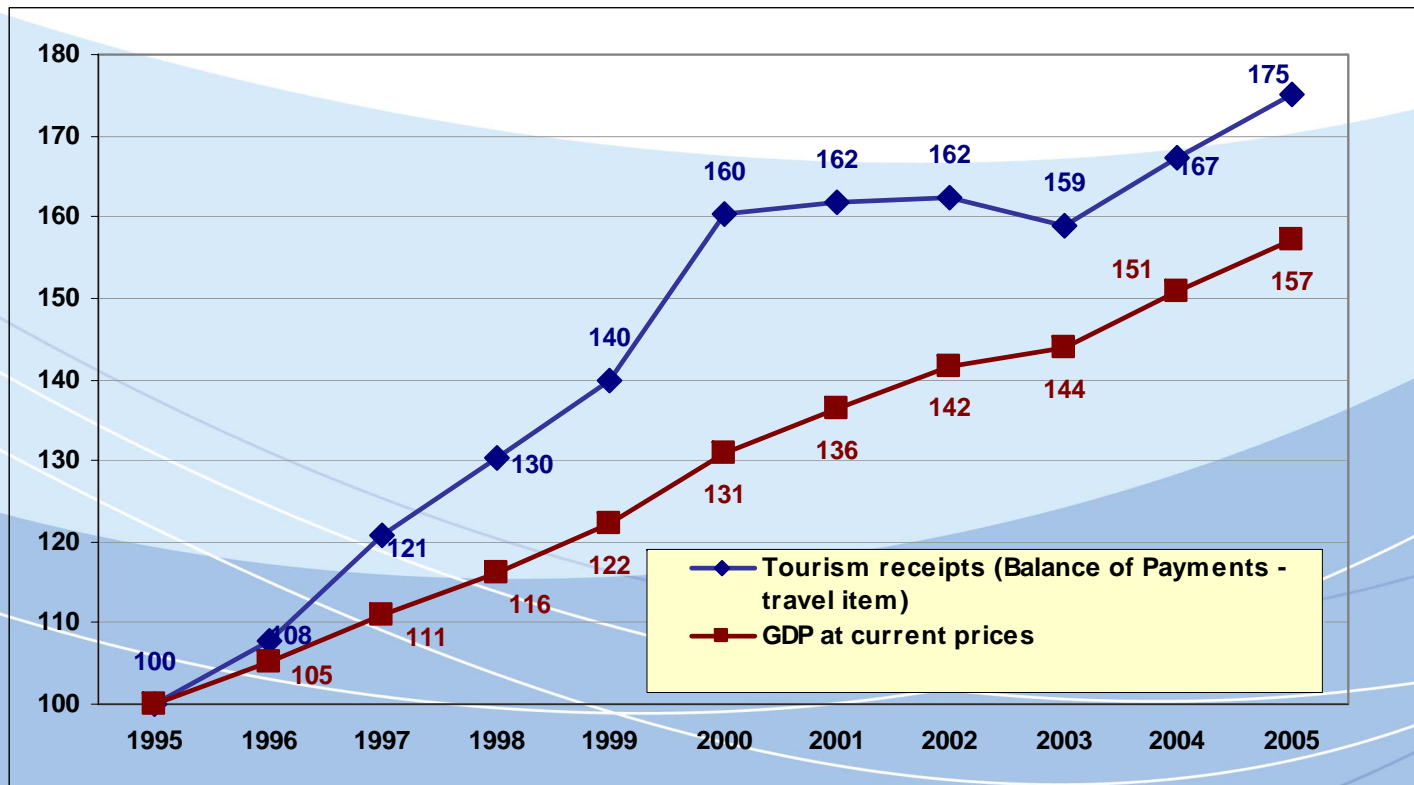
# Growth of nights spent in the EU

*The number of tourism nights in accommodation establishments in the EU is growing faster than the overall economic activity*



# Growth of European tourism receipts

*From 1998 to 2005, the tourism receipts have increased with 75%, compared to 57% GDP growth over the same period*

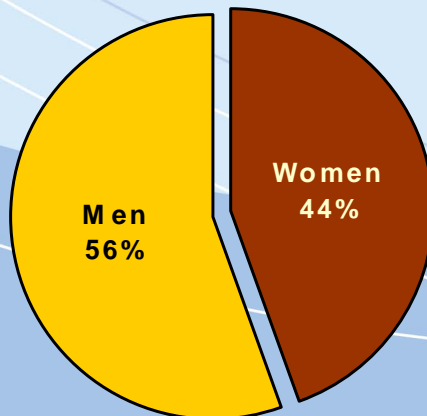


# Statistics on employment in tourism: relevance

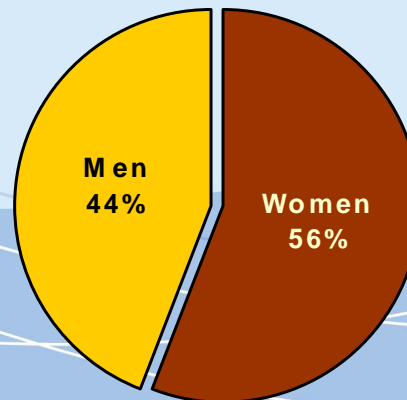
- ✓ **Tourism can contribute to employment of at-risk groups on the labour market**

⇒ **Women**

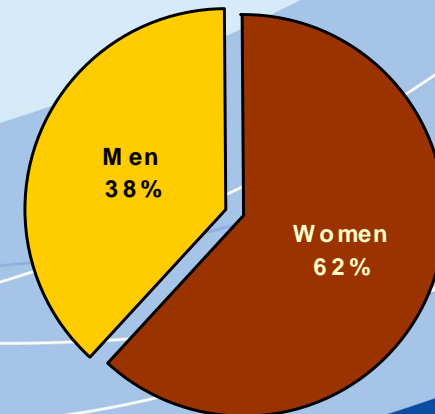
All economic activities



Hotels and Restaurants sector



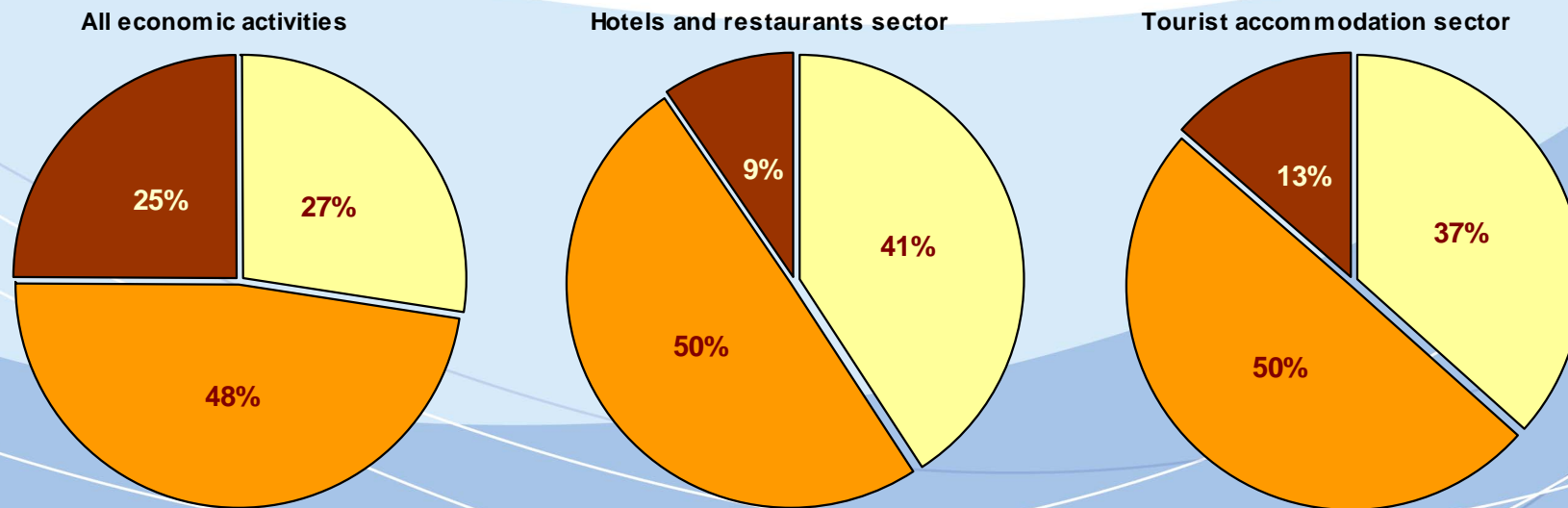
Tourist accommodation sector



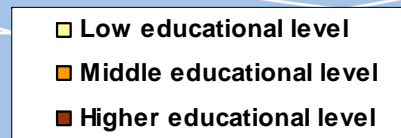
Source: Eurostat, Labour Force Survey & Tourism Statistics  
EU-27 (excl. BE, EE, IE, CY, LV, LT, SI, UK) + HR + CH

# Statistics on employment in tourism: relevance

## ⇒ *Lower educated persons*

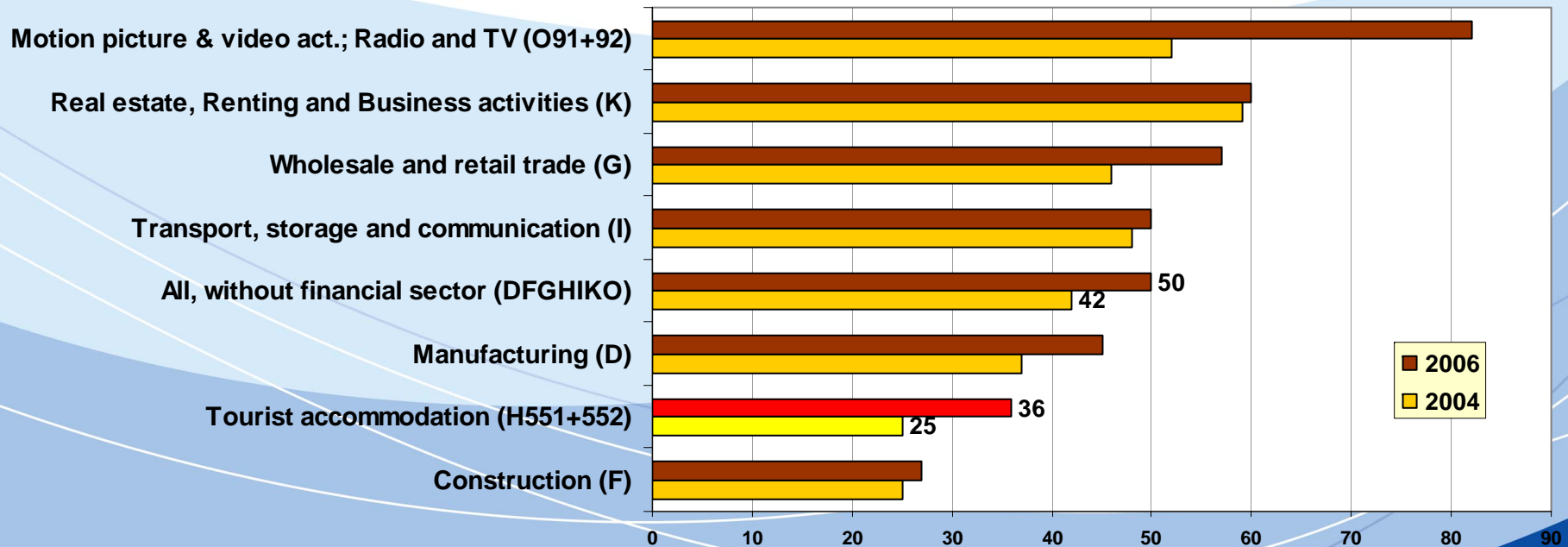


Source: Eurostat, Labour Force Survey & Tourism Statistics ; EU-27 (excl. BE, EE, IE, CY, LV, LT, SI, UK) + HR + CH



# Statistics on employment in tourism: relevance

## ⇒ *Persons with low ICT-skills*



**Percentage of employees using computers in their daily work routine**

Source: Eurostat, Community Survey on ICT usage in enterprises ; EU-27

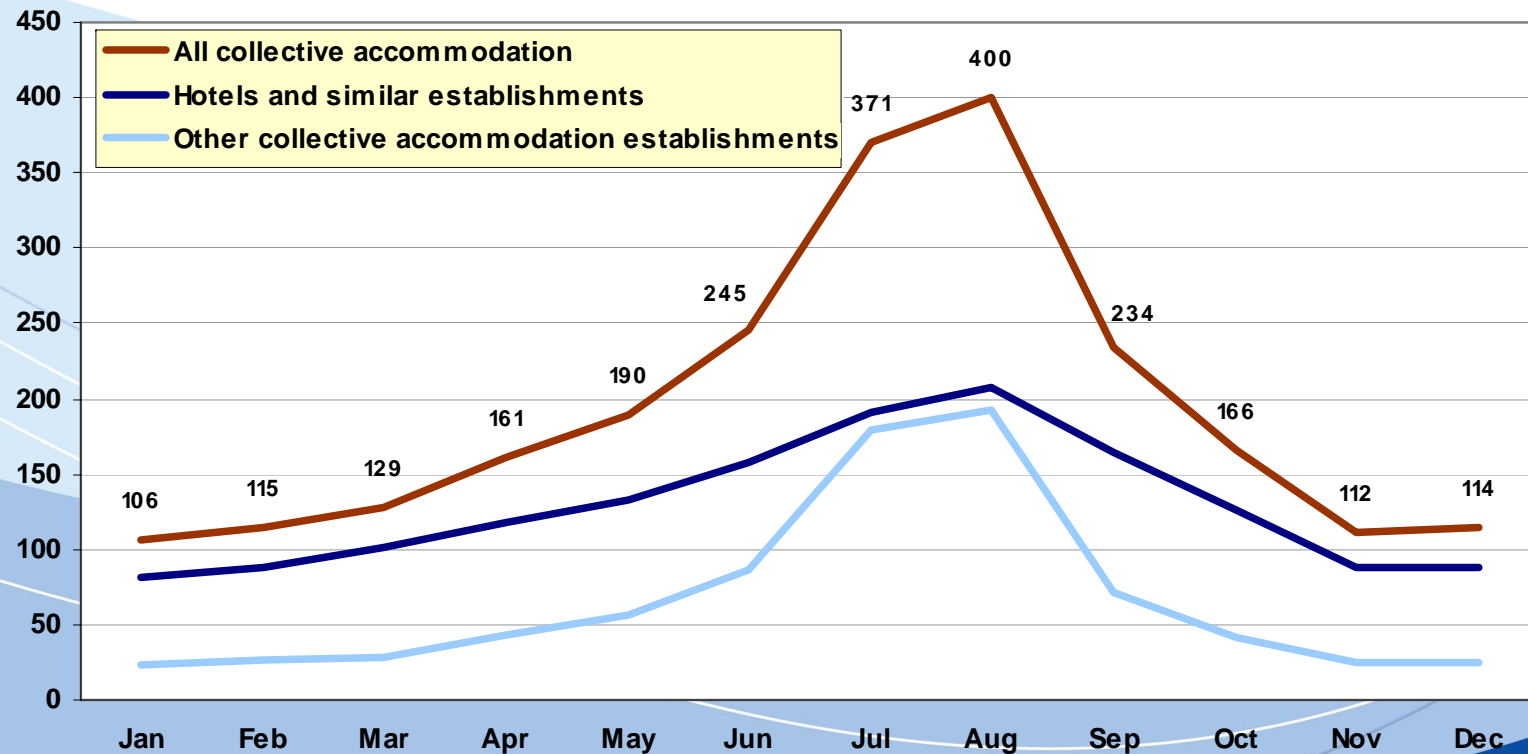
## Statistics on employment in tourism: **relevance**

### ✓ **Tourism has a strong seasonal component**

- Pressure or shortages on the labour market may be very significant in the top seasons
- Is the seasonal pattern or seasonal effect the same for economical output as for labour input in terms of jobs?

# Seasonality of tourism

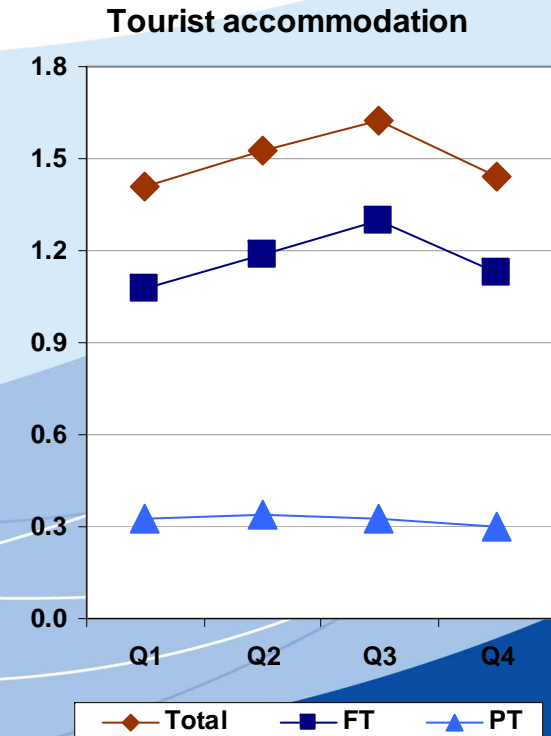
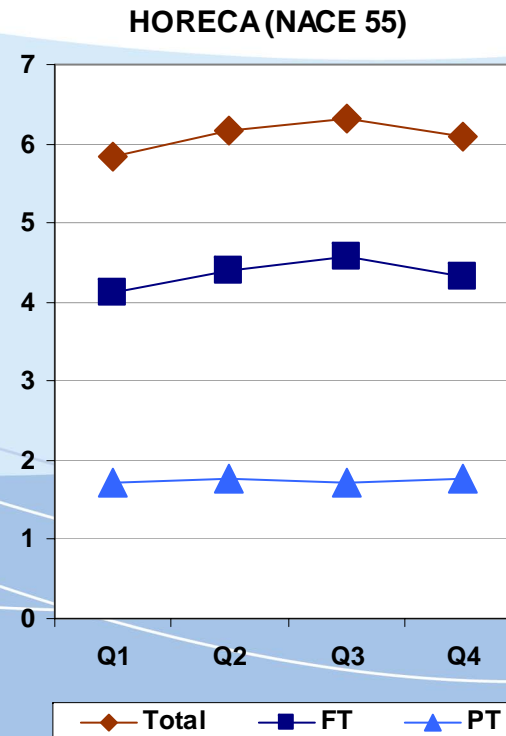
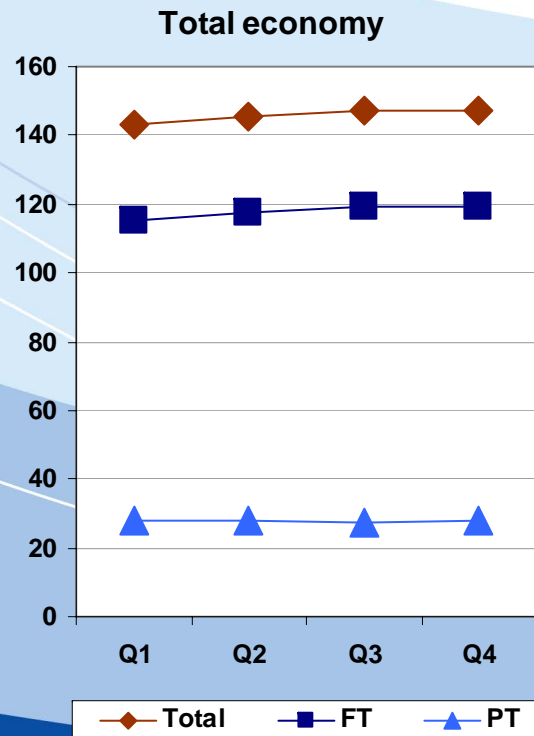
**Nights spent in collective accommodation (in million), 2006**  
 (data for EU-27 – except IE – and HR, IS, NO)



Source: Eurostat, Tourism Statistics

# Seasonality of employment

*Number of employed persons (in million),  
by economic activity and work status, 2006 (quarterly data)  
(data for 11 European countries – CZ, DE, ES, FR, IT, NL, AT, PL, FI, SE, NO)*





## Statistics on employment in tourism: **Labour Force Survey – current situation**

- ✓ **Data is transmitted to Eurostat at 2 digit level of “NACE” (classification of economic activities)**
  - ⇒ Data is available for *HORECA*, but not for *tourist accommodation* separately
  - ⇒ Not all HORECA employment can be linked to tourism

## Statistics on employment in tourism: **Labour Force Survey – current situation**

- ✓ **Additional data transmission for “NACE 551+552”  
(tourist accommodation sector)**
  - ⇒ On a *voluntary* basis
  - ⇒ 2006, 2007: data available for 19 Member States
  - ⇒ Available breakdowns:
    - Gender
    - Age groups
    - Educational level
    - Full-time vs. part-time
    - Permanent vs. temporary job
    - Seniority with the current employer

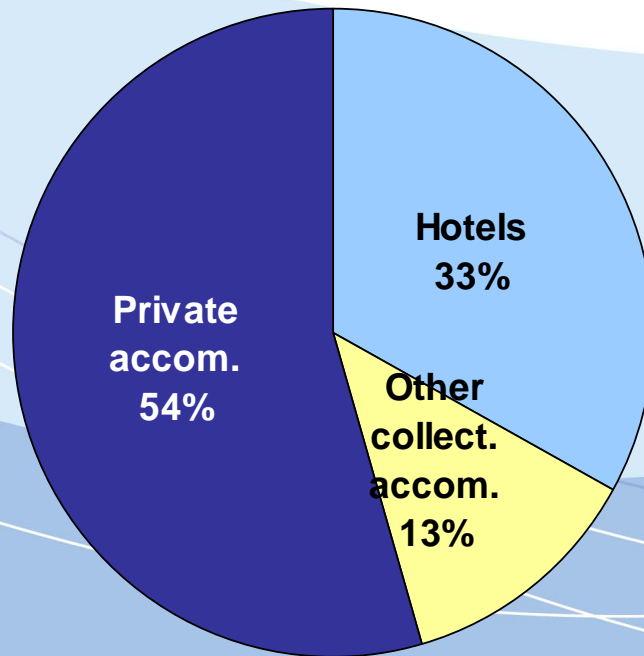
## Statistics on employment in tourism: **Labour Force Survey – current situation**

⇒ Shortcomings:

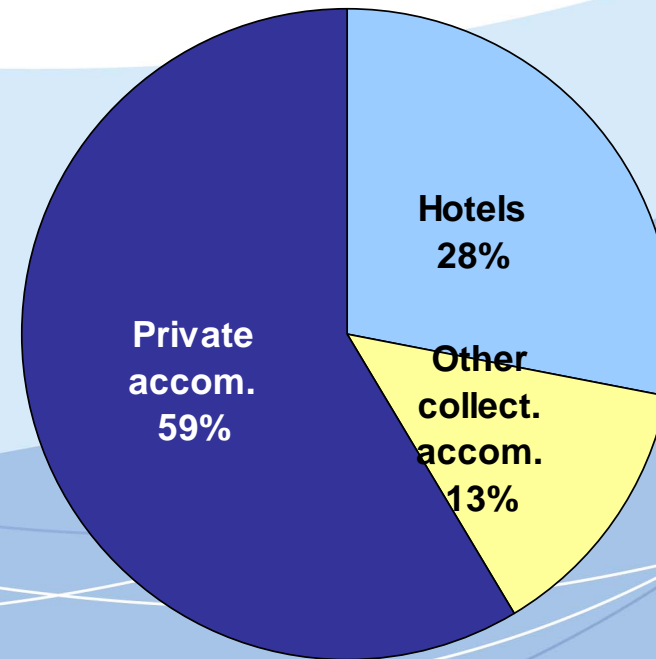
- Not available for all countries
- Only a subset of explanatory variables in the LFS
- The subsample of respondents working in tourist accommodation is very small for some countries
- Only captures persons having their *main job* in this sector
- Only captures *collective* accommodation

## *Trips and nights by type of accommodation*

*Trips by type of accommodation*



*Nights by type of accommodation*



Source: Eurostat, Tourism Statistics

## Statistics on employment in tourism: **Labour Force Survey – future situation**

- ✓ **The activity classification “NACE” has been revised**
  - ⇒ Tourist accommodation will be a separate category at 2-digit level of the classification
  - ⇒ Data will be available from the standard Labour Force Survey data transmission
    - = all Member States
    - = all variables of the Labour Force Survey
  - ⇒ First data expected in spring 2008

## Statistics on employment in tourism: **Tourism Satellite Accounts** - *introduction*

- ✓ **"TSA": macro-economic framework to embed tourism into National Accounts**
- ✓ **Methodology developed by OECD, Eurostat and UNWTO (World Tourism Organisation)**
- ✓ **Many European countries have started compilation work**
- ✓ **Eurostat project aiming at harmonising of the work will start in January 2008**
- ✓ **No legal basis foreseen in the near future**

## Statistics on employment in tourism: **Tourism Satellite Accounts - coverage**

- ✓ **“Tourism sector” or “tourism industry”, in a wider sense:**
  - ✓ **Accommodation services**
  - ✓ **But also parts of:**
    - ✓ transport services,
    - ✓ food and beverage serving services,
    - ✓ travel agencies,
    - ✓ cultural services,
    - ✓ recreation and entertainment,
    - ✓ etc.

## Statistics on employment in tourism: **Tourism Satellite Accounts - contents**

- ✓ **A system of 10 tables, of which one on "Employment in the tourism industries"**
- ✓ **Variables in Table 7:**
  - ✓ Number of *jobs*, number of *employed persons*, number of *employees*
  - ✓ Broken down by *gender* and by *industry*
    - Hotels and similar
    - Restaurants and similar
    - Railways passenger transport
    - Road passenger transport
    - Water passenger transport
    - Air passenger transport
    - Passenger transport supporting services
    - Passenger transport equipment rental
    - Travel agencies and similar
    - Cultural services
    - Sporting and other recreational services



## Statistics on employment in tourism: **Tourism Satellite Accounts - *implementation***

- ✓ **Long term project ...**
- ✓ **Very costly in terms of human resources**
- ✓ **But would give a more complete picture of tourism employment**
  - ⇒ Based on results for some countries, total tourism employment is about 4 times the employment measured via the LFS (which is limited to employment in the collective accommodation sector)

## Further information

### Contact

Eurostat Unit F6 - Information Society and Tourism Statistics

⇒ **Christophe Demunter** (@ec.europa.eu)

### Data

- ✓ All data is available on the Eurostat website, including estimates of employment in tourism (from LFS) – <http://ec.europa.eu/eurostat>
- ✓ Dedicated section on Tourism Statistics – <http://ec.europa.eu/eurostat/tourism>