

## Questionnaire on Tourism and Employment: Overview of Results

UNWTO Statistics and Tourism Satellite Account (TSA) Programme

Room Document

2<sup>nd</sup> T.20 Ministers Meeting – Republic of Korea

11 – 13 October 2010

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### PRESENTATION

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Tourism is a social, cultural and economic phenomenon that entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. Tourism refers to the activities of these people called visitors. Consequently, visitors (either overnight visitors or day-trip/excursionist visitors) are a subset of travellers.

The tourism sector is the cluster of production units in different industries that provide goods and services typically demanded by visitors. Such industries are called tourism industries because visitor acquisition represents such a significant share of their supply that, in the absence of visitors, their production of these goods and services would cease to exist in meaningful quantity.

The growth of the tourism sector, and its contribution to national economics (as measured by a Tourism Satellite Account-TSA), has fostered the general recognition of tourism as a major job generator. However, there is as yet little international consensus on the particularities of the relationship between tourism and employment.

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### BACKGROUND

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For the first time, there is a call from United Nations (UN) about the need for a credible measure of job creation in the tourism sector given the importance of tourism as an economic activity. This wake-up call has been possible by the cooperation of International Labour Organization (ILO) and World Tourism Organization (UNWTO) with the UN Statistical Division.

What's more, the 2008 *International Recommendations for Tourism Statistics* (IRTS 2008) includes a chapter on employment explaining the basic concepts, definitions and classification to be used for its measurement. Future work includes the implementation of the joint ILO/UNWTO project on the "Measurement of Employment and Decent Work in the Tourism Industries", which includes the preparation of the joint ILO/UNWTO publication *A Technical Guide on Best Practices of Measuring Employment in the Tourism Industries*. The outcomes of the project will be the pillars for an increasing production of internationally comparable data and indicators in countries.

In addition, UNWTO is expanding its collection of internationally comparable data and indicators (in the *Compendium of Tourism Statistics*) to include also employment along with inbound tourism, domestic tourism, outbound tourism, tourism industries and complementary macroeconomic indicators.

Furthermore, at its 5<sup>th</sup> International Conference on Tourism Statistics—Tourism: An Engine for Employment Creation—in Bali, Indonesia on 30 March-2 April 2009, UNWTO presented a first official document on tourism and employment. It was based on answers to a questionnaire that focused

on collecting some basic information on tourism related employment in UNWTO Member States. The number of responses was quite low (a 25% response rate) and therefore only intended as a first yet useful qualitative gauge of countries' situations and available information.

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## **INTRODUCTION**

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With the prospect of the T.20 meeting in Korea and in order to provide participating countries with some suggested areas for further actions and research, UNWTO decided to supplement the valuable information gathered in the 2009 questionnaire by sending out a slightly updated version of it, this time only to T.20 countries.

Just as in 2009, the 2010 Questionnaire attempted to gauge countries' accomplishments, expectations and concerns in the field of tourism employment. In order to give respondents more freedom of response, it presented an additional section on 'areas of interest'. The 2010 version presented common statements repeatedly made in tourism circles which were taken directly from the 2009 version. Interestingly, this time around respondents seemed more upfront about challenging certain elements of these, in some cases unfounded, beliefs. The responses are a first step towards credible figures and rigorous analysis on tourism and employment.

The 2010 results are assimilated in this present Conference Room Document, which:

- Is used by UNWTO as the starting point for drafting its concept paper that will be presented during the meeting in Korea; and
- Is made available, along with the 2009 questionnaire results and report, to the ILO as material to consider for their contribution in this meeting.

Participation by T.20 countries in the Questionnaire has been moderate yet increasing when compared to 2009. In 2009 eight (8) T.20 countries responded; in the 2010 version this number went up to thirteen (13) with 5 countries providing responses for both years: Argentina, Australia, Canada, Mexico and Spain. Because of the small sample size (20) in the present version, the response rate shoots up to 65%. Combining both years, there is information for a total of fifteen (15) countries. UNWTO warmly thanks all countries that participated with so many sensible and meaningful comments. A special thank you is extended to Canada and Australia for their significant contribution.

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## **I. Relating Tourism and Employment: Areas of Interest**

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In an attempt to obtain an unbiased indication of countries' priority concerns in the relationship between tourism and employment, valuable insight is offered by the following answers to *What is it about the relationship between tourism and employment that most interests or concerns you?*<sup>1</sup>

**Canada:** **Fostering an adequate supply of skills and labour** to enhance visitor experiences through **quality** service and hospitality.

**China:** Tourism could **attract a large number of employees**.

**Germany:** Tourism is an important sector for employment and **job creation**. In Germany approx. 2,8 million people are employed in tourism and related sectors.

**Indonesia:** **Tourism and Human Resources** has strong relationship. Since tourism are a service industry, which needs labor / manpower. An increase in tourism activities will stimulate **job creation**, either directly or indirectly.

**Italy:** Improving the attractiveness of the tourism sector for **skilled professionals pursuing career advancement**, so as to provide **services of excellence** in the tourism industry.

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<sup>1</sup> Please note that the responses have been taken in full and directly as provided by the respective respondents. UNWTO has made some parts of the text **bold** to highlight key areas.

**Japan:** In Japan, the demand for tourism tends to concentrate on public holidays, as the vacation taking rate is low. Therefore, the **regular employment rate** is low (e.g. 46% in accommodation operators). “The Urgent Economic Policy for Future Security and Growth” decided by the Cabinet in December 2009 mentions the promotion of measures to realize a tourism nation from a standpoint of **creating employment**.

**Mexico:** The National Development Plan 2007-2012 [...] states that is necessary to “Make tourism a national priority, in order to generate investment, employment and to **tackle poverty** in areas with competitive tourist attractions”. Moreover, in the Tourism Sectoral Program 2007-2012 which establishes the national tourism policy, the objective number 5 [...] require[s] to “Promote public policies within the sector, aimed to better off the conditions for the **creation of jobs, taking into account gender equity**”. Thus, there have been launched the following lines of action:

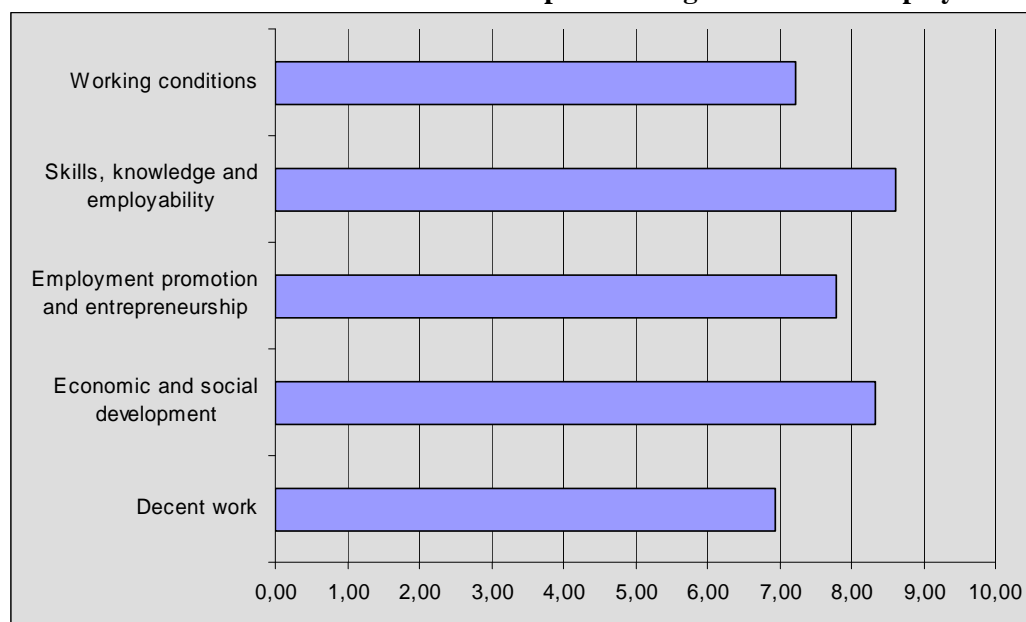
- To promote the creation of a national system for **training and education** for the tourism sector, in coordination with the Secretariat for Education and the Secretariat for Work. This will **increase the competitiveness of the human capital** from the tourism sector, in accordance with the priorities of the national tourism policy and the needs of the labor market.
- To enhance the insertion of secondary and Higher education agencies, into programs that **promote employment**, as well as into other similar programs coordinated by Federal, State and Local Governments.

**Spain:** The **follow-up** of the employment evolution in the tourism sector; its **quality and stability** and how these features.

**Turkey:** **Employability, employment promotion, entrepreneurship, service quality and knowledge education**, quality and the **working environment** of employees are important in terms of our promotional strategies, as stated in the document `Tourism Strategy -2023

These statements are largely supported when respondents were asked to mark their level of interest for different topics, following the classification of relevant ILO areas of work.

**Table 1: Level of Interest for different topics relating tourism and employment**



On average, the highest scoring concerns are *Skills knowledge and employability*, which includes aspects like lifelong learning and training/vocational guidance, and *Economic and social development*, including themes like globalization, poverty reduction, sustainable development, labour migration and local economic development.

Though care must be taken when interpreting these two areas as relative priorities, countries’ individual statements above show that they are perceived as main policy areas. In fact, countries like **Canada, Indonesia, Mexico and Turkey** recognize that economic and social development goes hand in hand with the development of skills, knowledge and employability. Investing in the human capital in tourism industries increases the quality of tourism supply. This not only attracts more visitors and

expenditure but may also justify a higher return per visit(or). Additionally, human capital development generates linkage effects with the education sectors while the higher income earned by more qualified employees raises consumption to generate induced effects on a great variety of goods and services. All these are economic effects that can foster development.

The sections below explore these areas more in depth as part of the characteristics of the tourism sector as identified by countries, their existing employment regulation, and human resource development policies.

## II. Characteristics of the Tourism Sector: Diversity & Opportunities

The table below shows the number of countries that (dis)agreed with selected statements concerning different characteristics of employment in the tourism sector.

Number of responses (out of 13)	YES	NO	N/A	N/C
1 Tourism is a regionally diverse industry providing job opportunities in many areas where traditional economic activities are faltering. Tourism is a more diverse sector than many others	11	0	1	1
2 Tourism offers the opportunity to get a job for unemployment prone groups such as youth, unskilled or low-skilled workers and women.	11	0	1	1
3 Tourism is a labour intensive industry employing a wide range of skills, which is particularly usefull in tackling poverty.	10	1	1	1
4 A large portion of tourism jobs is part-time due to the seasonal character of the sector in many destinations. This could be considered as a negative aspect in terms of decent work.	6	5	1	1
5 Large tourism enterprises are concentrated in accomodation and transport activities--although few in number, they generate a substantial share of total jobs. Both in rural and urban contexts, practically all the tourism industries are composed of small and medium-sized enterprises.	9	2	1	1
6 The vast majority of posts are recruited from the local markets. Consequently, tourism creates opportunities for many small and micro entrepreneurs, both in the formal and informal sector. It is a sector in which start-up costs and barriers to entry are generally low or can be easily lowered.	10	1	1	1

N/A: no answer; N/C: no change since 2009

### II. (1) Diversity

As in the 2009 results, countries largely recognize that, in economic terms, tourism is a diverse sector—more so than many other sectors—in that it comprises a wide variety of industries and maintains strong economic linkages with numerous goods and services producing entities. Diversity is also associated with the distribution of tourism activity over the geographical territory.

In term of employment, **Turkey** states that, compared to more traditional economic activities, tourism contributed more to the economic recovery (with approximately 90.000 jobs) and asserts that this is largely due to the diverse supply in terms of tourism products— “health tourism, golf tourism, sea tourism, eco-tourism, convention tourism and expo tourism activities”. **Indonesia** highlights the diversity of components involved in supplying the visitor with a “satisfied total experience” thus also involving a diversity of human resources.

Geographically, tourism tends to be unevenly distributed over territory. **Germany** writes that tourism may develop former agricultural areas, providing farmers with opportunities to diversify their income, turn former industrial sites into cultural or recreation sites (i.e. Ruhr region). However, as **Mexico** points out, employment in tourism tends to be more evenly distributed than employment in other

economic activities. In Italy, there are “no particular quantitative differences registered between Northern and Southern regions”. **Canada** refers to research findings that the “intensity of tourism employment in predominantly rural regions is about the same as urban areas” and reminds us that the tax revenue from tourism is centralized and thus benefits all regions equally.

**Selected responses<sup>2</sup>**

**Australia:** [...] Tourism is a vital driver of regional development and a major source of employment for regional Australia. In 2006-07 it is estimated that tourism directly employed 227,000 persons in areas outside metropolitan centres. Tourism related employment is generated across a wide range of industries, [...] in 2008-09 [the key industries] were: cafes and restaurants (123,400 persons or 39 per cent of total tourism employment); retail trade (96,900 persons or 19.9 per cent of total tourism employment); accommodation (68,000 persons or 14 per cent of total tourism employment).

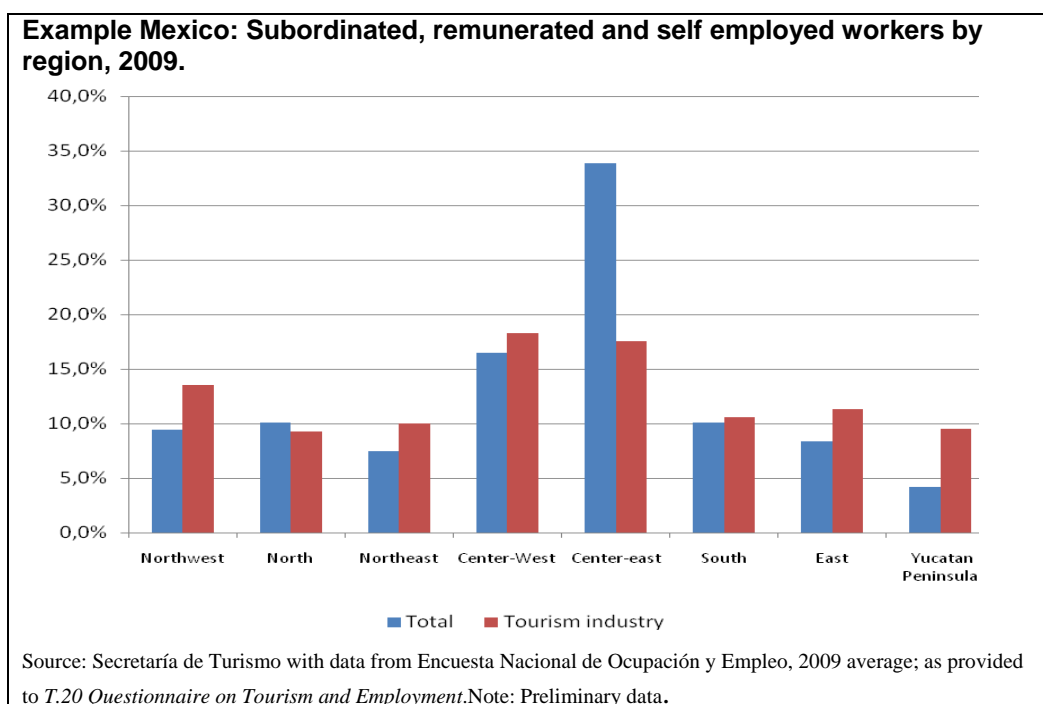
A significant component of Australia’s tourism industry resides in rural and regional Australia, making invaluable contributions to the regional economies and communities within which they operate. In 2009, 46 cents of every tourism dollar spent in Australia was spent in regional areas. [...]

**Canada:** [...] From an industry point of view, tourism is a diverse sector that provides 9.4% of all employment in Canada. In 2009, the tourism sector accounted for 1.6 million jobs in five tourism industry groups: accommodation; transportation; food & beverage services; recreation & entertainment; and, travel services (2010 HRM data). Of these jobs, one-third is directly attributable to tourism demand in tourism industries. [...]

From a geographical point of view, tourism businesses operate in communities large and small, in every corner of Canada. [...] When it was last measured in 2003 (reference year 1998), the tourism shares of provincial/regional GDP ranged from a low of 1.8% in the province of Saskatchewan to a high of 4.4% in the Yukon Territory. Similarly, regional shares of employment attributable to tourism demand ranged from a low of 3.2% in the provinces of Quebec and Saskatchewan to high of 6.8% in the Yukon (Barber Dueck and Kotsovos, 2003). [...] [O]ther Canadian research on tourism employment in rural regions has found that the intensity of tourism employment in predominantly rural regions is about the same as urban areas (Beshiri, 2005). Thus, in Canada, tourism seems to be a growing economic alternative for the economic viability of rural regions.

**Japan:** In Japan, the consumption on tourism is 23.6 trillion yen (in FY2008). Estimating economic ripple effects on the industries including other than tourism, the production ripple effect is 51.4 trillion yen and the employment creation effect is 4.3 million people. This shows that tourism has a great effect on various industries.

**Mexico:** [...] The graph below shows that more than 50% of national employment is concentrated at the center-east and center-west of Mexico. However, workers employed in tourism are well distributed over the country. It can also be seen [...] that while only 4.5% of national labour force is employed at the Yucatan area, 10.9% of tourism industry employees work there.



<sup>2</sup> All ‘Selected responses’ have been taken in part or in whole from the full answers as provided by respondents; parts where text is left out are indicated with [...].

## II. (2) Opportunities for unemployment prone groups

The popular notion is that unemployment prone groups such as youth, unskilled or low-skilled workers and women stand to gain opportunities from tourism development. More so than in 2009, countries seem to support this notion but many stipulate, in the words of **Turkey**, that this is only true “on condition that they should receive on-the-job training intensively”. In **Italy**, tourism offers “part-time opportunities and professional training programmes for students and women with young children; for low-skilled workers, most working arrangements include “on the job training” schemes”. **China** seconds this approach: “unskilled or low-skilled workers may receive the training and become qualified employees in tourism.

**Canada** cites its latest census where 42% of tourism employees have some level of post-secondary education, however many entry-level and front-line job opportunities in tourism do not require formal credentials to gain employment. At the same time, employers do often seek individuals with essential skills and qualifications. Skills include: a positive attitude, responsibility, adaptability, a willingness to continuously learn, communication, numeracy, computer and other technology skills, thinking skills, the ability to work with others, the ability to manage information, knowledge of the tourism sector, valuing safety, and the ability to provide professional service.

**Australia** specifies the challenge of increasing the involvement of mature age workers and **Spain** acknowledges the sector’s employment opportunities for migrants.

### Selected responses

**Australia:** [...]Tourism activity encompasses many tourism characteristic service industries. Service industries are characterised by low barriers of entry and exit. Many occupations are suitable for entry level positions for youth, unskilled or low-skilled workers and other members of the community who are not in the traditional workforce as it provides a range of flexible and entry level options. [...]The Accommodation, Cafes and Restaurant industry has a relatively young workforce, as demonstrated by its median age of 26 years. [...]

**Canada:** The Human Resource Module (HRM) of the Tourism Satellite Account shows that youth and women in Canada are disproportionately represented in tourism industries. [...] While] women represented 47% of the total Canadian labour force in 2009, [...] women occupied 55% of all employee jobs in the tourism sector, [...] 60% of the employee jobs in both accommodation and food and beverage services, and three-quarters of employee jobs in the travel services industry. Youth aged 15 to 24 years-old occupied four-out-of-ten of employee jobs in 2009, and are disproportionately represented in the food and beverage services and recreation and entertainment industries. Accounting for 56% of employees, people aged 45 or older are disproportionately represented in the transportation industry. [...]

**China:** Tourism puts forward fewer requirements for employees [...] and has become one of the sectors that absorbs the largest number of employees in China. At present, 76 million people are involved in China’s tourism [sector], representing 9.6% of the total of national employees in China.

**Mexico:** [...]For gender,] the percentage of women employed at lodging, food and beverage services sector (59%) was the greatest among economic sectors in 2009. [...] For age,] the percentage of remunerated or subordinated young people under 20 years old in the lodging, food and beverage services sector is 16%, the highest among all sectors. [...] It does not seem to be enough evidence to sustain that the touristic industry employs more non skill workers in Mexico than the rest of the industries.

## II. (3) Labour Intensity, Range of Skills and Tackling Poverty

The statement “Tourism is a labour intensive industry employing a wide range of skills, which is particularly useful in tackling poverty” rolls off the tongue easily yet several countries express reservations—it is difficult to evidence the (causal) relationship linking all these notions.

In regard to the first notion—“tourism is labour intensive”—most countries seem to concur that, being a collection of predominantly services oriented industries, the main factor of production in tourism supply is labour. **Canada** brings forward evidence: tourism supposes a larger share of overall employment (3.6%) in 2009 than its corresponding share of GDP (1.9%) and a lower per job GDP in tourism jobs (\$45,000) in 2009 than elsewhere in the economy (\$85,500). Even though “conventional



thinking suggests that tourism has corresponding low levels of labour productivity”, there are “substantial differences in the level of labour productivity across tourism industries” and between provinces. Also, analysis commissioned by the Canadian Tourism Human Resource Council of the 1997-2008 Canadian Tourism Human Resource Module data determined that labour productivity in tourism is found to increase with the capital labour ratio, the proportion of part-time hours, the share of hours supplied by women, the proportion of immigrant workers, and by the proportion of the most experienced workers.”

In regard to the second notion—“tourism employs a wide range of skills”, countries generally agree. Canada again presents evidence showing that tourism includes 85% of all occupational categories and that these occupations are distributed across all skill levels.

In regard to the third notion—“useful in tackling poverty”— **Spain** makes a valuable point “Tourism is associated with job creation, and to the extent that this positive effect in the employment level could alleviate poverty indirectly it could be useful, but it does not represent a direct tool for poverty eradication”.

Several countries, nevertheless, argue that tourism has been helpful in dealing with poverty in economically lagging, especially rural, regions. **China** states that, “in recent years, tourism has played a key role in tackling poverty by providing job opportunities to the surplus labour force in the undeveloped areas of China”. **Indonesia** and **Turkey** note similar experiences where the latter, as well as **Mexico**, maintains that tourism helps low-skilled segments out of poverty by providing them jobs. Following Indonesia’s argument that “poverty is related to the lack of skills”, one may deduce that accompanying tourism jobs with training for skills development may thus be a way to boost the mitigating effect on poverty.

#### **Selected Responses**

**Australia:** Tourism includes a number of labour intensive service industries which can provide employment opportunities for skilled and unskilled workers. While Australia is a developed nation, it is also a diverse country with some regions confronting problems related to a lack of opportunities for economic and social development. [...]

**Italy:** The tourism industry in Italy employs a wide range of skills and is easily accessible to low-skilled workers, thanks to the “on the job training” schemes of recruitment. Such an opportunity helps raising life standards for low-income population, especially in less industrialized areas of the Country.

## **II. (4) Seasonality... or not?**

Compared to the 2009 the ratio of respondents answering ‘no’ to those answering ‘yes’ is considerably higher (83.3% to 54.2%). Many countries present evidence showing large portions of part-time or irregular work in the tourism industries: **Canada** (40% of employee jobs in tourism industries in 2009 were part-time), **Italy** (38% of all jobs in the tourism sector are part time), **Japan** (54% of irregular employment, which is higher than the average over all industries) and **Mexico** (51% of workers without a specific contract or have a temporary job temporary contracts). On the other hand, **Spain** shows quite the opposite (13.5% of employees were part-time in the 2<sup>nd</sup> Quarter of 2010).

Reasoning their disagreement to this statement, **Germany** and **Turkey** state that the tourism season can be spread over the entire year (though depending on the region) with sufficient diversification of tourism types and tourism products, while **Indonesia** highlights the potentially smoothing effects of adequate policy.

Except for Japan, countries seem to largely oppose the causal relationship from seasonality in tourism to a large portion of part-time employment. **Australia** notes that there are a number of aspects to seasonality: the annual demand cycle due to climate versus the weekly demand cycles (especially relevant for e.g. restaurants) which affect different tourism industries differently, the “unpredictable 24/7 trading environment”, the interplay with a tight (or loose) labour market, and the preference for

part-time work by some segments (e.g. students). Canada seconds this by noting the difference between part-time and part-year jobs in the sector.

On the question of whether this is a negative aspect in terms of decent work, many countries oppose: “part-time jobs are not incompatible with decent employment conditions” (Spain). Italy does, however, note the role of proper regulation in part-time contracts.

#### **Selected Responses**

Indonesia: [...] The government and the industry made many efforts to boost the number of visitor’s arrival at low season through the promotion and giving incentives for the tourist.

Italy: In many cases, the concentration of working activities in some periods of the year and part-time contracts allow workers, in particular women and students, to better organize their family life and complete their studies. [...] The Italian legislation (legislative decree n.66/2003) regulates three types of part-time contracts in the tourism sector: reduced working days per week, reduced working hours per day, mix of reduced working days per week and reduced working hours per day.

## **II. (5) Size of Tourism Enterprises, Shares of Jobs**

**Australia, Canada, Germany, Italy, Japan** and **Spain** provide evidence that confirm that the tourism sector is mostly composed of small and medium-sized enterprises (SMEs), while **China** affirms that not all its tourism industries are composed of SMEs though SMEs are the important channels to offer job opportunities.

Large enterprises make up a small percent of the total number of enterprises and do generate a substantial share of jobs *relative to their numbers*. Nevertheless, it does not seem to be completely clear whether it is the SMEs which provide the majority of total jobs, whether it is the large enterprises, or whether both are roughly on a par (as suggested by **Indonesia**).

#### **Selected Responses**

Italy: According to the Ministry of Labour, in 2006, 91.9% of Italian tourism enterprises employed up to 9 staff, 7.5% up to 49 staff, 0.5% up to 249 staff and 0.1% more than 250 staff. The above data refer to enterprises dealing with accommodation (23.1%) and restauration and catering (79.9%).

Mexico: Excluding government activities, 20.4% of employees in tourism were employed by big firms, while 79.6% worked at small and medium business in 2009. [...]

Spain: Indeed 99.8% of tourism businesses are SMEs (less than or equal to 99 workers).

Turkey: Small and medium-sized enterprises for the sustainability of tourism development especially in the rural context are important.

## **II. (6) Entrepreneurship**

Generally, countries have little evidence but intuitively assume that jobs as largely recruited locally, as **Canada** states, it is the “labour market of first resort”.

Responding countries do not provide evidence on the relationship between the informal labour market and tourism.

**Spain** correctly points out that low start-up costs and entry barriers do not hold for all tourism industries, a notable example being transportation. **Germany, Indonesia, Italy** and **Turkey** highlight the role of the state in providing support and investment for start-ups and creating a friendly environment for SMEs vis-à-vis large firms. **Australia** explains that while most people working in tourism are recruited locally, there is strong evidence of shortages in both skilled and unskilled occupations. The Australian immigration program provides scope for “immediate response to satisfy current labour demand for skilled workers”.



### Selected Responses

**Australia:** [...] As [of] June 2007, there were 193,290 tourism related businesses located in regional Australia providing good opportunities for small and micro entrepreneurs.

**Canada:** [...]The] distribution of establishments in tourism industries by size obtained from the Business Registry data reveals that small enterprises are more prevalent in:

- Entertainment industries relating to independent artists in visual arts, performing arts and independent writers and authors.
- Accommodation industries, such as bed and breakfast, RV Parks and Campground, housekeeping cottages and cabins, motels, and hunting and fishing camps
- Taxi services and limousine services. In contrast, there are significantly fewer small enterprises in the following industries:
- Passenger rail transportation, deep sea, coastal and great lake water transportation, urban transit systems, charter, interurban and rural bus transportation, and scheduled air transportation,
- Hotels, resorts, casino hotels and casinos,
- Skiing facilities, amusement and theme parks, golf courses and country clubs and musical and opera companies. [...]

**Indonesia:** government needs to protect small and medium scale industry from large company's exploitation by certain regulations. For example small and medium companies made a partnership with the large companies.

## III. Regulating Employment in Tourism Industries

Respondents seem to handle this in two different ways: those that see the need for implementing specific regulations for (specific occupations in) tourism and those that consider regulation of employment in tourism by extension—where legal and regulation affairs seem to be taken care of by a broad-spectrum employment regulation or, as tourism is a combination of industries, by these respective industries that make up the tourism sector.

Number of responses (out of 13)	YES	NO	N/A	N/C
1 Are there any labour laws or regulations in your country which are specific to the tourism industries?	6	5	1	1
2 If not, has any of the stakeholders, i.e. employees, employers or government considered it necessary to issue special labour rules for tourism, given its specific characteristics (re. seasonality, working hours, language skills, temporary workers, etc.)?	2	2	7	2

N/A: no answer; N/C: no change since 2009

### III. (1) Existing Laws and Regulation

Countries generally do not seem to have an umbrella labour law or regulation applicable to all tourism industries, though a notable example appears to be **Argentina's** 2004 National Tourism Law. Some countries do have laws and regulations applicable to specific occupations of tourism related employment, for example: **China, Italy, and Turkey** while **Australia** is in the process of modernizing its awards according to industries and occupations.

### Selected Responses

**Canada:** There is no over-arching labour law or regulation for the entire tourism sector in Canada. There are regulated aspects that concern some tourism jobs, such as requirements for a hunting licence (hunting guides), driver's licence (taxi drivers), gaming license (casino workers), food safe handling certificate (servers, cooks), and Serving-it Right in BC or Smart Serve Ontario (bar staff), which vary by province and at times by municipality. It should be noted that some of these requirements apply to non-tourism jobs also.

**China:** Regulations on Administration of Tour Guides

**Italy:** There are specific provisions in the field of labour legislation and collective labour agreements applying to the tourism industry. Law 368/2001 regulates a specific kind of working relationship, the so called “extra works”, allowing employers in the tourist sector to recruit workers for a maximum of three days, when there is the need to perform specific services, such as meetings, fairs, assistance service to the airport arrivals and so on. Another kind of employment, typically used by tourist companies to recruit staff for short periods, is the so called “intermittent work”.

**Turkey:** - Law for the Encouragement of Tourism - Law concerning Travel Agencies and the Associations of Travel Agencies - Regulation on Tour Guiding

### III. (2) Is tourism particular enough to require special labour rules?

Respondents that have no particular rules and regulations in place for the tourism sector seem to have very clear reason for it: as it is an amalgamation of different industries, tourism requires no umbrella regulation on top of the ones already in place for the different industries it is composed of. **Canada**, **Mexico**, and **Spain** have no plans to develop a “specific regulation for the labour conditions in the tourism industry” (Mexico).

#### Selected Responses

**Canada:** A specific requirement for tourism does not exist. There are labour laws related to the minimum age of workers, hours worked, and seasonal and part-time jobs, among others, but these are not exclusive to tourism.

**Spain:** As it is a heterogeneous sector, it does not exist specific regulation for the tourism sector at a global or general level. However, there are collective agreements by industry, such as catering, transportation, travel agencies, etc.

## IV. Human Resource Development

Countries seem to be very much involved in human capital formation in tourism.

Number of responses (out of 13)	YES	NO	N/A	N/C
Has your administration an established policy and/or programmes for HRD in tourism? Please specify.	12	0	0	1
b If so, this policy has been discussed and agreed with: (see below)	-	-	-	1
Are there any programmes, schemes, subsidies or other mechanisms offered by the State to encourage training and continuous education of the labour force in tourism?	13	0	0	0
Does the government or the trade association have its own tourism training centre? Is so, please provide details.	9	3	0	1

N/A: no answer; N/C: no change since 2009

### IV. (1) Existing Policy and Programmes

All countries seem to have some sort of Human Resource Development (HRD) policy or module in place for encouraging training and education of employees in the tourism industries. **Canada** mentions some core topics: “increased investment in skills development to promote a quality workforce; a learning system that is informed of, and more responsive to, the needs of industry; reduced barriers to labour mobility, leading to a more efficient labour market; and, enhanced ability to recruit and retain workers and to address human resources issues”.

Other noteworthy elements of the identified policies are: collaborations with sub-national governing bodies and universities (**Spain**), inter-ministerial efforts (**Italy**) accounting for demographic differences and change (**Germany**, Italy), competitiveness (**Australia**, **Japan**, **Mexico**) and the

challenge of living up to the increasing quality expectations (Mexico) from both inbound and domestic visitors (Germany).

#### **Selected Responses**

Australia: [...] three key initiatives aimed at building the capacity of the tourism workforce [are]: (1) In December 2009, the Australian Government launched a *National Long-Term Tourism Strategy* which outlined a policy framework designed to enable all levels of government to work in partnership with industry in addressing the tourism supply-side issues that impact our tourism competitiveness. [...]

(2) [the] Skills Services Australia (SSA) Tourism & Hospitality Workforce Development Strategy [...] has been developed by industry, for industry and is an important step in continuing to address the skills and labour shortages in the tourism and hospitality industry. [It] focuses on four key priorities: The creation of a highly skilled workforce; Access to quality employment; Shaping the future through better workforce planning; Expanding the traditional workforce.

(3) The Restaurant and Catering Industry Action Agenda implementation commenced in January 2004 following extensive consultation with industry and government. [...] Supply side recommendations deal with issues such as increasing recruitment options available to hospitality operators, promoting the industry as a career path, increasing the number and suitability of job applicants, improving the training of apprentices and trainees, increasing the number of mature age workers in the industry, and improving the ease of access to migration by employers as a means of recruitment.

China: CNTA has compiled the 11th Five-Year Personnel Planning for China's Tourism. We are drafting the 12th Five-Year Personnel Planning for China's Tourism.

Indonesia: Indonesian government made some policy in developing Tourism Human Resources development through the Arrangement of Tourism National Competency Standard, arrangement of competency based training, and encourages implementation of job certification.

Japan: Japan (NTA) plans 1) development of human resources who support the competitive tourism industry, 2) development of human resources who bear the development of attractive tourism locations, 3) development of human resources who bear regions and tourism in the future, and 4) development of human resources related to MICE as measures for HRD in tourism. [...]

Korea: We have several HRD programmes running by government sector. It consists of training programmes for tour guides, professional convention organizers in MICE industry and coordinators of medical tourism etc.

Mexico: [...The] Integral Program of Training and Tourist Competitiveness (IPTTC) was created by the intention of combining resources and efforts to improve the quality of the presentation of the tourist services, the purpose is that the actions of training and competitiveness that are carried out attend to the specific needs that need the tourist destinations of the different [federal] entities.

Spain: The "Plan Horizonte 2020", which provides measures to modernize the Spanish tourism sector [...].

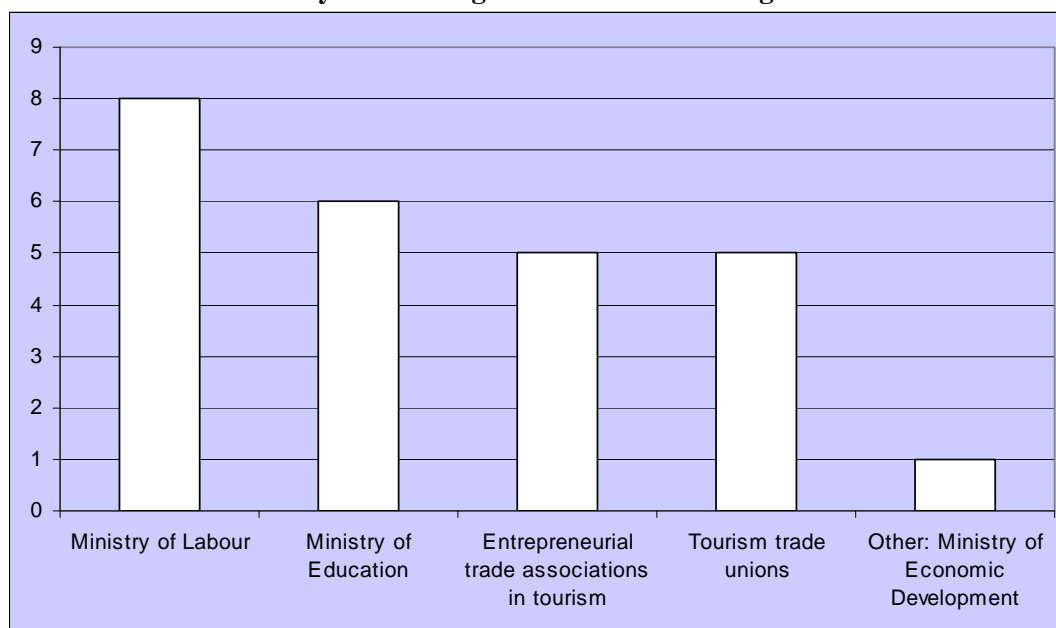
Turkey: Training programmes for human resources in tourism sector: 1) On-the-job Trainings: Front office training, Food and beverage training, House keeping training, Food production training; 2) Bed&Breakfast Trainings and Seminars; 3) Personal Development Seminars; 4) Training of the Trainers

#### **IV. (2) Institutional Involvement**

In countries like **Canada**, **Germany**, **Mexico**, **Spain** and **Turkey** the policy on employment in tourism industries has been widely discussed among institutional actors, counting on the involvement from the Ministry of labour, the Ministry of education, entrepreneurial trade associations and tourism trade unions. Often, these countries went even further to also include the migration portfolio (**Australia**), universities and researchers (Spain), and tourism businesses and local government (Canada).

In other countries, labour policy for tourism has been discussed mainly with the Ministry of Labour (**Indonesia**) or with the Ministry of Labour and that of Education (**Japan**). An exception is **Italy**, where an agreement was reached with the Ministry of Economic Development.

**Table 2: Policy has been agreed with the following institutions\***



\* Multiple answers were possible

#### **Selected Responses**

**Australia:** The Australian Government works across the portfolios with responsibility for tourism, the labour force, education, migration and training and with industry associations and trade unions to address supply-side issues affecting the tourism and hospitality industry.

**China:** CNTA collaborates with the Chinese Academy of Personnel Science to draft The 12th Five-Year Personnel Planning for China’s Tourism. The latter is under the umbrella of Ministry of Human Resources and Social Security of China.

**Japan:** Based on the Tourism Nation Promotion Basic Law, the Tourism Nation Promotion Basic Plan was decided by the Cabinet in Japan (June 29, 2007)

#### **IV. (3) Encouraging training and continuous education**

In order to encourage training and continuous education of the employees in tourism industries, respondents point to several ongoing initiatives in their countries. Central to these initiatives are common elements like standards for occupations, certification (**Canada**), qualifications (**France, Turkey**); requalification or “upskilling” of employees (**Australia, France**); consultation with industry to ensure that training caters to their needs and to those of participants (Australia, Canada); and the strengthening of (post-) graduate tourism-related education in universities (**Germany, Japan**).

Some countries also draw attention to the importance of considering implementation of such initiatives at lower geographical disaggregation—i.e. sub-national—levels to better adapt to the requirement of each region (i.e **Indonesia, Italy**, and especially Japan).

#### **Selected Responses**

**Australia:** [...]The Australian vocational education and training system is designed to provide employers with the skills development services that meet their business needs for all sectors of the economy. It offers a range of flexible training options which can be used for all stages of an employee's development. From preparing new entrants to start work in the industry, to recognising the skills of more experienced staff, and upskilling employees or preparing them to take on supervisory or management roles. This flexibility is underpinned by training packages, which [...] are developed in consultation with industry [...]. Under the Skilling Australia for the Future initiative, the Australian Government has funded the Productivity Places Program (PPP) which will deliver 711,000 qualification commencements over five years across a range of industries. [...]

**Canada:** Through its tourism training brand, emerit, the CTHRC provides online, paper-based and instructor-led training products that encompass a diverse range of professional positions in the tourism sector [...]. The

CTHRC offers more than 50 National Occupational Standards[...]. Management standards also guide training, evaluation and selection of staff. Professional Certification is awarded when an employee demonstrates they have mastered the required skills and met the standards of their profession in a practical job setting. The CTHRC's Ready-to-Work employment bridging program is a national, industry-based internship program that assists individuals by preparing them for the world of work. [...] The CTHRC is part of a network of tourism human resource development organizations (HROs) across Canada. In each province and territory, these local partners deliver the entire range of emergent tourism training programs and the Ready-to-Work program [...].

China: In December of 2009, the State Council of China issued its "Suggestions for accelerating the development of the tourism industry", in which the mechanisms and issues on the planning and budgets for the education and training of the labor force in tourism industry are clearly defined.

France: The provision of Law No. 2009-1437 of 24 November 2009 on the reform of life-long vocational training, applies to all sectors of the French economy, including tourism. This Act provides for the creation of a joint fund for career security. This fund helps finance training activities contributing to the qualification and requalification of employees and job seekers.

Germany: Most young people in Germany are trained within the system of dual vocational training after leaving school. In the tourism sector [there are...] 12 training regulations: specialist in the hospitality services industry; specialist in the hotel business; hotel clerk; cook; restaurant specialist; professional caterer; travel agent; [ etc. ...] There are also bachelor and master studies on tourism subjects and training regulations for continuing vocational training [...]. It is one of the acknowledged aims of the German government to further improve the qualification of people working in the tourism sector.

Japan: Japan supports efforts for autonomous and sustainable development of human resources by each region by formulation of the guidelines that clarify the image of human resources required in each region and knowledge and skills to be acquired, review thereof, information provision on human resources development for tourism destination development, and information sharing among regions. [...] In order to provide the tourism industry with high-quality human resources who have received specialized education, the industry, the academia and the government cooperatively construct model curriculums to enhance and strengthen the tourism management education at universities that offer tourism education.

#### IV. (4) A Tourism Training Centre

Many responding countries do seem to have specific training centres aimed at (future) employees in the tourism industries funded by the State (**Korea, Turkey**) or jointly with funding from the EU in case of **Italy** and **Spain**.

Countries that do not have a special government-funded training centre for tourism at the national level are **Australia, Japan** and **Mexico**. On the other hand, some countries do implement publically-funded training and education that is specifically geared to tourism industries at the subnational level: for example **Canada** (at the province/territory level) and **China** (all 32 provinces have tourism training centres)

In addition, countries do generally boast a number of (semi-)commercial schools and training centres that may be embedded in tourism enterprises (China) or trade associations (**Germany**).

#### Selected Responses

China: All 32 tourism administration bureaus of provincial level in China have set up the tourism training centres.

Indonesia: Government has tourism educational institution such as Medan Tourism Academy, Makassar Tourism Academy, Bandung Tourism Institute, and Bali Tourism Institute which offer diploma, undergraduate, and graduate program.

Korea: There's a "Tourism Education Academy" in KTO. They're responsible of organizing suitable programme for tourism sector, cooperating with other related organization such as tourism association or local government and providing the education center for free to the private tourism sector.

Turkey: General Directorate of Research and Education in the Ministry of Culture and Tourism deals with the issue of tourism training. In addition, there are Tourism Training Centers under the Ministry of National Education.

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## FINDINGS

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Overall, the responses reveal some very interesting, recurring issues that the UNWTO Secretariat believes should be carefully considered, serving as topics for discussion, by National Tourism Administrations (NTAs) of T.20 and non-T.20 countries alike. All these topics have to do with the uneven distribution of tourism activity and its related employment across a range of variables: geographic territory, occupational segments, and production units. Compared to the 2009 results, respondents take a clearer position in challenging seemingly apparent causal relationships—see Section II—by bringing forward evidence (or the lack thereof) and pointing to areas that require further work and consideration.

First, countries affirm the importance of considering the sub-national perspective in crafting a sensible strategy for policies related to employment in tourism industries. It seems impossible to conceive that national policy should ignore the territorial considerations so important in the generation of tourism activity and its related employment. Themes like territorial dispersion of human capital, tourism demand cycles, labour mobility, efficiency, and product diversification are all related and relevant. Beyond this, the implementation of policies in terms of, for example, industry incentives and human resource development programmes, stand to gain from collaboration with local government units and private players.

Second, it becomes clear that it is not meaningful enough to talk about ‘tourism employment’ as a homogenous entity. Because employment is unevenly distributed over different occupations with varying educational/skill requirements, policy makers should require information and analysis that not only takes this into account but also allows for enough disaggregation to craft and target effective policy. Analysing labour shortages in key occupations may require a sub-national focus.

Third, the above two points and the variety of country experiences highlight the need for a conceptual framework in order to measure and analyse the employment and occupations that cater to tourism demand in ways that are credible and comparable. In terms of the broader macroeconomic context, respondents have shown an excellent level of adherence to the concepts, definitions, and classifications in *International Recommendations for Tourism Statistics 2008*—evidencing the legitimacy of this economic accounting framework but also especially its usefulness to country analysts and policy makers. Such enthusiastic adoption provides an extra justification for expanding the present recommended framework into guidance for the development of a complementary framework targeting tourism-related employment and occupations.

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## ANNEX 1. LIST OF RESPONDENTS

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T.20 Respondents to the 2010 Questionnaire:		T.20 Respondents to the 2009 Questionnaire:	
Argentina	Italy	Argentina	France
Australia	Japan	Australia	India
Canada	Korea	Brazil	Mexico
China	Mexico	Canada	Spain
France	Spain		
Germany	Turkey		
Indonesia			