

MONITORING KEY FIGURES ON EMPLOYMENTS IN THE TOURISM INDUSTRY IN OECD COUNTRIES

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I. INTRODUCTION

This paper is a first attempt to set up a statistical monitor for key figures on “employment in the tourism industry”.

A questionnaire for a pilot survey in OECD Member countries has been developed but is not included in this report.

I.1. Objectives

The primary objective of this paper is to provide a statistical framework and methodological guidelines to establish the volume in terms of the number of people employed and some characteristics of employment in the tourism industry, seen from a supply-side perspective. These guidelines should be consistent with the concepts and definitions followed in other areas of economic and tourism statistics and are intended to be simple and flexible enough for adoption and adaptation. The introduction of these methodologies should lead to the generation of international comparable statistics on employment in the tourism industry. This will not be an easy task

because comparability of data on employment in general is already hampered by differences in definitions between countries.

These guidelines should also be in line with the Manual on Tourism Economic Accounts. Although linking the demand- and supply-side of the tourism industry for employment purposes is not a primary objective of this paper, it could be one of the results of this exercise.

Collecting data on employment in general can have two major goals. First of all data, can be used to describe and analyse the current employment situation in the tourism industry in terms of, for example, number of people employed, characteristics of the labour force, labour conditions and education and training provisions. Secondly, collected data can be used to analyse (or predict) the impact of (changes in) tourist expenditures on employment levels and structures in the different sectors related to the tourism industry. This, however, means connecting the supply-side with the demand-side of the tourism industry. Data on employment can provide important information for policy

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makers on a more macro-economic level in areas such as labour-force planning, as well as for individual entrepreneurs or regions for benchmarking.

I.2. Importance of employment in tourism

The OECD Tourism Committee first attempted to define the contribution of the tourism labour market to Member countries in the 1980s. Although little importance was attached to tourism in labour market policies of the time, there were signs that this sector had an important potential to generate employment. The results of this study were incomplete as they referred only to the hotel sector labour market. It was not possible to analyse and draw conclusions on the complete range of jobs directly and indirectly linked to tourism. This is due to the fact that, while tourism is a heterogeneous industry representing a wide variety of types and sizes of businesses, it is not an industry in the traditional sense of the word. So it does not fit the standard criteria for (national) accounts.

Nevertheless, the tourism industry is playing an increasingly important role in the economy of many of the OECD countries, contributing, to their economic growth and job creation. Because tourism is seen as a growth sector and is still partly considered to be labour-intensive, policy makers like to see the development of this sector as one of the means to tackle unemployment in their region. This is especially the case for unemployed persons at the bottom of the labour market, such as women, immigrants and young people with low educational attainment.

In addition to these arguments, the attention directed towards employment in the tourism industry is reinforced by the fact that the tourism industry is maturing into a consumers market through increasing (inter)national competition, market turbulence and changes in consumer needs. This requires more and more attention, not only to quality in products and services, but also to quality in human resources, which is one of the major assets of this industry. This growing attention to human resources is diverging in different directions. On the one hand, increasing competition entails more emphasis on cost-reduction and efficiency in business operations. Even in a labour-intensive industry such as tourism, this leads to a growing elimination of human labour through the use of (information) technology, standardisation of products and services, job de-skilling and outsourcing. On the other hand, in order to compete and adapt to new market environments it is important to invest in the quality of staff and managers. Although, human resources are the most valuable asset of the tourism industry, paradoxically, the will to invest in education and training in some of the major sectors (e.g. horeca) is relatively low compared with most other industries. For obvious reasons, such as seasonality, high proportions of part-time workers, high labour turnover, limited career opportunities and often poor labour conditions, little attention is given by employers and employees to training and education. Too often human resource planning in the tourism industry is based on short term thinking. This applies especially for small and medium-sized enterprises.

This renewed interest in (the job generating potencial of) employment in the

tourism industry in the last couple of years is indicated by the organisation of international seminars on this subject in Antalya (Turkey) in 1994 and in Annecy (France) and Vienna (Austria) in 1995. This growing attention, however, also entails the danger for the circulation of questionable data and stereotypes. Statistics should play an important role to uncover these stereotypes and monitor developments. This is even more important because the labour market in general looks to be in a transition phase from a more homogeneous market with clear-cut and steady jobs to a highly multiform market with all kinds of flexible labour structures. Because of its specific characteristics, the tourism industry has been at the front edge of this transition for some years. A transition which is also strongly driven by new directions in the tourism industry such as super-segmentation of demand and flexibility of supply and distribution.

I.3. Timeframe

This paper should result in a useful and accepted framework for the collection of data on employment in the tourism industry, seen from a supply-side perspective. Simultaneously, an initial pilot survey was set up to collect some data in OECD countries. Results will be discussed at the meeting of the Statistical Working Party of the OECD Tourism Committee.

II. CONCEPTUAL FRAMEWORK

Tourism is usually defined as a demand-side concept, that is: the need for people to travel outside their usual environment (A). To

travel outside their usual environment people spend money on a variety of products and services. In response to this demand, all kinds of enterprises and organisations need to employ inputs, such as capital, materials, but also labour (B), to supply these tourism products and services. Of course, there is also interaction between supply and demand. Through, for example, marketing, promotion and prices, the need for tourism products and services can be influenced to some extent.

Changes in the demands of different tourist consumer groups will have an effect on the supply-side of the tourism market. Not only through the increase or decrease in the demand for products and services, for example, but also in the employment situation of people working in the tourism industry. For instance, firms have to react with more experienced and knowledgeable staff to increasingly demanding, independent and experienced travellers. They have to adapt their strategies and skills to new markets by implementing, for example, better tourism information systems, increasing efforts in R&D and investing in human resources.

Enterprises and organisations in the different sectors of the tourism industry will differ greatly in the way they provide these products and services to tourists and the way they react to changes in the marketplace. Besides fluctuations in demand (e.g. seasonality), this will depend on all kinds of factors, such as: the product(s) or service(s) they provide, the way these products and services are produced, the use of technology, competition, economic performance, size and ownership (B1), and also, the availability of (qualified) labour, labour costs and labour productivity (B2).

In this light, some general features of tourism labour markets are:

- the continuing domination of small businesses with a high level of family or self-employment in some sectors on the one hand and the often still traditionally public-owned enterprises (transportation) on the other, with a tendency towards integration and concentration of businesses;

- high levels of fluctuation in demand for its services and products. Not only in terms of annual seasonality, but also within the timeframe of a week or day. This has major consequences for the demand of labour. Especially towards more flexibility in working hours, as well as in tasks. This need for flexibility also results more and more in all kinds of multiform labour structures (e.g. more part-time and on-call employment), de-skilling of tasks through the use of technology and standardisation and outsourcing. In a world with increasing competition, adaptability, not only to changes in demand, but also in business operations is becoming more and more essential for the survival of firms and organisations in the tourism industry;

- certain sectors are constrained by service characteristics where production and consumption are inseparable, often meaning that products and services cannot be stored;

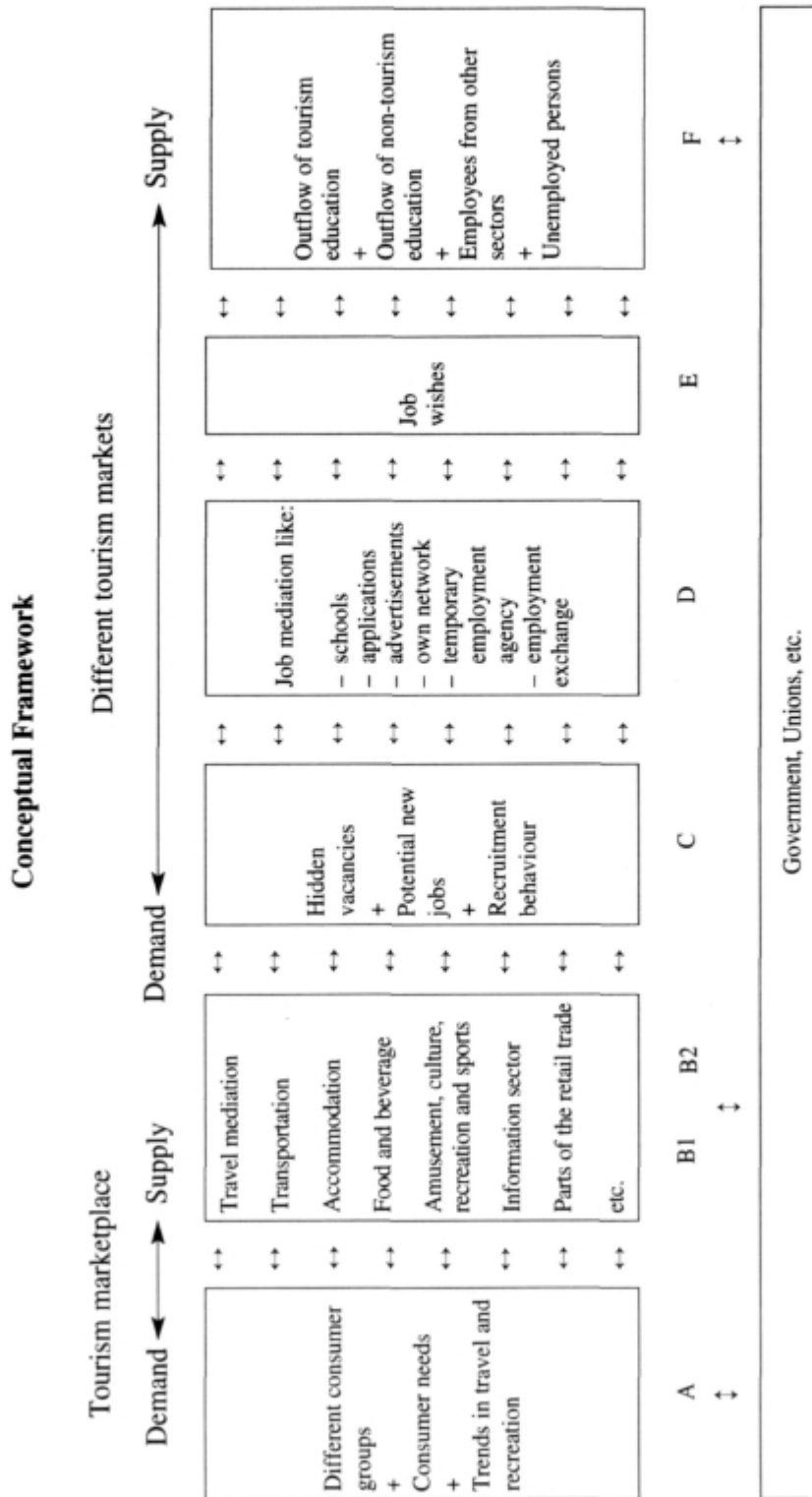
- it is still a labour-intensive industry in most of its major sectors, although the impact of technology as a substitute for labour will become more and more important. This applies more to the production of goods and services rather than the service side. State-of-the-art technology is becoming an essential

asset for the accessibility of the tourism marketplace;

- as a consequence of its labour intensity, some of the major sectors are dominated by unskilled and semi-skilled jobs which means that the tourism labour force is often accessible to workers with a minimum of training;

- some of its major sectors are dominated by traditions of low pay, perceived poor conditions and high labour turnover (instability).

Thus the range of subsectors, the size of businesses, their ownership, the markets they serve and the impact of seasonality illustrate the factors which contribute to determine the range of tasks which are undertaken, the number of people employed and the skills required. However, while these associations are important, they cannot be seen as the exclusive determinants of the different tourism labour markets. In its broadest sense, a labour market comprises the total working environment at sectorial, local, regional, national or even transnational level. In the case of the tourism industry this working environment consists of all tourism-related sectors, their personnel requirements, the skills needed and working conditions, as well as those currently outside the actual workforce, whether unemployed, temporarily unable to work because of illness or injury or those undergoing some kind of training or education. Labour markets are driven by the intermingling of demand (B2-C) and supply (E-F) of labour through a complexity of interactions. Not only between the direct demand and supply of labour, but also determined by a wide range of other factors. Some of these factors include:



– the culture and history of the locality or sector (also in terms of size and ownership of businesses); the economic system (e.g. free market or planned economy);

– economic performance factors which will influence demand for products and services, the price that will be paid for them and the level and character of employment that will be generated as a result;

– the number of (hidden) vacancies (C). Together with the people who are already working, in the tourism industry, these vacancies determine the demand-side of the labour market. Enterprises and organisations will have different recruitment strategies for filling vacancies (C). Vacancies that can have a wide variety of (required) characteristics, such as: education requirements, skills, experience, working hours, salary and other working conditions;

– factors at the supply-side of the labour market, such as: demographic structure and trends and the range of skills available. The competitive advantage of countries can depend on the amount of available skilled and unskilled labour for the tourism industry. In general terms, the supply-side of the tourism labour market can be divided into four groups: graduates with a tourism education, graduates with no tourism education, unemployed and employed from other areas (F). These people will have different skills, qualifications, expectations and wishes (E);

– the structure, of and focus on educational and vocational training, provisions: private and public (F);

– the extent of inward and outward labour mobility;

– the competition between companies and organisations for available skills within the workforce and school-leavers. For example: where the supply of labour to the tourism industry is not perfectly elastic, growing demand can raise costs and thereby reduce the competitiveness of the tourism industry. So there can be differences between gross and net employment effects;

– the structures of job mediation, i.e. through schools, advertisement or application, own networks and labour agencies (E);

– policies enacted at a local, regional, national and transnational level by a wide range of bodies government, unions, councils and all kinds of representative assemblies - with respect to matters like fiscal policies, education and training, employment creation and related incentives, employment protection measures, workplace conditions and health and safety provisions.

A labour market, therefore, is a dynamic concept responding, to a diversity of factors which can not be treated as static and unchanging. Perfect labour markets, in the sense of well-oiled machines which balance demand and supply of labour, do not exist. This also makes analysis, predictions and forecasts in this area rather difficult. This is complicated even further by the fact that the tourism industry itself is also characterised by a diversity of activities in different sectors, only bound together by their contribution to a common goal: that of meeting, the needs of tourists.

III. METHODOLOGY

III.1. Concepts and definitions

Tackling the subject of tourism and employment from a statistical point of view is not an easy task.

First of all, defining tourism from a demand-side perspective will only provide insight to the number of jobs (total labour volume) in the tourism industry. In these cases, some variant of the multiplier method, input-output analysis or an econometric model is used. These methods usually translate the total turnover of (or expenditures in) a (sub)sector of the tourism industry into a number of persons employed by using some kind of labour coefficient or ratio. Such methods, however, cannot say anything about the characteristics of, for example, the labour population or labour conditions. One can think here of aspects such as sex, age, immigrant status, working hours, education levels, wages, labour costs, vacancies, etc., but also of mobility, flexibility, seasonality, informal labour, substitution of human labour through the use of technology, outsourcing, recruitment strategies and the image of labour conditions in the tourism industry. To say something about these characteristics, some kind of supply-side approach must be used. That is to say: defining tourism from the classification of companies and organisations that offer products and services to tourists. Because tourism cuts through and merges into a variety of economically- defined subsectors, it is difficult to define the actual boundaries of tourism from a supply-side perspective. This, however, should not be a constant source of frustration. A practical and flexible approach should be used here.

Secondly, employment or labour markets should be defined which is a more difficult task than it might seem. Furthermore, a first selection should be made from the (key) characteristics of the labour force or labour market. These (key) characteristics also need to be defined.

III.1.1. Definition of the tourism industry from a supply-side perspective

For the definition of the tourism industry from a supply-side perspective, the classification according to industry, i.e. the main economic activity of an enterprise or organisation, on the basis of the international standard classifications of industry (ISIC, rev. 3), can be used. Seen from an employment perspective, this is fundamentally different from that of other possible approaches, that is: according to occupation on the basis of the international standard classifications of occupation (ISCO, 1988) and according to products and services on the basis of the Central Product Classification (CPC, 1989).

As mentioned before, defining tourism from a supply-side perspective is a problem. Tourists spend their money on a variety of products and services and therefore tourism cuts through the normal classification of industries. Using a practical approach however, a first selection of these industries as core sectors of the tourism industry can be made on the basis of a set of criteria. These may include association with the WTO definition of tourism (see also the SICTA), the degree of tourism specialisation of a sector (that is: tourism-driven versus tourism-related sectors by the use of turnover), availability of reliable statistical data and the

direct contact between enterprise or organisation and tourist. This last criterion means that indirect and induced employment will be left out.

On the basis of these criteria the following selection of core sectors looks plausible:

Diagram 1

- 63 Supporting and auxiliary transport, of which:
 - 6304 Travel agencies, tour operators and tour guides.”
- 55 Hotels and restaurants, of which:
 - 551 Hotels, campsites and other commercial accommodation.
 - 552 Restaurants, bars and canteens.”
- 60 Land transport, of which:
 - 601 Railways.
 - 602 Other land transport.
- 61 Water transport, of which:
 - 61 Sea and coastal water transport of which: cruise ships.
 - 612 Inland water transport.
- 62 Air transport, of which:
 - 621 Scheduled air transport.
 - 622 Non scheduled air transport.
- 92 Recreational, cultural and sporting facilities, of which:
 - 923 Libraries, archives, museums and other cultural activities.
 - 924 Sporting and other recreational activities.

?? Information services (part of 751 1)

This selection can, of course, be elaborated or adjusted with other (sub)sectors of the ISIC classification. An essential precondition, however, is the availability of reliable statistical data.

III.1.2. Definition of the (tourism) labour force (or employment)

To start with the collection of data on all aspects of the (different) labour market(s) in the tourism industry is too difficult to handle at this moment. It is not only difficult because of the diversity of aspects in play but also problems about the definition and availability of data that can be expected concerning these aspects. This paper, therefore, only focuses on some of the key characteristics of the tourism labour force (see B2 in basic framework).

In diagram 2 a picture is given of the different concepts of the labour force or employment in general. The volume of the potential labour force (C), that is: the total labour supply, depends on the participation rate (B) of the population (A) of a region or country in the labour market. This is influenced, for example, by the age structure of the population and the rate of unemployment, which can discourage people from looking for a job. The demand for labour consists of the actual labour force plus (hidden) vacancies (E). The demand for labour and the potential labour force determine together the rate of unemployment (D).

The labour force or employment can be expressed in employed persons, in jobs and in total labour volume. Some people employed

in the tourism industry will have a job on the side in the same industry. Jobs and jobs on the side result in the total number of jobs in the tourism industry. Jobs, however, differ in size

- full-time or part-time. If all jobs are converted to full-time equivalents (fte) the total labour volume of the tourism industry can be calculated (see diagram 3).

Diagram 2

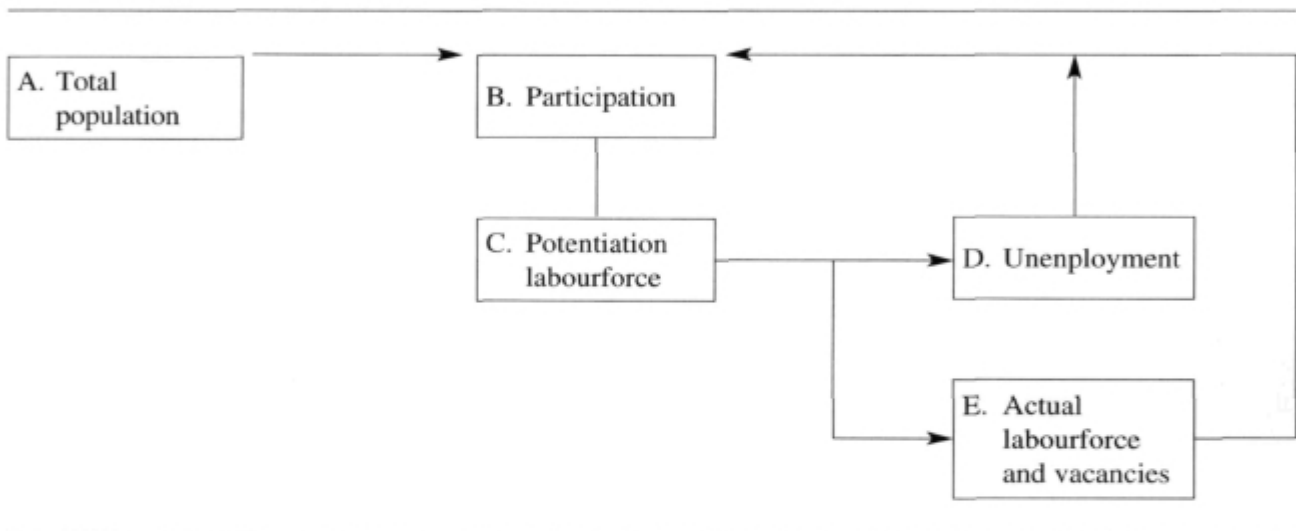
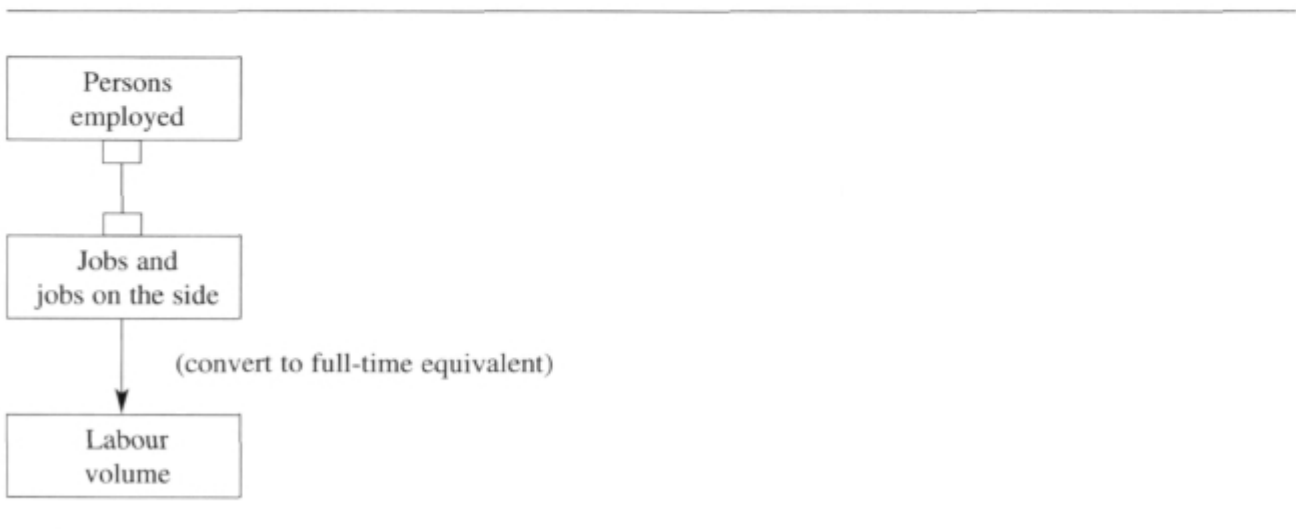


Diagram 3



At this moment the comparability of data on employment in general between countries is hampered by differences in definitions, classifications, groups covered and methods of collection.

Practices as to the definition of the (potential or actual) labour force or, in terms of the ILO: economically active population, vary as regards to the treatment of groups such as the armed forces, members of religious orders, seasonal workers, persons engaged in part-time economic activities, (e.g. jobs of four hours or less) or family workers, particularly females, who assist in family enterprises. In certain countries, all or some of these groups are included among the economically active while in other countries they are treated as inactive. In the framework of tourism, seasonal, part-time, on-call and family workers are important groups.

The reference period can also be an important factor of difference: in some countries census data on the economically active refer to the actual position of each individual on the day or week of the census, while in others the data recorded refer to the usual position of each person, generally without reference to any given period of time.

Also, in most countries, the statistics of the economically active population relate only to persons above and/or below a specific age limit, while in some there is no such age provision in the definition. Often age limits of 15-74 or 15-64 are used.

In some way a common denominator between countries should be found here. In this paper the starting point for the (potential or actual) labour force is the age group between 15-64 years. Included should be:

- employed and self-employed people (incl. family workers);

- people who have a job of 4 hours or more;

- if possible: people on-call and students. People who work through temporary agencies should, if possible, be classified separately.

III.1.3. Definitions of key variables/characteristics:

As for the definition of employment, it is not wise to aim too high and try to cover all possible characteristics of a labour force. A selection of key variables should be made. The following key variables are included here:

– *General level of employment: the number of persons employed distinguished for:*

- + the total labour force in a country;

- + the selected core sectors of the tourism industry;

- + if possible: annual growth/decline rates;

The number of people employed (or jobs) should be counted. There is no intention yet to make a conversion to full-time equivalents. It must be clear, that these figures only present a (big) part of the people employed as a result of the different expenditures of tourists on the one hand and include people whose job is a result of the expenditure of residents instead of tourists on the other. (See also 3.3 ratios).

– **Key characteristics of the labour force:**

1. **Sex** - distinguishing between male and female.

2. **Age groups** - 15-24; 25-34; 35-44, 45-54; 55+.

3. **Nationality** - distinguishing between nationals and non-nationals/immigrants. This differs between countries.

4. **Working hours** - distinguishing only between full-time and part-time on the basis of the average number of hours worked per week, excluding overtime, annual leave, holidays, sick leave and time spent in travel from home to work and vice versa. Part-time work is defined here as working equal or less than half of the average hours worked per week. In making comparisons it should be borne in mind here that the data are influenced by the number of days worked per week, regulations and customs regarding working on Saturdays and Sundays.

5. **Seniority** - average seniority per core sector and country.

6. **Status in employment** - the international classification of status in employment (ISCE) classifies jobs with respect to the type of explicit or implicit contract of employment the person has with other persons or organisations. The main ISCE groups are: employers, own-account workers, employees, members of producers cooperatives and unpaid family workers. These groups are not easily comparable between countries. For example, in most countries managers and directors of incorporated enterprises are classified as

employers. Another example is (un)paid family members, in most countries they are classified as employers, but some countries classify them as unpaid family workers. Also many countries cannot make a distinction between own-account workers and employees. Because of these differences between countries the only distinction here should be made between employers (self-employment) and employees (paid employment). Self employment includes: employers, own-account workers and (un)paid family workers. Paid employment (salaried) should (if possible) also include: on call workers, apprentice, paid students and paid homemakers.

7. **Education level** - Because of the different education systems per country there is no unambiguous definition here. However, a translation can be made to the international accepted standard classification of education, divided in the groups low, middle and high.

All variables should distinguish between the total labour force of a country and the labour force per core sector of the tourism industry.

III.2. Sources

In general, employment data can be obtained from three main sources, namely:

1. **Labour force survey** (and general household survey) - these surveys are a source of regular information on both the total labour force (employed and unemployed) and total inactive population. The data generally relate to employment during a specified brief period, either one

week or one day. This source usually covers key variables 1, 2, 3, 6 and 7.

2. Social insurance statistics/administrative registrations - this source covers the working population protected by sickness, accident or unemployment insurance schemes. Persons working a very short time or receiving very low pay are sometimes excluded. This source usually covers key variables 1, 2, 4, 5 and partly 6.

3. Establishment surveys - this source provides data on the number of workers on establishment payrolls for a specified period or working day in this period. This source usually covers key variables 1, 2, 4, 5 for employees (thus partly 6). In some countries labour accounting systems are developed. They provide official estimates of (un)employment data by national authorities. These are based on a combination of information drawn from one or more of the above sources. This source, usually, covers all key variables.

III.3. Further methodological considerations

As stated before, the comparability of data on employment is hampered by differences in definitions between countries. So it is important that the methodology and definitions used to collect data on employment in the tourism industry should be described and fit in as best as possible with the definitions in this paper.

In addition the following, considerations should be made:

– that only existing official employment data should be used. This can limit the distinction between the selected (sub)sectors of the tourism industry. If possible data on a three digit level should be presented. If this is impossible: at least data on a two digit level should be given;

– that yearly averages should be presented. Only if possible: seasonal data should be given;

– that a distinction between employment in small and medium sized enterprises on the one hand and employment in large enterprises on the other is useful, but difficult to obtain on a reliable basis if one also holds on to the distinction between the different selected core sectors;

– for reasons of reliability, data of two or three years can be joined together in one more reliable data-set. This is especially the case for data on the characteristics of the labour force;

– regional employment data is not asked, because of reliability problems that can arise. For the same reason aspects, such as: informal labour and the distinction between permanent and seasonal labour, are excluded. The availability of data plays an important role as well.

III.4. Ratios: linking supply- and demand-side concepts

One of the major problems of a supply-side approach is the question: which tourism-related sectors should be included? By its nature, however, tourist expenditure and hence tourism-related employment

encompasses the outputs of almost every industry in the economy. On the other hand, industries defined as those which comprise the tourism industry can cater for the needs of residents as well as tourists. Only a proportion of their employment will be associated with tourism.

To solve this problem, at least partly, a connection should be made between the supply- and demand-side of the tourism industry. With the expenditures of tourists (demand-side) and, for example, the total turnover (supply-side) in the selected sectors of the tourism industry, ratios could be calculated. These calculated ratios can then be used to allocate employment in the selected sectors to tourism, excluding employment generated by expenditures of residents. With such an exercise there can also be a much better confrontation between employment data from a supply-side approach and employment data from a demand-side approach, insofar as it concerns employment figures on the number of people employed - or full-time equivalents - and not the different characteristics of the labour force. Such a confrontation could also provide better insight in the reliability of labour coefficients and full-time/part-time ratios which are often used.

Until now, not much research has been done on the use of these ratios and the way they should be calculated in operational terms. This is certainly not the goal of this paper but in the enclosed questionnaire one of the tables is directed to this subject. Concepts (and data) from the Manual of Economic Accounts can be very useful here. The Manual integrates aspects of tourism supply and tourism demand with its three main accounts:

- the production account which presents supply-side information, including employment data of sectors with tourism activities (within a country);

- the consumption account on utilisation;

- and the commercial goods and services account reconciling supply and utilisation.

These three accounts are used in conjunction with each other to build a global system which encompasses all statistics relative to the consumption and production of tourism. Although the linking of demand and supply is a very useful exercise, some questions about this approach should also be asked:

- it is often difficult to allocate expenditures of tourists to the selected sectors of the tourism industry with existing statistics. The availability of reliable and actual data is also a problem here;

- it is still unclear how the connection should be made. A very simple way is to determine the total turnover (T) in a sector and relate this to the expenditure of tourists (E) in that sector;

Tourism ratio of sector X = E/T

In an ideal situation, ratios could even be calculated for the different tourist groups - domestic, inbound and outbound (and also same-day visitors). However, a more comprehensive method should be developed here using concepts such as value added, capital formation and product and service classifications. See the Manual;

– this exercise is mainly important when the number of people employed, the number of jobs, full-time equivalents or total labour volumes are discussed. However, the usefulness of these ratios is questionable if characteristics such as sex, age groups and labour conditions, are discussed

– for labour policies, it is only important to know exactly which part of employment in a sector is generated by tourist expenditures in a limited way. In many cases, labour policies will be directed to the total labour market or the total labour force of that sector, regardless whether the employment is a result of the expenditure of tourists or residents. On the other hand, if the impact of tourism expenditures and tourism flows on employment need to be analysed, these are the best methods at the moment.

IV. SUMMARY

“Counting people employed” from a supply-side perspective is certainly not the only method to measure employment levels and structures in the different sectors related to the tourism industry,

Beside the fact that it is hard to define the tourism industry by the use of a narrow set of sectors of the Standard Industries Classification, a supply-side approach has also some other limitations. For example:

– this method neglects so-called secondary effects, such as indirect and induced (employment) effects of tourist spendings. This can result in an underestimation of tourism-related employment. However, employment in some sectors (e.g. construction and

processing), which supply services and products to industries that cater directly to tourists, could be included as well. In these cases a value chain could be useful;

– this method provides little direct insight into the responsiveness of employment growth to factors like increased visitor numbers for example. Effects must always be related back to tourist expenditures in some way.

Methods which recognise the relation between tourist expenditure and the impact of that expenditure on job creation are mainly demand-side driven approaches like simple expenditure methods, input-output methods, multiplier models or econometric models. Although these methods have their own specific limitations, these approaches are much better suited to analysis of the impacts of tourism expenditure on employment levels, connections between all kinds of tourism-related industries, effects of government revenue and expenditure, etc.

Beside, the fact that results are quite sensitive to the assumptions made, the major deficiency of these demand-side driven approaches is that they cannot say anything about the characteristics of employment in the tourism industry. For this, a supply-side driven method must always be used. Therefore the goal should be to use both approaches simultaneously and gear them together as much as possible. Here the concepts of the Manual of Economic Accounts should play an important role.

Improvements can be made to all methods used. For the supply-side method, some possibilities are:

- improving the definition of tourism by including more (sub)sectors (also related to indirect employment);
- adding more aspects and determinants of the labour force and labour markets;
- making a more elaborate analysis of the different tourism labour markets;
- providing data on a regional level;
- better linkages between supply- and demand-side perspectives;
- including more qualitative aspects, such as: effects of labour turnover (mobility), substitution of human labour by technology, new multiform labour structures, recruitment strategies, (un)availability of skilled labour, effects of labour costs and informal labour.

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