

Macro-economic value of tourism:

Employment

Nico Heerschap (Statistics Netherlands), Cusco, 2018



Content

- **Why do we want to pay attention to employment in relation to tourism?**
- **Not all the figures about employment are the same: some concepts**
- **Basic figures on tourism-related employment in the Netherlands**
- **Effects of digitalisation**

Why pay attention to tourism-related employment?

- Hospitality-industry / People's industry → Professionalism of staff and management
- People often part of the experience of visitors
- Innovation and sustainability
- Income and self esteem for local population
- Economic development of areas
- Jobs at the bottom of the labour market
- Changes in labour conditions, see online platforms like Airbnb, Uber, Deliveroo
- Alignment of education/training (life long learning) and labour demand (tight labour markets)
- In Netherlands: more people employed in the tourism sector than people employed in education, construction or agriculture



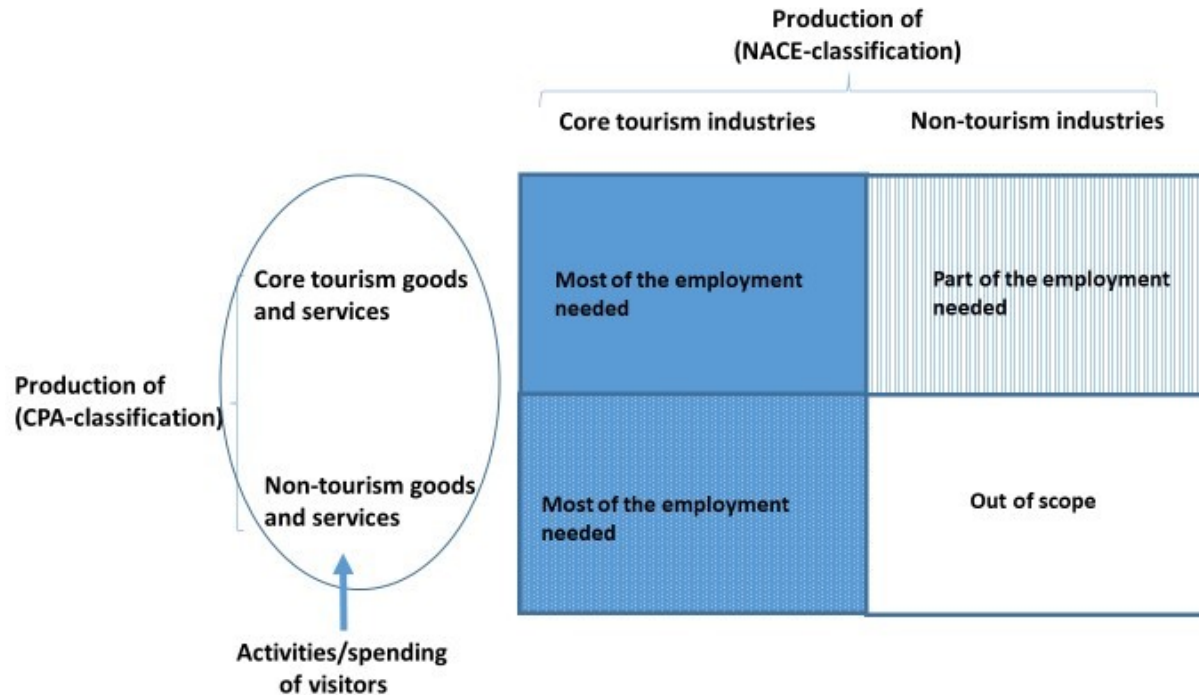
Tourism is for a large part carried by people
Provides substantial number of jobs compared to other industries in the economy



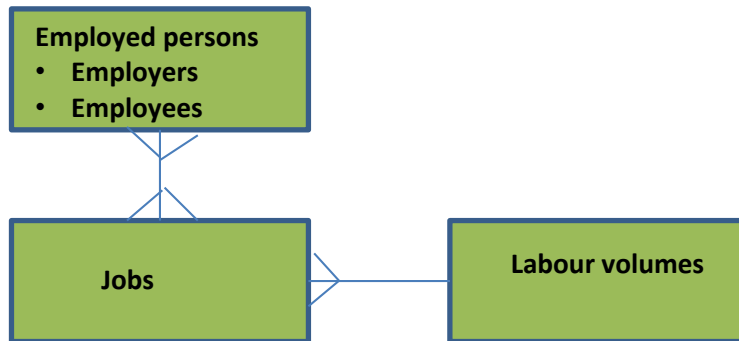
Expectation?
Employment is at the top of every priority list in tourism

Not all employment figures have the same meaning: some concepts

- Different scope: direct, indirect and induced employment
- Volumes of employment especially taken from Tourism Satellite Accounts



- Different indicators for the volume of employment: employed persons, jobs and labour volume (fte's)



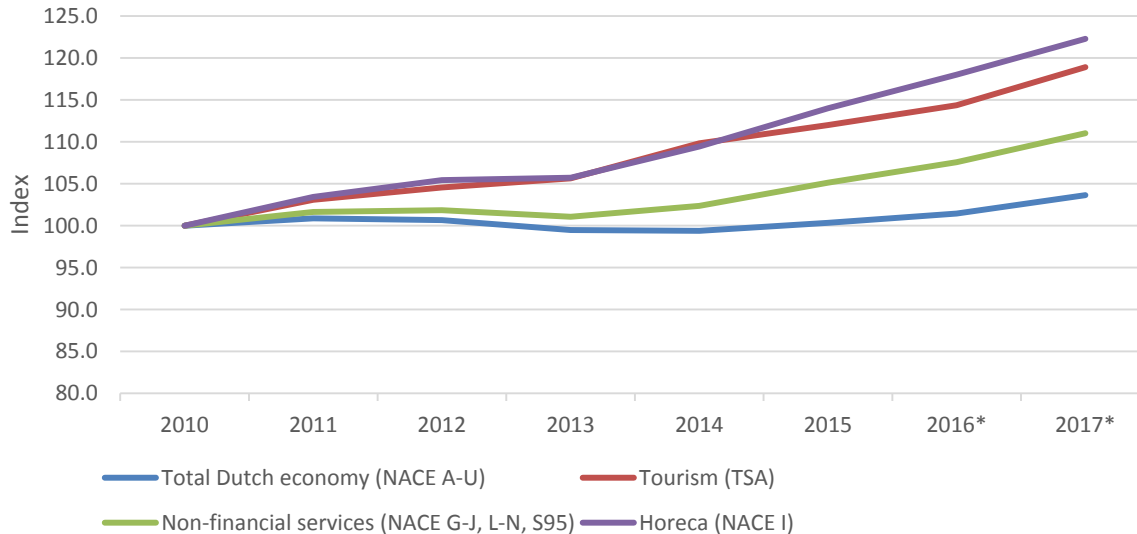
- For the characteristics of employed persons (e.g. age and gender) and jobs (e.g. part-time) the TSA cannot be the primary source, but tourism-related industries are the starting point. So: dependant on the demarcation of tourism: which industries are included and which not?



Some figures: Dutch TSA-2017 and EU-2014

- **Employed persons: 654.000 (TSA)** 7,2% of the total of employed persons (growth since 2010: 19%)
- **Jobs: 761.000 (TSA)** 7,5% of all jobs
- **Labour volume: 455.000 (TSA)** 6,3% of the total of labour volume

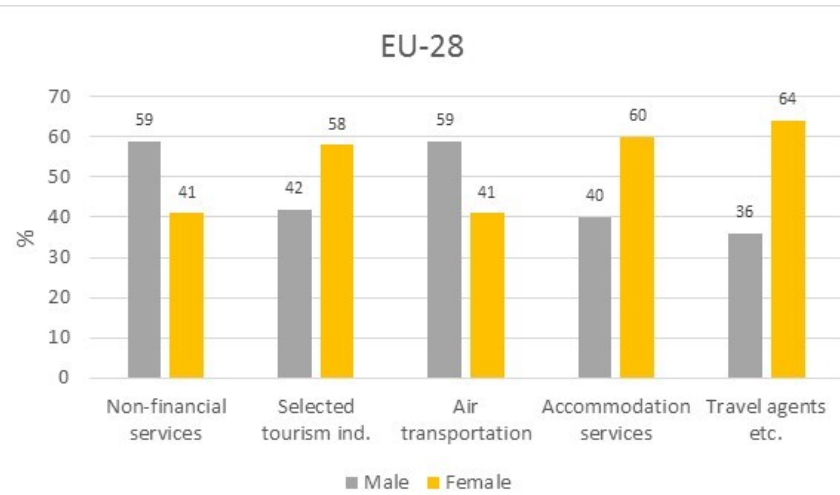
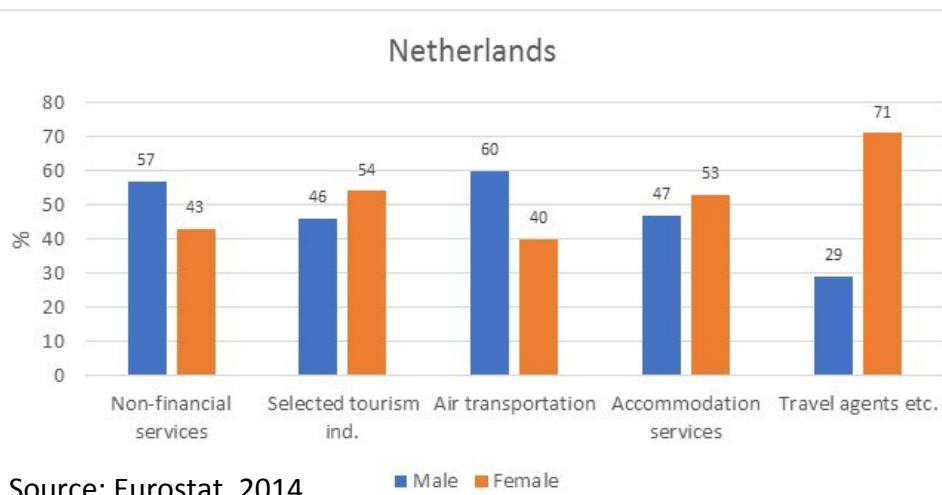
More employed persons than in Construction (457.000 e.p.) and Health (526.000 e.p.)



With this, at the moment tourism is one of the most important growth sectors of the Dutch economy



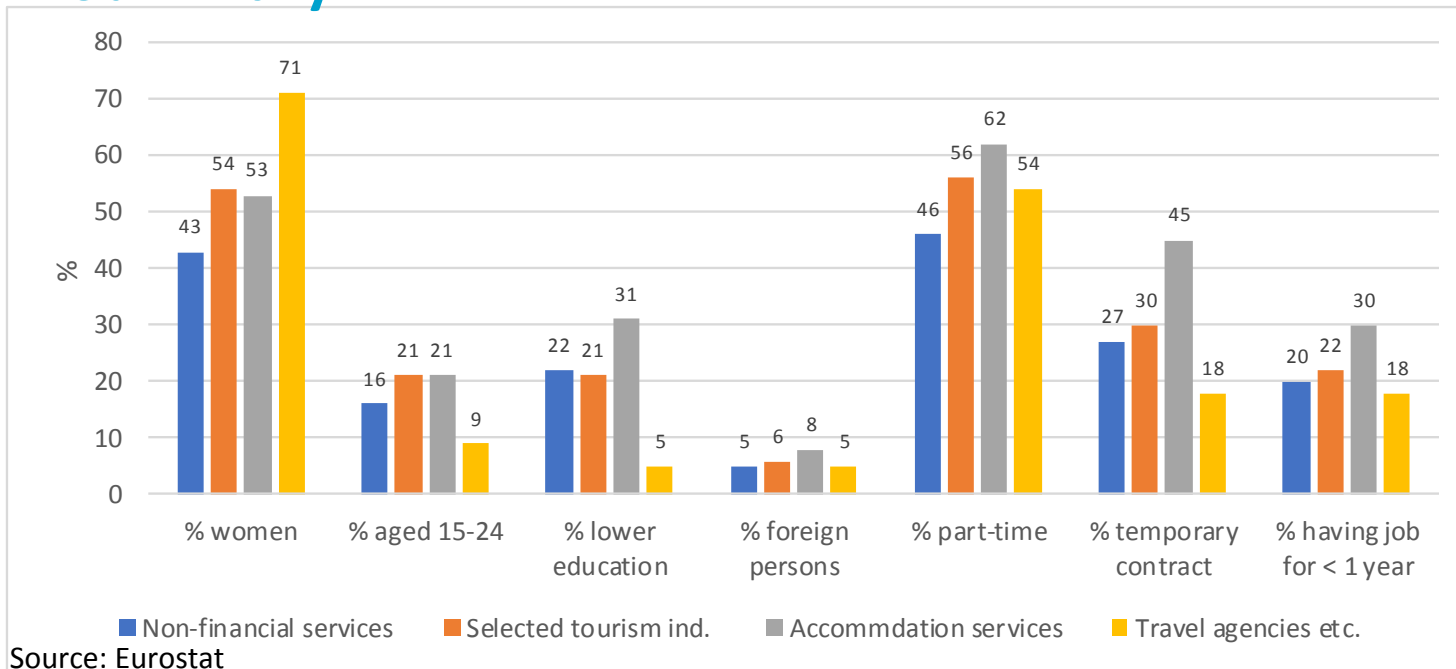
Characteristics of tourism-related employment



Source: Eurostat, 2014



Summary

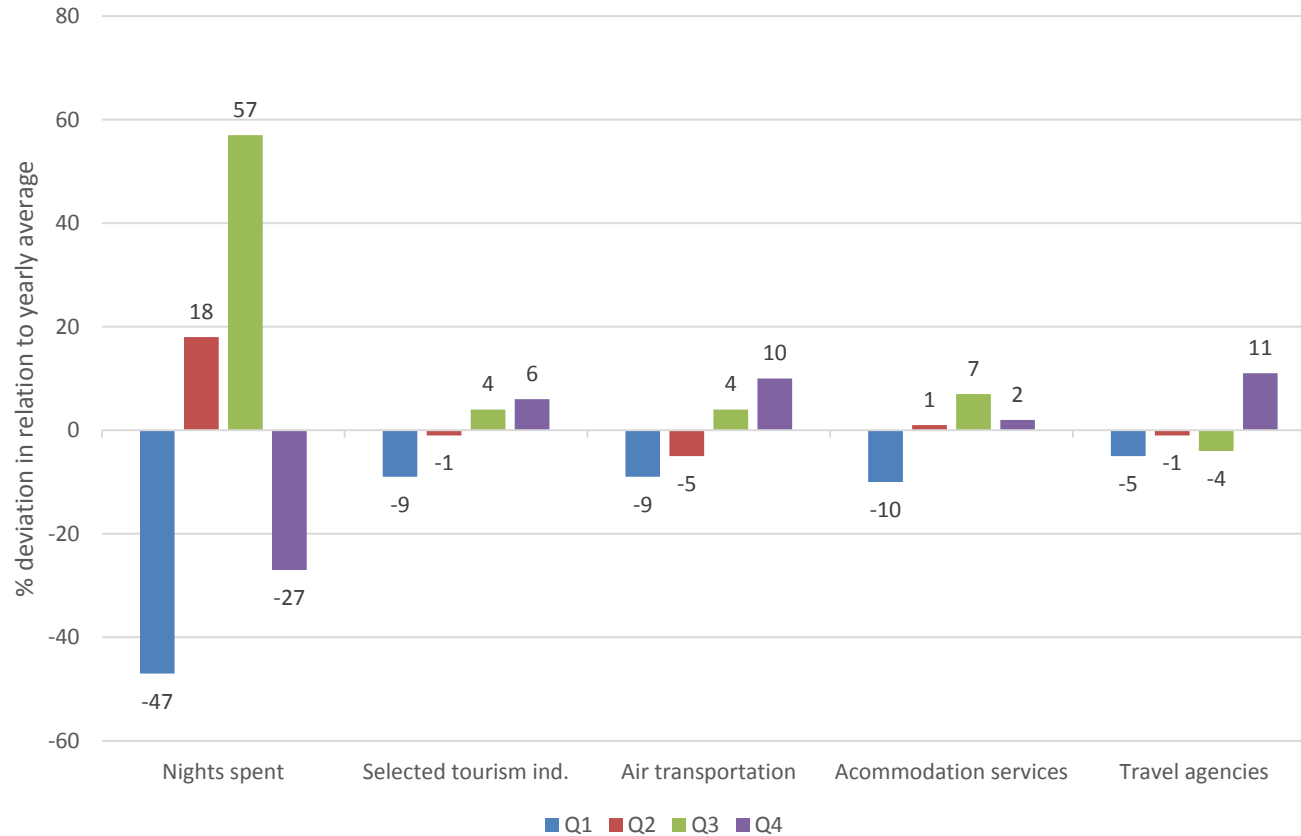


Different analysis are possible: all kinds of developments, job vacancies, productivity, wages, wage costs, flexible layers of workers (self employed) and labour conditions in relation to online platforms.

Sustainable Development Goals, goal 8: work for (yes) all and decent jobs (questionable)



Seasonality

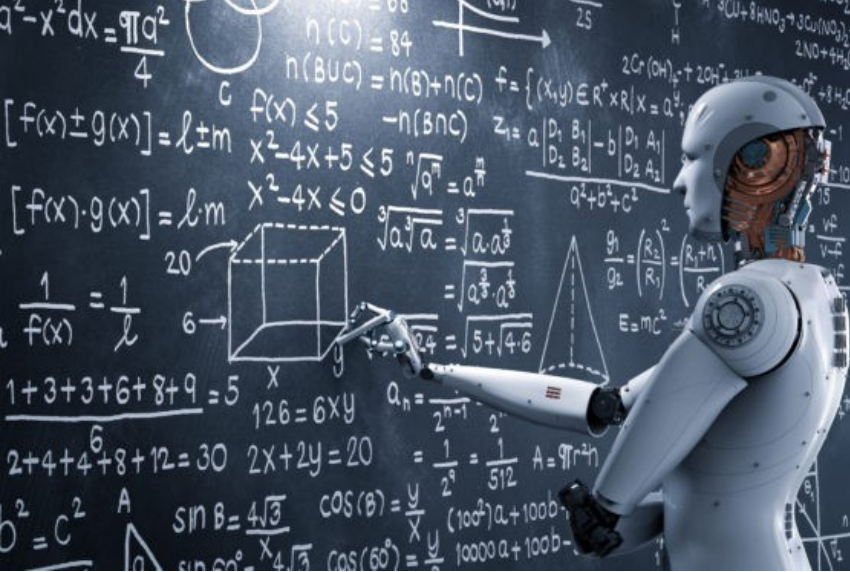


Source: Eurostat



Digitalisation and robotisation

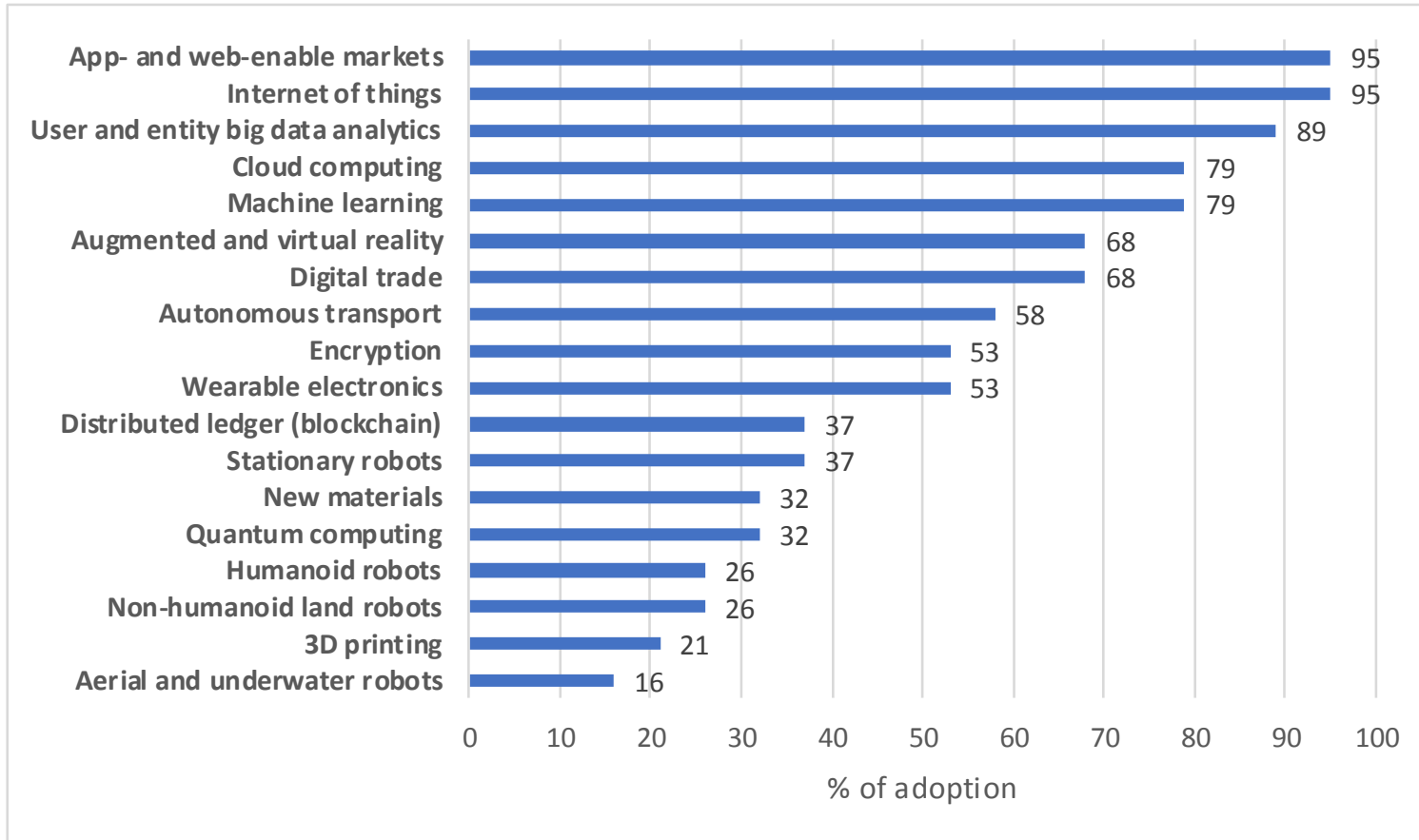
In the future: more or less jobs in tourism?



- Gartner's 'Nexus of forces': acceleration through the mutual reinforcement of developments like internet, cloud, big data, social media and mobile, but also more and more AI and robotisation
- Much has already been digitised (internet, mobile, process automation)
- Also jobs with higher qualifications within reach of digitisation, e.g. communication and decision making
- The environment of online platforms: social security, permanent jobs, wages (global competition) and training (difficult if one does not have a permanent job)



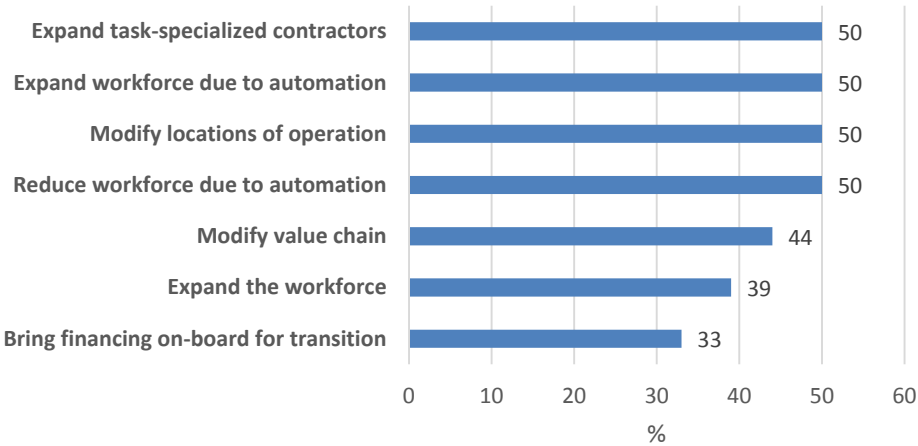
Adaptation of new technologies in 2022 by Aviation, Travel and Tourism



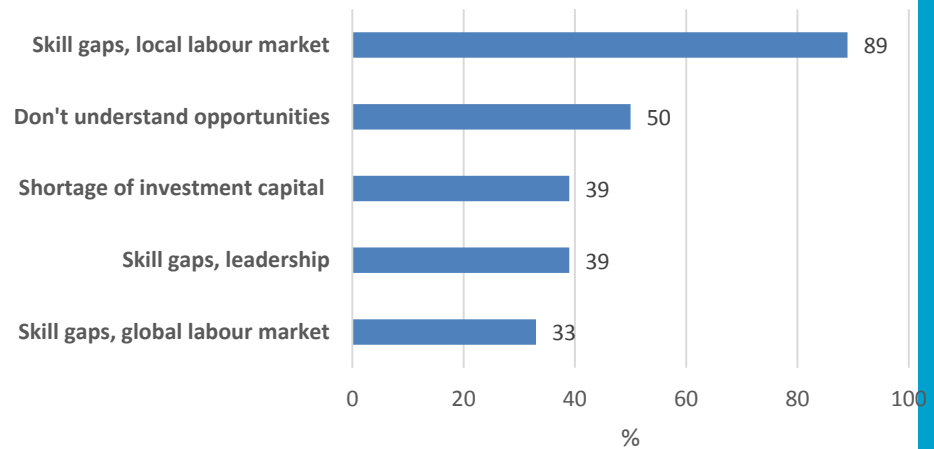
Source: World Economic Forum



Expected impact on workforce



Barriers to adoption of new technologies



Source: World Economic Forum

Given the current developments and importance, it is advocated to do more research and develop a long-term vision on tourism-related employment



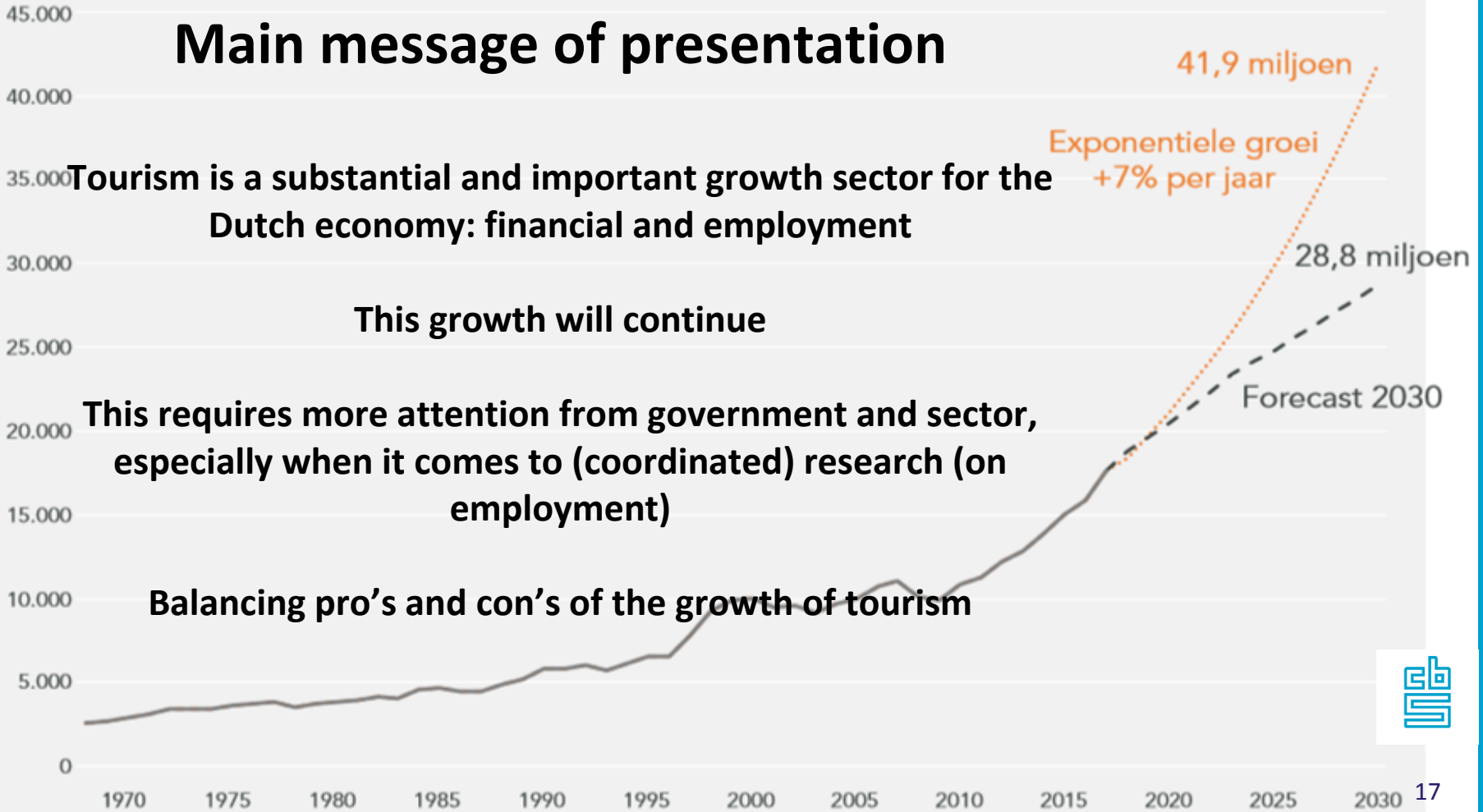
Main message of presentation

Tourism is a substantial and important growth sector for the Dutch economy: financial and employment

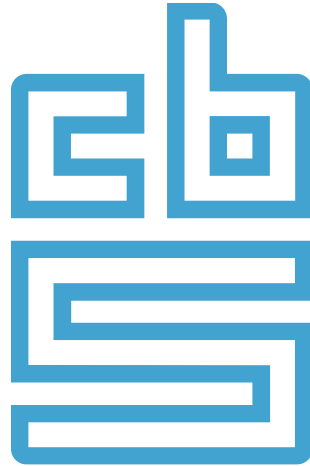
This growth will continue

This requires more attention from government and sector, especially when it comes to (coordinated) research (on employment)

Balancing pro's and con's of the growth of tourism



Thanks for your attention



Voor wat er feitelijk gebeurt