



Ministry of Culture and Tourism
Government of Indonesia



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World Tourism Organization

with the cooperation of



International Labour Organization



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Tourism and Employment: an Overview by UNWTO

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Introduction

The importance of employment

- Continuous growth of tourism in the last decades
- Importance of economic contribution of tourism to national economies (TSA)
- General recognition of tourism as a major job generator, especially for youth, women, unqualified workers, etc.
- However, very few studies on the real tourism contribution in terms of jobs, quantitatively and qualitatively

Preliminary work of UNWTO

- First global survey on tourism and employment: In preparation of the present Conference, the Organization decided to collect, for the first time, some basic information on tourism related employment in Member States and a survey has been conducted to serve this purpose.
- Ministries of Tourism and NTAs were encouraged to attach to their response any additional information, comments, statistical tables, legislative texts, and any other material relevant to the issue of employment in tourism.
- 40 replies received (see list of respondents in Annex 1). This rather low level of reply confirms the relatively low priority granted by ministries of tourism and NTAs to the employment issue in general.

- The present report is based partly on these replies and partly on a sample of studies on employment in the tourism sector or sub-sectors published at national or regional levels.
- The report analyses the different quantitative and qualitative aspects of tourism and employment and draws some preliminary recommendations for the public and private tourism stakeholders for further action.

Notwithstanding the low level of replies, the importance of studying the employment implications of tourism has been recognised by most of the respondents to the survey and UNWTO has been encouraged to continue this work, as illustrated in the following comment made by Hungary: *“Thank you for the questionnaire, it is highly relevant as we do not have a real system for measuring tourism’s real role in job creation. Best practices for that and any government system for supporting tourism education or experiences in adaptation the education system to the tourism industry demand would be highly appreciated.”*

I. Quantification of employment in the tourism industries

The quantification of employment should follow international rules recommendations (International Recommendations for Tourism Statistics 2008) and technical guidance for developing data to be provided by ILO according to ILO/UNWTO joint project.

Only eight countries provided data on the number of employed persons:

Table 1: number of people working in the tourism industries

Country/territory	Number of people working in the tourism sector	Percentage of national workforce
Australia	483,000 (TSA 2008)	4.7
Bahamas	48,000 (TSA 2004)	30
Canada	1,760,000 (HRM 2005) ¹	
Flemish Community	132,000 (2005)	5.1
France	1,700,000 (2007) ²	6.2 ³
Hong Kong	176,300 (2006)	5.2
Mexico	2,300,000 (2004) ⁴	5.4
Spain	2,345,000 (TSA 2007)	10.2

The development of TSA allows for a detailed analysis by industries as well as for a homogeneous intra-state comparability, as shown in the following table in the case of Australia:

¹ Human Resource Module

² Key Facts on tourism, 2008 Edition, http://www.tourisme.gouv.fr/fr/z2/stat/chiffres/chiffres_cles.jsp

³ French national workforce estimate for 2007: 27.5 Million, http://www.insee.fr/fr/themes/document.asp?ref_id=ip1092®_id=0&page=graph#graphique1

⁴ Mexican national workforce estimate for 2004: 43.4 Million

Table 2: Australia: Number of persons employed in tourism by industry (TSA 2008)

	2004-05	2005-06	2006-07
Tourism characteristic and connected industries			
Travel agency and tour operators services ('000)	21.6	21.4	21.8
Road transport and motor vehicle hiring ('000)	23.8	24.3	25.5
Air and water transport ('000)	31.4	33.4	33.5
Accommodation ('000)	73.2	73.3	71.4
Cafes and restaurants ('000)	49.3	48.3	51.4
Clubs, pubs, taverns and bars ('000)	23.6	23.0	24.0
Rail transport ('000)	3.2	3.4	3.0
Manufacturing ('000)	32.5	31.8	31.8
Retail trade ('000)	119.9	120.7	120.1
Casinos and other gambling services ('000)	1.9	2.1	1.8
Libraries, museums and arts ('000)	9.2	9.6	9.8
Other entertainment services ('000)	12.2	13.0	13.6
Education ('000)	32.1	34.2	34.2
Total characteristic and connected industries ('000)	433.8	438.4	441.9
All other industries ('000)	38.0	39.3	41.0
Total tourism employed persons ('000)	471.7	477.7	482.8
Total employed persons(a) ('000)	9800.1	10042.2	10304.9
Tourism industry share of total employment (%)	4.8	4.8	4.7

Note: Tourism employed persons are derived by multiplying the number of employed persons in the industry by the proportion of total value added of the industry which is related to tourism.

This division of tourism employment data by industries gives policy makers a clearer vision on the importance of tourism and helps them to take appropriate measures in order to increase the benefits from the sector, especially in the local economy.

Size of tourism enterprises

The replies received confirm that this sector is mostly composed of small and medium-sized enterprises. This is illustrated through the following examples:

Examples

- **Austria:** According to the 2001 census on enterprises by Statistics Austria, carried out every ten years, the majority of tourism enterprises (71%) employ less than five employees, while 99 % of the total number of enterprises employ less than 20 employees. Only 100 enterprises out of 38,680 employ more than 100 employees. In 2007, 33.6 % of the employees worked in an enterprise with less than 10 employees.
- **Canada:** Tourism industries are practically all composed of small and medium-sized enterprises. Large enterprises account for 0.2% of the total number of tourism enterprises in Canada, whereas small and medium tourism enterprises make up 99.8%. Large enterprises therefore do generate a substantial share of jobs relative to their numbers, although SME do account for the creation of an overwhelming majority of employee jobs. Overall, approximately 6% of total tourism industry employee jobs are generated by large enterprises, leaving 94% of jobs provided by small and medium enterprise.
- **France:** Tourism industries include many small companies and some very large. The large companies (more than 250 workers), which account for 0.7% of the companies of the hotel and restaurant sector employ 20% of the employees. In one sub-sector, the concentration in large enterprises is higher. Indeed, in the travel agencies and tour operator sector, 2% of the companies employ 46% of the employees.
- **India:** as per a study conducted in India in 2002, 1.85 million people were employed in restaurants, cafeterias, tea-coffee shops, a significant proportion of who are in the small scale segment. A further additional 1.3 million were employed in "dhabas" (small eating places) on the state and national

highways. In the accommodation sector, 15% of the workforce is employed in classified hotels that can be considered as larger enterprises.

- **Slovak Republic:** The tourism sector is largely composed of small enterprises and micro enterprises which often employ less than 10 persons.
- **Spain:** 99.8% of enterprises of the Tourism sector are SMEs (less than 100 workers)
- **Mexico:** Mexico seems to have a more balanced tourism labour market as far as the size of enterprises is concerned: according to the 2004 tourism statistical data, 16.8% of the tourism employees work in establishments of 1 or 2 people; 15.2% in establishments from 3 to 5 people. But establishments from 101 to 250 people and from 251 to 500 people also represent an important share, since they represent respectively 10.9% and 10.3% of the total tourism employees.

II. Youth and women

It is generally accepted that tourism is a more diverse industry than many others, in that it comprises a wide variety of suppliers of both, numerous goods and services. It has also the potential to support in a crucial manner other economic activities, such as small agricultural production, small scale fishing, handicrafts production and retailing, cultural industries and the like, which without tourism demand would hardly survive. Through providing flexible, part time jobs to many rural and urban people, tourism can serve families to complement other livelihood options. And most importantly, being labour intensive, tourism provides a wide range of different employment opportunities, from the highly skilled to the unskilled.⁵ Data compiled from the replies to the survey seem to confirm all these statements.

Youth

It is generally believed that rates of youth employment in tourism are higher than in other sectors, and that this is related to the demand for unqualified workers. It obviously varies according to the tourism sub-sectors, as shown in the following examples:

Examples

- **Australia:** the Accommodation, Cafes and Restaurants industry has a relatively young workforce, with more than one third (35.9 per cent) of workers aged 15 to 24 years, compared with the average of 17.7 per cent for all industries. Youth aged between 15 and 24 years experienced the strongest employment growth in this industry in the five years to 2007 (up by 31,600 people). Data compiled in Table 3 below corroborate these trends, showing a quite low median age in the tourism sector, with some disparities according to the sub-sectors.

Table 3: Australia: Accommodation, Cafés and Restaurants Sectors - Median Age in years - 2006

Cafes & Restaurants	27 yrs
Accommodation	40 yrs
Pubs, Taverns & Bars	27 yrs
Clubs (Hospitality)	37 yrs
Accommodation, Cafes-Restaurants	31 yrs
All Industries	39 yrs

Source: ABS Labour Force Survey

- **Austria:** the high share of young employees is specific for the tourism industry. In 2007, 39.4 % of the employees were under 30 years old. Over all sectors, 27.1 % of the employees were younger than 30 years. One reason for this high representation of young employees is the fact that many students choose this industry to work during their holidays.

⁵ Tourism and Poverty Alleviation – Recommendations for Action (UNWTO, 2004)

- **Canada:** youth aged 15 to 24 years-old, occupied 39% of employee tourism jobs. Youth are disproportionately represented in the Food and Beverage services as well as in the Recreation and Entertainment industry.
- **France:** in the Hotel-café-restaurant sub-sector, which employs around 800,000 people, the proportion of young workers aged 15 to 29 years is quite high: 43.8% against 19.8% for the whole economy.

Women

In many countries, the high presence of women in tourism is also linked to the demand for unqualified workers, especially for young women and those returning to the labour force. However, the apparent high rate of women in the sector seems also to be related to cultural issues, especially for employment in housekeeping, laundry, food preparation, guest services, etc.

In a study conducted in 15 Western European Union countries and published in 2005, the percentage of women working in the hotel and restaurant sector is often above 50% (i.e. in 11 of the 15 countries): over 60% in UK, Portugal and Austria, and up to 70% in Finland.⁶ A more recent study of the EU-27 confirms that the share of women in both, the food and catering and the accommodation industries is higher than in the economy as a whole in all member states of the EU as well as in Croatia, Norway, Serbia and Switzerland. Other countries have published similar data:

- In **Bahamas**, almost 60% of employed people in Hotels and Restaurants are female.
- In **Canada**, women accounted for over 60% of the employee jobs in the accommodation, food and beverage services and travel services industries in 2006, and overall, women occupied 55% of employee jobs in tourism industries.
- In **Australia**, the tourism sector has a relatively high share of female employment (55.8% share compared with 45% for all industries).

This proportion seems to be higher when considering part-time jobs and some sub-sectors:

- in France, travel agencies employed 78% of women in 2007
- In the case of Spain, women represent more than half of the part-time jobs in the tourism sector as a whole and this trend is continued and especially noticeable in the restaurant sub-sector. In the hotel sector women occupy as much as four times the amount occupied by men, whereas it is only in the remaining activities that men almost catch up to women.

Obviously, there are exceptions, like in Egypt where women represent only 25% of tourism total workforce, or cases of more balanced gender distribution within the tourism labour market, like in Dominican Republic (50% women) or in Mexico (47 % women, though above the 36% of women within the whole working population).

⁶ *EU hotel and restaurant sector: work and employment conditions*, European Foundation for the Improvement of Living and Working Conditions, 2005

Skills and qualifications

Many jobs in tourism are recognised to be quite easily accessible as far as skills and qualifications are concerned. Most job opportunities in the sector do not require formal credentials to gain employment. Many respondents to the UNWTO survey stated that, as expected, this situation correlates with the fact that workers in the tourism sector have some of the lowest nominal average wages in the national economy (see part III on quality of jobs).

In **Austria**, qualifications of employees in tourism are significantly below the average. In 2007, 31.9 % had only finished the compulsory education (in the national economy: 13.4 %), 33.9 % have at most a degree of a vocational training (national economy: 44.7 %). The share of university graduates stood 2007 at only 3.1 % (national economy: 13.1 %).

However, as the competition grows among the different destinations worldwide, the importance of raising quality in services is urging tourism managers to look for a workforce adequately trained or with particular skills in order to reach or even exceed internationally recognised standards, as shown in the following example in Canada:

In **Canada**, based on the Transferable Skills National Occupational Standards, Tourism Essentials presents the skills that people need to get a job as these are a requirement of any frontline professional in the sector. Skills included are 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.

A quotation from the reply received from the **Bahamas** illustrates perfectly well the need for upgrading skills in all tourism jobs, including the less qualified: *“Even housemaids will have to become electronically literate if required to update room inventory with a hand held technology.”*

III. Quality of jobs

Wage levels

As already mentioned, many countries recognise that, together with the quite low level of qualifications required, tourism does not offer high wages. This seems to be the case particularly in developed economies, and in developing countries it seems to me even more pronounced. For example, in the **Bahamas**, the following table shows that for each tourism sub-sector, wages, though not really high, are clearly above the minimum daily wage:

Table 4

Comparison of Daily Wages for Selected Workers with 2006 Average Daily Wage of Hotel Workers, with Minimum Wage and with Poverty Line				
OCCUPATION	Poverty Line	2006 Average		Average Wage as percentage above Poverty Line
	Per Person Per Day (a)	Minimum Daily Wage	Daily Wage, Bahamas (b)	
Housekeeping	\$7.84	\$32.00	\$72.64	927%
Room Attendants	\$7.84	\$32.00	\$46.72	596%
Housemen	\$7.84	\$32.00	\$46.72	596%
Space Cleaners	\$7.84	\$32.00	\$46.72	596%
Assistant Dock Master	\$7.84	\$32.00	\$46.72	596%
Ferry Operator	\$7.84	\$32.00	\$98.64	1258%
Security Officers	\$7.84	\$32.00	\$72.80	929%

(a) Source: Living Conditions Survey Report, 2001, Department of Statistics

(b) Source: Occupations and Wages in Hotel Industry Report, 2006, Department of Statistics

Tourism seasonality

Tourism seasonality is a crucial issue in many destinations, especially under more temperate climates. However, tropical countries also witness variations in tourist flows, as stated by the Dominican Republic and the Bahamas, where hotels are open all year round but have to reduce staff during some months.

Many countries recognise that seasonal employment is frequent in their tourism sector, especially in mountain and coastal destinations. Reference is also made to destinations that are pilgrim places and therefore suffer high variations in their tourist arrivals. However, very few countries mention how this situation can be improved as far as tourism workers are concerned. **Austria** underlines that seasonal jobs are partly covered by students who find how to earn money in a way compatible with their studies. Also farmers and mothers with small children enjoy the advantage of seasonal work. In some specific cases in developed countries and in many developing countries, tourism gives the possibility of complementary earnings for local populations. **Lesotho** mentions seasonality as something positive since it allows individuals to multi-tasks.

However, generally speaking and particularly in developed tourism destinations, seasonal fluctuations create an irregular use of the potential workforce, resulting in seasonal unemployment and in a heavy burden to the unemployment insurance.

The seasonal fluctuation of capacity use in tourism brings also a local shift of the working area (for example from ski destinations in winter to the lakes or coasts in summer). This requires a high degree of flexibility of the labour market, but also the need to consider, in highly seasonal destinations, developing plural-activity skills for local populations. **Australia** (Service Skills Australia) is dealing with this problem, by providing training courses that prepare employees, in regions with high seasonality, to work in different occupations in high and low season, for example combining training for retail occupations with training for tourism and hospitality employment.

Several countries reported efforts to extend the high season by creating new tourism products that attract tourists all the year around. This would solve the seasonality of employment, as well as help to secure a better return on investment.

Part-time jobs

Part-time jobs relate in many cases to low weekday demand versus high demand on weekends for many tourism businesses (e.g. restaurants, hotels, etc.). This fluctuation along the week makes it difficult for businesses to employ all their workers on a full-time basis.

Examples

- **Canada:** 36% of employee jobs in tourism industries in 2006 were part-time; that is, they involved less than 30 hours of work per week
- **Australia:** the Accommodation, Cafés and Restaurants sub-sector, with almost half of the jobs (48.1 per cent) in the industry being part-time, has the highest proportion for any industry in terms of part-time employment.
- **France:** the proportion of part-time employment is 55% in hotel and restaurant sub-sector and 58% for travel agencies.
- **Malta:** An average of 9,306 full-timers and 8,416 part-timers were directly employed with hotels and restaurants in Malta during 2007 (source: NSO Labour statistics).
- **Spain:** in the second half of 2008, 17% of the employees in tourism had part-time jobs.

When it is the choice of workers, part-time jobs can be viewed as positive; they do provide significant benefits, particularly for people who are looking to earn money in various ways, for those looking for flexibility in their work schedules, for a supplementary income to that of their main job, or for a start in the labour market, etc.

However, many workers are not part-time by choice and are deemed to be under-employed, thus, seeking more pay through more hours. The nature of part-time/casual employment entails poorer conditions of work, high staff turnover, and in some instances less work commitment.

IV. Working conditions

Tourism Employment Regulations

According to the replies to the UNWTO survey, employment in tourism is regulated by general labour laws in the very large majority of countries. However, some particularities exist in terms of special licences for some tourism activities: guides, gaming license (casino workers), food safe handling certificate, hunting guide license, etc.

In addition, a few countries have developed special regulations or corporate collective agreements for tourism workers in some sub-sectors.

Examples

- **Slovenia** has an Act on Catering Industry dealing with health and sanitary measures, minimum level of education of workers, etc.)
- The general law on employment in **Mexico** has some articles dealing with some particularities of the hotel, restaurant and bar sub-sector (e.g. tips)
- The **FYR of Macedonia** Law for Tourism Activity regulates tourism license as follows: "To have at least four employees, out of which two persons have a proof for active knowledge of one world language and one of the employees has passed the IATA course for sale of airplane tickets"
- **Hungary** also has a decree on professional requirements for tour operator and travel agency activities
- **Israel** has a special agreement concerning the employment conditions of workers in the Hotels and Accommodation sector, such as the wages, hours of work, etc.
- **Australia** has collective agreements that cover employees working in tourism characteristic businesses, including special provisions for the hours of work, breaks, overtime, shift work, and weekend work. They also tailor provisions for leave, transfers and travel and working away from usual place of work.
- **Austria:** Tourism is one of the few sectors for which numerous special arrangements exist within the legal protection regulations for employees: Working Time Act, Working Rest Act, Children and Youth Employment Act and Maternity Protection Act.

A comment made by some respondents is that if a labour problem is difficult to solve under existing general regulations, it does not necessarily follow that introducing industry-specific regulations would automatically benefit employees. It is hard to develop robust, long term industry-specific solutions if the industry is difficult to define like tourism or is constantly changing.

A major problem in many countries, including developed countries, is the recurrent situation of “black” or “grey” labour (illegal or non-declared jobs) in the tourism sector. “Black” labour sometimes refers to the use of migrants illegally residing in tourism destinations. “Grey” labour refers undertaking additional, non-registered work tasks within a legal job. Both “black” and “grey” jobs are an obstacle to the reliability of data and their possible interpretation.

Physical working conditions

The UNWTO survey on tourism employment did not include questions on this aspect. However, based on other studies⁷ published regarding the hotel and restaurant sub-sector, it appears important to mention some of the harmful conditions that often suffer people working in this sub-sector:

- Noise, hearing and high sound levels
- Low light conditions
- Temperature and breathing problems
- Physically demanding work
- Eczema, skin problems and infections
- Safety conditions (sharp objects, hot substances, etc.)
- Smoking and alcohol consumption

It is often recognised that the aspects previously listed are all present at the same time and constitute a combination of risks. In addition, this physical work environment is regularly mixed with some difficulties intrinsically linked to working in hotels and restaurants:

- High workload and stress
- Overtime or irregular working times affecting the organisation of private life
- Harassment and discrimination (from customers or colleagues)
- Autonomy and control (no time for breaks in rushing hours, uncertainty about the finishing time, low predictability of work linked to part-time jobs and seasonality)

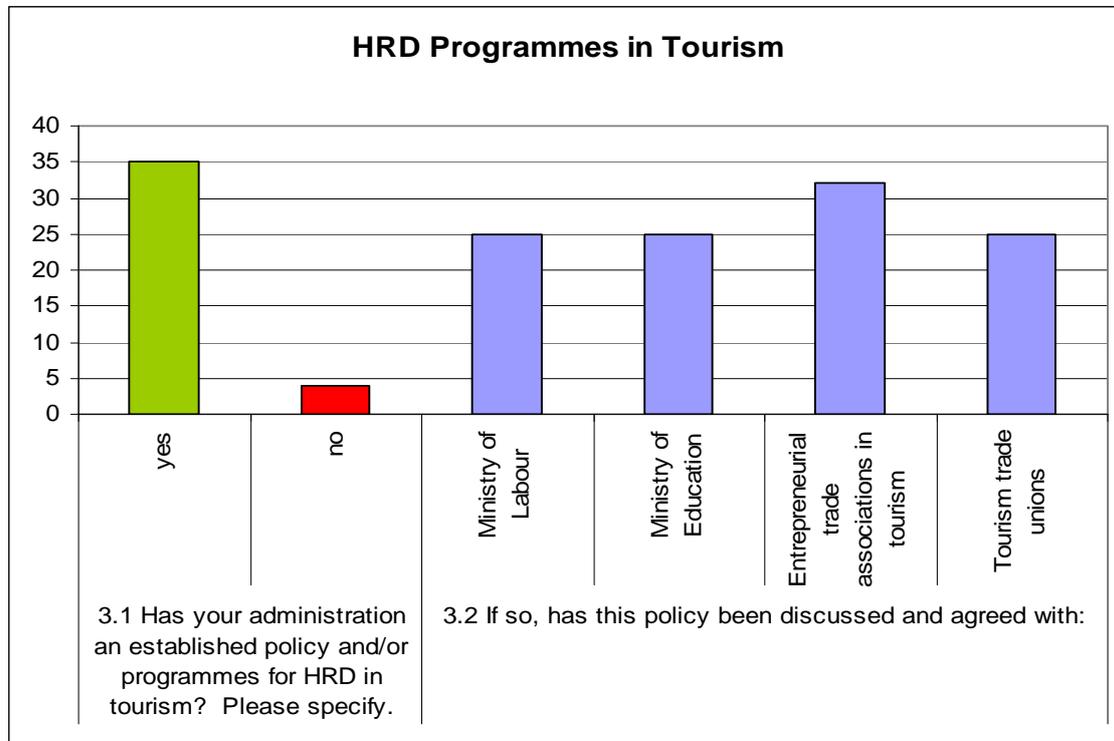
⁷ Especially the report “*EU hotel and restaurant sector: work and employment conditions*”, European Foundation for the Improvement of Living and Working Conditions, 2004

V. Human Resource Development (HRD)

HRD Programmes

Most countries have set up HRD programmes for tourism workers, as illustrated in the following graphic summarising the replies received:

Graph. 3



These programmes have been discussed by most of the NTA (25 of the 39 respondents to this question) with the ministries of Labour and of Education, but also with tourism trade unions, while the main stakeholders involved in these programmes were representatives of entrepreneurial trade associations in tourism (32 of 39 respondents). Only 4 of 39 NTA have not coordinated their actions regarding HRD with other partners.

HRD programmes are often composed of an evaluation of needs of the sector and then of a range of training mechanisms that intent to respond to those needs. Training can cover the whole sector (e.g. on sales or marketing aspects) or only some-subsectors (e.g. hotel and restaurant). In some cases, programmes are dedicated to some specific layers of the population (e.g. ethnical minorities, youth, and women). One example of the latter can be found in Australia:

The Australian Government is focussed on increasing Indigenous participation in the tourism industry through supply side capacity building measures. The *Business Ready Program for Indigenous Tourism (BRPIT)* is a \$3.8 million 4-year pilot program that has provided assistance to existing and start-up Indigenous tourism businesses through mentoring support. The main goal of the program is to develop Indigenous operators' business skills and the knowledge required to establish and run a commercially viable tourism operation.

Twenty-three countries have responded positively to the following question of the survey: Does the government or the trade association have its own Tourism Training Centre? Some interesting examples are listed.

Examples

- In **Canada**, the Canadian Tourism Human Resource Council (CTHRC) is mandated to address labour market issues and promote professionalism in the Canadian tourism sector. It is a Sector Council of the Canadian Government and has four principal objectives: 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.
- In the **Dominican Republic**, the Secretariat of Tourism counts with an Under-Secretariat for Training, in charge of identifying training needs in tourism and of creating the mechanisms to respond to such needs.
- In **India**, the Ministry of Tourism has set up the National Council for Hotel management and Catering technology to provide a thrust in the development of hospitality management education. It has also set up the Indian Institute of Travel and Tourism Management.
- In **Jamaica**, the Government's Human Employment and Resource Training/ National Training Agency institution (HEART/NTA) provides training for tourism workers. Training programmes are offered to all working age Jamaicans based on labour market demand.
- The Industry HR-Development Unit, within the **Malta** Tourism Authority, is responsible for EU-funded projects like training programme for tourism awareness and customer care for tourism front-liners; management training and certification; or a 'Tourism Industry Qualifications Scheme' to train and certify operational personnel, developed together with the Institute of Tourism Studies

In other countries, training and education in tourism are reflected in major policy documents; these may depend on a variety of structures for their implementation: universities, tourism institutes, training centres, etc. Some online educational material is sometimes made available through the NTA's websites:

Examples

- The two important strategic documents dealing with tourism development, namely, the Tourism Development Strategy of the **Slovak Republic** until 2013 and the State Tourism Policy of the Slovak Republic – also include some tools and tasks related to HRD development in tourism.
- Similarly, in **Slovenia**, one of the eight pillars of the Development Plan and Policies of Tourism 2007-2011 is Human resources and development policy.
- In **Spain**, the Tourism Plan for 2020 includes the following measures: a training programme (AVANZA FORMACIÓN), talents head-hunting, and an Employment Forum. Other mechanisms put in place can be very specific, like continuous training for families in charge

Public-private cooperation

In some cases, like in **Lebanon**, training programmes rely on public/private partnerships and are implemented by institutions of the private sector specialised in HRD. In **Lesotho**, programmes for human resource development have been developed by the government to facilitate training for the private sector and local communities.

The following examples of **Bahamas**, **Panama** and **Slovenia** show some of the existing mechanisms that join efforts from all types of tourism stakeholders in order to train and educate tourism employees at all levels. Many other examples exist in other countries too.

Examples

- **Bahamas**: *The Sustainable Tourism Entrepreneurial Management Marketing (STEMM) Project* was initiated by the Bahamas Hotel Association. Industry partners include the Bahamas Ministry of

Tourism & Aviation, the Antiquities, Monuments and Museums Corporation and the Caribbean Alliance for Sustainable Tourism.

- **Panama:** A concerted effort for HRD in tourism is made between the NTA, the National Human Resource Development Institute and the Tourism Chamber (private sector), including the establishment of Labour Competence Norms, that will come as a substitute of academic degrees.
- **Slovenia:** The National Institute for Vocational Education and Training is a public institution, funded in 1995 by the Government and co-founded by the Chamber of Commerce and Industry of Slovenia and the Chamber of Crafts of Slovenia.

In **Hungary**, an interesting exercise is currently underway: the National Tourism Authority is identifying the outputs of the existing tourism education programmes and institutions (i.e. graduates and their qualifications and skills) and contrasting such outputs with the demand for human resources in the tourism industries.

Replies regarding HRD from most countries were very complete, demonstrating the high degree of importance granted to this issue by NTAs. This is in line with the emphasis UNWTO is putting on Education issues in its next programme of work for the biennium 2010-2011, responding to its Members' high priority.

In addition, based on these results, UNWTO will establish preliminary guidelines on tourism and employment intended to the different stakeholders of the tourism sector (UNWTO itself, NTAs, tourism companies and trade associations, etc.), as well as for stakeholders related to the employment issues (ILO, ministries of labour or education, trade unions, etc.) in order to suggest some areas for further actions and research.

The UNWTO Secretariat would like to seize this opportunity to thank all NTA officials and other people who contributed with their valuable replies and opinions to this survey.

Annex 1. List of respondents

The present report has been based on the responses received from 40 out of 160 Full and Associate Members. The following countries have replied:

Full Members

Africa

- 1. Lesotho
- 2. Sudan
- 3. Tunisia

Americas

- 4. Argentina
- 5. Bahamas
- 6. Brazil
- 7. Canada
- 8. Chile
- 9. Costa Rica
- 10. Dominican Republic
- 11. Jamaica
- 12. Mexico
- 13. Panama

Asia

- 14. Venezuela
- 15. Australia
- 16. Cambodia
- 17. India
- 18. Malaysia
- 19. Philippines
- 20. Sri Lanka

Europe

- 21. Andorra
- 22. Austria
- 23. France
- 24. Hungary
- 25. Israel
- 26. Malta
- 27. Poland
- 28. San Marino

- 29. Slovak Republic
- 30. Slovenia
- 31. Spain
- 32. The FYR of Macedonia

Middle East

- 33. Egypt
- 34. Jordan
- 35. Lebanon
- 36. Qatar
- 37. Syrian Arab Republic
- 38. Yemen

Associate Members

- 39. Flemish Community
- 40. Hong-Kong

The graph below indicates, in percentage terms, the Members' replies from different regions:

