Office for National Statistics

Supply Side of Tourism Report 2009

Coverage: **UK**
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Geographical Area: **Region**

The Supply Side of Tourism Report 2009

This supply side of tourism report for 2009 provides analysis of the tourism industries: those activities that provide goods and services to visitors. The report examines the gross output and GVA of the tourism industries before examining trends and characteristics of employment in those industries. The report also provides an analysis of the demography of tourism industries in terms of the size of firms.

Acknowledgements

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Introduction

In this report we are concerned with a national level analysis of Gross Value Added (GVA) and gross output in the defined set of tourism industries for the year 2009. We then undertake a detailed analysis of employment in tourism industries for the regions and nations of the UK. We also describe features of business demography in the tourism industries in relation to the size of firms. The aim of this report is, therefore, to describe in detail the supply side of tourism in terms of the set of industries that serve tourists. This set of tourism industries is based on international recommendations and has been employed in previous outputs from ONS' Tourism Intelligence Unit (TIU).

It is important to be clear that this report does not attempt to reconcile the information on the supply side of tourism with demand side information or tourist consumption data to derive, for instance Tourism Direct GVA or Tourism Direct Employment variables. In a sense that is the next step in the process and is best achieved through a Tourism Satellite Account (TSA). The TIU has already published a TSA for the UK (reference date 2008) and is now working on the production of an updated TSA for 2009, which will draw on the results of this supply side analysis in its compilation.

This is the second supply side of tourism report from the TIU report with the first referring to 2008. There are some improvements made to the methodology in this new report that should be highlighted. Firstly, in our definition of tourism industries we are omitting some elements of 'real estate activities' that were previously included. We explain the rationale for this in the next section of this report. Secondly, our analysis of gross output and turnover is balanced against totals provided in the national accounts. The latest national accounts for 2009 (published in November 2011) are based on the Standard Industrial Classification (SIC) for 2007. Data in the national accounts referring to 2008 has also been published on this basis. For this reason we are re-calculating gross output and GVA for 2008 as well as 2009 in this report. This will provide us with a consistent framework for future iterations of this report.

This supply side report is structured around a number of key sections. Firstly, attempts to achieve a classification of tourism industries are described. The main body of the report is concerned with the analysis of key aspects of the supply side of tourism; GVA, output, and employment. Finally, we introduce some analysis of the importance of small firms in the tourism sector and their contribution to tourism turnover.

Notes

1. Gross output is equal to net output (also known as Gross Value Added as used here) *plus* intermediate consumption (the total monetary value of goods and services *consumed or used up as inputs in production* by enterprises)

Defining the Tourism Industries

The complex issue of defining tourism activities has been developed at an international level through the compilation of the International Recommendations on Tourism Statistics by Eurostat, OECD and the UN World Tourism Organisation (UNWTO) (IRTS, 2008). The supply side of tourism activity and the issue of tourism industry classification are considered in detail in the IRTS and an excerpt is reproduced here for the sake of clarity,

“In supply side statistics, establishments are classified according to their main activity, which in turn is determined by the activity that generates the most value added. As a consequence, the grouping of all establishments with the same main activity which serves visitors directly and is one of the tourism-characteristic activities constitutes a tourism industry” (IRTS, 2008)

The IRTS also lists tourism characteristic activities by main categories according to ISIC rev. 4. Early work by the TIU mapped the Standard Industrial Classification (SIC 2007) in the UK onto the ISIC four digit codes for each industry. During the compilation of the 2008 UKTSA SIC codes relating to real estate activities were omitted from the analysis (Owning and dealing in real estate AND Letting of dwellings). These SIC codes are included internationally because they attempt to highlight the importance of short term leasing of dwellings which is important in some tourist destinations. In the UK, the inclusion of these SIC codes over inflated the accommodation element of tourism, without any reliable source of information on the consumption of such activity *for tourism purposes*. In this report we also omit the real estate codes from the analysis and, although this goes against international recommendations, we believe it is a sensible approach for the UK, given the absence of data on the demand side.

The list of tourism industries produced in following the ISIC rev.4 classification of tourism industries is shown in Table 1.

Table 1: The Tourism Industries at SIC2007 5 digit level

Industry	SIC 2007 code(s)
Railway Passenger transport	49100
Road Passenger transport	49320, 49390
Water Passenger transport	50100, 50300
Air Passenger transport	51101, 51102
Accommodation for Visitors	55100, 55201, 55202, 55209, 55300, 55900
Travel agencies & other reservation services activities	79110, 79120, 79901, 79909
Food and beverage serving activities	56101, 56102, 56103, 56210, 56290, 56301, 56302
Transport Equipment Rental	77110, 77341, 77351,
Sporting and recreational activities	77210, 92000, 93110, 93199, 93210, 93290
Country-specific tourism characteristic activities	82301, 82302, 68202
Cultural Activities	90010, 90020, 90030, 90040, 91020, 91030, 91040

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In supply side statistics, establishments are classified according to their main activity, which in turn is determined by the activity that generates the most value added. As a consequence, the grouping of all establishments with the same main activity which serves visitors directly and is one of the tourism-characteristic activities, this constitutes a tourism industry. Thus each tourism industry is composed of all establishments whose main activity is a particular tourism-characteristic activity and which serves visitors directly (IRTS, 2008).

The key point to take from this is that we must be clear about what we mean by the term ‘tourism industries’. As we have seen these represent groups of establishments whose main activity is the same tourism characteristic activity. These establishments have to be classified somehow to fit into accounting frameworks and this is based on the activities that they carry out that generate the most value added. Because establishments might have secondary activities, not all production of tourism characteristic products happens within tourism industries; on the other hand, tourism industries also have outputs that are not tourism characteristic products.

In the following section we describe the process of producing figures for gross value added and gross output for the tourism industries. This analysis refers to all the output from the tourism industries identified in this section. As previously mentioned it does not include any analysis of the proportion of the output driven by tourism consumption, as we are solely interested in the supply side dimension of tourism within this report.

GVA and Output in the Tourism Industries

Background

Every year ONS publishes the UK National Accounts (known as the blue book) which provide detailed accounts of the UK's production and service activities and the demand for, and consumption, of those activities and products. In essence national accounts provide a description of all economic activity within the economic territory of the UK, as well as activity involving both domestic (i.e. individuals and institutions resident in the UK) and external (those resident in other countries) units. The majority of the core accounts deal with transactions between the various sectors of the economy, such as corporations, households and government, as well as transactions with the rest of the world.

The main transactions between the different sectors of the economy are detailed in the Input Output and Supply Use Tables (SUT hereafter) and detail the total supply of products, intermediate and final demand for those products, and UK and non-UK household expenditure in the UK and abroad on those products. Activities and products in the SUT are divided into industries groupings based on the Standard Industrial Classification (SIC). This was previously based on the SIC 2003 classification but is now (since the latest Blue Book released in November 2011) based on the new SIC 2007 classification. Key changes in SIC07 include a number of new sections giving more service sector detail. Under the new SIC, manufacturing is significantly reduced as a proportion of economic activity, which reflects the move towards more services-based economies over the past 20 years. The TIU has produced all of its outputs on the SIC 2007 classification in order to be prepared for the adoption of this classification across ONS' outputs that has now taken place.

The latest national accounts were published in 2011 and refer to reference year 2009. The aim of this work is to balance supply side data on tourism to the national accounts and this is why we take 2009 as the reference year in this report. This supply side analysis will feed into a new Tourism Satellite Account for the UK (again for 2009) which will be published in the spring of 2012.

As part of the intermediate consumption table, the SUT provides GVA at basic prices and the total gross output at basic prices for each industry group (based on products used) and the aim here is to show how much of this GVA and gross output is attributable to tourism characteristic industries. In Table 2 we present the SIC 2007 tourism industry codes for Sport and Recreational Activities and how this spans across three separate 'SUT' industries (the downloadable table shows this relationship for all the tourism industries). Sometimes this is a one-to-one match but more often a SUT industry will contain a number of different elements of the tourism characteristics industries (in terms of their SIC code make up).

Table 2: Matching Tourism Industries to SUT Industries

Tourism Industries	Description	SIC 2007	SIC	SUT code	SUT Category (2011 re-classification)
Sporting & Recreational activities	Gambling & betting activities	92000	92	107	Gambling and Betting Activities
	Operation of sports facilities	93110	93	108	Sports Activities and Amusement and Recreation Activities
	Other sports activities	93199	93	108	Sports Activities and Amusement and Recreation Activities
	Activities of amusement parks and theme parks	93210	93	108	Sports Activities and Amusement and Recreation Activities
	Other amusement and recreation activities nec	93290	93	108	Sports Activities and Amusement and Recreation Activities
	Renting and leasing of recreational	77210	77	94	Rental and Leasing Activities

	and sports goods

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Methodology

It is clear from Table 1 that it is not possible to extract information on GVA and gross output directly from the SUT. We are faced, instead, with trying to determine the share of SUT industries that are accounted for by tourism characteristic industries. For food and drink activities and accommodation activities, for example, there is a one-to-one relationship between tourism industry SIC Codes and those used in the SUT industry class. For ‘meetings and conference activities’, however, we are using tourism SIC codes that represent a small part of the SUT industry called ‘Office Administration, Office support and other business activities, plus a small part of ‘real estate activities’ in relation to the ‘Conference Centre and Exhibition Centre Letting’ (SIC code: 68202).

In order to calculate the proportion of tourism industries SIC codes in each SUT industry we perform a two-step procedure.

Step 1

We analyse the data from the ONS Annual Business Survey (ABS) and label each record according to which Tourism Characteristic Industry grouping and each SUT industry it belongs to. This allows us to calculate the proportion of the tourism industries within each SUT. An example is shown in Table 3 for the Land Transport SUT industry, of which road passenger activities are a part. Looking at GVA in this table we are totalling the GVA for the tourism SIC codes 49320 and 49390 and dividing by the total for the Land Transport services SUT industry and this gives us a tourism share of 12%.

Table 3: Deriving Tourism Shares

			GVA		Gross output	
SUT Category (2011 re-classification)	**SIC 07 codes included in SUT**	**SIC07 (from the tourism SICs)**	***Value £m***	***Tourism share***	***Value £m***	***Tourism share***
Land Transport Services and Transport services via pipeline, excluding rail transport	493, 494, 495	49320, 49390	2,269	12%	3,573	9%
Non Tourism				88%		91%

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Step 2

Once we have determined the share of each SUT industry that is attributable to tourism characteristic activities, we are able to apply these shares to the figures for gross output and GVA reported in the UK national accounts, as shown in Table 4.

Table 4: Gross Output and GVA from Supply Use Tables (£ Millions)

SUT Category (SIC 2007 Classification)	Gross output at Basic Prices (2009) from SUT	Gross Value Added at basic prices (2009) from SUT
Accommodation	18 455	7 575
Food and Beverage Serving Activities	56 527	27 653
Railway transport	9 236	3 755
Land Transport Services and Transport services via pipeline, excluding rail transport	41 669	20 850
Water transport	12 512	5 252
Air transport	17 732	6 669
Rental and Leasing Activities	20 891	11 391
Travel Agency, Tour operator and other reservation service and related activities	14 793	3 016
Creative, Arts and Entertainment Activities	6 929	2 364
Libraries, Archives, Museums and other cultural activities	4 901	3 375
Gambling and Betting Activities	10 659	4 810
Sports Activities and Amusement and Recreation Activities	20 346	8 856
Office Administration, Office support and other Business Support Activities	28 570	14 637
Real Estate activity	63 217	35 096
Totals	326 437	155 299

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The final results from this process are figures for Gross Value Added and Gross output for each of the tourism characteristic industries that are derived using the shares of gross output and GVA in each SUT industry from the ABS and balanced against national accounts totals.

Results

As mentioned previously the national accounts have been presented in SIC 2007 for the first time this year and we are able to perform the procedure detailed above for both 2008 and 2009 data (2008 data has been re-calculated in the national accounts on the SIC 2007 classification). This gives a different set of results from those published in our previous supply side report for 2008 (this also included the real estate activities mentioned previously) but it is preferable to work under the new SIC 2007 classification as this gives us a consistent framework moving forward. In the previous supply side report for 2008 the process was more difficult as the ABS data analysed was in SIC 2007 format but this had to allocated to the relevant SUT industries based on the old SIC 2003 classification. The 2008 report will be revised to reflect this change in methodology.

In Table 5 below we present the gross output and GVA figures for 2008 and 2009 based on the SIC 2007 classification. This shows that there has been a drop in output and GVA of 5% and 7% respectively and that tourisms share of the UK economy in terms has also fallen during this period of recession.

Table 5: Gross Output and GVA in Tourism Industries 2008 and 2009 (£ Millions)

Tourism Industries	Gross output 2008	GVA 2008	Gross output 2009	GVA 2009
Accommodation for visitors	18,558	7,281	18,455	7,575
Food and beverage serving activities	59,526	29,391	56,527	27,653
Railway Passenger transport	8,299	3,163	8,570	3,380
Road Passenger Transport	4,381	2,317	3,897	2,492
Water Passenger Transport	5,064	2,238	5,136	2,162
Air passenger transport	17,667	7,158	16,160	5,990
Transport Equipment Rental	6,102	3,947	5,711	3,889
Travel agencies and other reservation services	16,577	2,913	14,793	3,016
Cultural activities	11,099	5,260	7,670	2,412
Sport and recreation activities	18,564	8,619	19,244	8,269
Conference activities	2,153	997	2,995	1,150
Total	**167,667**	**73,103**	**159,156**	**67,988**
Tourism Share of UK Economy	6.4	5.7	6.1	5.4

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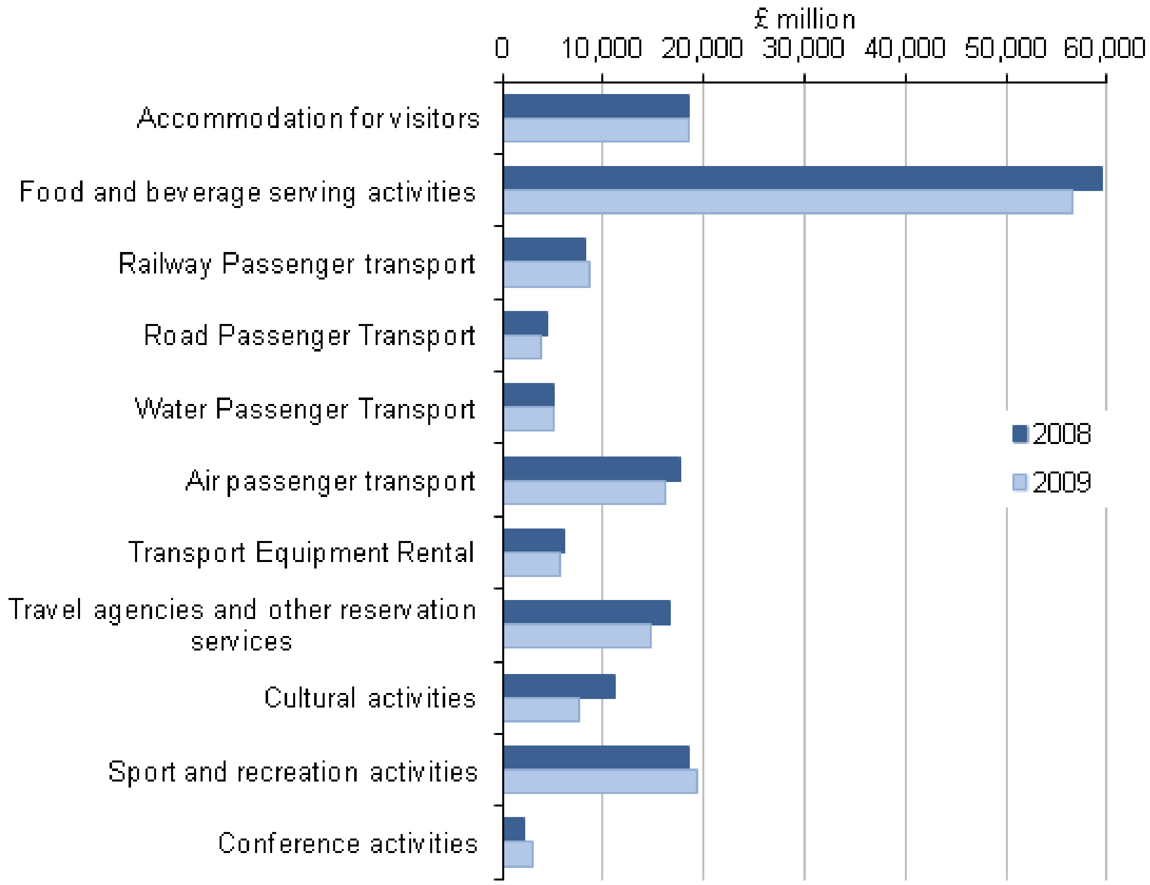
Figure 1 displays the change in tourism characteristics industries gross output between 2008 and 2009 and we can see that although gross output has held up relatively well during a period of recession, there has been some drop in gross output in food and drink, air passenger transport, travel agencies, and, particularly, cultural activities.

Figure 1: Change in gross output 2008 - 2009



Source: Office for National Statistics

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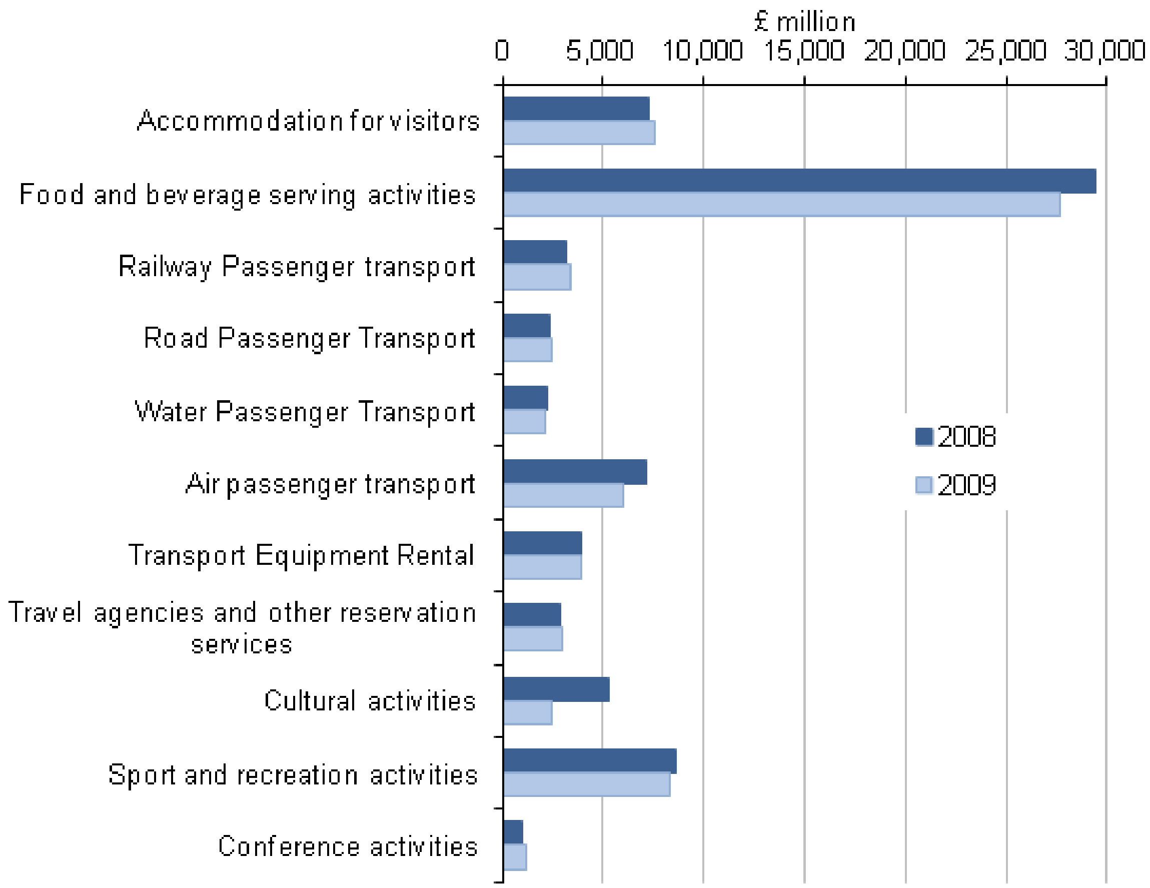
A similar pattern is seen in relation to GVA, as shown in Figure 2. Here the reduced level of GVA in the cultural activities is more pronounced. When analysing the ABS data for SIC codes that make up ‘cultural activities’ it was clear that this is driven by a larger negative value for SIC code 91020, which covers museums and galleries, than that seen in 2008.

Figure 2: Change in GVA 2008-2009



Source: Office for National Statistics

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Limitations

We attempt to make our estimates of GVA and gross output as robust as possible by balancing against national accounts totals. However, we have to use Annual Business Survey data to undertake this process and, as with all survey data, this is subject to volatility when considering the, sometimes, small number of SIC codes that make up the tourism industries. Therefore, differences in the sample responding to the survey over time could result in short term volatility in variables such as gross output or GVA.

Employment in Tourism Industries – Introduction

This section focuses on the characteristics of UK employment in the tourism industries that have been defined by the United Nations World Tourism Organisation (UN WTO). It includes information about workers in these industries and the nature of their employment. It also features estimates of the number of jobs in these industries and indications of recent trends.

It is important to remember that these estimates do not measure the amount of employment directly due to tourism. Most of the UN WTO's tourism industries also provide goods and services to non-tourists (e.g. restaurants are used by locals and visitors), while some industries excluded from the definition do serve, in part, tourists (e.g. retail outlets in resorts).

Tourism Satellite Accounts (TSAs) are used to reconcile supply data, including employment, with demand data obtained from surveys of visitors. Among other outputs, this reconciliation provides estimates of "tourism direct employment". The latest UK TSA relates to 2008 and is available via http://www.ons.gov.uk/ons/rel/tourism/tourism-satellite-account/2008---the-economic-importance-of-tourism/uk-tsa-2008.pdf. The 2009 TSA is due to be released in the spring of 2012.

Sources of Tourism Employment Data

The key sources used in this section are the Annual Population Survey (APS) and Workforce Jobs (WFJ) estimates:

The APS is a survey of households. It combines results from the Labour Force Survey (LFS) and various boosts funded by Government departments. APS datasets are produced quarterly and each contains data for 12 months. The purpose of the APS is to provide robust local area labour market estimates but its large sample size also allows the analysis of other aspects of employment.

The WFJ estimates are mainly compiled from surveys of businesses rather than households and provide a more reliable industry breakdown than the APS. These estimates are quarterly and include information about employee jobs and self-employment jobs, the latter based on information from the LFS.

The two sources were used in different ways to produce the analysis in this paper: APS data for individual industrial sub-classes were aggregated to provide tourism industry estimates. In contrast, broad industry WFJ data were assigned to tourism and non-tourism industries proportionally using other sources to calculate the proportions.

Employment in Tourism Industries 2009

Employment by Tourism Industry

Although the WFJ series is the Office for National Statistics' preferred source of data on jobs by industry, the breakdown in the APS allows cross tabulation with employment status, geographical area and other data.

From 2009 the APS categorises the industry of employment using sub-classes in the 2007 Standard Industrial Classification (SIC 2007). This is the same classification used by the UN WTO to define tourism industries (see the "Defining the Tourism Industries" section). It is therefore possible to provide employment estimates for internationally comparable tourism industry groups as Table 6 illustrates. Also included are employment estimates for meetings and conference activities which have been defined using three additional SIC 2007 sub-classes. Note that the UK accommodation industry group differs slightly from the UN WTO recommendation.

Table 6 provides employment data that sum the number of main and second jobs within specific SIC 2007 sub-classes. It illustrates that tourism industries were responsible for about 9 per cent of employment in 2009 with by far the largest proportion in food and beverage serving activities.

Table 6: UK Employment by Tourism Industry - Main & Second Jobs 2009

UNWTO Tourism Industry	Main & Second Job Employment (1,000s)	Percentage of Total Main & Second Job Employment
Accommodation for visitors	336	1.1
Food & Beverage Serving Activities	1,138	3.8
Railway Passenger Transport	52	0.2
Road Passenger Transport	235	0.8
Water Passenger Transport	14	0.0
Air Passenger Transport	56	0.2
Transport Equipment Rental	29	0.1
Travel Agencies & Other Reservation Services	112	0.4
Cultural Activities	231	0.8
Sporting & Recreational Activities	435	1.5
Meetings & Conference Activities	27	0.1
Tourism Activities	**2,663**	**9.0**
Non-Tourism Activities	**27,083**	**91.0**
All Activities	**29,746**	**100.0**

Table source: Office for National Statistics

Table notes:

1. Annual Population Survey 2009
2. Totals may not sum due to rounding

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Downloadable data tables accompanying this release include a more detailed breakdown of the employment statistics with data for individual or combined SIC 2007 industry sub-classes. This breakdown highlights that five such sub-classes were each responsible for employment of more than 200,000 people in 2009. These were licensed restaurants; public houses and bars; hotels and similar accommodation; taxi operation and unlicensed restaurants and cafes.

The remainder of this section includes analysis of employment which uses four summary tourism industry groups:

- accommodation for visitors;
- food and beverage serving activities;
- passenger transport and travel;
- cultural, sporting, recreational and meetings & conference activities.

The first two of these are identical to the initial two industries in table 6, the third is a combination of the third to eighth industries in the table and the fourth is the sum of the last three.

Main and Second jobs in Tourism Industries

In total, 9 per cent of main and second job employment in 2009 related to tourism activities. The proportion is not the same for the two types of job, however. Tourism activities were responsible for over 17 per cent of second job employment but only 8.6 per cent of main job employment in 2009.

As table 7 indicates, second job employment was particularly prevalent in food and beverage serving activities and cultural, sporting and recreational activities. Almost 15 per cent of second jobs in the UK in 2009 were within these industries, compared with less than 6 per cent of main jobs.

Table 7: UK Employment by Summary Tourism Industry and Main & Second Job 2009

Summary Tourism Industry	Main Job Employment (1,000s)	Second Job Employment (1,000s)	Main & Second Job Employment (1,000s)
Accommodation for visitors	319	17	336
Food & beverage serving activities	1,049	89	1,138
Passenger transport & travel	485	12	497
Cultural, sporting, recreational & meeting activities	615	77	692
Tourism Activities	**2,468**	**195**	**2,663**
Non-Tourism Activities	26,152	931	27,083
All Activities	**28,621**	**1,126**	**29,746**

Table source: Office for National Statistics

Table notes:

1. Annual population Survey 2009
2. Totals may not sum due to rounding

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Around 27,000 of those with a second job in one of the tourism industries also have their main job in such an industry. This means that about 2.64 million workers have a main and / or second job in a tourism industry, about 9.2 per cent of all in employment. Table 8 shows how this total is calculated:

Table 8: Workers with a main and/or second job within tourism activities

Category	Employment 2009 (1,000s)
A: Industry of main job within tourism activities:	2,468
B: Industry of second job within tourism activities	195
C: Industry of both main and second job within tourism activities	27
A + B - C: Number of people employed in tourism activities	**2,637**
Total number of people in employment	**28,621**
Percentage of people employed in tourism activities	*9.2*

Table source: Office for National Statistics

Table notes:

1. Annual Population Survey 2009
2.

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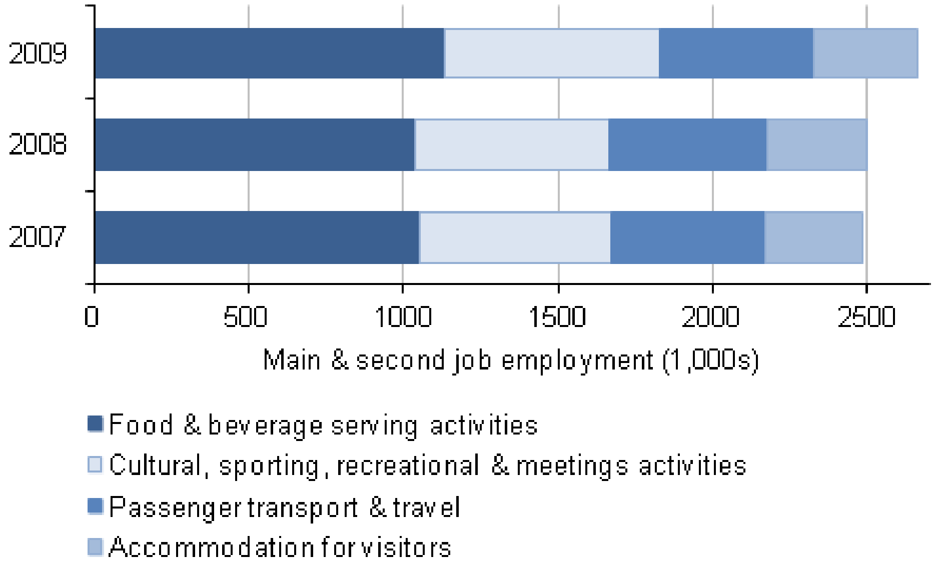
Comparisons with Previous APS Data

Previous versions of the APS used an earlier industrial classification (SIC 03) which did not exactly match the UN WTO definition of tourism industries. Calculations of employment in tourism industries therefore used estimates of how much employment in each SIC 03 sub-class related to a tourism industry.

Figure 3 illustrates that employment in tourism industries as estimated by the APS was higher in 2009 than in 2007 and 2008. Most of the increase related to food & beverage serving activities and cultural, sporting, recreational & meetings activities.

Another section of the paper provides estimates of workforce jobs in tourism industries, which allow for a more consistent comparison over time, although it is not broken into summary tourism industries.

Figure 3: UK Employment by Summary Tourism Industry and Main & Second Job 2007-2009



Source: Annual Population Survey (APS) - Office for National Statistics

Notes:

1. Definitions of tourism industries for 2009 use the 2007 Standard Industrial Classification (SIC 07); definitions for 2007 and 2008 use an earlier classification (SIC 03)

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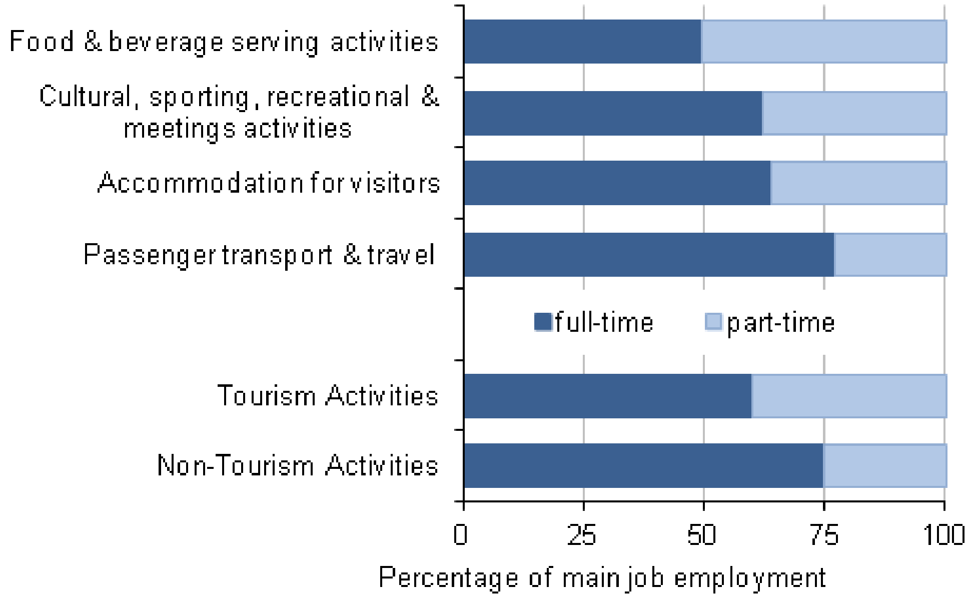
Characteristics of Employment in Tourism Industries 2009

Full-time and Part-time Working

Part-time working is more prevalent within tourism industries than in other industries as figure 4 illustrates. Around 13 per cent of all part-time employment in main jobs in the UK related to tourism activities, compared with just over 7 per cent of full-time employment. Food and beverage serving activities alone are responsible for 7 per cent of all part-time employment in main jobs.

Figure 4: Full-time / part-time status of main job by summary tourism industry 2009



Source: Annual Population Survey (APS) - Office for National Statistics

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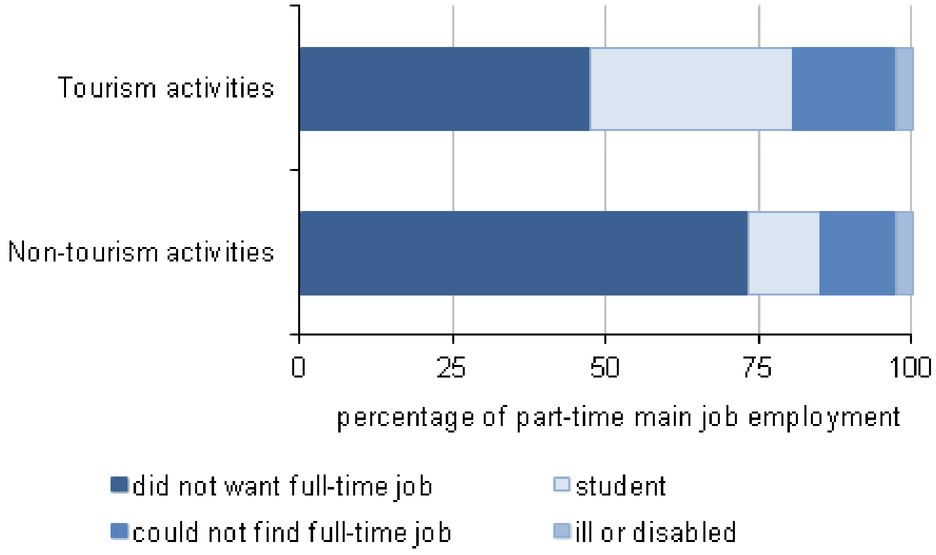
In total, taking account of second jobs, only 56 per cent of all employment in tourism activities is full-time employment in main jobs. This compares to 72 per cent in non-tourism activities. There are more details in the downloadable data tables accompanying this release.

The breakdown of reasons given for part-time working in tourism industries in 2009 differed quite considerably from those elsewhere with higher proportions of students and workers who could not find a full-time job (see figure 5). Almost 30 per cent of student part-time workers in the UK were within tourism activities as were 17 per cent of those who could not find a full-time job. These proportions compare with 13 per cent of part-time workers in total.

Figure 5: Reasons for part-time working in main job by tourism / non-tourism activities 2009



Source: Annual Population Survey (APS) - Office for National Statistics

Notes:

1. Denominator excludes part-time working where no reason was stated

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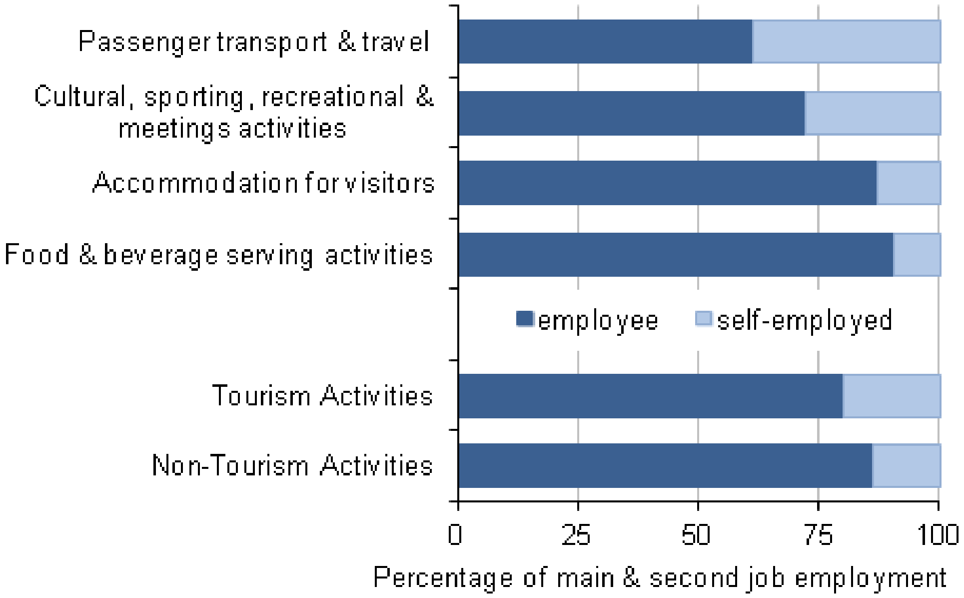
Self Employment

Self employment is more prevalent within tourism industries. Figure 6 illustrates the proportions of employees and self-employed (excluding the small number of APS respondents who are employed as part of a Government scheme, are unpaid family workers or who did not provide information). The high proportion (38 per cent) of self-employment in passenger transport and travel agencies in 2009 reflects the inclusion of taxi drivers in this industry group.

One eighth (12.5 per cent) of self-employment in the UK in 2009 was within tourism industries, compared with 8.4 per cent of employee jobs. The tourism industries outside of food and accommodation were responsible for 9 per cent of self-employment but only just over 3 per cent of employee jobs.

Figure 6: Employment by employee / self-employed status of main or second job 2009



Source: Annual Population Survey (APS) - Office for National Statistics

Notes:

1. Denominator excludes "other" status, e.g. part of a Government scheme, unpaid family worker or not stated

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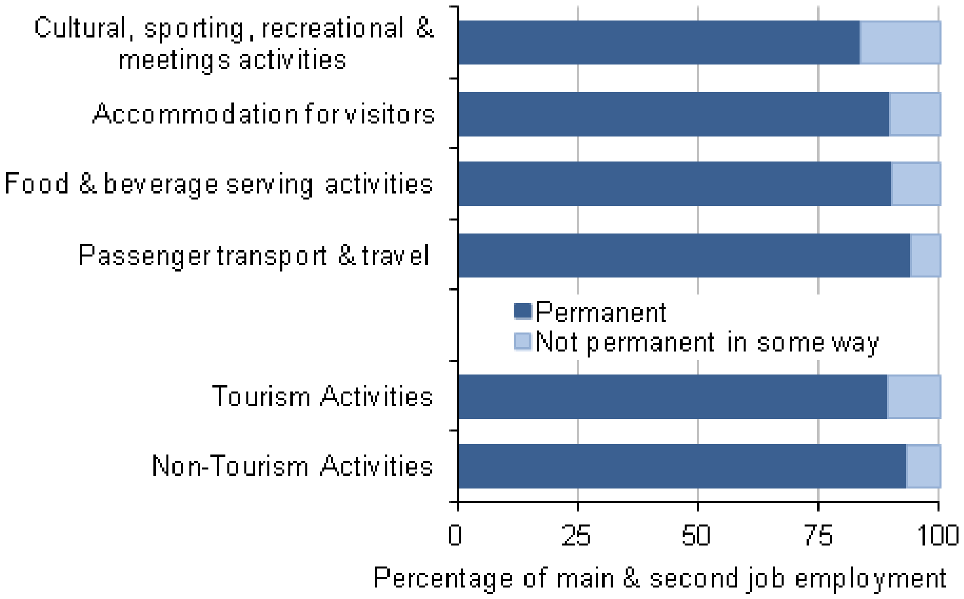
Temporary Working

There is a greater degree of temporary working within tourism activities, as figure 7 shows. Temporary working in tourism industries was most prevalent in cultural, sporting, recreational and conference activities in 2009 and these were responsible for over 5 per cent of temporary employment in the UK, compared to less than 2 per cent of permanent employment. In total, 13.5 per cent of temporary employment in 2009 was within tourism industries, along with 8.1 per cent of permanent employment.

Figure 7: Employment by permanency of main or second job and summary tourism industry 2009



Source: Annual Population Survey (APS) - Office for National Statistics

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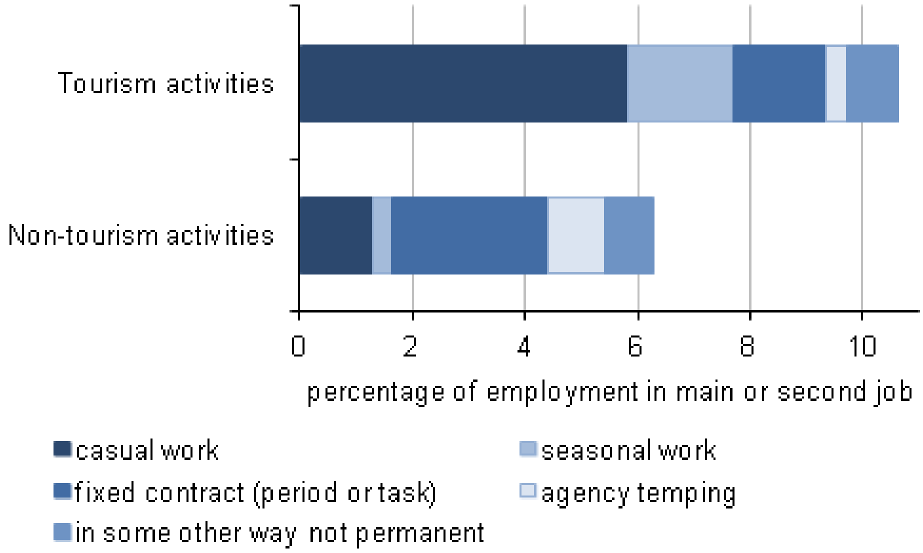
Figure 8 illustrates that the types of temporary working differ between tourism and non-tourism activities. In particular, tourism industries were responsible for 34 per cent of temporary casual employment and 29 per cent of temporary seasonal employment in 2009. At the other extreme, just over 3 per cent of agency working and 5 per cent of fixed contract employment was within these industries.

Figure 8: Percentage of employment in main or second job by type of temporary work 2009



Source: Annual Population Survey (APS) - Office for National Statistics

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Occupations in Tourism Industries

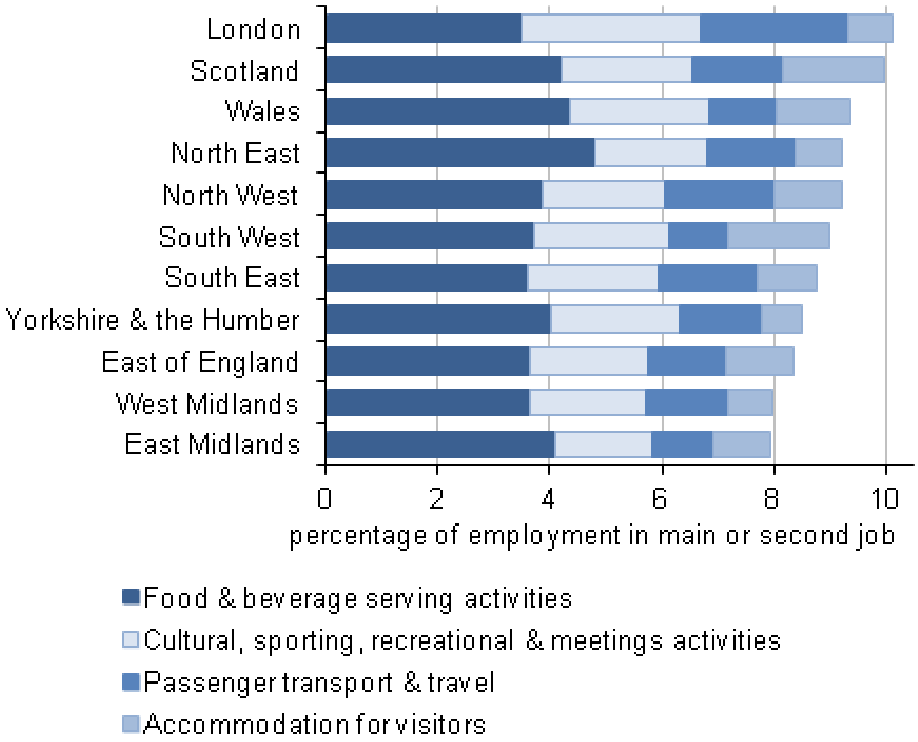
The APS is a household survey and respondents give information about the industry within which they work as well as their occupation. Table 9 shows employment data about occupations within tourism industries in 2009, produced by cross-tabulating this information.

Five of the six most prevalent occupations in tourism activities relate to food and beverage serving and these, together with taxi drivers and similar, make up 44 per cent of employment in tourism industries. Note that all occupations in table 9 also include employment in non-tourism industries as well. For example, only 58 per cent of kitchen and catering assistant employment is within tourism activities. Further information about the extent of employment elsewhere is in the downloadable data tables accompanying this release.

Regional Tourism Employment

In 2009, London had the highest proportion of its workplace workforce in tourism activities among the 12 UK regions. As figure 9 illustrates, this was particularly due to having the largest proportions of employment in cultural, sporting, recreational and meeting activities (3.2 per cent) and passenger transport and travel (2.6 per cent). The North East had the highest proportion of employment in food and beverage serving (4.8 per cent) while Scotland and the South West had the highest in accommodation activities (both 1.8 per cent).

Figure 9: Percentage of employment in main or second job by tourism industry and region of workplace 2009



Source: Annual Population Survey (APS) - Office for National Statistics

Notes:

1. Northern Ireland excluded due to smaller sample size

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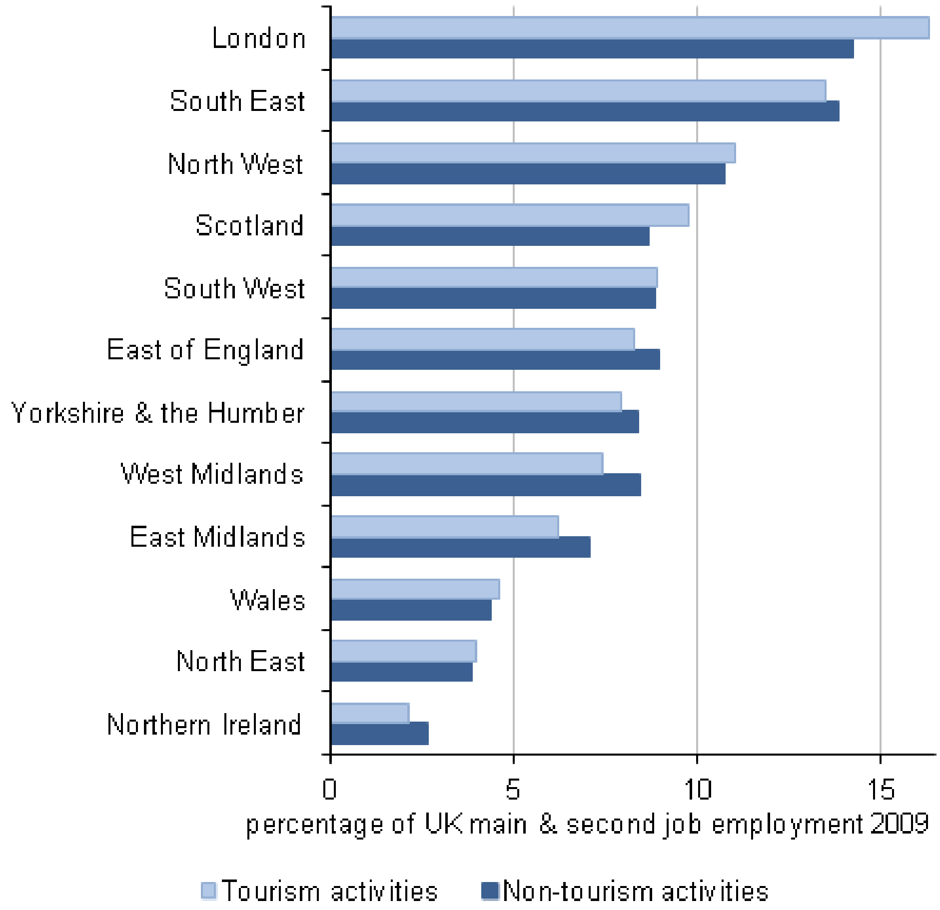
More than 16 per cent of employment in main and second jobs in tourism activities was based in London in 2009 compared with just over 14 per cent in non-tourism activities, as figure 10 illustrates. The other region where the share of employment in tourism activities was more than 1 percentage point higher than for non-tourism was Scotland.

Figure 10: Percentage of UK employment in main or second job by region of workplace and tourism / non-tourism activities 2009



Source: Annual Population Survey (APS) - Office for National Statistics

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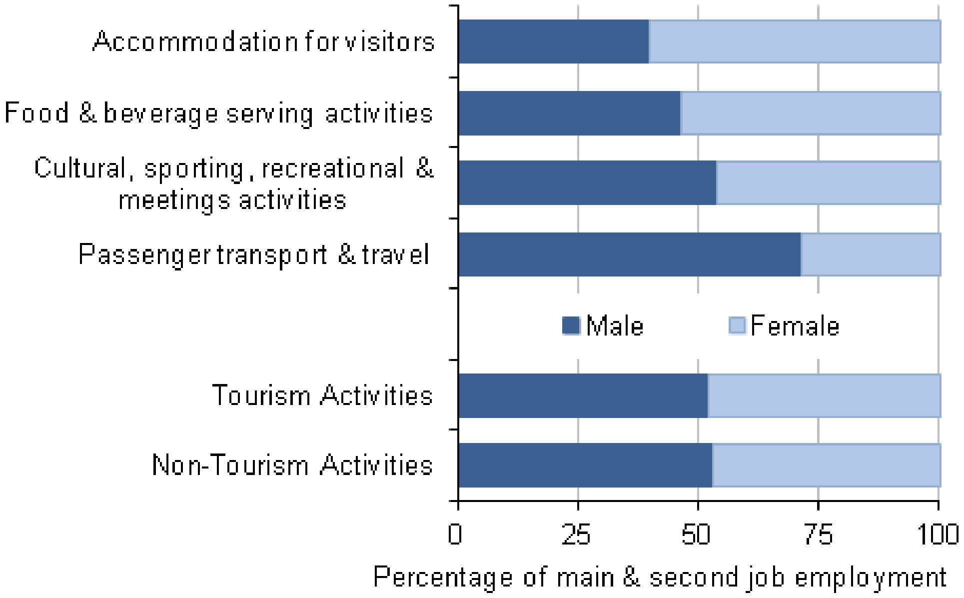
Analysis of tourism industries by region of residence using the APS produces fairly similar levels of employment in all regions outside London, the South East and the East of England. A comparison of workplace and residence based data highlights a net in-commute into London of around 37,000 people employed in tourism industries with related out-commute in the two neighbouring regions. More information is in downloadable data tables accompanying this release.

Gender

In 2009, the proportion of females in employment in tourism activities (48 per cent) was similar to that in non-tourism activities (47 per cent). However, as figure 11 illustrates, these proportions varied differed by individual tourism industry. Food and beverage serving activities were responsible for 4.4 per cent of UK female employment in 2009, but only 3.4 per cent of male employment. Similarly, accommodation for visitors made up 1.4 per cent of female employment but 0.9 per cent of male. In contrast, 2.3 per cent of UK male employment was in passenger transport and travel agencies but this was true of only 1.0 per cent of female employment.

Figure 11: Percentage of employment in main or second job by gender and summary tourism industry 2009



Source: Annual Population Survey (APS) - Office for National Statistics

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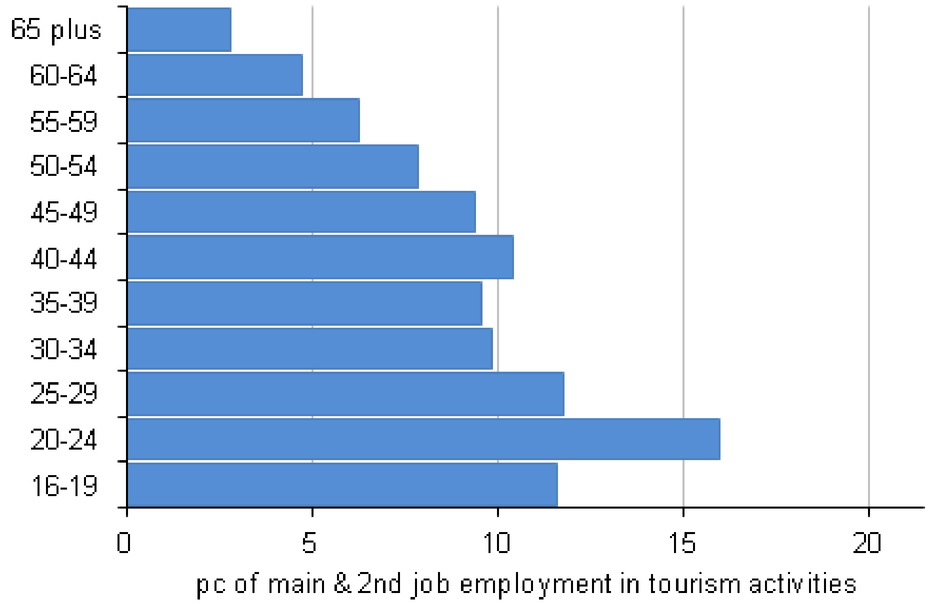
Age groups

The age profile of workers employed in tourism activities is younger than that of those in other industries as figures 12a and 12b illustrate. Over 39 per cent of employment in tourism activities in 2009 was of people under 30 years old, compared with less than 23 per cent in other activities. The only other age group with a higher proportion of the workers in tourism than of the workers elsewhere was the oldest age group (65 plus).

The downloadable data tables accompanying this release include age breakdowns for the four summary tourism industry groups. These highlight large differences in the proportions of those employed that are aged under 30, ranging from over 51 per cent in food and beverage services down to less than 16 per cent in passenger transport and travel agencies.

Figure 12a: Percentage of tourism employment in main or second job by age 2009



Source: Annual Population Survey (APS) - Office for National Statistics

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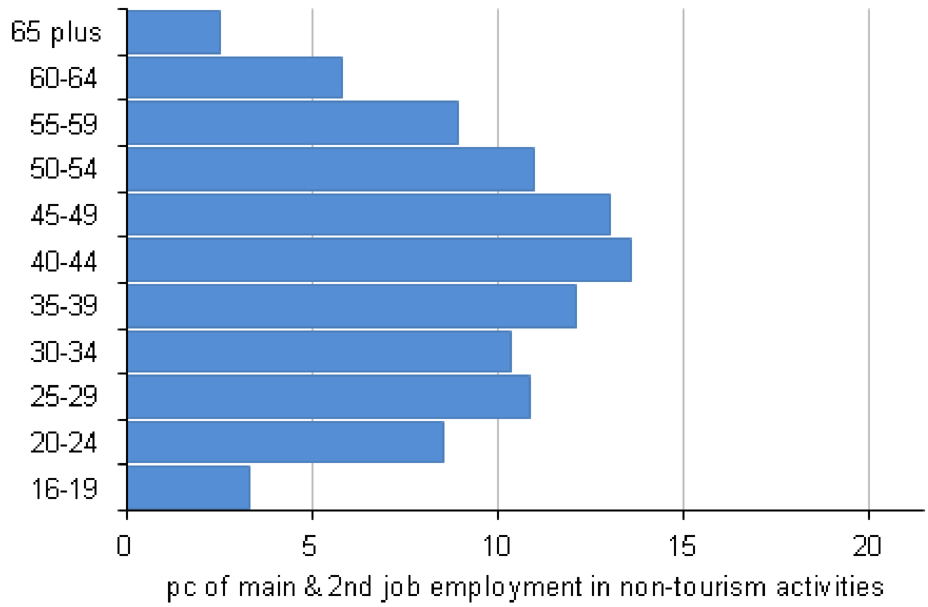
Figure 12b: Percentage of non-tourism employment in main or second job by age 2009



Source: Annual Population Survey (APS) - Office for National Statistics

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Workforce Jobs in Tourism Industries

Workforce Jobs - Introduction

The Office for National Statistics' (ONS') preferred source of data on jobs by industry is the workforce jobs (WFJ) series. Estimates are published each quarter and are available in the data tables that accompany each monthly labour market statistics release, which is available via http://www.ons.gov.uk/ons/publications/all-releases.html?definition=tcm%3A77-21589.

The WFJ published tables include estimates of the numbers of workforce jobs, employee jobs and self-employed jobs, all with the same 19 industry group breakdown. Seasonally adjusted and non-seasonally adjusted estimates are published. The total number of workforce jobs is the sum of the number of employee jobs, self-employed jobs, Government supported trainee jobs and HM Forces jobs, with the latter two a very small proportion of the total.

The nomis website (https://www.nomisweb.co.uk/) gives additional information about the number of part-time and full-time workforce, employee and self-employed jobs. This is for non-seasonally adjusted data only.

The estimated number of employee jobs is obtained by surveying businesses, while the number of self-employed jobs uses output from the Labour Force Survey, which has responses from households. The published number of workforce jobs in the WFJ series is generally larger than the total obtained from the LFS by adding together the headline (main job) employment figures and those for workers with a second job. There is a quarterly ONS publication reconciling these two totals that is released with the labour market statistics and includes links to further explanations of the reasons. The latest version was published in December 2011 and is available at http://www.ons.gov.uk/ons/rel/lms/labour-market-statistics/december-2011/comparison-of-estimates-of-jobs.html.

Tourism Industry Workforce Jobs - Methodology

The tourism industries as defined by the UN WTO (see the "Defining the Tourism Industries" section of this paper) are within five of the 19 industry groups that the workforce jobs estimates are published for. However, only one of the five is entirely made up of tourism industries so we have calculated multipliers for the other four to estimate the total number of tourism industry workforce jobs. Because the full-time / part-time split of employment is different in many tourism industries than elsewhere, we have used non-seasonally adjusted data and calculated multipliers for both these types of employee job and self-employed job.

For employee jobs the multipliers are based on data from the Business Register and Employment Survey (BRES), which gives estimates of the number of part-time and full-time employees by industry sub-class (5 digit SIC code). The BRES is based on a sample of businesses and we have used three years worth of data (2008-10) to ensure relatively large sample sizes for each sub-class.

For full-time and part-time self-employed jobs the multipliers are based on the 2009 Annual Population Survey (APS), the source used elsewhere in this report to analyse characteristics of tourism employment. For the relatively few Government supported trainee jobs in tourism industries we have used the same BRES multipliers as for employee jobs. All HM Forces jobs are in an industry group that does not include any tourism industries.

2009 Tourism Industry Workforce Jobs

Table 10 includes the estimated number of tourism industry workforce jobs for the four quarters of 2009. The data are not seasonally adjusted and, as might be expected, the number of such jobs was higher in the second quarter of the year than in the first. However, the number was lower in the July to September period than in either of the two previous quarters, a more unexpected outcome, given that this includes the UK school summer holiday period.

Table 10: Workforce Jobs in Tourism Industries 2009

Number of jobs (Not seasonally adjusted) (1,000s)	**Q1 - 2009**	**Q2 - 2009**	**Q3 - 2009**	**Q4 - 2009**
All Jobs	3,139	3,169	3,132	3,065
Full-Time Jobs	1,685	1,675	1,644	1,662
Part-Time Jobs	1,454	1,494	1,488	1,403
Employee Jobs	2,608	2,636	2,614	2,556
Self-Employed Jobs	529	531	516	507
Change on previous quarter (1,000s)				
All Jobs	-79	30	-37	-67
Full-Time Jobs	-56	-10	-31	18
Part-Time Jobs	-23	41	-6	-85
Employee Jobs	-69	29	-22	-58
Self-Employed Jobs	-10	3	-15	-9

Table source: Office for National Statistics

Table notes:

1. Data from Workforce Jobs, Business Register & Employment Survey, Annual Population Survey
2. Totals may not sum due to rounding

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The rise in tourism workforce jobs between the first and second quarters was entirely due to an increase in the number of part-time jobs and the same was true of the fall between the third and fourth quarters. Table 11 shows a similar pattern: The proportion of full-time workforce jobs that were in tourism industries was fairly similar throughout 2009 but the proportion of part-time jobs peaked in the middle six months of the year.

Table 11: Workforce jobs in tourism industries as a percentage of all workforce jobs 2009

Percentage of workforce jobs (not seasonally adjusted)	Q1 - 2009	Q2 - 2009	Q3 - 2009	Q4 - 2009
All Jobs	9.9	10.1	10.0	9.8
Full-Time Jobs	7.8	7.8	7.7	7.8
Part-Time Jobs	14.4	14.8	14.8	14.0
Employee Jobs	9.6	9.7	9.7	9.5
Self-Employed Jobs	12.6	12.7	12.2	12.0

Table source: Office for National Statistics

Table notes:

1. Data from ONS Workforce Jobs, Business Register & Employment Survey, Annual Population Survey

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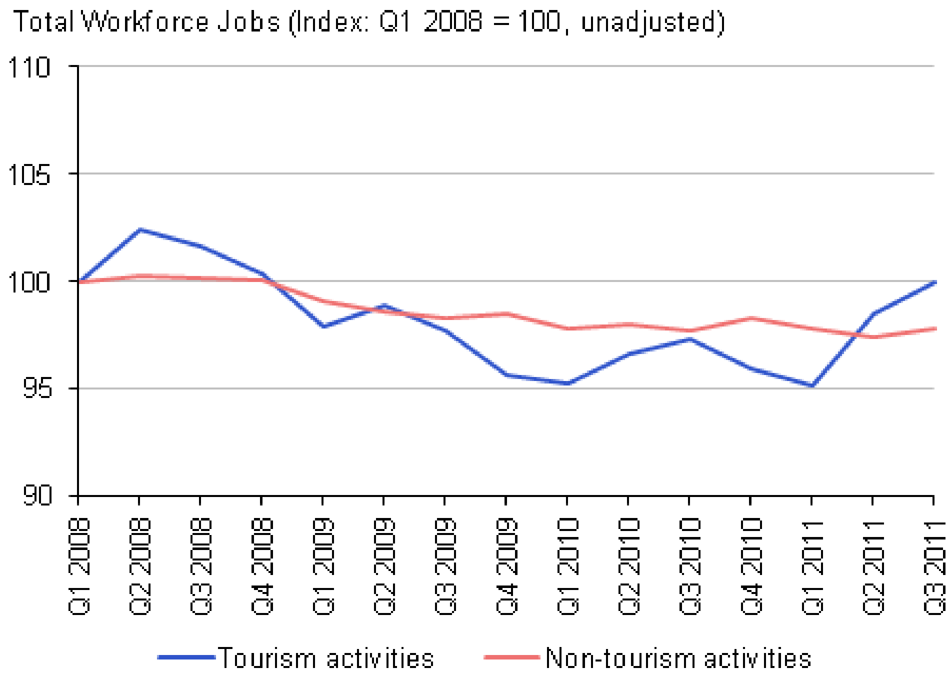
Recent Trends in Tourism Industry Workforce Jobs

A long term time series of workforce jobs estimates is available for the latest standard industrial classification (SIC 2007). This section compares workforce job data for each quarter from the first quarter (Q1) of 2008 to the third quarter (Q3) of 2011. The charts use indexed data with the figure for 2008 Q1 being equated to 100 in each case.

Figure 13 compares recent trends in the totals of workforce jobs in tourism and non-tourism industries. It highlights the seasonal aspect of the former and illustrates the recent downward trends in both.

Figure 13: Workforce jobs Q1 2008 – Q3 2011: Tourism & Non-Tourism Industries

Indexed: Q1 2008 = 100



Source: Annual Population Survey (APS), Business Register and Employment Survey (BRES) - Office for National Statistics

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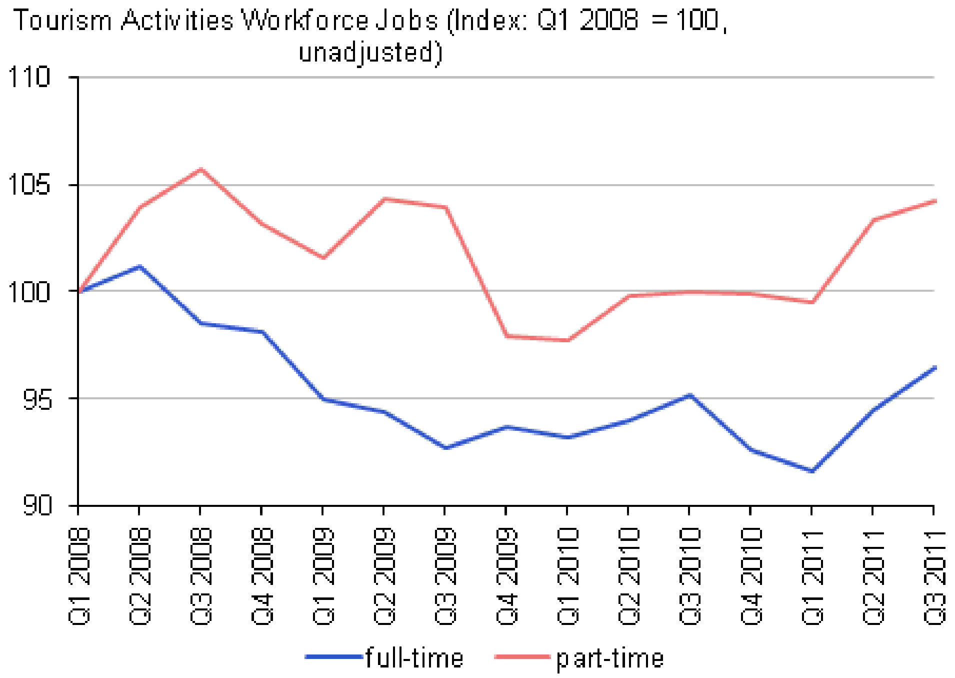
Within tourism industries, the recent trend in the number of part-time workforce jobs has been healthier than that in the number of full-time jobs, as figure 14 illustrates. The number of the former in 2011 Q1 was similar to that in 2008 Q1 but the number of full-time workforce jobs fell by about 8 per cent in the same three year period. The latest workforce jobs estimates for tourism industries in the third quarter of 2011 were more positive. The number of full-time workforce jobs was higher than in the same quarters in both 2009 and 2010 and the same was true for part-time jobs.

Figure 14: Workforce jobs in tourism industries Q1 2008 – Q3 2011: full-time and part-time

Index: Q1 2008 = 100



Source: Annual Population Survey (APS), Business Register and Employment Survey (BRES) - Office for National Statistics

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The Demography of the Tourism Industries

In this section of the report we provide an indication of the demography of the tourism sector in terms of the number of firms, the size of firms (by number of employees), and how size of firm relates to turnover in the tourism industries. We draw on two sources for this analysis. The first is the Inter Departmental Business Register (IDBR) examining data from 2009 and 2011. This is the register of businesses within the UK that is used as a sample frame for other business surveys that the ONS carries out, in particular the Annual Business Survey (ABS). The IDBR covers about 98% of business activity (by turnover) in Great Britain. The IDBR also records data from the administrative sources of VAT and PAYE records for all the businesses in the UK. The IDBR data used is based on the number of VAT and/or PAYE registered enterprises or local units. This data is available from the ONS website broken down into size bands for turnover and employment with the number of businesses within each band recorded.

The second source that we make use of here is the Business Population Estimates for the UK and Regions in 2011, produced by the Department for Business Innovation and Skills (BIS). This source includes estimates of unregistered businesses in the smallest size class (zero employees). The smallest size class (zero employees) contains estimates of unregistered businesses. These estimates are based on self-assessment data from the HMRC, and the Office for National Statistics' Labour Force Survey which is subject to sampling variability.

Both the IDBR and the BIS BPE data are based on SIC2007 codes.

IDBR analysis

The analysis of the IDBR data draws on information from the published IDBR annual snapshot of data (UK Business: Activity, Size and Location) for 2009 and 2011. In Table 12 and Table 13 we display the number of local units in VAT and/or PAYE Based Enterprises for the tourism characteristic industries. This is provided for each nation of the UK and a UK total. The two tables show that there has been a drop in the numbers of local units across the tourism industries but this is mirrored across all industries. Table 13 also displays the percentage change in the number of units across the industries and we can see from this that food and beverage services, road and air passenger services and travel agencies have seen a substantial reduction in the number of local units. Overall, the tourism industries have seen a reduction in the number of local units nearly twice as great as the total for all industries. Interestingly conference activities have seen an increase in the number of local units over this two year period.

Table 12: Number of local units in tourism characteristic industries (IDBR: 2009)

Number of Local Units in VAT and/or PAYE Based Enterprises	England 2009	Wales 2009	Scotland 2009	NI 2009	UK 2009
Accommodation services for visitors	14,165	1,635	3,140	370	19,310
Food and beverage serving services	132,310	7,710	12,435	4,125	156,580
Railway passenger transport services	870	45	10	20	945
Road passenger transport services	9,515	630	990	280	11,415
Water passenger transport services	665	35	120	10	830
Air passenger transport services	885	30	85	25	1,025
Transport equipment rental services	3,775	173	319	78	4,345
Travel agencies & other	9,980	445	910	230	11,565

reservation services					
Cultural activities	29,645	900	1,475	285	32,305
Sport and recreation activities	19,330	1,476	2,685	766	24,255
Exhibitions & Conferences etc.	2,595	109	346	100	3,150
TOTAL - Tourism Industries	**223,735**	**13,188**	**22,515**	**6,289**	**265,725**
TOTAL - All Industries	**2,237,555**	**115,520**	**195,375**	**86,340**	**2,634,790**

Table source: Office for National Statistics

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Table 13: Number of local units in tourism characteristic industries (IDBR: 2011)

Number of Local Units in VAT and/ or PAYE Based Enterprises	England 2011	Wales 2011	Scotland 2011	NI 2011	UK 2011	% change
Accommodation services for visitors	14,140	1,650	3,085	380	19,255	-0.3
Food and beverage serving services	120,780	7,075	11,840	4,110	143,805	-8.2
Railway passenger transport services	855	45	10	25	935	-1.1
Road passenger transport services	8,440	570	920	275	10,205	-10.6
Water passenger transport services	615	35	145	10	805	-3.0
Air passenger transport services	825	30	80	20	955	-6.8
Transport equipment rental services	3,610	148	288	75	4,120	-5.2
Travel agencies & other	9,010	400	845	215	10,470	-9.5

reservation services						
Cultural activities	28,615	825	1,410	265	31,115	-3.7
Sport and recreation activities	19,165	1,433	2,814	806	24,215	-0.2
Exhibitions & Conferences etc.	2,830	102	326	88	3,345	6.2
TOTAL - Tourism Industries	**208,880**	**12,313**	**21,763**	**6,269**	**249,225**	**-6.2**
TOTAL - All Industries	**2,161,190**	**110,625**	**192,450**	**83,575**	**2,547,840**	**-3.3**

Table source: Office for National Statistics

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BIS Business Population Estimates

The BIS Business Population Estimates data has a number of different levels of information, for example we can analyse information at the SIC 2 digit (or Division) level or at the SIC 3 digit level (Group level). The more detail in terms of the industry classification breakdown (i.e. down to 3 digit SIC codes) then the less information is available in terms of the size of firms. At the Group level information is only available for firms within certain size categories, but it does allow us to look at quite a detailed level in terms of the tourism characteristic industries covered. Table 14 displays the breakdown of firm size across the tourism characteristic industries.

Table 14: Firm Size in Tourism Characteristic Industry groups (2011) (SIC 2007 3 digit level)

			Micro	Small	Medium	Large
SIC Code	Tourism Characteristic Industries	All Employers	(1 - 9 employees)	(10 - 49 employees)	(50 - 249 employees)	(250+ employees)
491	Passenger rail transport, interurban	55	20	10	10	15
493	Other passenger land transport	7,930	6,105	1,530	215	80
501	Sea and coastal passenger water transport	275	210	50	10	5
503	Inland passenger water transport	100	85	10	5	0
504	Inland freight water transport	45	40	5	0	0
511	Passenger air transport	290	160	70	40	20
551	Hotels and similar accommodation	8,895	4,760	3,045	975	115
552	Holiday and other short-stay accommodation	2,095	1,845	190	45	15
553	Camping grounds, recreational vehicle parks	1,300	1,015	230	50	5

	and trailer parks					
559	Other accommodation	345	300	40	5	0
561	Restaurants and mobile food service activities	59,925	51,150	7,830	785	160
562	Event catering and other food service activities	5,740	4,735	790	150	65
563	Beverage serving activities	33,140	26,780	5,950	360	50
771	Renting and leasing of motor vehicles	1,870	1,475	320	55	20
791	Travel agency and tour operator activities	3,530	2,730	635	135	30
799	Other reservation service and related activities	435	335	80	20	0
823	Organisation of conventions and trade shows	1,460	1,165	245	45	5
900	Creative, arts and entertainment activities	7,820	7,160	565	80	15

910	Libraries, archives, museums and other cultural activities	705	485	150	65	5
920	Gambling and betting activities	1,285	880	280	95	30
931	Sports activities	9,165	7,110	1,575	360	120
932	Amusement and recreation activities	2,840	2,185	555	85	15
	Total	149,245	120,730	24,155	3,590	770

Table source: Business, Innovation and Skills

Table notes:
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The greatest amount of detail is available at the SIC division level (2 digit 2007 SIC codes). This gives information on number of enterprises, employment and turnover by size of enterprise.
This also includes an estimate of turnover in enterprise with no employees, in other words single proprietors, and it is likely that many of these will not be registered for VAT. At this level we are able to gain some indication of the breakdown of size by turnover for accommodation activities and food and beverage serving activities, for instance, and assess the importance of the smallest size bands (including those with no employees at this level). In Table 15 to 17 we present the data on turnover and size of firm for accommodation, food and drink and travel agencies.

Table 15 : Detailed breakdown of number of enterprises, employment and turnover in Accommodation (2011)

	Number			*Percent*		
	Enterprises	Employment	Turnover	*Enterprises*	*Employment*	*Turnover*
		thousands	*£ millions*			
All enterprises	25,750	389	18,863	*100.0*	*100.0*	*100.0*
All employers	12,635	370	18,126	*49.1*	*95.1*	*96.1*
With no employees	13,115	19	737	*50.9*	*4.9*	*3.9*
1	1,645	4	388	*6.4*	*1.0*	*2.1*
2-4	3,950	14	920	*15.3*	*3.6*	*4.9*
5-9	2,330	17	985	*9.0*	*4.4*	*5.2*
10-19	1,820	26	1,284	*7.1*	*6.7*	*6.8*
20-49	1,680	53	2,289	*6.5*	*13.6*	*12.1*
50-99	740	51	2,241	*2.9*	*13.1*	*11.9*
100-199	295	40	1,972	*1.1*	*10.3*	*10.5*
200-249	45	10	594	*0.2*	*2.6*	*3.1*
250-499	75	26	1,284	*0.3*	*6.7*	*6.8*
500 or more	55	127	6,169	*0.2*	*32.6*	*32.7*

Table source: Business, Innovation and Skills

Table notes:
1.

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Table 17 : Detailed breakdown of number of enterprises, employment and turnover in travel agency and related activities (2011)

	Number			*Percent*		
	Enterprises	Employment	Turnover	*Enterprises*	*Employment*	*Turnover*
		thousands	*£ millions*			
All enterprises	15,450	100	21,004	*100.0*	*100.0*	*100.0*
All employers	3,965	88	20,033	*25.7*	*88.0*	*95.4*
With no employees	11,485	12	971	*74.3*	*12.0*	*4.6*
1	240	1	72	*1.6*	*1.0*	*0.3*
2-4	1,950	6	1,142	*12.6*	*6.0*	*5.4*
5-9	875	6	1,474	*5.7*	*6.0*	*7.0*
10-19	430	6	1,487	*2.8*	*6.0*	*7.1*
20-49	285	9	2,942	*1.8*	*9.0*	*14.0*
50-99	100	7	1,987	*0.6*	*7.0*	*9.5*
100-199	45	6	1,625	*0.3*	*6.0*	*7.7*
200-249	10	2	528	*0.1*	*2.0*	*2.5*
250-499	15	6	1,752	*0.1*	*6.0*	*8.3*
500 or more	15	40	7,024	*0.1*	*40.0*	*33.4*

Table source: Business, Innovation and Skills

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What tables 15 to 17 show is that there are a significant number of enterprises that have no employees, particularly in the accommodation sector where these enterprises account for 51% of all enterprises. The data in these tables also show, however, that the contribution of these enterprises to the employment and turnover of the sector is relatively small, 3.9% in the accommodation sector. Despite this, it is still important to have an indication of the scale of these small (in terms of number of employees) or sole proprietor establishments and their relative importance to the sector. It is difficult to make a concrete assessment of the influence of small firms within the tourism sector on the basis of the analysis presented here but it does serve to illustrate that there may be some under-estimation of the influence of single proprietor businesses, many of whom are likely to not be VAT registered, within the official business register. This is unlikely to have a major impact on the levels of turnover identified by such business registers at the national level, but there could be some regional variation within this which is worthy of future examination.

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