

when judged against the high levels of recent years. Some might say it is only a dream. We see it as an attainable goal, however, and I suggest that, at the end of the day, a goal is only a dream with a deadline. Investment in tourism has to be one of the most attractive options for the Irish economy because of its capacity to create jobs, not just in the tourism industry and in the more remote regions, but in every corner of the economy.

Our plans constitute a unique opportunity for Irish tourism to establish a level of playing pitch with our fellow EU member states. In implementing it we can establish a foundation for sustainable tourism growth for many decades into the future.

## EMPLOYMENT CREATION IN IRISH TOURISM

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### INTRODUCTION

The tourism sector has received considerable emphasis in recent years from the Irish government as a source of new employment creation. Thus, the Operational Programme for the sector under the EC Community Support Framework for Ireland for the period 1989-93 provided for the creation of 25,000 additional jobs in tourism, an increase of one third. The National Development Plan for the period 1994-99 envisages a further growth of 29,000 in tourism employment in that period. This emphasis on employment creation in tourism in Ireland reflects the international situation, in that governments everywhere are now devoting considerable funds to tourism development. Tourism is being targetted because of its strong long-term growth performance, increasing levels of disposable income among large sections of the populations of advanced economies, the relative labour-intensity of tourism activities and the ease of entry for new small businesses into many aspects of the tourism industry.

This chapter examines trends in employment levels in the Irish tourism industry and the nature of this employment. It begins by looking at the problems associated with actually measuring tourism employment, followed by a presentation of recent estimates of employment trends in the industry. It then looks in particular at the Hotel sector, the largest sector in the tourism industry. This section focuses on the types of employment which characterise the sector, and highlights the importance of the sector as an employer of women in particular. This is followed by a brief look at the Leisure sector, and some concluding comments.

## MEASURING TOURISM EMPLOYMENT

Monitoring the performance of the government's targets regarding tourism employment is no easy matter, due to the difficulties involved in actually measuring employment in the industry (Tansey, Webster and Associates, 1991). This is because the tourism "industry" is not an industry as such, but involves a range of services, spread across a variety of sectors, most of which are provided simultaneously to non-tourists as well (restaurants, bars, shops, transport). Even in a tourist-intensive activity such as hotels, a considerable amount of business is generated by the local trade (bars, weddings, functions).

Tourism employment, therefore, is not counted directly in government censuses or labour force surveys, and has to be estimated by more roundabout methods. One approach is to estimate the employment created in tourism from the amount of money spent by tourists in the economy. Put at its most simplistic, if one knows the total level of employment in the economy in a given year, and the total amount of money spent in the economy in that year, one can calculate the level of expenditure required to support each individual job. One can then use this ratio to calculate the number of jobs generated where one knows the total level of tourism expenditure.

In practice, the estimation method is much more sophisticated than this, involving the breakdown of total national expenditure into the different economic sectors and then using surveys of tourist expenditure patterns to calculate employment generation by sector. However, this method remains only as reliable as the many assumptions which have to be used in making the calculations.

An alternative method of estimating tourism employment is by direct surveys, whereby various establishments are asked to estimate what proportion of their total staff working time is taken up by serving tourists alone. Clearly this method is fraught with problems of reliability. There is also the problem that a large proportion of tourism employment is part-time and/or seasonal, and these have to be converted to full-time job equivalents (FTEs) to facilitate further analysis.

Despite the very different methodologies involved, these approaches have produced results which do not differ greatly from each

other. Thus, a direct survey carried out by CERT (the Council for Education, Recruitment and Training, the national tourism training agency) in 1986 came up with a figure of 38,500 FTE jobs (CERT, 1987) in tourism while an expenditure-based analysis carried out by the then Department of Tourism, Transport and Communications arrived at a total of 33,000 for the same year (Tansey, Webster and Associates, 1991).

These figures refer only to those involved *directly* in providing services to tourists. To these must be added the *indirect* employment created in activities providing goods and services to tourism outlets (breweries, laundries, souvenir manufacturers, etc.) and the so-called *induced* employment created by the circulation within the economy of the income spent by those directly and indirectly employed in tourism, and of the tax revenues obtained by the state from the latter.

Adding its estimated totals for direct, indirect and induced employment together, the Department of Tourism, Transport and Communications calculated that, in 1990, tourism accounted for an overall total of 80,000 jobs, equal to 7.1 per cent of total employment and 12.6 per cent of total service employment (Table 1)<sup>1</sup> (Tansey, Webster and Associates, 1991). Since tourism accounts for six per cent of all employment in the European Union (EU), it can be seen that Ireland has an above-average dependency on tourism as a source of employment in an EU context.

Table 1: Estimated Total Tourism Employment (1990)

Direct	47,000 (59%)
Indirect	18,000 (22%)
Induced	15,000 (19%)
Total	80,000
	= 7.1% Total Empl.
	= 12.6% Service Empl.
Source: Based on Tansey, Webster and Associates (1991), Table 10, p.26	

It should be noted that over one quarter of Irish tourism employment is generated by domestic tourism (Deane and Henry, 1993). To a certain extent, this employment would have been created anyway, if the tourists in question had spent their money on alternative goods and services within Ireland rather than taking a holiday. To this extent, the contribution of the tourism industry to *net* employment creation is overstated. However, no evidence is available on how much of the expenditure in question would have stayed in circulation within the Irish economy if it had not been spent on an Irish holiday. It may be, for example, that a large proportion of those involved would have gone on a foreign holiday if they had not holidayed in Ireland, thereby removing revenue and its associated employment from the Irish economy.

Irish tourism employment increased by 15,000 or 23 per cent between 1985 and 1990. This represented over one third of the total national increase in employment in this period; thus, tourism made a major contribution to employment growth in Ireland in the late 1980s - albeit that the overall rate of employment growth was itself very low in this period. This trend has continued into the 1990s: Bord Fáilte estimated that by 1992 tourism employment had grown by a further 12,000 to 92,000 (*Irish Times* 26/5/1992); this despite the fact that total employment in the economy remained stagnant in this period. Thus, in 1992 tourism accounted for one job in twelve in Ireland.

Tansey Webster and Associates (1991) have estimated the level of tourism employment in the different tourism regions (Table 2), using the regional division in operation prior to the 1989 revision (see Fig. 5, Chapter 1). While the Dublin/East region had by far the largest share of tourism employment in 1990, in relative terms tourism made a below-average contribution to employment in the region. The region with the largest share of tourism employment relative to total employment was the Northwest/Donegal, followed closely by the Southwest (Cork/Kerry). The West and Midwest also had above-average shares, while the Southeast and the Midlands were below the national average. This highlights the important role tourism plays as a source of employment and economic growth in the less developed regions along the western seaboard.

Table 2: Regional Distribution of Tourism-Related Employment (1990)

Region	Tourism-Related Employment (% of Nat. Total)	Tourism-Related Empl. as % of Total Regional Empl.
Dublin/East	36.5	6.1
Southeast	8.6	5.8
Southwest	20.0	9.7
Midwest	9.4	7.8
West	11.2	9.5
Northwest/Donegal	7.7	10.8
Midlands	6.6	4.7
Total	100.0	7.1

Source: Based on Tansey Webster and Associates (1991), Table 31, p.59

#### CONSTITUENTS OF TOURISM EMPLOYMENT

The 1986 CERT survey of employment in the tourism industry (CERT, 1987) provides a useful breakdown of the industry into its sectoral constituents. CERT first of all calculated the total number of jobs (including seasonal and part-time) in the different sectors serving the tourism industry; it then converted these totals into full-time equivalents (FTEs). CERT then estimated the proportion of employment in the different sectors which could be attributed to tourism alone; from this it calculated the number of FTE jobs created by tourism in the different sectors. The data presented in the CERT report

have been reworked to produce Table 3.

This table shows, first of all, that, apart from employment engaged in the direct organisation and administration of the tourism sector, the sectors with the highest level of dependence on tourism are Accommodation (80%), Travel Facilitation (70%), Access Transport (60%) and Leisure/Recreation (57%). By contrast, the Catering and Internal Transport sectors create little tourism-related employment.

Secondly, in 1986, a total of 54,700 people were employed to some extent in tourism; however, these converted to only 38,500 FTEs (i.e. 70% of total actual employment). The sector with by far the lowest conversion rate to FTEs was the Accommodation sector (57%); this is important since this is by far the single biggest sector in employment terms, representing over 40% of total tourism employment. This reflects the high level of seasonal and part-time employment in Accommodation. However, as we shall see, the position in this respect has been improving in recent years. The other sectors all have very high proportions of year-round full-time employment.

Overall, Accommodation and Catering accounted for 54% of tourism employment in 1986; Transport and Travel Services represented 22%, Leisure and Recreation 18% and Administration 7%.

#### EMPLOYMENT IN THE HOTEL SECTOR

We now turn to a more detailed examination of employment trends in the Hotel sector, the largest single sub-sector in the tourism industry, accounting for over three quarters of all employment in the Accommodation sector and one third of all tourism employment. We will look in particular at recent trends in the sector based on detailed surveys carried out by CERT in 1988 and 1992 (CERT, 1988, 1993).

Overall, employment in the Hotel sector grew by 18 per cent between 1988 and 1992, despite the fact that the number of registered hotels actually declined, from 680 to 658. This decline was presumably largely confined to smaller hotels; the actual number of hotel rooms rose by 11 per cent over the period.

Table 3: Sectoral Composition of Tourism-Related Employment

Sector	Tourism as % of Sector Total	Total Tourism Jobs	Tourism FTE Jobs	As % of Total
Accommodation	80	27,800	15,900	41.3
Catering	12	6,400	4,700	12.2
Sub-Total		34,200	20,600	53.5
Access Transport	60	5,100	4,500	11.7
Internal Transport	6	2,000	1,800	4.7
Travel Services	4	100	100	0.3
Travel Facilitation	70	1,900	1,900	4.9
Sub-Total		9,100	8,300	21.6
Leisure/Recreation	57	8,300	6,900	17.9
Admin/Support Services	100	3,100	2,700	7.0
Total		54,700	38,500	100.0

Note: Employment data rounded to nearest 100.

Source: Data in CERT (1987)

Table 4 shows the regional distribution of hotel employment in 1988 and 1992, and relates this distribution to that of total employment, as given in the 1986 Population Census. This table shows that, in 1992, disproportionately high concentrations of hotel employment were to be found in the Northwest, the West and the Southwest, while Dublin (in particular) and the Southeast had relatively low shares. This pattern mirrors that for the regional distribution of total tourism employment reported earlier.

It is not possible to directly compare the 1992 and 1988 regional distributions, because the system of regions was altered in the intervening period. However, comparisons can be made for those regions whose definitions did not change - Dublin City and County and the Southeast. According to the CERT surveys, both of these lost ground over the period, both relatively and absolutely (despite the fact that the number of hotels actually increased in both regions). Further inspection of the two tables would suggest that the Midwest has also been losing ground, that the other western regions have been largely holding their own, and that the main progress has been made in the Midlands and East.

Table 5 shows trends in the kind of employment provided in the Hotel sector. In 1988, only just over half of employment in the sector was permanent and full-time. At 48% of the total, temporary and part-time employment stood at three times the proportion of the national workforce accounted for by these categories of employment. However, permanent full-time employment grew much more quickly than total employment in the sector between 1988-92, so that by 1992, this type of employment accounted for 58% of the total. The big swings in part-time and casual employment apparent in Table 5 are largely due to the redefinition of these categories for the 1992 survey: when these categories are combined, they reveal only very limited growth.

**Table 4: Regional Distribution of Hotel Employment (%)**

(a) 1988

Region	Hotel Empl.	Total Empl.	Ratio
Dublin City/ County	20.2	31.2	0.65
East	9.1	12.6	0.72
Southeast	10.9	10.4	1.05
Southwest	21.0	14.7	1.43
Midwest	11.6	8.9	1.30
West	12.0	8.1	1.48
Northwest	9.6	5.4	1.78
Midlands	5.5	8.8	0.63

(b) 1992

Region	Hotel Empl.	Total Empl.	Ratio
Dublin City/ County	16.0	31.2	0.51
Midlands/East	15.5	16.4	0.95
Southeast	8.4	10.4	0.81
Southwest	19.2	13.1	1.47
Midwest	11.9	10.9	1.09
West	14.6	9.8	1.49
Northwest	14.3	8.4	1.70

Note: Regional definitions different between two years.

Source: Data in CERT (1988, 1993)

**Table 5: Hotel Employment by Employment Category**

Category	1988 %	% Change 1988-92	1992 %
Permanent Full-Time	52.3	+30.9	58.0
Permanent Part-Time	12.2	+89.1	19.6
Seasonal Full-Time	13.5	+ 3.3	11.8
Seasonal Part-Time	2.2	+82.1	3.4
Casual	19.7	-57.1	7.2
Total	100.0	+18.0	100.0
Casual + Part-Time	34.1	+4.2	30.1

Source: Data in CERT (1988, 1993)

The strong growth in permanent full-time jobs is undoubtedly a welcome trend. However, it is directly linked to another parallel trend - the relative growth of male employment. Table 6 shows that, in 1988, males accounted for just 35% of total employment in the hotel sector. This compares with 69% of all employment in the economy in 1987 and 56% of total service employment. However, between 1988-92, male employment grew at almost twice the female rate, so that by 1992, males represented 37% of employment in the sector. The Hotel sector, therefore, ran counter to the general trend of growing female participation in the labour force: in 1991, women comprised 34% of the national workforce compared with 31% in 1987.

**Table 6: Gender Structure of Hotel Employment**

Gender	1988 %	% Change 1988-92	1992 %
Males	35.3	+25.1	37.3
Females	64.7	+14.2	62.6

Source: Data in CERT (1988, 1993)

Table 7 shows that, in 1992, males were more strongly represented in permanent full-time employment (41%) than in total hotel employment (37%). Further, male permanent full-time employment grew faster than for females since 1988, so the male share has grown somewhat. Relatively speaking, males were less likely to be found in the other employment categories, especially in seasonal part-time and occasional work.

The domination of hotel employment by female workers is directly related to the low skill levels in the sector. While CERT (1993) gives data indicating that over three quarters of all "operatives" (i.e. workers outside management and supervisory grades) are "skilled operatives", no definition of this term is provided. However, when one notes that the categories kitchen assistant and porter, seasonal/occasional waiters/waitresses, accommodation/laundry assistants and porters together amount to about 40% of all operative jobs, it is clear that the definition of skill being used here is quite relaxed.

The 1992 CERT survey also gives the proportion of various occupational categories of staff who have received formal training i.e. off-the-job education or training leading to a certificate relevant to the Hotel and Catering industry. This provides an alternative definition of "skill" which is likely to be more closely linked to remuneration levels

in the industry.

**Table 7: Hotel Employment Categories by Gender**

	1988 %	% Change 1988-92	1992 %
<b>PERMANENT FULL-TIME</b>			
Male	40.8	+32.8	41.4
Female	59.2	+29.5	58.6
<b>SEASONAL FULL-TIME</b>			
Male	27.2	+38.1	36.4
Female	72.8	-9.8	63.6
<b>PERMANENT PART-TIME*</b>			
Male			35.3
Female			64.7
<b>SEASONAL PART-TIME*</b>			
Male			23.5
Female			76.5
<b>OCCASIONAL*</b>			
Male			18.3
Female			81.7
*Comparable data for 1988 not available.			
Source: Data in CERT (1988, 1993)			

Table 8 has been calculated from the CERT data augmented by a number of additional assumptions relating to occupational categories for which training data are not provided and to certain categories of seasonal and occasional employment. This table indicates that only about one third of all workers in hotel employment have formal training and, for the "operative" category which accounts for over four

fifths of all jobs, this proportion falls to about one quarter. This reverses the proportion of operatives who are "skilled" as defined by CERT and reported above.

**Table 8: Formal Training in the Hotel Sector (1992)**

	% of Total Hotel Empl.	Formally Trained as % of All Jobs
Managerial/ Supervisory	16.8	63.4
Operative	83.2	26.6
Total	100.0	32.8
Source: Data in CERT (1993)		

There is also a clear relation between skill and gender distribution in the Hotel sector (Table 9). Thus, two thirds of those in management have formal training, and men make up almost 60% of all jobs in this category (compared with 37% for all hotel employment); similarly, over four fifths of chefs have formal training, and 56% of these are men. On the other hand, less than one third of waiters/waitresses have formal training, and only one twelfth of these are men, while only one fifth of accommodation/house assistants ("chambermaids") have formal training, and a mere four per cent of these are men.

It may also be noted from Table 9 that there is a strong link between level of formal training and level of permanent full-time employment. Some 87% of managerial jobs and 71% of chefs are permanent full-time, compared with 55% of accommodation assistants and just 34% of waiters/ waitresses. In other words, a man working in the Hotel sector is much more likely than a woman to have a skilled, permanent, full-time and, presumably, well-paid job.

**Table 9: Skill and Gender Distribution in Selected Occupational Categories in the Hotel Sector (1992)**

Occupational Category	Formally Trained as % of All Jobs	Males as % of All Jobs	PFT as % of All Jobs*
Management	67.8	59.2	87.4
Chef	82.8	56.3	70.7
Waiter/Waitress	31.3	12.1	34.3
Accommodation/House Assistant	19.2	4.1	54.7
All Hotel Employment	32.8	37.3	58.0

\*PFT = Permanent Full-Time

Source: Data in CERT (1993)

### THE LEISURE SECTOR

We now turn our attention briefly to another important sector of tourist activity in Ireland - the Leisure sector. In both 1990 and 1992, CERT carried out surveys (CERT, 1991, 1993) of a wide range of activities in which tourists engage in Ireland, outside the accommodation, catering and transport sectors. These refer, for the most part, to leisure activities. While these data do not embrace the entire range of leisure activities engaged in by tourists, they do provide useful pointers to the nature of employment provided in the tourism-related leisure sector, and to trends in this sector. These data should be of particular interest to local authorities and local tourism development groups, as this sector includes many of the kinds of tourism projects which are pursued at this level, including craft centres, heritage and cultural projects,

summer schools, rural tourism and sporting activities.

In its 1992 survey, CERT identified 25 distinct leisure activities which, between them, accounted for over 12,000 jobs. From data provided in CERT (1987), we can estimate about 60% of these jobs (about 7,000 in all) were generated by tourists. This represents about 13% of all direct tourism employment in 1992. Within the sector, the main employers are golf, art galleries, craft centres, summer schools, historic homes and gardens and horse riding (Table 10, in which the data should be regarded as indicative of orders of magnitude rather than being precisely accurate).

**Table 10: Employment in Leisure Activities (1992)**

GOLF	2,322
ART GALLERIES	1,398
CRAFT CENTRES	1,262
SUMMER SCHOOLS	900
HISTORIC HOMES	686
GARDENS	615
HORSE RIDING	591
ANGLING	488
CYCLING	451
HISTORIC SITES	450
NATURAL ATTRACTIONS	449
HERITAGE CENTRES	373
CABIN CRUISING	349
THEATRES	322
RURAL TOURISM	252
WATERSPORTS	250
ARTS CENTRES	226
PLEASURE CRUISING	191
MUSEUMS	182
FOLK VILLAGES	120
GENEALOGY	72
FOREST PARKS	61
SHOOTING	61
WALKING	53
HORSE-DRAWN CARAVANS	13
TOTAL	12,237

Source: Data in CERT (1993)



The Leisure sector is also an expanding sector, having grown by about 30% since the previous survey in 1990 (comparing only those sub-sectors for which employment data were available from both surveys). As with the Hotel sector, a feature of this growth has been the stronger performance of male employment compared with female employment (Table 11). Although female employment was not as dominant as in the Hotel sector, it still comprised a majority of the Leisure sector in 1990; by 1992, however, it had slipped to a minority.

**Table 11: Gender Structure of Leisure Employment**

Gender	1990 %	% Change 1988-92	1992 %
Males	47.1	+48.9	54.1
Females	52.9	+12.3	45.9

Source: Data in CERT (1991, 1993)

As with Hotel employment, this relative growth in male employment is associated with vigorous expansion in the number of permanent full-time jobs (Table 12). While this employment category grew, overall, by almost 50% in the period, the rate of growth for males was no less than *eight* times that for females. Thus, males moved from a position where they constituted only a minority of permanent full-time jobs in 1990 to one where they accounted for almost two thirds in 1992. The main sources of this switch towards male permanent full-time jobs were the two largest categories identified in Table 10, golf and art galleries, which showed spectacular increases in this category of employment. Again, while the absolute and relative growth of permanent full-time employment is to be welcomed, it is much better news for men than for women. And the fact remains that, despite this vigorous growth of permanent full-time employment, by 1992 part-time and seasonal jobs still accounted for almost one half of the total in the

Leisure sector (Table 13).

**Table 12: Permanent Full-Time Employment Change in the Leisure Sector**

Gender	1990 %	% Change 1990-92	1992 %
Males	49.4	+87.8	62.2
Females	50.6	+11.5	37.8

Source: Data in CERT (1991, 1993)

**Table 13: Leisure Employment by Employment Category and Gender**

Employment Category	As % of Total Employment	Women as % of Category
Permanent Full-Time	53.4	35.6
Permanent Part-Time	10.0	57.7
Seasonal Full-Time	24.1	56.9
Seasonal Part-Time	12.5	45.9

Source: Data in CERT (1993)

## CONCLUSION

Our analysis shows that, despite trends to the contrary, tourism remains an industry characterised by a high level of seasonality and part-time work, with only a minority of workers having received any formal training. These characteristics are strongly linked to the fact that women constitute the majority of the industry's workforce. Of course, for many women in particular, seasonal or part-time work is the preferred option. However, survey evidence shows that the proportion of involuntary part-time and temporary workers is large and growing (Dineen, 1989).

Certainly, one may question the emphasis being placed on the creation of this type of work - even at a time of high unemployment - and one may ask whether, in the long run, the resources involved might be better utilised in other ways. One may also observe that, while the disproportionate concentration of tourism employment in the West of Ireland does significantly enhance employment opportunities in that area, it simultaneously tends to increase the income disparity between West and East, due to the concentration of better-quality service employment in the latter region.

## NOTE

1. The Department of Tourism, Transport and Communications only provided a total figure for tourism employment in 1990. The division between direct, indirect and induced employment presented in Table 1 is based on the proportionate division between the three for 1989.

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