

# THE SIGNIFICANCE OF TOURISM AS AN EMPLOYMENT GENERATOR IN THE EU LABOR MARKET

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## ABSTRACT

*The main aim of this paper is to analyze the tourism sector with focus on its contribution to the labor market in the European Union. Several important features of the labor market are emphasized. The intention of this paper is to stress the importance of the tourism industry as a key driver of socioeconomic progress through employment, revenues and overall development. The paper's findings confirm that: tourism represents a major economic activity in most countries of the European Union and contributes strongly to the EU GDP; tourism is a labor intensive economic activity creating employment for low-skilled and under-qualified workers, unemployed young people entering the markets for the first time, long-term unemployed, minorities and women; employment in the tourist industries of the EU prove to be resilient to the economic crises. The paper provides a comprehensive overview of the impact of tourism on the European Union labor market, emphasizing the importance of this industry for a large number of state members.*

**Key words:** *labor market, tourism, employment, European Union*

**JEL classification:** J21, E24, J60,

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## **INTRODUCTION**

Tourism has become one of the largest and fastest growing economic sectors in the world, accounting for more than one-third of the total global service trade and employing over 12 million people just in European Union. The high intensity of labor within the industry makes it a significant source of employment, and places it among the world's top creators of jobs that require varying degrees of skills and allow for a quick entry into the workforce by youth, women and migrant workers (ILO, 2011).

The labor market represents one of the most complex and sensitive markets. It is the place where labor supply and labor demands encounter each other. Employers are competing on this market with each other in order to obtain highly qualified and motivated employees, while employees are competing in securing a job that will bring them the greatest satisfaction.

The main purpose of this this research is to analyze and determine the contribution of tourism to the EU economy, focusing on the labor market. Several important features of the labor market are emphasized. The intention of this paper is to stress the importance of the tourism industry as a key driver of socioeconomic progress through employment, revenues and overall development. The main hypotheses of the research are: tourism is a major economic activity in most countries of the European Union and contributes strongly to the EU GDP; tourism is a labor intensive economic activity creating employment for low-skilled and under-qualified workers, unemployed young people entering the markets for the first time, long-term unemployed, minorities and women; employment in the tourist industries of EU prove to be resilient to the economic crises.

The structure of the paper is as follows. In the first section of the paper the theoretical background is outlined, concentrating on the problem and the term definition, emphasizing key characteristics of the tourism labor market. The second part analyses of employment and different features of the labor market in the tourism industries in European Union are carried out. The last section sets out the most important conclusions of the paper.

## LITERATURE OVERVIEW

Tourism is a socioeconomic phenomenon related to movement of people between places outside their usual place of residence, and acts as an engine of economic development and a social and cultural force impacting a wide range of industries (Jurdan, 1997; Obadić, Marić 2009). Viewed from the “supply side” taking into consideration all supporting industries, it is defined as “the aggregate of all businesses directly providing goods and services to facilitate business, pleasure and leisure activities away from the home environment” (Johnson & Thomas, 1990).

The tourism sector is the cluster of production units in different industries that provide consumption goods and services demanded by visitors. Such industries are called tourism industries because visitor acquisition represents such a significant share of their supply that, in the absence of visitors, the production of these would cease to exist in meaningful quantities (UNWTO, 2018). Tourism contributes and impacts the economy as powerful force providing employment, foreign exchange and tax revenue. Economic impacts are measured in terms of its effects on income, employment, investment and development and balance of payment. It has become a major consumer market experiencing strong global and national competition, market turbulence and changes in consumer demand (UNWTO, 2014; United Nation, 2018).

Human resources will be a major asset for the tourism industries. Many tourism products include human resources as an integral part. The quality of the products and services delivered on the market in tourism will strongly be affected by the quality and availability of humans on the labor market. A high-quality skilled workforce will ensure greater competitiveness and innovation, improve job prospects and ease the process of adjustment in changing markets.

When analyzing productivity in an intensive labor market, one of the key indicators will be employment. Employment in the tourism industries refers to all the jobs (or persons engaged) in both tourism-characteristic activities and non-tourism-characteristic activities in all establishments in tourism industries” (UN, 2018). Tourism employment can be categorized at three separate levels (direct, indirect and inducted) depending on the involvement into tourism supply-side (WTO, 1998; Keyser, 2002; UNWTO, 2014; Obadić & Marić, 2009). The tourism industries will impact employment on the labor market in different ways. It will

create jobs connected with delivering products and services directly to tourists (direct employment) and create jobs in the sectors supplying inputs to the tourism industries (indirect employment). Beside these two types of employment, the development of tourism will stimulate the growth of employment in other areas in the destination (induced employment).

Tourism plays an important role on the labor market by creating opportunities for employment for people entering the labor market for the first time, or having difficulties to find employment. This refers especially to low-skilled and unqualified workers, unemployed young people, long-term unemployed, minorities and women with a family who are looking for part-time jobs. Tourism creates opportunities for self-employment and entrepreneurial activities, generating therefore openings of many small to medium sized enterprises in the tourism industry. New jobs in these enterprises will be offered primarily to the local people generating income that in developing countries will strongly alleviate poverty.

The tourism labor market is a very dynamic one, therefore it is characterized by a high labor turnover, and often increased costs due to on-going recruitment and necessary additional training of new employees. Tourism employment will often be characterized by seasonality, part time and excessive hours at work, low-pay labor and informal or sometimes illegal labor, demanding working conditions (Braun, 2008). In spite of the high number of jobs being created in tourism, the general perception is that the industry is offering mostly low-paid jobs. This will have a strong effect on the attractiveness of the industry for potential employees, making it difficult for employers to avoid a high turnover, additional recruitment and training costs, and high levels of permanent staff.

In order to improve productivity and competitiveness in different segments, an employment analysis will help determine the key characteristic and driving forces on the tourism labor market. Since tourism is not an industry, the traditional way of understanding and measuring tourism employment is particular complex.

## **METHODOLOGY**

The research focuses on determining the contribution of tourism to the overall European economy according to the data from Eurostat, the European Commission, the Organization of Economic Co-operation (OECD), the United Nation and UNWTO.

Special attention will be given to the tourism labor market analysis by looking at several important specific characteristics, such as persons employed by enterprise size and economic activity, employment of young people and women etc.

## **RESULTS AND DISCUSSION**

According to the World Tourism Barometer, all world regions enjoyed a continuous growth in international tourism in 2018. Destinations worldwide received 1,083 million international tourists' arrivals in 2018, 56 million more than in the same period in 2017. EU member states reported 538 million international tourist arrivals last year, accounting for 40% of the world's total. This is the eighth consecutive year of sustained growth for tourism in the EU (UNWTO, 2018).

The European Union in 2016 received 500 million international tourists, accounting for 40% of the world's total number of tourists and reaching 31% of the worldwide tourism earnings. Within the EU, Southern and Mediterranean Europe are the most visited groups of countries with 193 million arrivals in 2016, followed by Western Europe (171 million), Northern Europe (66 million) and Central and Eastern Europe (70 million). Five out of the top ten destinations in the world are located in the European Union (France, Spain, Italy, Germany and the United Kingdom). Europe is the world largest source region for outbound tourism, generating an estimated 618 million arrivals, half of the world's total, in destinations worldwide in 2016. Four out of the top ten source markets in the world are located in the European Union (Germany, United Kingdom, France and Italy). Tourist destinations in the European Union counted 608 thousand accommodation establishments in 2016, with a total capacity of 31 million bed-places, 44% of which were in hotels. Around 1 billion guests spend 3.1 billion nights in EU accommodation establishments. International tourism accounts for 6% of the EU overall exports and 22% of the service exports. Tourism ranks fourth as an export category after chemicals, automotive products and food (Eurostat, 2018).

Tourism is the third socioeconomic activity in the European positively impacting economic growth, employment, and sustainable development of European regions. Tourism contributes 10% to the EU GDP and creates jobs for 26 million people, particularly for young people, women and people from a migrant background. Economic activities related to tourism employs just over 12 million people in the European Union (Table 1). The three selected tourism industries - accommodation, travel agencies / tour operators, and air transport employ 3.3 million people in the EU.

Table 1: Number of persons employed, by economic activity, 2013

	Total non-financial business economy(*)	Services(*)	Tourism industries (total)(*)	Transport (total)(*)	Accommodation (scope of Reg. 692/2011)(*)	Food and beverage (total)(*)	Car and other rental (total)(*)	Travel agency, tour operators (total)(*)	Selected tourism industries(*)
<b>EU-28</b>	133 076 972	55 244 131	12 043 560	1 988 400	2 364 233	6 960 025	199 664	492 426	3 252 701
Belgium	2 709 917	1 210 008	:	:	22 245	131 927	4 134	8 773	36 394
Bulgaria	1 864 690	606 534	:	:	39 349	90 996	1 947	5 946	48 301
Czech Republic	3 486 702	1 071 154	186 473	27 288	30 074	115 165	2 060	11 885	47 486
Denmark	1 601 015	639 217	:	:	16 973	41 923	1 532	6 304	32 468
Germany	26 468 059	10 823 695	2 076 514	273 320	499 935	1 176 844	28 804	97 611	662 078
Estonia	400 718	150 405	:	:	6 090	13 060	698	1 766	8 160
Ireland	1 097 444	543 723	:	:	54 145	91 445	1 727	4 602	66 624
Greece	2 198 983	853 200	:	:	74 102	196 549	3 797	11 604	88 143
Spain	10 574 716	4 748 975	1 324 118	:	241 857	841 933	14 863	50 277	325 378
France	15 295 948	6 825 778	1 323 076	398 351	193 283	662 794	27 476	41 172	302 761
Croatia	996 631	347 568	112 055	14 343	30 936	59 714	1 311	5 751	:
Italy	14 407 907	5 545 722	1 404 906	157 048	256 365	932 266	13 535	45 692	325 172
Cyprus	207 254	92 970	:	:	16 778	17 338	638	1 565	19 352
Latvia	584 281	229 221	36 939	6 598	6 089	20 793	1 339	2 120	9 563
Lithuania	869 398	299 795	45 837	5 866	7 446	27 975	1 646	2 904	10 854
Luxembourg	243 372	116 843	:	:	3 437	12 391	404	:	:
Hungary	2 393 877	924 340	152 050	32 599	23 300	87 116	3 367	5 668	31 073
Malta	121 972	57 440	20 258	:	7 790	6 962	:	1 596	:
Netherlands	5 343 971	2 677 890	:	:	75 937	279 782	9 035	22 356	123 379
Austria	2 707 211	1 105 638	333 704	46 328	109 690	162 209	3 697	11 780	129 370
Poland	8 205 480	2 436 109	334 938	100 377	66 066	143 465	7 260	17 770	89 731
Portugal	2 853 849	1 136 541	:	:	54 277	192 533	4 383	9 675	74 832
Romania	3 835 627	1 174 306	215 042	59 617	40 115	102 817	2 638	9 855	59 542
Slovenia	573 850	190 031	:	:	10 135	21 186	359	1 944	13 204
Slovakia	1 401 847	435 793	66 943	12 734	11 976	37 098	1 989	3 146	18 819
Finland	1 457 598	475 170	:	:	8 899	33 601	1 087	4 822	17 007
Sweden	3 027 838	1 326 564	249 989	60 109	45 959	128 391	2 978	12 550	68 139
United Kingdom	18 146 817	9 199 501	2 125 821	232 831	410 985	1 331 752	56 960	93 292	580 731
Norway	1 540 190	625 508	135 389	45 461	29 190	53 238	1 538	5 962	42 804
Switzerland	2 744 454	1 102 948	:	:	66 611	124 138	1 348	15 957	95 189

Note: Tourism aggregates estimated using available data and including 2012 data for some countries. Due to unreliable data at country level, the use of 2012 data instead, and rounding, deviations can occur between total and subtotals.

(\*) NACE sections: B-N\_S95\_X\_K (Total business economy; repair of computers, personal and household goods; except financial and insurance activities), IE, EL and FI: 2012 data.

(\*) NACE sections: H-J, L-N and NACE division S95.

(\*) NACE classes: H491, H4932, H4939, H501, H503, H511, I551, I552, I553, I561, I563, N771, N7721 and division N79.

(\*) NACE classes: H491, H4932, H4939, H501, H503 and H511. LT: 2012 data.

(\*) NACE classes: I551, I552 and I553. IE: 2012 data. EE, IE, LU and NL: including NACE class I559.

(\*) NACE classes: I561 and I563. IE: 2012 data.

(\*) NACE classes: N771 and N7721. EU-28 estimate not including MT. IE: 2012 data. DK, EE, IE, ES and CH: not including class N7721.

(\*) NACE division N79. EU-28 estimate not including LU. IE and FI: 2012 data.

(\*) NACE divisions: H51, I55 and N79. FR and SE: include class H511 instead of division H51.

Note: Full description of economic activities covered, see under "Data sources and availability".

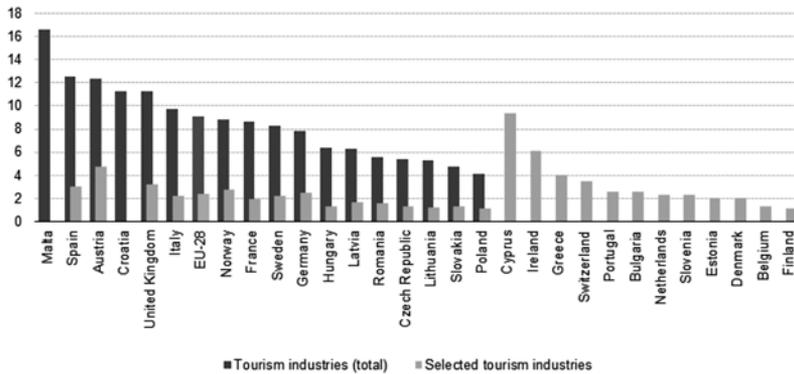
..: Aggregate not available due to one or more unreliable components at NACE 3 or 4 digit level.

Source: Eurostat (sbs\_na\_sca\_r2), (sbs\_na\_1a\_se\_r2)

Tourism is a major economic activity in most countries of the European Union. In total, the tourism industry represents 9% of those employed in the non-financial business economy. The tourism industry accounts for 22% of people employed in the service sector. Malta records the highest share, meaning that one of six people is working in the tourism industry. Five member states, who have in absolute terms the highest employment in the tourism industry (United Kingdom, Germany, Italy,

Spain and France), account for 68,5% of employment in the tourism industry across the EU (Figure 1). Looking at the company sizes and employment in the selected tourism industries (accommodation, travel agencies / tour operators, air transport), a large percentage of people (22%) work in small enterprises that employ fewer than ten people (Eurostat, 2018).

Figure 1: Persons employed in total in the tourism industries<sup>(1)</sup>, and in the selected tourism industries<sup>(2)</sup>, as a share of those in total employed in the non-financial business economy<sup>(3)</sup>, 2013, (%)



(\*) NACE classes: H491, H4932, H4939, H501, H503, H511, I551, I552, I553, I561, I563, N771, N7721 and division N79.

(\*\*) NACE divisions: H51, I55 and N79. FR and SE: include class H511 instead of division H51.

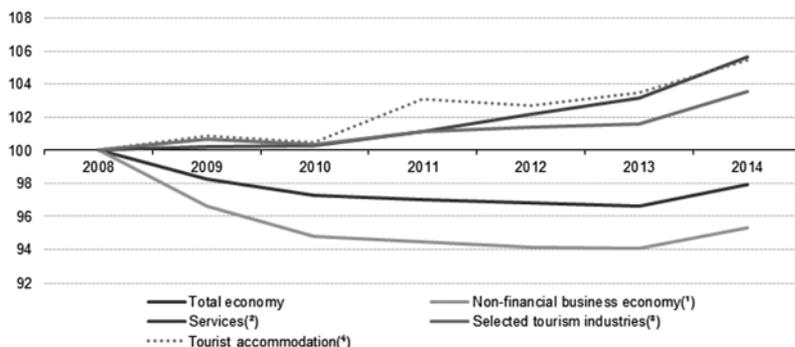
(\*\*) NACE sections: B-N, S95\_X\_K (Total business economy; repair of computers, personal and household goods; except financial and insurance activities). IE, EL and FI: 2012 data.

Note: Full description of economic activities covered, see under "Data sources and availability".

Source: Eurostat (sbs\_na\_sca\_r2),(sbs\_na\_1a\_se\_r2)

During an economic crisis, employment in tourism tends to be less affected and to recover more quickly than other economic sectors (UNWTO and ILO, 2014). The service sector, and especially the tourism industry, was resilient to the economic crisis, and although the economic crisis led to a fall in total employment, it did not happen in this industry. The tourism industry therefore has the potential to grow, even in times when problems on the market will affect other parts of economy (Figure 2).

Figure 2: Persons employed by economic activity, EU-28, 2008-2014, (index 100=2008)



(\*) NACE sections: B-N\_S95\_X\_K (Total business economy; repair of computers, personal and household goods; except financial and insurance activities).

(\*) NACE sections: H-J, L-N and NACE division S95.

(\*) NACE divisions: H51, I55 and N79.

(\*) NACE division I55.

Note: Full description of economic activities covered, see under "Data sources and availability".

Source: Eurostat (lfsa\_egan2).

Tourism has a higher share of women employees and entrepreneurs than the economy as a whole, and creates job opportunities for young people, long-term unemployed people, minority groups and lower-skilled individuals. The industry is characterized by more female workers (58%) than male workers. Women working full time still represent the biggest share of employment (40%), even though nearly one in three women are working part-time. The proportion of part-time employment in tourism (24%) is significantly higher than the figure for the service sector as a whole (22%). The proportion of part-time employment is highest in the accommodation sector (25%), followed by tourist agencies and tour operators (23%). The analysis of the individual member states has shown a higher proportion of part-time employment in tourism compared to the rest of economy (especially Czech Republic, Sweden). This reflects the fact that tourism employment is often characterized by seasonality, in accordance with the characteristic of tourism activities on some regions. Only four countries, Greece, Spain, Cyprus and Portugal have a proportion of part-time work that is lower in the tourism industry than in the rest of economy.

The tourism industry offers jobs to young people, giving them the opportunity to enter the market for the first time, or to work part-time during their studies. In EU tourism, 13% of the workers are young people aged 15 to 24, in comparison to 9% in the service or the non-financial business economy. People with a low education level are equally represented on the labor market in the tourism sector (20%), and this is especially the case in the sub-sector of accommodation, where one in four employees has lower education level (meaning they have not finished high school). In Malta, Spain and Portugal, almost half of the workforce belongs to this group. The tourism industries are employing a large majority of foreign citizens. In average they count for 15% of the labor force. Looking at the member states, in some of them more than a quarter of the people employed in the tourism industry are foreign citizens: Ireland (29%), Austria (29%) and Cyprus (27%).

Table 2: Characteristics of employment in tourism, EU-28, 2014\_(%)

	Non financial business economy <sup>(*)</sup>	Services <sup>(*)</sup>	Selected tourism industries <sup>(*)</sup>	Air transport <sup>(*)</sup>	Accommo- dation <sup>(*)</sup>	Travel agency, tour operator <sup>(*)</sup>
Share of female persons employed	35.8	40.8	58.5	41.3	60.2	63.9
Share of persons employed part-time	16.7	21.9	24.1	17.8	25.5	23.1
Share of persons employed aged 15-24	9.3	9.1	12.5	4.2	14.9	8.9
Share of persons employed with lower educational attainment level	20.4	18.6	19.6	7.4	24.8	7.8
Share of foreign persons employed	7.9	9.9	14.4	7.9	17.2	8.1
Share of employees with temporary contract	13.5	14.9	21.0	6.9	25.5	14.0
Share of employees having had their job for less than one year	15.2	18.0	22.5	7.6	26.9	16.7

(\*) NACE sections: B-N\_S95\_X\_K (Total business economy, repair of computers, personal and household goods; except financial and insurance activities).

(\*) NACE sections: H-J, L-N and NACE division S95.

(\*) NACE divisions: H51, I55 and N79.

(\*) NACE division H51.

(\*) NACE division I55.

(\*) NACE division N79.

Source: Eurostat (*lfsa\_epgan2*), (*lfsa\_egan22d*), (*lfsa\_egaed*), (*lfsa\_egan*), (*lfsa\_egdn2*)

Additional indicators when analyzing the labor market in tourism that can be taken in account are: permanence of the job, earnings and labor cost. The likelihood of

occupying a temporary job is significantly higher in tourism (21% of people employed) than in the total non-financial business economy (14% people employed). Jobs are less stable in tourism than in the rest of the economy. Employees in tourism often change their jobs, and don't stay for a long time with the same employer. In tourism two out of three people employed (67%) have worked with the same employer for two or more years. The high seasonality in tourism activities is only partly reflected in the tourism employment to seasonality fluctuation in employment. In the EU, the average number of nights spent in accommodation establishments is 2.9 times higher in the third quarter of the year (the peak quarter) than in the first quarter (the low quarter) (Eurostat, 2015). The peak quarter of employment in tourism of the EU is only 1.2 times higher than in the lower quarters.

One of the positive impacts of tourism development and growth is the multiplicative effect it has on the local economy and labor market. Regions with higher tourism activity tend to have a lower unemployment rate. In the EU, 30 out of 40 regions with higher tourism intensity have an unemployment rate below the national average. (Table 3)

Table 3: Regional unemployment rates compared with the national unemployment rate for NUTS2 regions(\*) with the highest number of tourism nights per inhabitant, 2014

Region	Nights spent(*) in tourist accommodation	Population	Tourism nights per inhabitant	Difference between regional and national unemployment rate (in percentage points)
Notio Aigaio (EL)(*)	23 579 791	334 652	70	-6.4
Illes Balears (ES)	62 968 745	1 115 841	56	-4.4
Provincia Autonoma di Bolzano-Bozen (IT)	28 428 922	515 714	55	-8.3
Ionia Nisia (EL)(*)	10 543 079	208 241	51	-5.1
Tirol (AT)	34 534 903	721 574	48	-2.4
Jadranska Hrvatska (HR)	63 286 178	1 405 908	45	-0.1
Canarias (ES)	94 304 512	2 114 845	45	8.0
Algarve (PT)	18 290 626	442 358	41	0.6
Salzburg (AT)	21 004 395	534 185	39	-2.1
Kriti (EL)(*)	23 327 136	630 085	37	-2.5
Corse (FR)	9 391 573	323 092	29	-0.4
Provincia Autonoma di Trento (IT)	15 369 920	536 237	29	-5.8
Zeeland (NL)	9 830 149	380 621	26	-2.0
Região Autónoma da Madeira (PT)	6 516 775	261 313	25	1.1
Cornwall and Isles of Scilly (UK)(*)	13 161 809	538 101	24	-2.3
Valle d'Aosta/Vallée d'Aoste (IT)	2 986 319	128 591	23	-3.8
Highlands and Islands (UK)(*)	9 212 882	466 336	20	-2.2

(\*) The table lists all regions at NUTS2 level reporting more than 20 tourism nights per inhabitant. Analysis not applicable to EE, CY, LV, LT, LU, MT and SI (no NUTS2 regions).

(\*) Nights spent in tourist accommodation by non-residents and residents of the Member State.

(\*) 2013 data.

(\*) 2012 data.

Source: Eurostat (sbs\_na\_sca\_r2)

A relatively young labor force with a higher proportion of temporary contracts and lower job seniority has a comparative disadvantage on the labor market, which leads to lower labor costs and earnings. For the accommodation sector – which employs more people with a lower educational level and more part-timers – the differences are even higher. In the EU-28, labor costs and earnings tend to be significantly lower in the tourism industry than they are in the total economy.

The UNWTO long-term outlook *Tourism Toward 2030* shows that there is still a substantial potential for further tourism growth in the EU in the coming decades. Tourism is becoming one of the fastest growing economic activities in the European economy, and therefore it will continue to be an employment generator in the EU labor market.

## CONCLUSION

Tourism and therefore tourism employment has proven to be resilient to the economic crises and demonstrates a strong multiplier effect, meaning it stimulates growth and job creation in all sectors of the area concerned. It is a labor intensive activity contributing strongly to the European gross domestic product and creating employment for low-skilled and under qualified workers, unemployed young people entering the markets for the first time, long-term unemployed, minorities and women. Sustainable tourism will positively impact economic growth, employment and sustainable development of European regions. Future projections are showing that there is still a sustainable potential for further tourism growth in coming decades in the European Union and the world.

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