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## Introduction

The purpose of this document is:

- to provide an overview of the structures and characteristics of the hotels, catering and tourism (HCT) sector and its general trends in and more specifically on the hotel and restaurant subsector which the industry quite often also describes as accommodation and hospitality (Chapter 1);
- to discuss recent developments for the sector within the context of the global economic and financial crisis (Chapter 2);
- to evaluate the impact of new ownership patterns in the hospitality and tourism industry on employment, human resource development (HRD) and industrial relations (Chapter 3);
- to present information on major trends and the diversification of accommodation, operations and consumption and their possible differentiated impact on the employment of women and men, HRD and industrial relations (Chapter 4);
- to give an outlook on the specific criteria and needs in regard to sustainable tourism and social dialogue (Chapter 5);
- to provide points for discussion for the Global Dialogue Forum.

### Defining the hotels, catering and tourism sector and the scope of the issues paper

The definition of the HCT sector when the ILO Governing Body created the ILO Industrial Committee for the HCT sector in 1980 included:

- (a) hotels, boarding houses, motels, tourist camps, holiday centres;
- (b) restaurants, bars, cafeterias, snack bars, pubs, nightclubs and other similar establishments;
- (c) establishments for the provision of meals and refreshments within the framework of industrial and institutional catering (for hospitals, factory and office canteens, schools, aircraft, ships, etc.);
- (d) travel agencies and tourist guides, tourism information offices;
- (e) conference and exhibition centres.<sup>1</sup>

In the context of this discussion, it is worth adding that wider definitions of tourism frequently also include the visitor attractions “sector”, which encompasses natural, cultural and heritage sites, museums, as well as zoos and theme parks. Such locations frequently

<sup>1</sup> ILO: *Human resources development, employment and globalization in the hotel, catering and tourism sector*, report for discussion at the Tripartite Meeting on Human Resources Development, Employment and Globalization in the Hotel, Catering and Tourism Sector, 2–6 April 2001, Sectoral Activities Programme (Geneva, 2001), p. 5.

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include the presence of other related hospitality operations including hotels, restaurants and cafes.

The ILO definition of the “tourism” component of the sector includes specific segments of transport,<sup>2</sup> travel agencies and tour operators. Hotels, catering and restaurants are all considered by most organizations to belong to the “tourism-characteristic industries” and are therefore subsumed under tourism.<sup>3</sup> International tourism includes business and professional travel, visiting friends and relatives, religious travel, and health treatments of travellers crossing a border and spending one or more nights in the host country. The hotel and restaurant subsectors analysed in this paper include data and information about accommodation (hotels, boarding houses, motels, tourist camps, holiday centres, resorts and youth/backpacker hostels) and wider hospitality (restaurants, bars, cafeterias, snack bars, pubs, nightclubs) and other similar establishments.

A conceptual framework that links a comprehensive reconciliation of tourism data and macroeconomic analysis known as the Tourism Satellite Account (TSA)<sup>4</sup> measures the contribution of tourism to a State’s economy and its GDP. The TSA also provides a complete picture of tourism’s true impact in generating employment.

The UNWTO notes that the TSA<sup>5</sup> methodology was developed in association with the UN Statistics Division, Eurostat, OECD and the ILO. It is also an instrument to support countries in developing their own system of tourism statistics (see Appendix I). The ILO has been cooperating with those organizations in response to the mandate given by the Tripartite Meeting on the Effects of New Technologies on Employment and Working Conditions in the Hotels, Catering and Tourism Sector in 1997, aiming to provide a methodology for the production and presentation of tourism-relevant labour statistics to supplement the TSAs.

Since 2007, the ILO has been cooperating with the UNWTO to better measure employment in tourism industries. Thus, a new chapter was written for the *International Recommendations for Tourism Statistics 2008* (IRTS2008),<sup>6</sup> namely, Chapter 7, “Employment in the tourism industries”.

The IRTS2008 provides a comprehensive methodological framework for the collection and compilation of tourism statistics in all countries irrespective of the development level of their statistical systems. Its primary audience is the staff of national

<sup>2</sup> For instance: taxis, cruise ships, tourism trains and buses.

<sup>3</sup> Other organizations concerned with tourism, including governments, intergovernmental organizations and NGOs, often use much broader definitions of the term than those used by the ILO. They subsume under “tourism” all services and products consumed by tourists, including transport.

<sup>4</sup> United Nations Department of Economic and Social Affairs Statistics Division, UNWTO, Commission of European Communities, Eurostat, OECD: *Tourism Satellite Account, Recommended Methodological Framework 2008* (Luxembourg, Madrid, New York and Paris, 2008).

<sup>5</sup> TSA provides the following data: tourism’s contribution of GDP, tourism’s ranking compared to other economic sectors, the number of jobs created by tourism, the amount of tourism investment, tourism consumption, tourism’s impact on national balance of payments and characteristics of tourism human resources.

<sup>6</sup> UN Department of Economic and Social Affairs Statistics Division, UNWTO: *International Recommendations for Tourism Statistics 2008* (Madrid and New York, 2008) (IRTS2008).

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statistical offices and national tourism administrations involved in the compilation of these statistics.

Future works include the implementation of the joint ILO–UNWTO project on the “Measurement of Employment and Decent Work in the Tourism Industries.” The project aims to finalize and publish the *Technical Guide on Best Practices of Measuring Employment in the Tourism Industries* and going further to test the applicability of the recommendations included in the guide in three countries with developed statistical systems and tourism services.