

Centre for Policy Studies
Conference 2014
Coping with Recession – A Regional Perspective

Tourism Industries & Employment

A Statistical Profile of the Regions

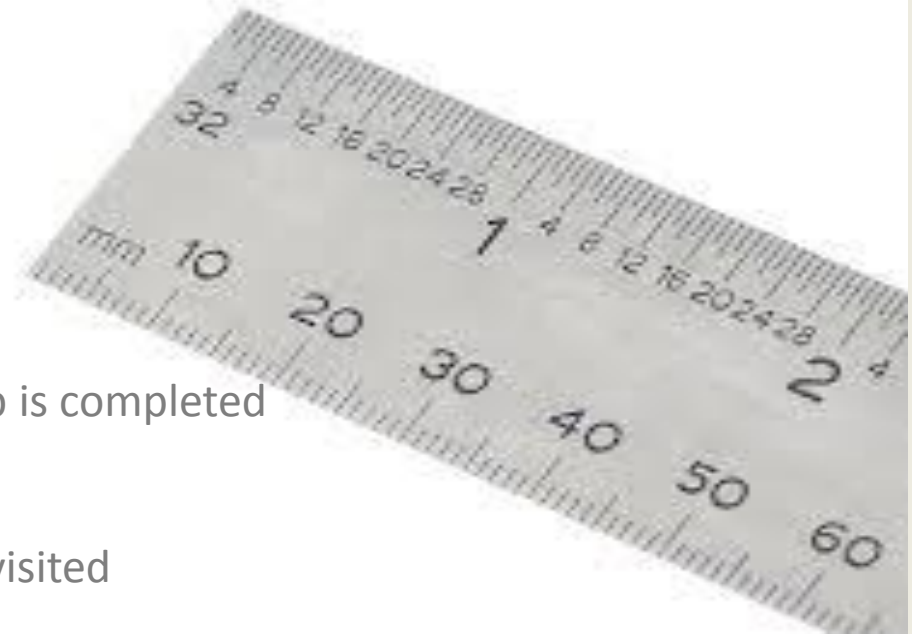
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Central Statistics Office



Tourism: Difficult to measure some examples why...

Complex sector to measure

- Inbound, outbound and domestic
- Travellers v tourists
- Business v leisure
- Usual environment
- Some expenditure occurs before the trip
- Some payments are made long after the trip is completed
- What is tourism consumption expenditure?
- Tourists frequently don't know where they visited



Tourism: An invisible sector



Fragmented, heterogeneous set of industries

Tourists interact with many in a diverse group of businesses

Tourism not identified by a single NACE code



Tourism: Difficult to compare



Bednights



???



Purpose of this research

Comparable indicators with other industries

Coverage of small businesses

Sub-national breakdown

Internationally comparable

Cost effective method

What are Tourism Industries?

Tourism Activities/Industries

- 1 Accommodation for visitors
- 2 Food & Beverage serving activities
- 3 Railway passenger transport
- 4 Road passenger transport
- 5 Water passenger transport
- 6 Air passenger transport
- 7 Transport equipment rental
- 8 Travel agencies and other reservation services activities
- 9 Cultural activities
- 10 Sports and recreational activities
- 11 Retail trade of country-specific tourism characteristic goods
- 12 Other country-specific tourism characteristic activities

Mapping Tourism Industries to NACE

CSO Tourism Industries

CSO Tourism Industries		NACE Rev.2	
1 Accommodation services for visitors		7 Transport equipment rental services	NACE Rev.2
Hotels and similar accommodation	55.10	Renting and leasing of cars and light vehicles	77.11
Holiday and other collective accommodation	55.20		
Recreational vehicle parks, trailer parks and camping grounds	55.30	8 Travel agencies and other reservation services	
Other accommodation	55.90	Travel agency activities	79.11
		Tour operator activities	79.12
2 Food and beverage serving services		Other reservation service and related activity	79.90
Restaurants and mobile food service activities	56.10		
Event catering activities	56.21	9 Cultural services	
Other food services	56.29	Performing arts	90.01
Beverage serving activities	56.30	support activities to performing arts	90.02
		Artistic creation	90.03
3 & 4 Railway & Road passenger transport services		Operation of arts facilities	90.04
Passenger rail transport, interurban	49.10	Library and archives activities	91.01
Urban and suburban passenger land transport	49.31	Museums activities	91.02
		Operation of historic sites and buildings and similar visitor attractions	91.03
Taxi operation	49.32	Botanical and zoological gardens and nature reserves activities	91.04
Other passenger land transport n.e.c.	49.39		
		10 Sports and recreational services*	
5 Water passenger transport services		Operation of sports facilities	93.11
Sea and Coastal passenger water transport	50.10	Fitness facilities	93.13
Inland passenger water transport	50.30	Other sports activities	93.19
		Activities of amusement parks and theme parks	93.21
6 Air passenger transport services		Other amusement and recreation activities	93.29
Passenger Air Transport	51.10	Renting and leasing of personal and household goods	77.21

* Activities of sports clubs (93.12) excluded

Conceptual Scope

Total Activity of Tourism Industries

∨

Tourism Generated Demand

Not all consumption of products of these industries is by tourists

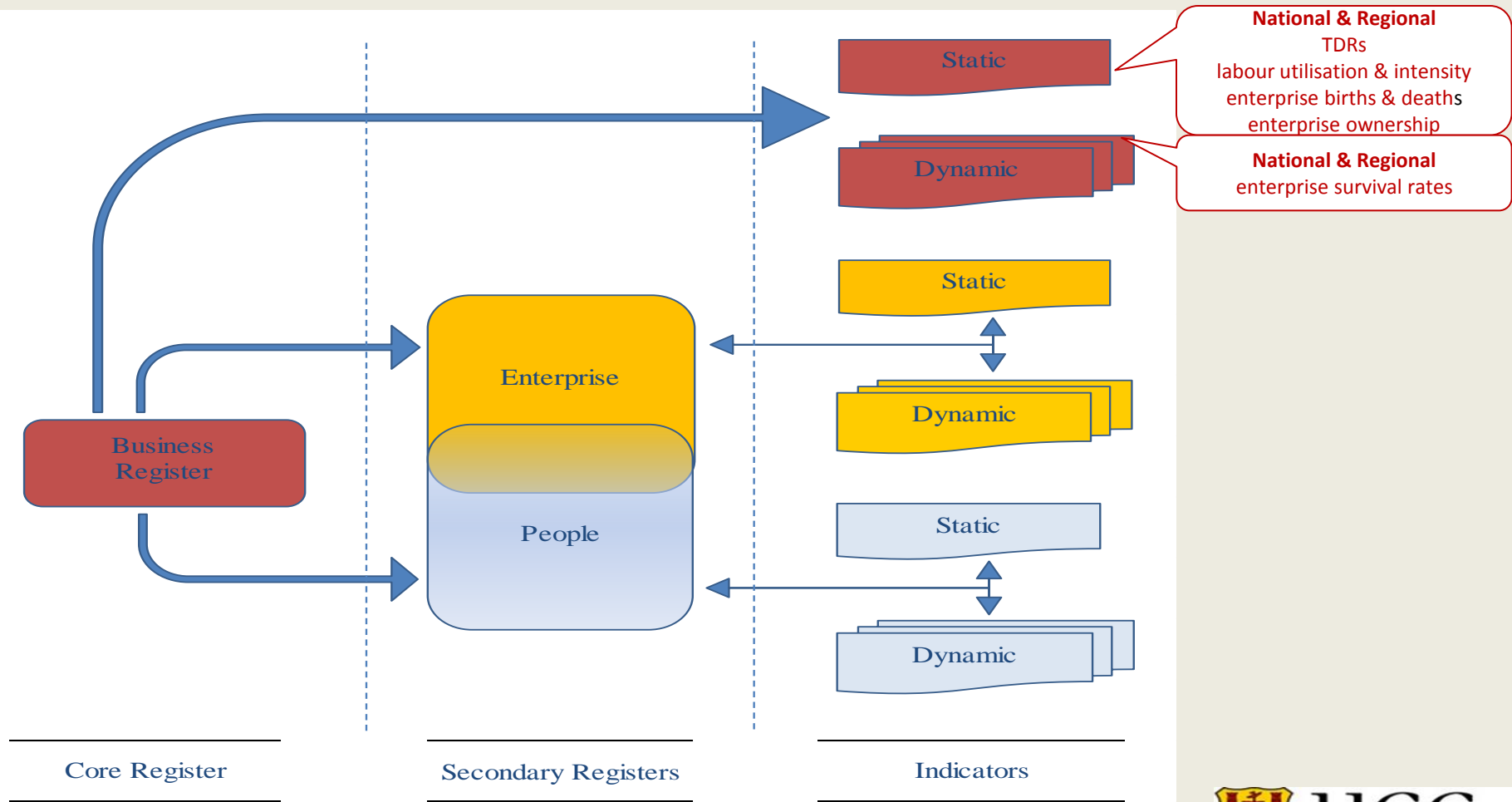
Tourists may consume other products not included in this list

What are Administrative Data?

“Information which is collected as a matter of routine in the day-to-day management or supervision of a scheme or service or revenue collecting system”

(NESC, 1985)

Using Administrative Data



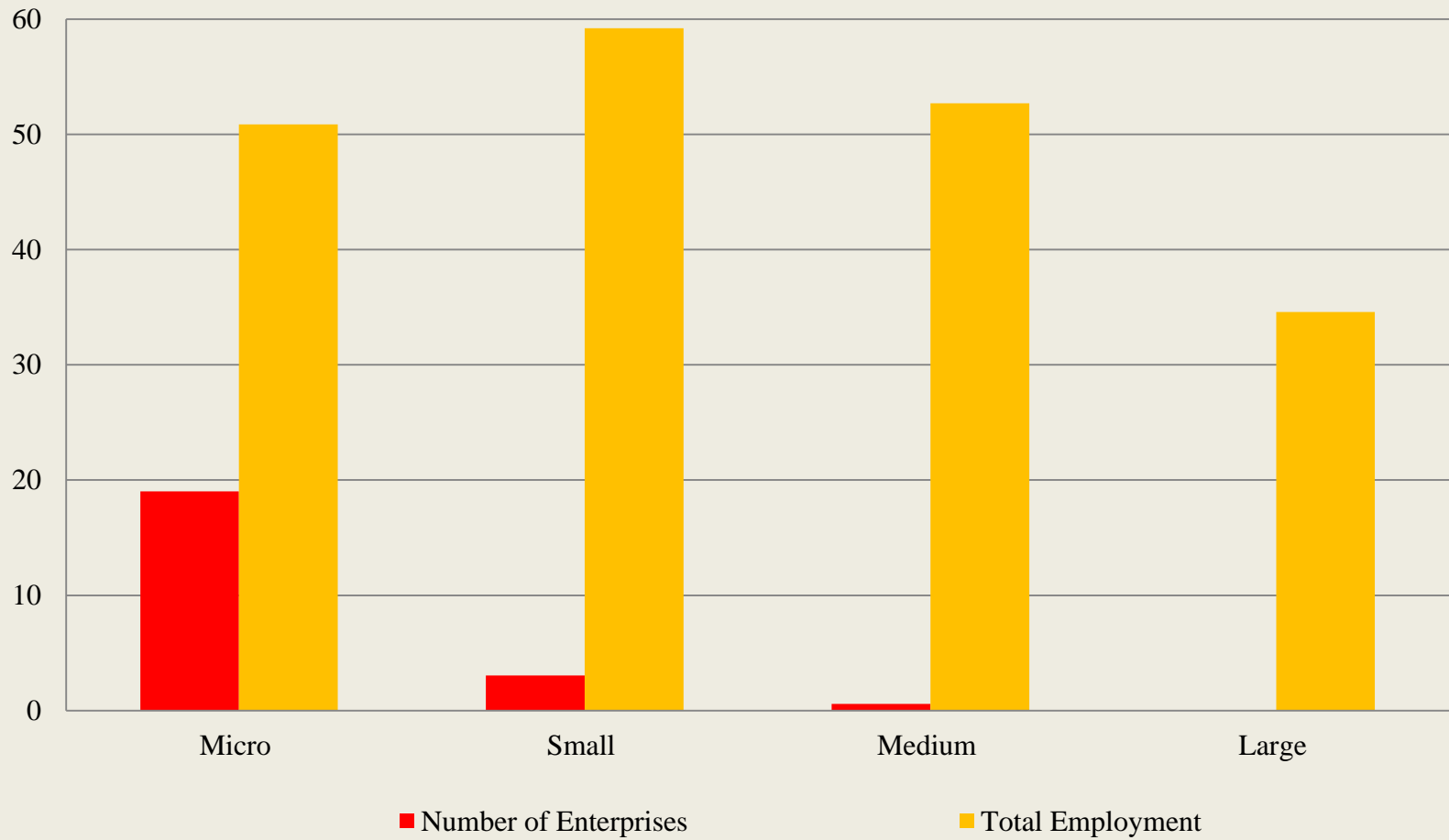
Tourism Sector Profile

NACE Rev. 2 Section	Number of Enterprises	Total Employment	Total Turnover ¹	Total GVA ¹
	<i>000's</i>	<i>000's</i>	<i>€ Billion</i>	<i>€ Billion</i>
Transportation and Storage (H)	1.9	27.1	7.6	2.6
Accommodation and Food Services (I)	16.3	146.0	7.9	3.0
Administrative and Support Services (N)	0.8	5.9	1.8	0.3
Arts, Entertainment & Recreation (R)	3.6	18.3	1.6	0.8
All Tourism Industries	22.7	197.3	18.8	6.7

¹ Creative, Arts and Entertainment (NACE Rev.2 - 90) or Libraries, Archives, Museums and other Cultural Activities (NACE Rev.2 - 91) were imputed

Source: Business Register & Annual Services Inquiry

Size Class



Enterprise Survival Rates

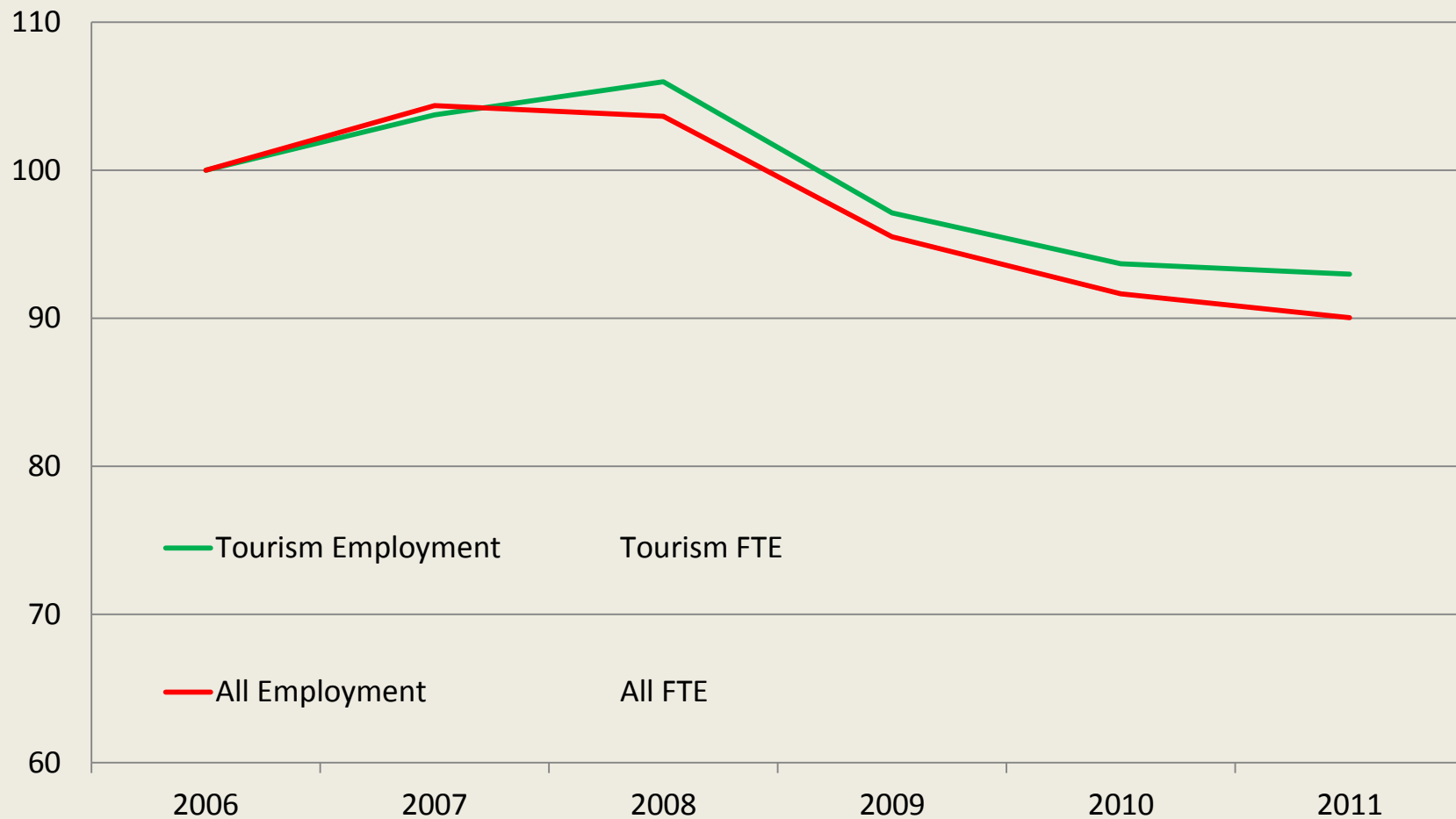
Year of Birth	Number of Surviving Enterprises					Survival Rates					
	1	2	3	4	5	1	2	3	4	5	
	Year	Years	Years	Years	Years	Year	Year	Year	Year	Year	
<i>Units</i>	<i>Units</i>	<i>Units</i>	<i>Units</i>	<i>Units</i>	<i>Units</i>	%	%	%	%	%	
Tourism Industries											
2006	1,613	1,407	1,274	1,168	913	850	87	79	72	57	53
2007	1,415	1,196	1,064	838	743		85	75	59	53	
2008	1,550	1,322	992	885			85	64	57		
2009	2,153	1,618	1,458				75	68			
2010	1,680	1,406					84				
Non-Tourism Industries											
2006	15,083	13,586	12,250	10,984	9,180	7,746	90	81	73	61	51
2007	12,046	10,383	9,122	7,691	6,381		86	76	64	53	
2008	10,404	8,930	8,141	6,410			86	78	62		
2009	11,657	9,718	8,341				83	72			
2010	9,557	7,981					84				

Source: Business Register

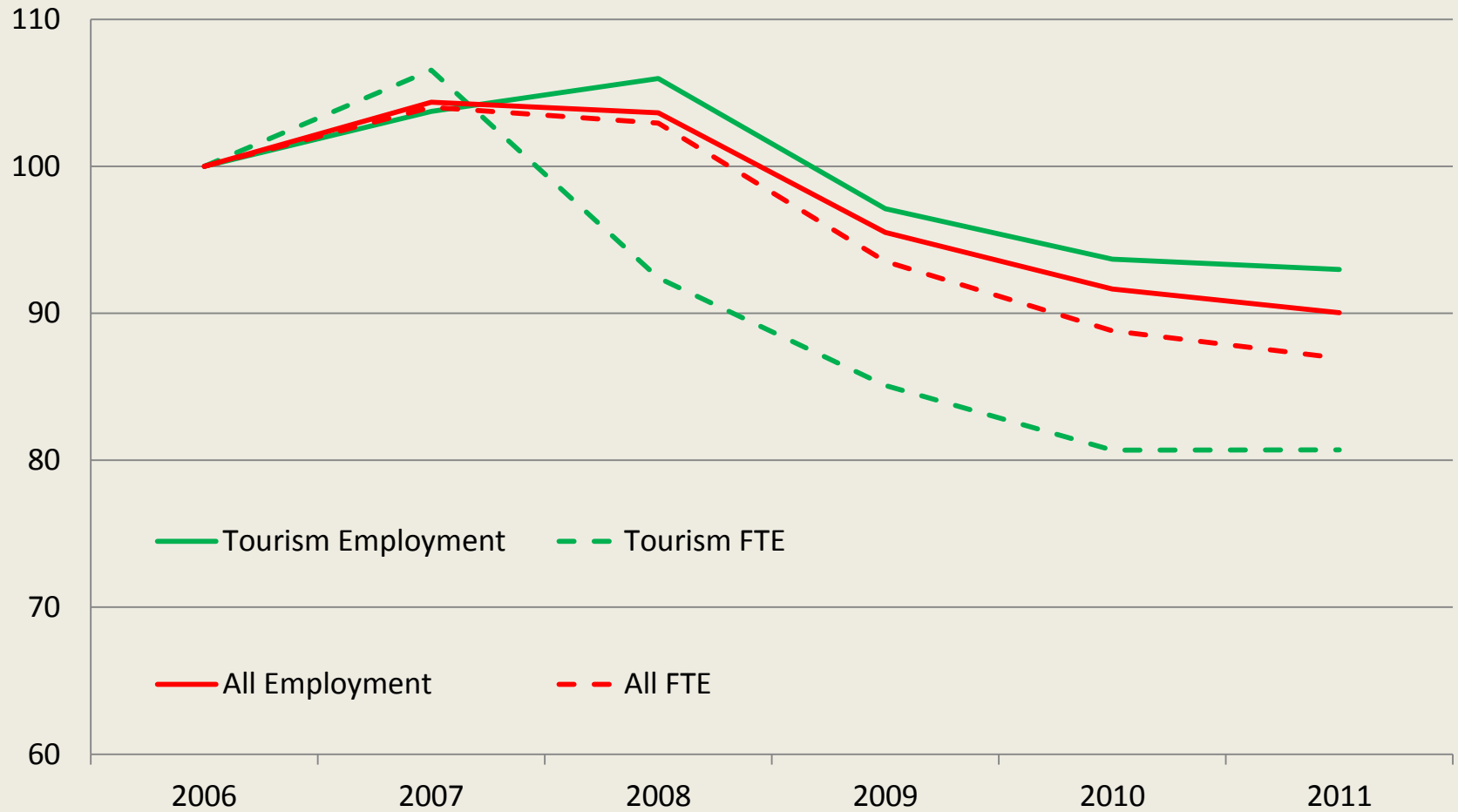
Tourism Dependency Ratios

	Unit	2006	2007	2008	2009	2010	2011
<i>Tourism Industries</i>							
Number of Enterprises	000's	23.0	23.3	24.1	24.0	23.5	22.7
Total Employment	000's	212.3	220.2	225.0	206.2	198.8	197.3
FTE Employment	000's	167.7	178.6	155.0	142.6	135.3	135.3
Turnover ¹	€ Billions	-	-	20.0	18.1	17.6	18.8
Gross Value Added ¹	€ Billions	-	-	7.0	6.5	6.2	6.7
<i>All Industries</i>							
Number of Enterprises	000's	217.2	221.9	222.1	212.9	201.7	195.2
Total Employment ²	000's	2,053.6	2,143.1	2,128.4	1,961.4	1,882.2	1,849.1
FTE Employment ³	000's	1,891.9	1,968.0	1,947.7	1,769.3	1,680.0	1,644.8
Turnover ⁴	€ Billions	-	-	414.4	359.4	352.4	376.7
Gross Value Added ⁵	€ Billions	-	-	161.1	147.1	142.8	147.6
<i>Tourism Dependency Ratios</i>							
Number of Enterprises	%	10.6	10.5	10.8	11.3	11.6	11.6
Total Employment	%	10.3	10.3	10.6	10.5	10.6	10.7
FTE Employment	%	8.9	9.1	8.0	8.1	8.1	8.2
Turnover	%	-	-	4.8	5.0	5.0	5.0
Gross Value Added	%	-	-	4.3	4.4	4.3	4.6

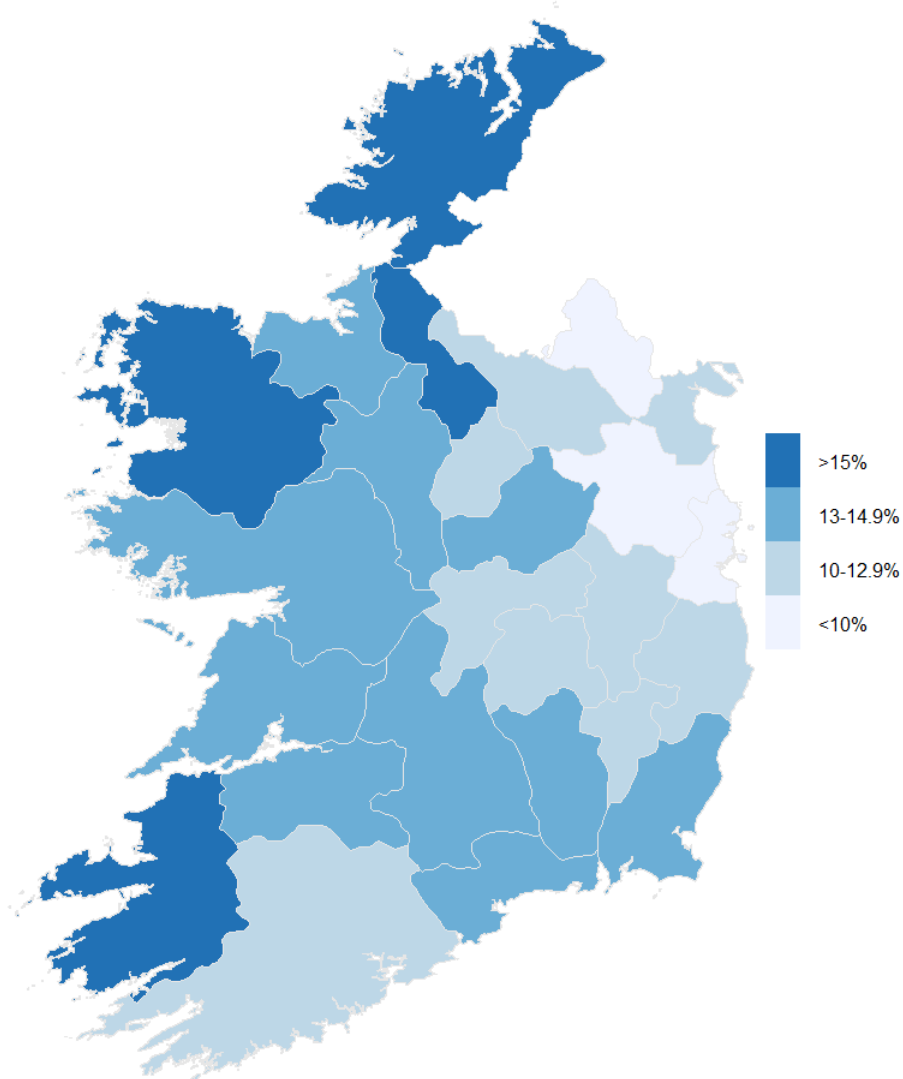
Employment



Employment



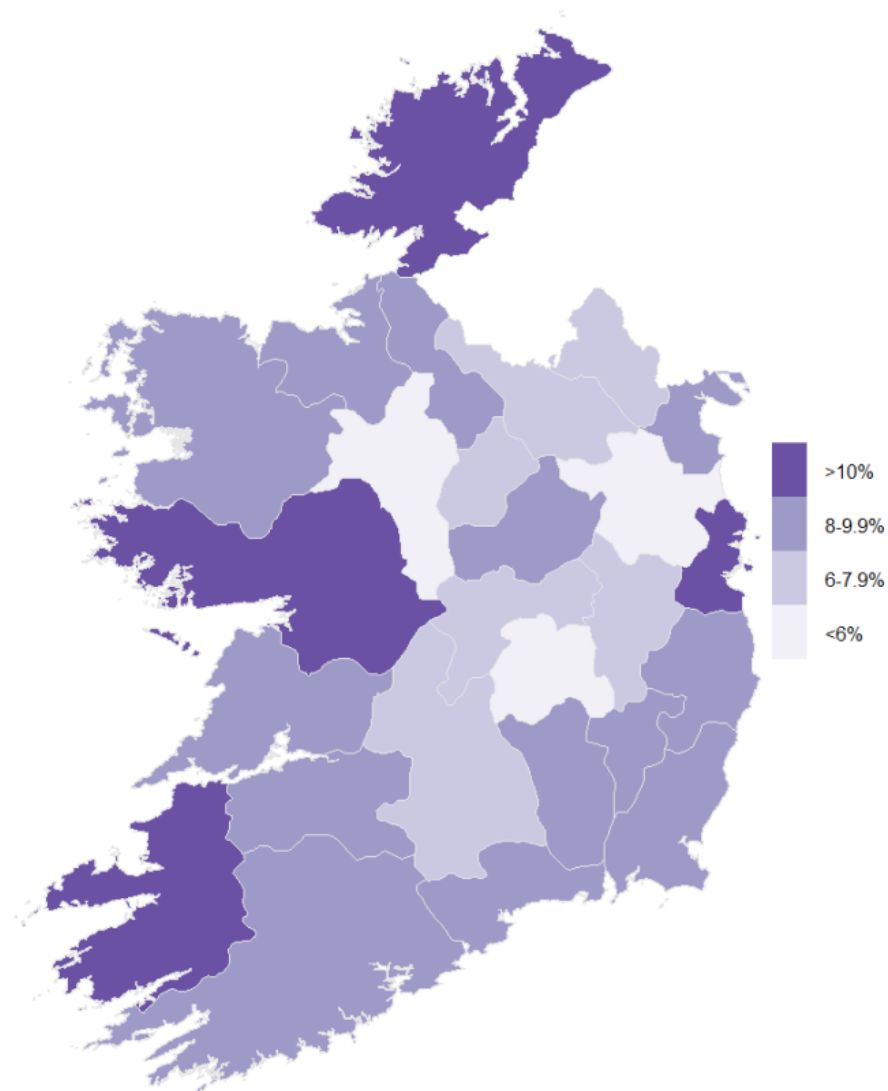
Enterprise TDRs 2011



NUTS Region	2006	2011
	%	%
Carlow	10.8	12.1
Cavan	11.2	12.5
Clare	13.7	14.7
Cork	10.6	11.4
Donegal	13.5	16.9
Dublin	8.1	8.8
Galway	11.7	13.4
Kerry	16.5	19.1
Kildare	9.0	10.1
Kilkenny	11.8	13.7
Laois	11.0	12.5
Leitrim	16.0	18.3
Limerick	12.0	13.0
Longford	10.8	12.3
Louth	10.8	12.1
Mayo	13.1	16.0
Meath	8.7	9.9
Monaghan	8.8	9.2
Offaly	11.4	12.2
Roscommon	11.5	13.5
Sligo	14.5	14.1
Tipperary	13.3	14.2
Waterford	12.9	14.3
Westmeath	11.9	13.1
Wexford	10.5	13.3
Wicklow	9.8	11.1

NUTS 4

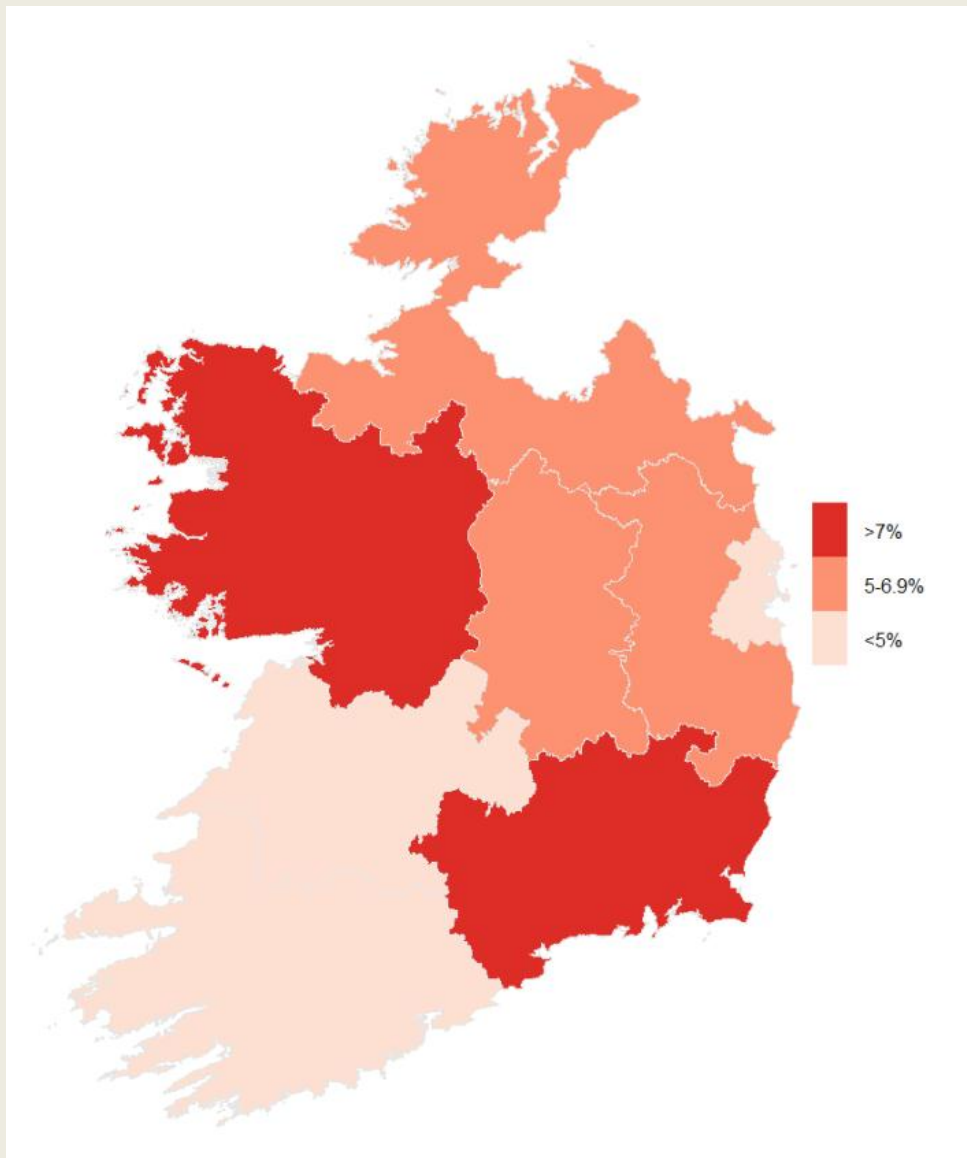
Employment TDRs 2011



NUTS Regions	2006	2011
	%	%
Carlow	9.5	9.6
Cavan	6.5	7.8
Clare	11.1	9.5
Cork	8.3	8.4
Donegal	11.9	12.3
Dublin	14.5	15.3
Galway	9.9	10.5
Kerry	13.7	14.3
Kildare	7.2	6.7
Kilkenny	7.6	8.7
Laois	6.1	5.0
Leitrim	9.6	8.8
Limerick	8.6	9.1
Longford	5.8	6.1
Louth	8.2	8.4
Mayo	9.3	9.8
Meath	5.5	5.4
Monaghan	6.7	6.8
Offaly	6.4	6.2
Roscommon	5.2	5.9
Sligo	10.0	8.9
Tipperary	7.4	7.5
Waterford	10.0	9.6
Westmeath	8.4	8.7
Wexford	9.5	9.9
Wicklow	8.0	9.9

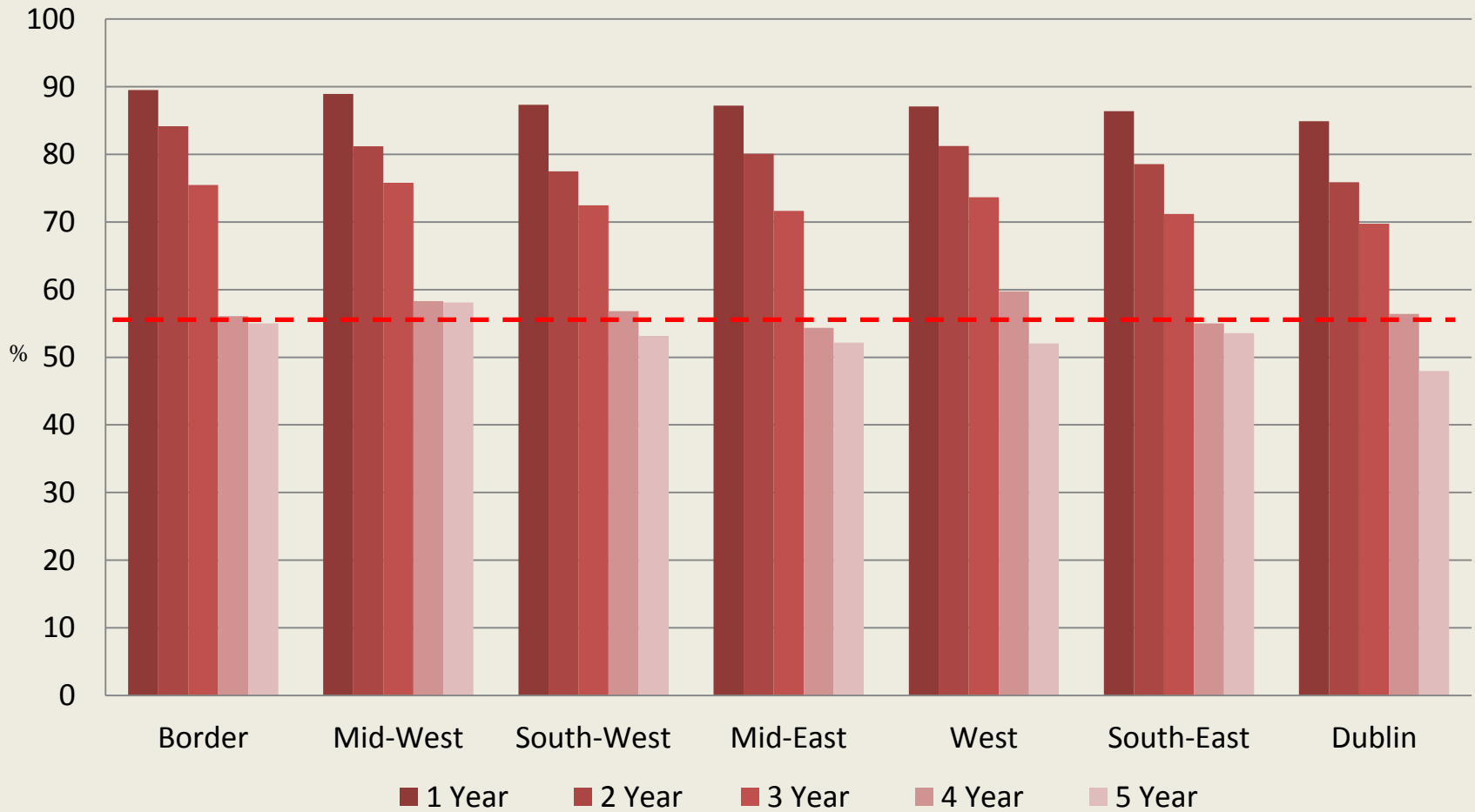
NUTS 4

Turnover TDRs 2011

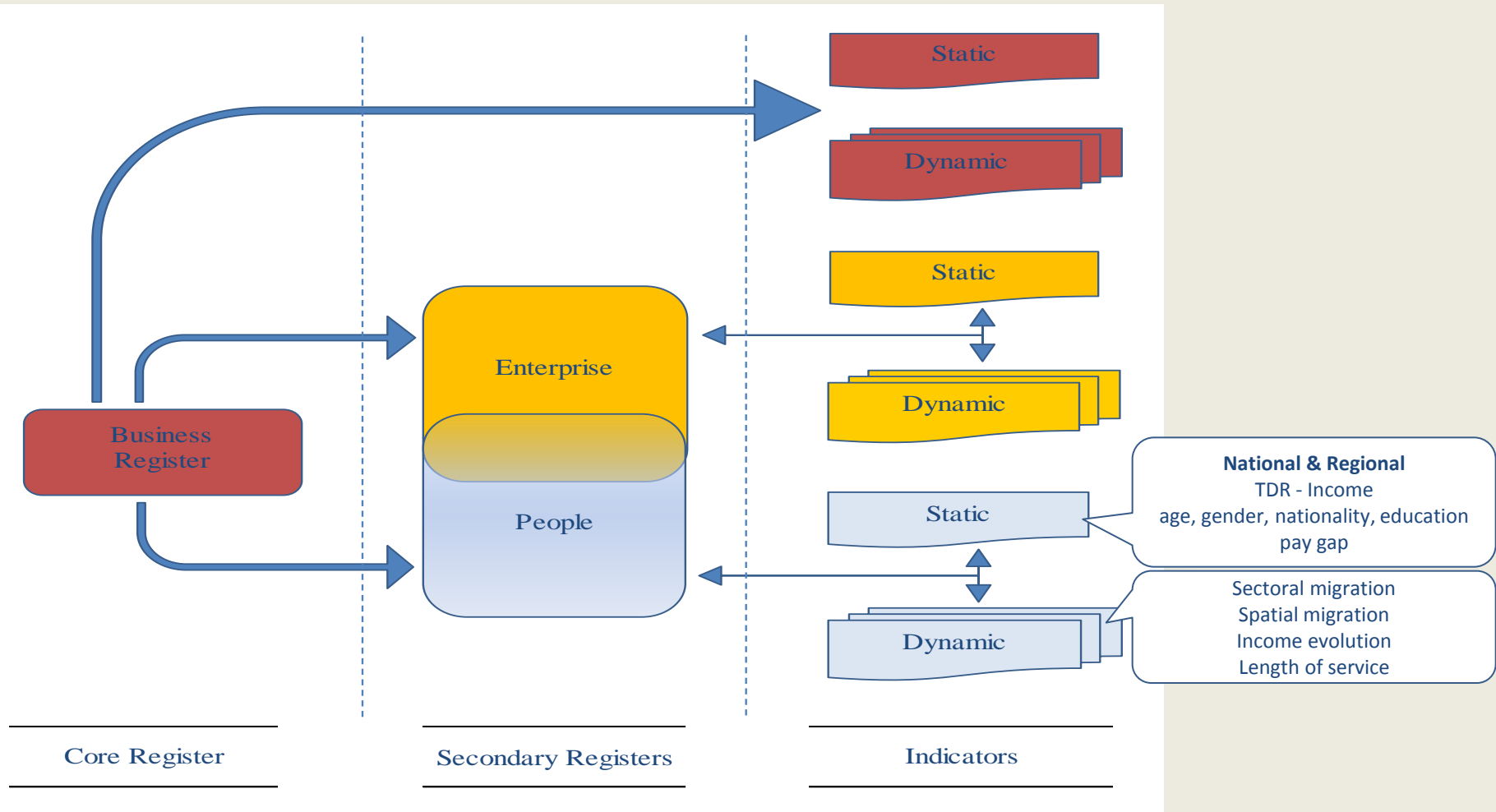


NUTS Region		2009	2010	2011	2009 - 2011
		%	%	%	%
NUTS 2	BMW	7.2	7.4	7.4	7.2
	S & E	4.8	4.8	4.7	4.7
NUTS 3	Border	6.5	6.4	6.0	6.2
	Midland	6.0	7.0	8.0	6.8
	West	8.7	8.9	8.8	8.7
	Dublin	4.7	5.1	5.0	4.9
	Mid-East	6.1	5.3	5.4	5.5
	Mid-West	5.5	4.6	4.4	4.8
	South-East	8.0	5.7	8.1	7.1
South-West	3.3	2.9	3.0	3.0	

Regional Survival Rates Tourism Industries born in 2006



Using Administrative Data



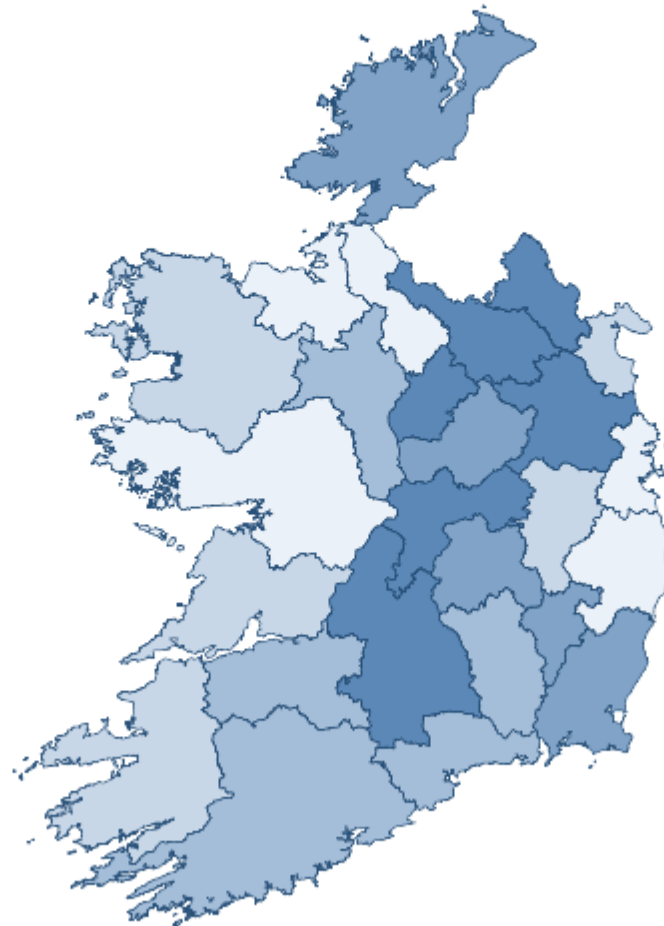
Female Employment

NACE Rev. 2 - Sector	2006	2007	2008	2009	2010
	%	%	%	%	%
Transportation & Storage	23.4	25.6	24.9	24.3	24.3
Accommodation & Food Services	55.0	54.4	53.5	52.9	52.3
Administrative & Support Services	64.8	63.7	63.0	61.6	59.4
Arts, Entertainment & Recreation	46.4	46.3	45.9	46.1	46.3
Tourism Sector	50.4	50.6	49.2	48.4	47.8
All Sectors	38.1	38.5	39.4	41.0	41.5

Employee Gender

Difference in Percentage Female Employment between Tourism and All Industries, 2010

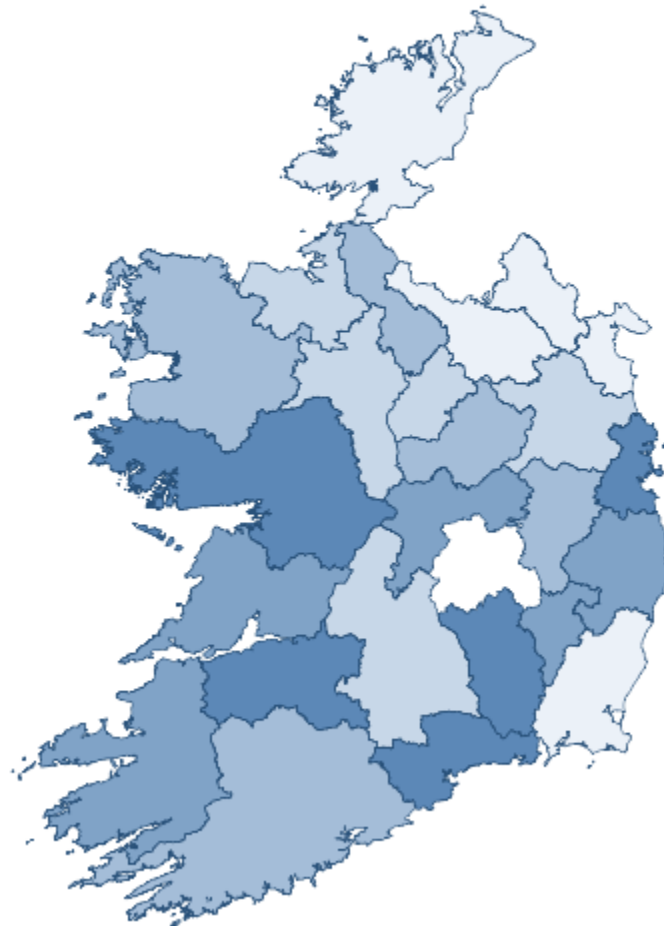
- 1.5 - 9.7
- 9.9 - 11.1
- 11.9 - 13.0
- 13.4 - 15.0
- 16.5 - 20.1



Employee Nationality

Difference between Percentage Non-Irish in Tourism and All Industries, 2010

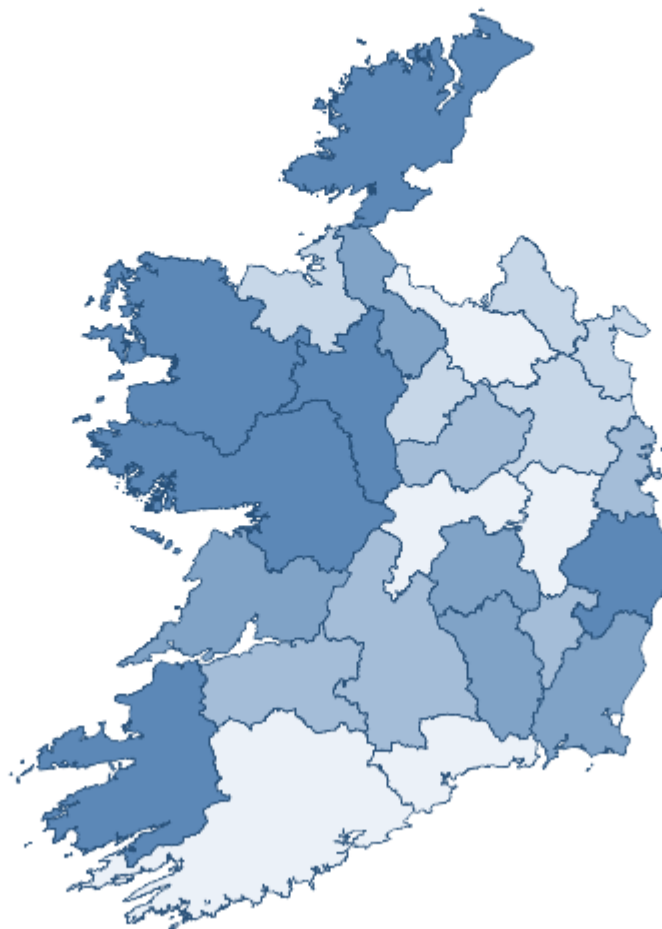
□	-1.3 - 6.2
□	6.2 - 7.9
□	8.5 - 10.2
□	10.3 - 11.2
□	13.0 - 17.3



Income TDRs

Tourism Dependency Ratio (Income), 2010

7 - 8.1
8.3 - 9.1
9.3 - 10.5
11.1 - 12.3
12.6 - 17.4



Conclusions

Nationally – Tourism accounts for:

- *12% enterprises*
- *11% total employment*
- *8% FTE employment*
- *5% of GDP*

But regional patterns can differ significantly:

- *Kerry 19% of enterprises; Dublin 9%; Cork 11%*
- *Dublin 15% of employment; Laois 5%; Cork 8%*
- *West 9% of turnover; Dublin 5%; South-West 3%*

Less diversified counties more dependent on tourism (Dublin an outlier)

In relative terms, tourism Sector surviving recession quite well

Conclusions

Tourism employs more:

- Women
- Younger people
- Non-nationals
- And pays lower incomes

Again, patterns differ by region

Raises issues vis quality of work in tourism industries

The End



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