

## Article

# Migrant labour force within the tourism industry: August 2019

The current demographic composition of those working in UK's tourism industry and movements into and out of the industry.

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# 1 . Main points

Between 2016 and 2018:

- An average of 3.2 million people worked in the tourism industry in the UK.
- An estimated 16% of people who worked in tourism were non-British nationals (501,000), compared with 11% in non-tourism industries.
- Of the 501,000 non-British nationals who worked in tourism, an estimated 64% were EU nationals and 36% were non-EU nationals.
- On average, British nationals were younger than non-British nationals working in tourism – a greater proportion of British nationals were aged 16 to 24 years (27%) compared with EU (17%) and non-EU nationals (12%).
- Nearly one in every four tourism workers in London were non-British nationals; one in five were an EU national.
- The ONS Longitudinal Study showed that a higher proportion of UK-born workers (74%) moved out of the tourism industry between 1991 and 2011 when compared with EU-born (60%) and non-EU-born workers (53%).

## 2 . Introduction

At the Office for National Statistics (ONS) we are transforming the way we produce both population and migration statistics, to better meet the needs of our users<sup>1</sup>. Users of our international migration statistics have told us they want to know more about migration at a local level, the impact that migrants have on local services and the contribution they make to the economy and sectors in which they work. This article uses official data sources to look at the current composition of the overall tourism industry and considers movements of people into and out of the tourism industry over time.

To provide detailed information of the characteristics of those working in tourism, this article uses data from the [Annual Population Survey \(APS\) \(PDF, 861KB\)](#) three-year pooled dataset. Specifically, this dataset is created by combining data across the years January 2016 to December 2018.

The three-year pooled dataset was designed to provide more robust analysis that is not always possible using the single-year APS. The dataset contains a sample size of around 550,000 respondents. The APS is weighted to the UK population totals to be representative of the whole household population. The APS is a household survey and so does not cover most people living in communal establishments. It is not possible to survey all people resident in the UK, so these statistics are estimates based on a sample of people living in households and therefore is subject to a margin of uncertainty.

This report also uses data from the [ONS Longitudinal Study \(ONS LS\)](#), which is a 1% sample of the population of England and Wales. The ONS LS contains linked census data since the 1971 Census for people born on one of four selected dates in a calendar year. It is the largest longitudinal data source in England and Wales.

The dataset is updated on an annual basis with life events such as births, deaths, immigrations and emigrations. The ONS LS is used to identify long-term trends in the tourism industry and allows insight into transitions into and out of employment.

### Notes for: Introduction

1. Further information on our transformation journey can be found in our [Update on our population and migration statistics transformation journey: a research engagement report](#).

## 3 . Things you need to know about this release

### Definitions

#### Tourism

To get an up-to-date picture of the demographic composition of those working in the tourism industry, it is necessary to use the United Nations World Tourism Organisation (UNWTO) definition of total employment for those whose main or second job is in the tourism industry<sup>1</sup>. This definition will include those who work in jobs that are in demand for both tourists and non-tourists<sup>2</sup>. For example, those who work in the renting and leasing of cars may be leasing a car to a tourist or may be leasing cars to businesses within the UK.

#### Migrant

When considering statistics about migrants in the labour market, nationality is the preferred definition as it reflects someone's rights to work and access services in the UK. Nationality is used to identify migrants using the Annual Population Survey (APS). A question on nationality was not included in the decennial census until 2011, therefore country of birth is used to identify migrants using the ONS Longitudinal Study (ONS LS). Differences in the use of these two definitions are fully explained in the January 2017 report, [What information is there on British migrants living in Europe?](#)

People who were born abroad may have obtained British nationality<sup>3</sup> since their arrival in the UK and so cannot be considered as British nationals in the APS analysis, although the LS data may still identify them as foreign-born. This is a significant factor for workers born outside the EU but much less so for those from another EU country. For information on country groupings used in this article please see [Appendix 3](#).

### Notes for: Things you need to know about this release

1. For further information on the UNWTO definition, please see [Appendix 1](#).
2. For information on those employed directly in tourism, the Tourism Direct Employment (TDE) definition can be used. The ratios applied to this definition are not detailed enough for this analysis. For further information on TDE please see [Appendix 2](#).
3. Nationality refers to that stated by the respondent during the interview for the Labour Force Survey. Nationalities are recorded as British or UK, Irish Republic and other. We have therefore grouped nationality as British and non-British at the highest level. For country of birth we have used UK and non-UK groupings at the highest level

## 4 . Of those working in the tourism industry, 16% were non-British nationals

The Annual Population Survey (APS) estimates that there were 3.2 million people whose main or second job was in the UK tourism industry<sup>1</sup> between January 2016 and December 2018 (3 million whose main job was in tourism, 195,000 second job in tourism).

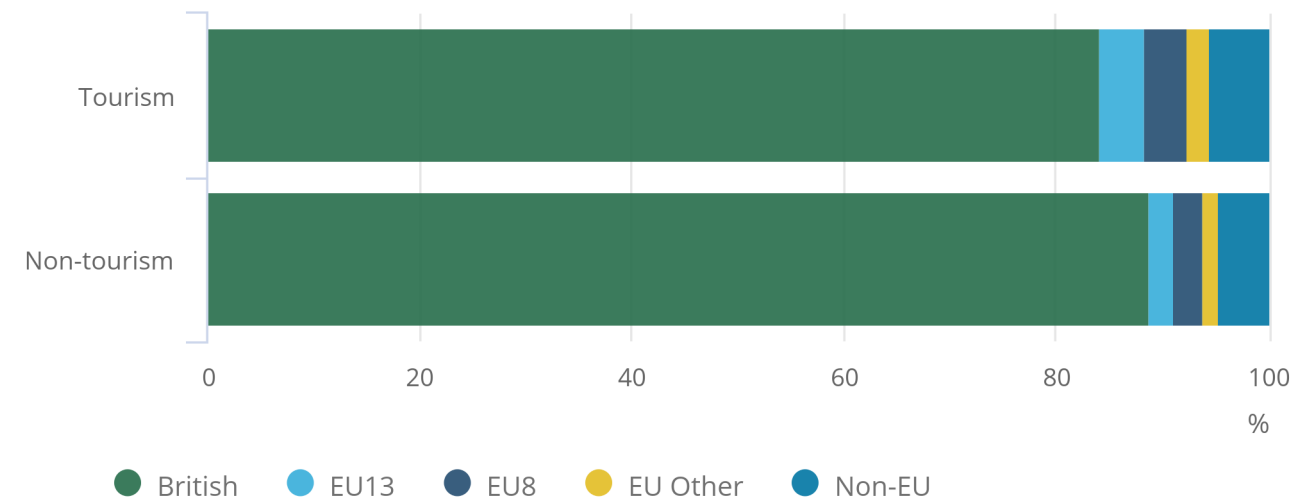
Of these 3.2 million people who worked in tourism, 16% were non-British nationals (10% EU nationals and 6% non-EU nationals). This compares with 11% who were non-British nationals in all other industries (Figure 1).

**Figure 1: The tourism industry had a higher proportion of non-British nationals than non-tourism industries**

Non-British nationals as a percentage of those who worked in tourism by nationality groupings, UK, 2016 to 2018

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Non-British nationals as a percentage of those who worked in tourism by nationality groupings, UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

Notes:

1. Industry is determined by the interviewer from the question “What does the firm or organisation you work for mainly make or do?” Industry sector does not always reflect job content – for example, people working in tourism could occupy a variety of jobs such as managerial, cleaning, fitness instructor and waitress.
2. In this instance EU Other includes: Ireland, EU2 countries, Croatia, Cyprus and Malta.
3. EU13 excludes the UK and Ireland.

**Notes for: Of those working in the tourism industry, 16% were non-British nationals**

1. As defined by the UN World Tourism Organisation (UNWTO), see [Appendix 1](#) for further details.

## 5 . Workers in the tourism industry were younger than workers in non-tourism industries

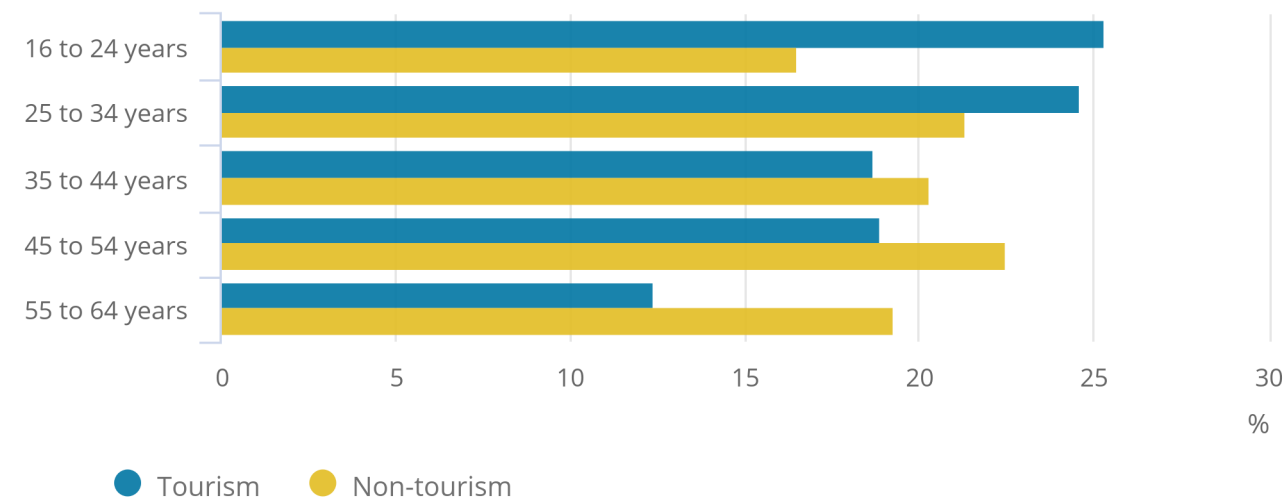
The age distribution of those who worked in tourism (regardless of nationality) was younger than non-tourism industries, with 50% of tourism workers aged 16 to 34 years compared with 38% of workers in non-tourism industries (Figure 2).

**Figure 2: The age distribution of those working in tourism was younger than in non-tourism industries**

Age distribution of the tourism industry compared with all other industries, 2016 to 2018

Figure 2: The age distribution of those working in tourism was younger than in non-tourism industries

Age distribution of the tourism industry compared with all other industries, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

**Notes:**

1. Industry is determined by the interviewer from the question “What does the firm or organisation you work for mainly make or do?” Industry sector does not always reflect job content – for example, people working in tourism could occupy a variety of jobs such as managerial, cleaning, fitness instructor and waitress.

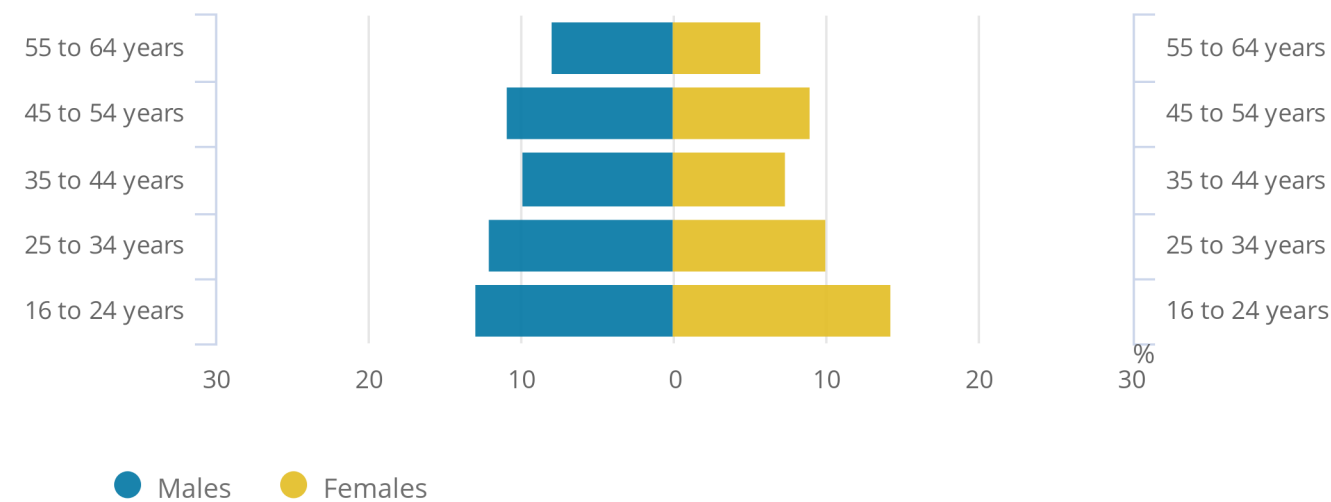
Figure 3 shows that the age distribution of British nationals who worked in tourism in the UK was young, with the highest proportions seen for those aged 16 to 24 years (27%). A lower proportion of non-British nationals were in the 16- to 24-years age group (17% of EU nationals and 11% of non-EU nationals).

**Figure 3: The age distribution of British nationals working in tourism was young**

Age and sex distribution of British nationals working in tourism in the UK, 2016 to 2018

Figure 3: The age distribution of British nationals working in tourism was young

Age and sex distribution of British nationals working in tourism in the UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

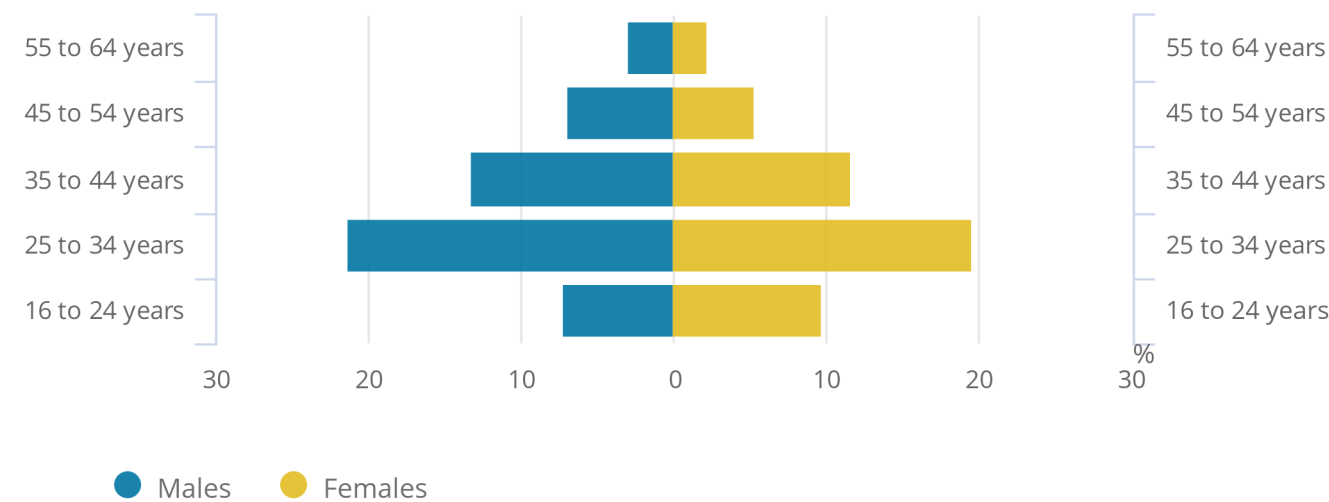
The age distribution for EU nationals who worked in the tourism industry tended to be in younger age groups. More tended to be aged 25 to 34 years (Figure 4), with this age group accounting for 41% of all EU nationals who worked in tourism.

Figure 4: A high proportion of EU nationals working in tourism were aged 25 to 34 years

Age and sex distribution of EU nationals working in tourism in the UK, 2016 to 2018

Figure 4: A high proportion of EU nationals working in tourism were aged 25 to 34 years

Age and sex distribution of EU nationals working in tourism in the UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

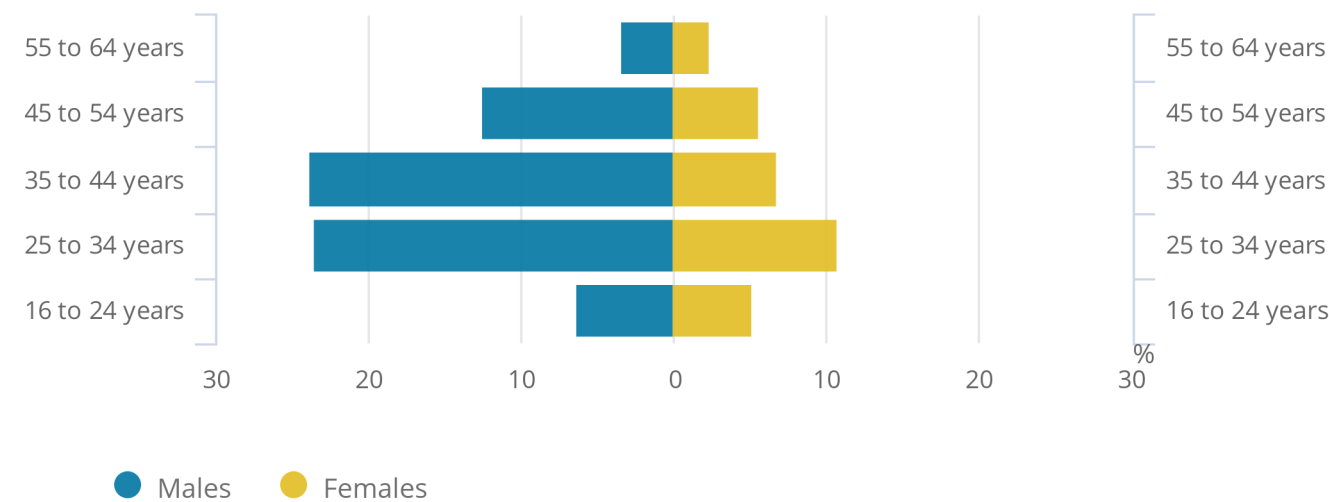
Higher proportions of male non-EU nationals worked in the tourism industry (70%) compared with women (31%) <sup>1</sup>. A large proportion of non-EU nationals who worked in tourism were men aged 25 to 44 years (47%) (Figure 5).

**Figure 5: Non-EU nationals who worked in tourism were more likely to be male than female**

Age and sex distribution of non-EU nationals working in tourism in the UK, 2016 to 2018

**Figure 5: Non-EU nationals who worked in tourism were more likely to be male than female**

Age and sex distribution of non-EU nationals working in tourism in the UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

**Notes for: Workers in the tourism industry were younger than workers in non-tourism industries**

1. Percentages may not sum due to rounding.

## 6 . Nearly one out of every four people who worked in tourism in England worked in London

The majority (85%) whose main or second job was in tourism, worked in England; 9% worked in Scotland, 4% in Wales and 2% in Northern Ireland. A higher proportion of those who were working in tourism in England worked in London (22%) compared with those who worked in non-tourism industries (19%) (Figure 6).

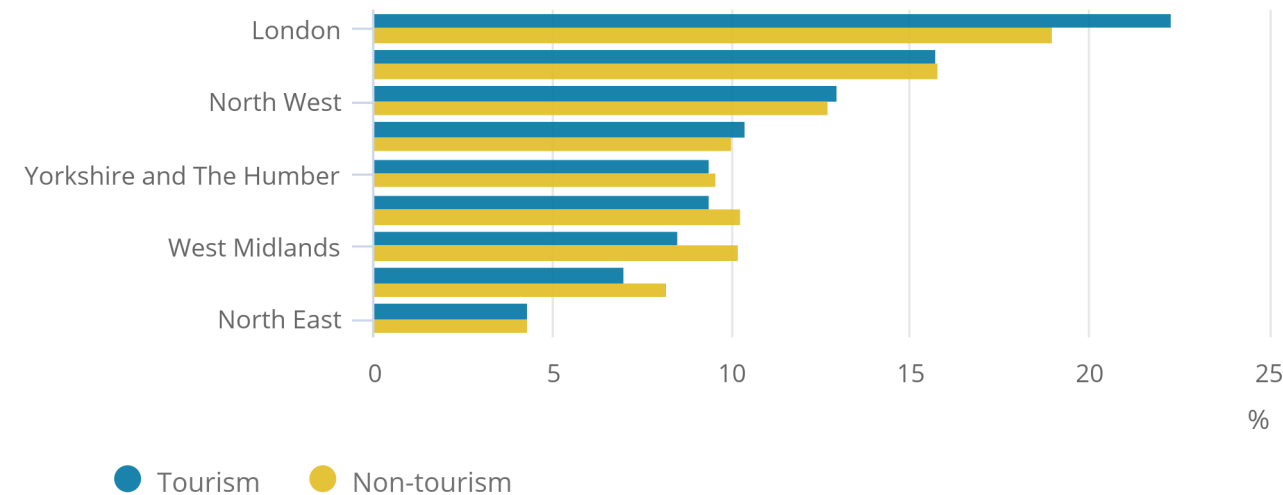


**Figure 6: A higher proportion of those who worked in tourism worked in London when compared with non-tourism industries**

Regional distribution of those whose main or second job was in tourism compared with those who worked in non-tourism industries, England, 2016 to 2018

Figure 6: A higher proportion of those who worked in tourism worked in London when compared with non-tourism industries

Regional distribution of those whose main or second job was in tourism compared with those who worked in non-tourism industries, England, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

Notes:

1. Industry is determined by the interviewer from the question “What does the firm or organisation you work for mainly make or do?”
2. Industry sector does not always reflect job content – for example, people working in tourism could occupy a variety of jobs such as managerial, cleaning, fitness instructor and waitress.

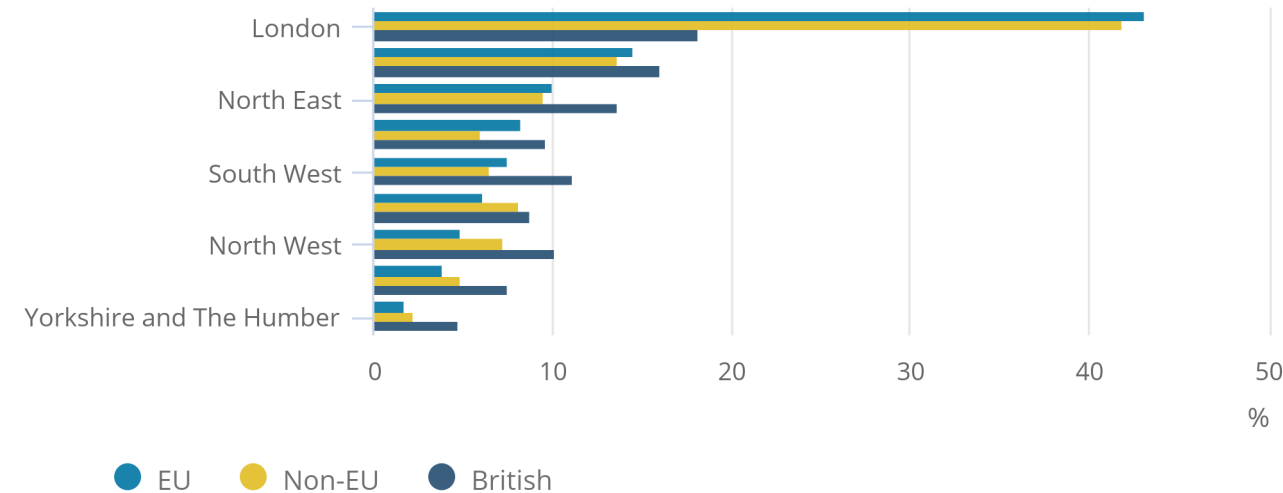
A higher proportion of EU and non-EU nationals working in tourism were working in London (43% and 42%, respectively) when compared with British nationals (18%) (Figure 7). When considering how this compares with the population distribution of England, 17% of the resident population lived in London between 2016 and 2018.

**Figure 7: A higher proportion of non-British nationals worked in London when compared with British nationals**

Regional distribution within England of those whose main or second job was in tourism by nationality grouping, 2016 to 2018

**Figure 7: A higher proportion of non-British nationals worked in London when compared with British nationals**

Regional distribution within England of those whose main or second job was in tourism by nationality grouping, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

**7 . The proportion of non-British nationals who worked in tourism varied depending on the sector in which they worked**

Of the 3 million people whose main job was in the tourism industry, 44% (1,315,000) worked in the food and drink sector, 23% (680,000) worked in the culture, sport and recreation sector, 22% (670,000) in the passenger and transport sector and the remaining 12% (351,000) worked in accommodation.<sup>1</sup>

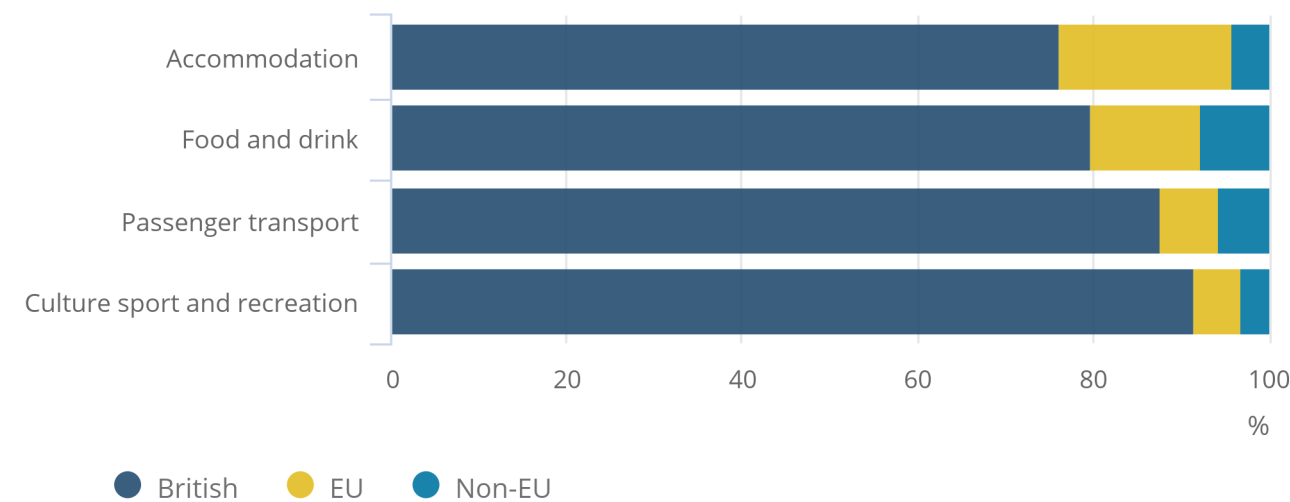
Figure 8 shows that both the accommodation, and food and drink sectors employed a larger proportion of non-British nationals compared with the other sectors. Of the 351,000 people who worked in accommodation, 24% were non-British nationals (20% EU nationals and 4% non-EU nationals). Of the 1,315,000 who worked in the food and drink sector, 20% were non-British nationals (12% EU nationals and 8% non-EU nationals).

**Figure 8: The accommodation sector had the highest proportion of non-British nationals**

Workers in tourism by nationality grouping and sub-sector, UK, 2016 to 2018

Figure 8: The accommodation sector had the highest proportion of non-British nationals

Workers in tourism by nationality grouping and sub-sector, UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

Notes:

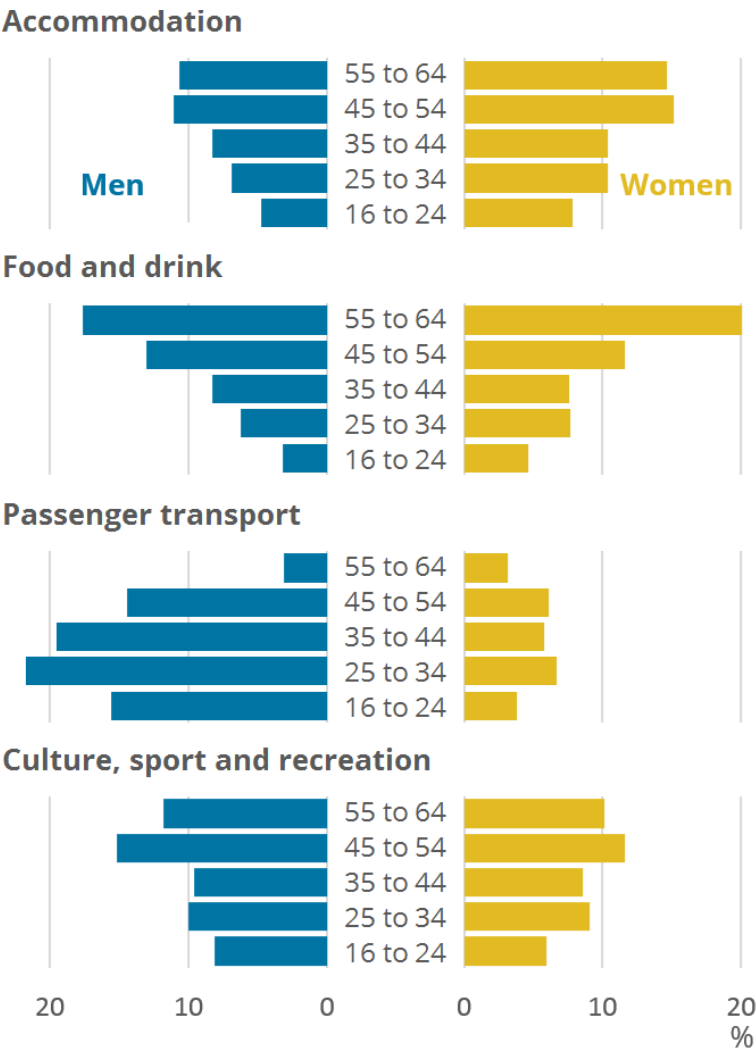
1. Sub-sectors for tourism industries as defined by the UNWTO, for further information please see [Appendix 1](#).

Figure 9 shows how the age and sex distribution of those who were working in tourism varied by sector. Those employed in the food and drink sector tended to be younger, with the highest proportion of individuals aged 16 to 24 years.

Men and women tended to be split evenly across all ages in the food and drink, accommodation, and culture, sport and recreation sectors. This is very different for the passenger transport sector. Men accounted for 74% of all people who worked in this sector, with a high proportion of men aged 25 to 44 years – accounting for 8% of all workers whose main job was in tourism.

Figure 9: The age and sex distribution varied by sector

Age and sex distribution by sub-sector of tourism, UK, 2016 to 2018



Source: Annual Population Survey three-year-pooled dataset - Office for National Statistics

**Notes for: The proportion of non-British nationals who worked in tourism varied depending on the sector in which they worked**

1. Totals may not sum due to rounding.

## 8 . The differences in working patterns seen between tourism and other industries were reflected in the average hours worked

A greater proportion of those working in tourism worked part-time when compared with those who worked in all other sectors (37% compared with 24%, respectively).

The main reason people were working part-time, regardless of the industry, was because the individual did not want a full-time job. Despite this, the proportion reporting that they did not want a full-time job was much lower for those who worked part-time in tourism (48%) compared with those who worked part-time in non-tourism sectors (72%).

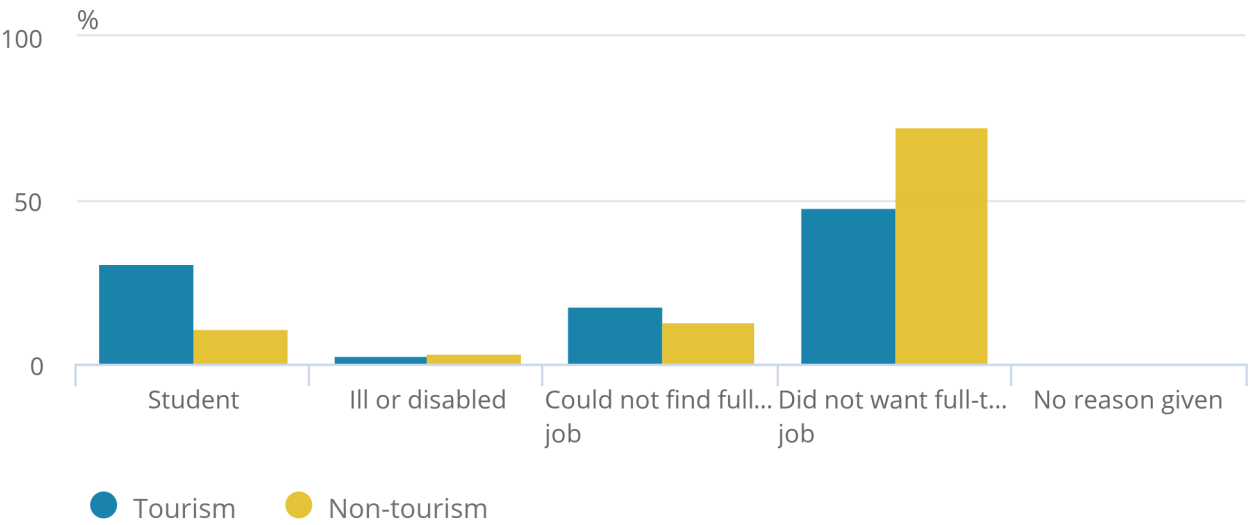
Instead, a greater proportion who worked part-time in tourism reported that they were part-time because they were a student (31% compared with 11% in non-tourism industries) (Figure 10). This could be explained by the younger age structure of those who worked in tourism compared with non-tourism (see [Section 5](#)).

**Figure 10: A higher proportion of those working part-time in tourism were doing so because they were a student than those working part-time in non-tourism industries**

Reason for part-time employment in tourism and non-tourism industries, UK, 2016 to 2018

Figure 10: A higher proportion of those working part-time in tourism were doing so because they were a student than those working part-time in non-tourism industries

Reason for part-time employment in tourism and non-tourism industries, UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

Notes:

1. Industry is determined by the interviewer from the question “What does the firm or organisation you work for mainly make or do?”
2. Industry sector does not always reflect job content – for example, people working in tourism could occupy a variety of jobs such as managerial, cleaning, fitness instructor and waitress.

**On average, those working in tourism worked fewer hours than those in non-tourism industries**

On average<sup>1</sup>, those who worked in tourism worked fewer hours per week (33 hours per week) than those in non-tourism industries (37 hours per week). The average hours worked per week varies by nationality group and sector within tourism. EU nationals worked more hours than British and non-EU nationals, on average, and this applies across all sectors and both within and outside of the tourism industry.

On average, British nationals working in tourism worked the fewest hours, with a median of 33 hours per week. In part this could be explained by the different age and sex structures presented in [Section 6](#) of this report – a higher proportion of British nationals were aged 16 to 24 years (27%) compared with non-British nationals (17% of EU nationals and 12% of non-EU nationals). Those aged 16 to 24 years may have been more likely to be in part-time work while in education.

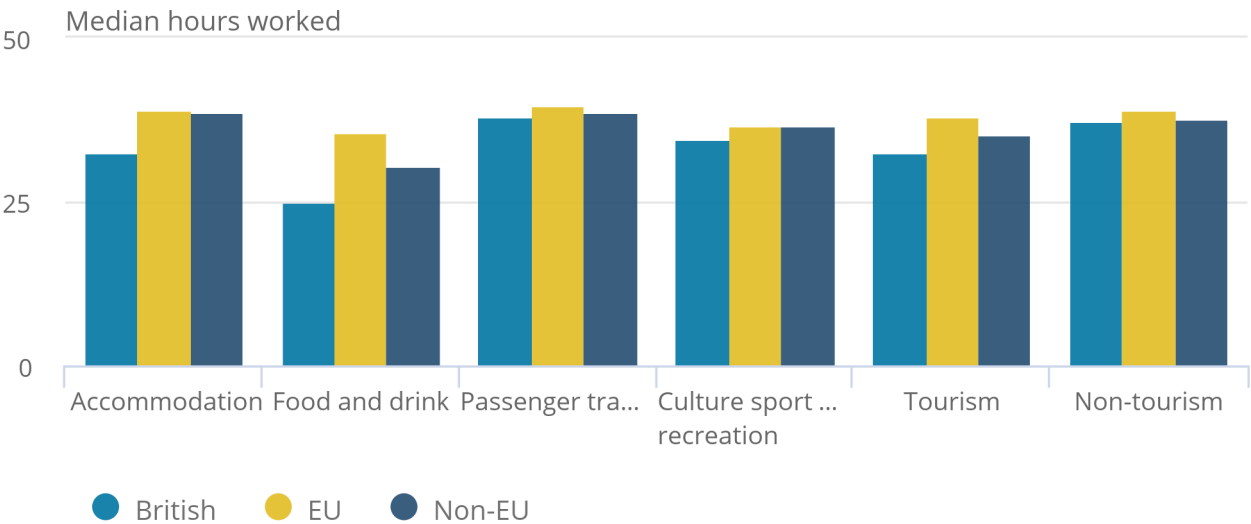
Across sectors within tourism, those working in the food and drink sector worked the fewest hours, on average (25 hours per week). In comparison, those who worked in passenger transport worked the most hours (38 hours per week). The average for both the accommodation sector and the culture, sport and recreation sector was 35 hours per week.

**Figure 11: On average, those who worked in the passenger transport sector worked the most hours per week**

Median weekly hours worked in tourism by nationality, UK, 2016 to 2018

Figure 11: On average, those who worked in the passenger transport sector worked the most hours per week

Median weekly hours worked in tourism by nationality, UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

### Non-EU employees were more likely to report that their work was not permanent in some way compared with other nationality groupings

The Annual Population Survey (APS) does not collect information on seasonal workers. However, the survey does ask people who are employees if they are in a permanent job (therefore, this section focuses on employees (2,598,000) and excludes self-employed people (563,000)).

Of the 2.6 million employees in tourism, 9% (238,000) reported that their job was not permanent in some way; this compares with 3% across all other industries. When asked the reason why their job was not permanent, 38% said that they did not want a permanent job, 24% could not find a permanent job, 7% were in a contract and the remaining 32% had an unknown reason.

EU employees in tourism were less likely to report that their work was temporary (7% compared with 9% of British nationals). The same trend is seen across all other industries, where 8% of EU employees reported their job was not permanent in some way compared with 5% of British nationals.

Non-EU employees were more likely to report that their work was temporary when compared with British nationals (11% of non-EU employees reported that their employment was not permanent in some way). The same trend was seen across all other sectors whereby a higher proportion of non-EU nationals (10%) reported that their job was not permanent in some way compared with 5% of British nationals.

Interpretation of these results should be taken with caution. The survey excludes those who are living at a temporary address. In addition, the survey excludes communal establishments, which means that any accommodation provided by employers will be excluded from the sample. Therefore, 238,000 temporary workers in the tourism industry is likely to be an undercount.

One government administrative data source currently being investigated, which may offer some insights into temporary workers, is HM Revenue and Customs (HMRC) Pay As You Earn Real Time Information and HMRC self-assessment data. The plan for the development of administrative data is continuously under review to stay responsive to changing priorities for evidence on different aspects of international migration. Further information can be found in our [Update on our population and migration statistics journey](#).

### **Notes for: The differences in working patterns seen between tourism and other industries were reflected in the average hours worked**

1. Average hours worked has been calculated as median hours worked.

## **9 . The most common occupation for non-British nationals in tourism was chefs**

Of the 3 million workers whose main job was in tourism, nearly one-third (29%) worked in elementary occupations<sup>1</sup>, such as kitchen and catering assistants, waiters and waitresses, and cleaners. EU nationals were more likely to be working in elementary occupations (39%) when compared with British and non-EU nationals (28% and 27%, respectively) (Figure 12).

The most common occupations for non-British workers were chefs (66,000), kitchen and catering assistants (58,000) and waiters and waitresses (55,000) – these three occupations accounted for 37% of non-British nationals working in tourism. Non-British nationals who worked as chefs accounted for 14% of all non-British nationals that worked in the tourism industry. Over one in three chefs were non-British nationals (19% were EU nationals and 15% were non-EU nationals).

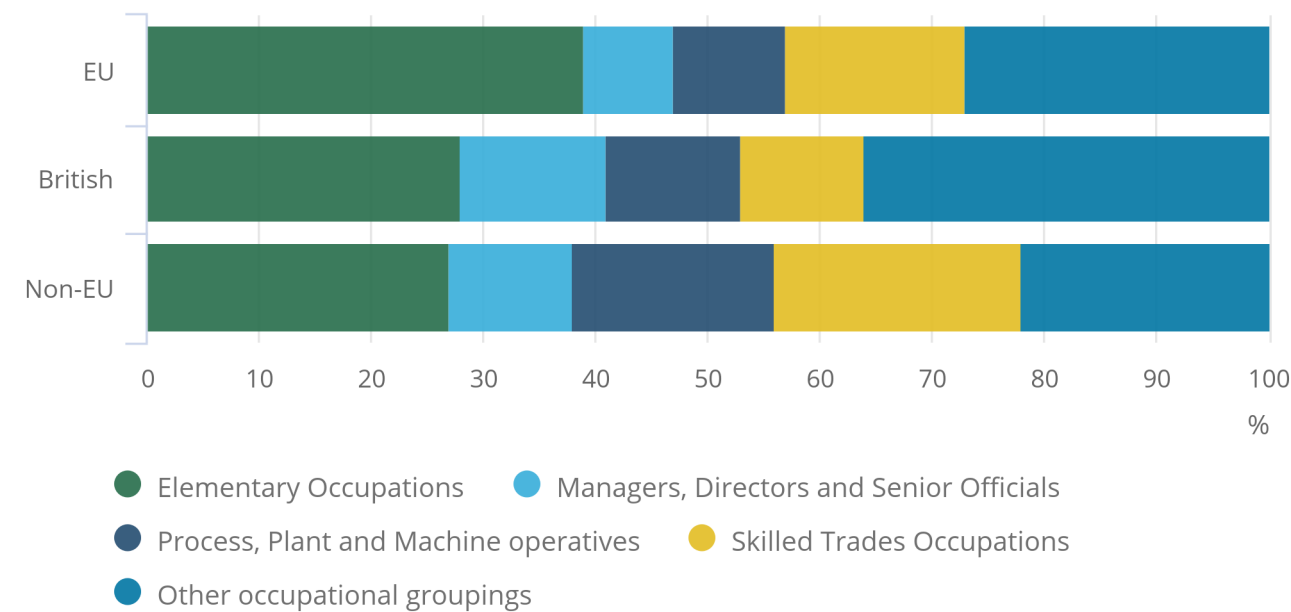
Kitchen and catering assistants was the second most common occupation for non-British workers in tourism (accounting for 12% of all non-British nationals in tourism). Non-British nationals accounted for 19% of kitchen and catering assistants with 12% being EU nationals and 7% non-EU nationals.

**Figure 12: EU workers were more likely to work in ‘Elementary occupations’ in the tourism industry than British and non-EU workers**

Major occupational grouping (SOC)<sup>1</sup> by nationality group, UK, 2016 to 2018

Figure 12: EU workers were more likely to work in ‘Elementary occupations’ in the tourism industry than British and non-EU workers

Major occupational grouping (SOC)<sup>1</sup> by nationality group, UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

Notes:

1. The Standard Occupational Classification (SOC) is a common classification of occupational information for the UK. For further information about the background, resources, concepts and processes of SOC 2010 please see [SOC 2010 volume 1: structure and descriptions of unit groups](#).

Notes for: The most common occupation for non-British nationals in tourism was chefs

1. Elementary occupations are varied and include: kitchen and catering assistants, waiters and waitresses, theme park attendants, cleaners and many more. For further information about the background, resources, concepts and processes of SOC 2010 please see [SOC 2010 volume 1: structure and descriptions of unit groups](#).



# 10 . Socio-economic position varied by industry and nationality

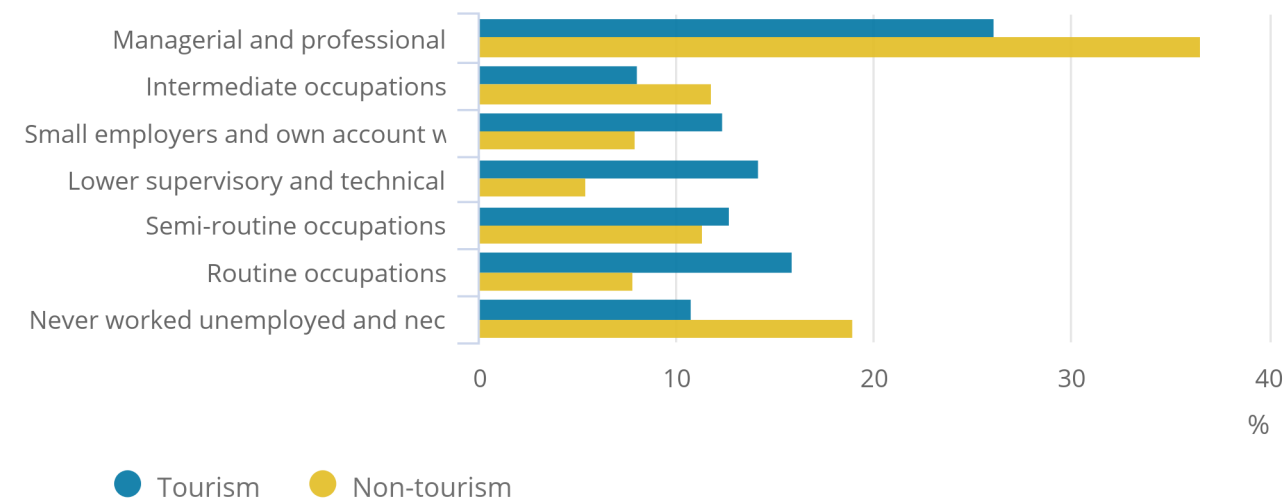
This analysis uses the [National Statistics Socio-economic Classification \(NS-SEC\)](#) as a measure to understand employment relations and conditions of occupations. A higher proportion of those who worked in the tourism industry were in routine occupations (16%) and lower supervisory and technical occupations (14%) when compared with those who worked in non-tourism industries (8% and 6%, respectively) (Figure 13).

**Figure 13: A lower proportion of those working in tourism were in the managerial and professional occupations compared with those working in non-tourism industries**

Socio-economic class by those working in tourism and non-tourism industries, UK, 2016 to 2018

Figure 13: A lower proportion of those working in tourism were in the managerial and professional occupations compared with those working in non-tourism industries

Socio-economic class by those working in tourism and non-tourism industries, UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

Notes:

1. Industry is determined by the interviewer from the question “What does the firm or organisation you work for mainly make or do?”
2. Industry sector does not always reflect job content – for example, people working in tourism could occupy a variety of jobs such as managerial, cleaning, fitness instructor and waitress.
3. ‘nec’ means not elsewhere classified.

Of those who worked in tourism, a higher proportion of British nationals (27%) worked in managerial and professional occupations when compared with EU (20%) and non-EU nationals (19%). Comparatively, a larger proportion of non-British nationals were more likely to be working in lower supervisory and technical occupations, and semi-routine occupations than British nationals.

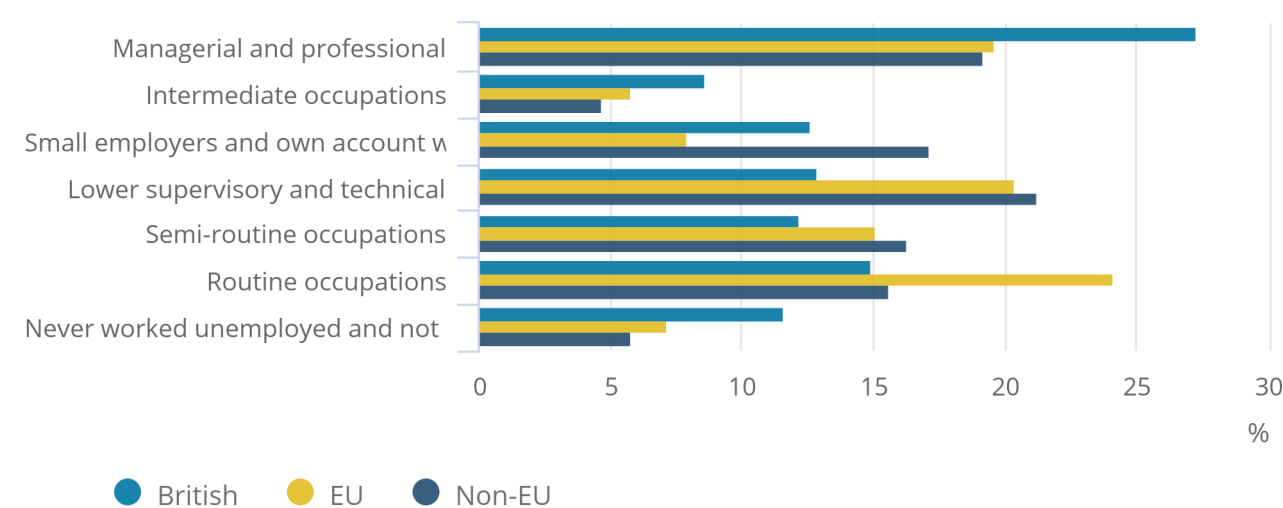
Almost one in four of EU national workers who worked in tourism were in routine occupations, compared with around one in six of UK and non-EU nationals respectively (Figure 14).

**Figure 14: Socio-economic position varied across nationality groupings for those who worked in tourism**

Socio-economic class for those working in tourism by nationality, UK, 2016 to 2018

Figure 14: Socio-economic position varied across nationality groupings for those who worked in tourism

Socio-economic class for those working in tourism by nationality, UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

# 11 . The highest qualification achieved for those working in tourism varied by nationality

EU nationals working in tourism had the highest proportion who were educated to degree level or equivalent (28%), closely followed by non-EU workers (27%). This compares with 22% for British workers (Figure 15).

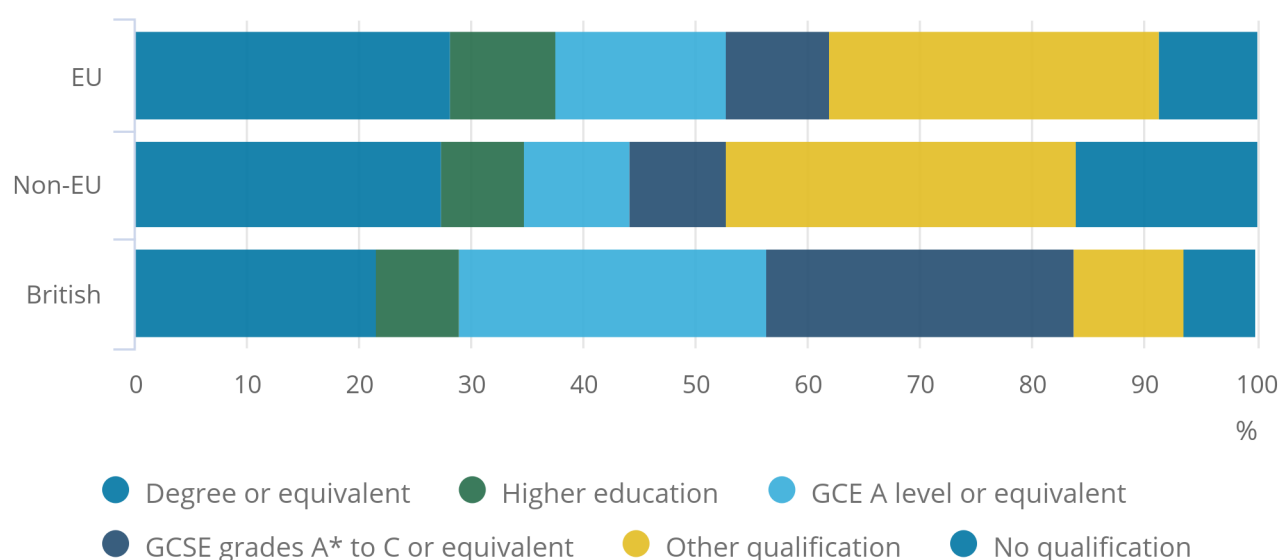
A higher proportion of British nationals have achieved a GCE, A level or equivalent, or GCSE grades A\* to C or equivalent when compared with both EU and non-EU nationals. But not all foreign qualifications will be able to match a UK-equivalent qualification, therefore the distribution of qualifications for non-British nationals is likely to be affected by these qualifications being categorised as “Other qualification”.

**Figure 15: EU nationals who worked in tourism had the highest proportion who are educated to degree level or equivalent**

Highest qualification of those who worked in tourism by nationality grouping, UK, 2016 to 2018

**Figure 15: EU nationals who worked in tourism had the highest proportion who are educated to degree level or equivalent**

Highest qualification of those who worked in tourism by nationality grouping, UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

## Match and mismatch of skills in tourism by nationality

The following results use a statistical methodology that is used by the International Labour Organisation (ILO) ([Skills mismatch in Europe – 2014 \(PDF, 1.26MB\)](#)) to compare the distribution of educational attainment<sup>1</sup> of those in employment in the UK against the average educational attainment level for their occupation. This analysis is filtered to the tourism industry, as defined by the United Nations World Tourism Organization (UNWTO) (see [Appendix 1](#)).

The method compares the average level of educational attainment for an occupation and shows the proportion of workers who are classified as: matched<sup>2</sup>, over-educated<sup>3</sup> and under-educated<sup>4</sup>.

Caution should be taken when interpreting these results as some foreign qualifications will not translate to a UK-equivalent qualification and will therefore be categorised as “Other qualification”. Of those who worked in tourism, 28% of EU nationals and 29% of non-EU nationals reported their highest level of qualification as “Other qualification”, this compares with 8% of British nationals. This therefore limits the ability for this analysis to provide the full picture on whether an individual’s qualification matches the average for the occupation in which they work.

The proportions for each matched and mismatched group will be sensitive to the assumptions made in the statistical method and should not be used in isolation. Further information on the methodology can be found in the following article: [Analysis of the UK labour market – estimates of skills mismatch using measures over and under education](#).

Looking at all people employed in the tourism industry, 68% had a level of education close to the average for their occupation (2 percentage points lower than for those employed in non-tourism industries); this is referred to as a “match rate”.

Figure 16 displays how the match rate of an individual who works in tourism varied depending on nationality grouping. British nationals had the highest match rate of all nationality groupings; this is true regardless of whether an individual works in the tourism industry (71% match rate) or non-tourism industries (72% match rate).

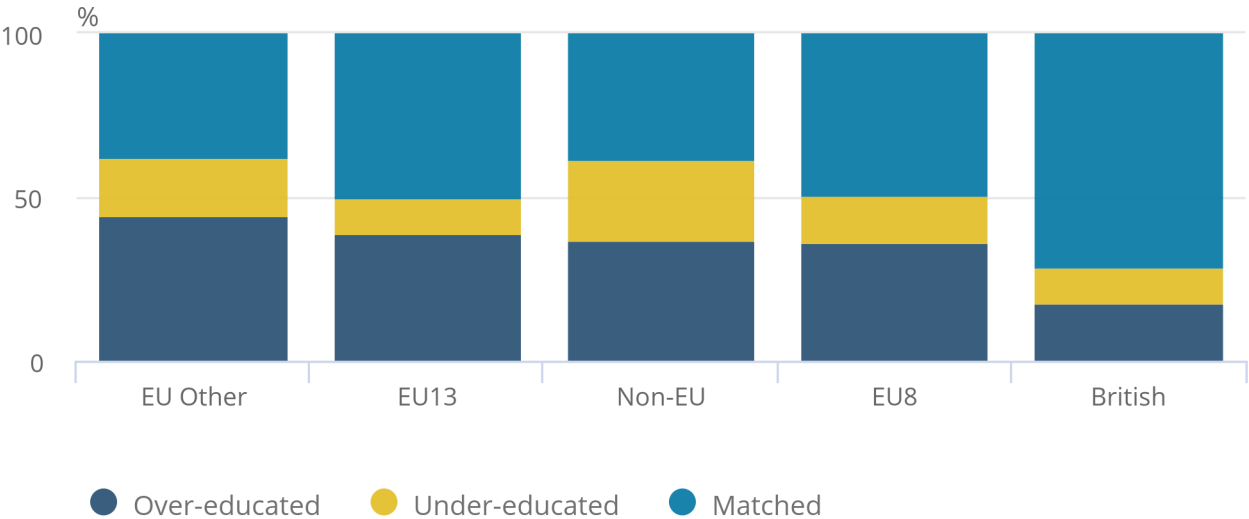
The greatest difference in match rate is seen between British nationals and Other EU (34 percentage points difference). Non-British nationals were more likely to be over-educated for the occupation in which they work compared with British nationals.

**Figure 16: A greater proportion of non-British nationals who work in tourism were over-educated, compared with British nationals**

Skill match or mismatch in tourism by nationality grouping, UK, 2016 to 2018

Figure 16: A greater proportion of non-British nationals who work in tourism were over-educated, compared with British nationals

Skill match or mismatch in tourism by nationality grouping, UK, 2016 to 2018



Source: Office for National Statistics – Annual Population Survey three-year-pooled dataset (2016 to 2018)

For individuals working in non-tourism industries, EU nationals and non-EU nationals had a match rate of 53% – a difference of 3 and 14 percentage points when compared with the tourism industry, respectively. Like with those working in tourism, non-British nationals were more likely to be over-educated than British nationals.

## Notes for: The highest qualification achieved for those working in tourism varied by nationality

1. The ILO uses years of education as proxy for skill, so total mismatch is based on aggregating over and under-education, rather than over and under-skilled.
2. Matched are individuals in employment whose highest level of educational attainment lies within one standard deviation of the mean for their given occupation.
3. Over-educated are individuals in employment whose highest level of educational attainment is greater than one standard deviation below their given occupation ([see Methods for more detail](#)).
4. Under-educated are individuals in employment whose highest level of educational attainment is greater than one standard deviation above the mean for their given occupation ([see Methods for more detail](#)).

## 12 . The ONS Longitudinal Study allows tourism workers' movements to be followed through time

The Office for National Statistics [Longitudinal Study](#) (ONS LS) is a 1% representative sample of the population of England and Wales. This data source allows us to understand long-term trends and how people move into and out of tourism.

Firstly, this analysis follows a cohort of LS members employed in tourism in 1991 and assesses their outcomes if they were still present at the 2011 Census. Secondly, this analysis looks at LS members who were employed in tourism at the time of the 2011 Census and considers, of the LS members who were present at the 1991 Census, what their origins were in terms of economic activity and industry of work.

It is important to note that the classification and coding of industries change throughout time, therefore movements between industries and within tourism sectors may reflect methodological differences rather than LS members' movements<sup>1</sup>.

Table 1: Air passenger transport had the highest proportion of Longitudinal Study members born outside of the UK

Tourism sectors for LS members aged 16 years and over and in work in tourism in 1991, by country of birth England and Wales

Tourism sector	Country of birth						
	UK	%	EU27	%	Non-EU	%	Total %
Accommodation for visitors	2,290	86	210	8	170	6	2,670 100
Food and beverage serving activities	7,480	81	560	6	1,160	13	9,200 100
Railway passenger transport	1,120	89	40	3	110	8	1,260 100
Road passenger transport	2,330	84	80	3	370	13	2,780 100
Water passenger transport and Transport equipment rental	570	89	20	3	50	8	640 100
Air passenger transport	690	81	50	6	110	13	850 100
Travel agencies and other reservation service activities	5,800	91	150	2	390	6	6,350 100
Cultural activities	2,230	90	80	3	170	7	2,470 100
Sporting and recreational activities	3,130	93	100	3	140	4	3,370 100
Country-specific tourism characteristic activities	5,360	89	220	4	420	7	6,000 100
Total	30,990	87	1510	4	3,080	9	35,580 100

Source: Office for National Statistics – ONS Longitudinal Study

#### Notes

1. Water passenger transport and Transport equipment rental have been combined due to low counts. [Back to table](#)
2. Percentages are displayed for rows. [Back to table](#)
3. Percentages and totals may not sum due to rounding. [Back to table](#)
4. Country-specific tourism characteristic activities includes: Activities of exhibition and fair organisers, Activities of Conference Organisers and Letting and operating of conference and exhibition centres. [Back to table](#)

In 1991, there were 35,580 LS members aged 16 years and over in work in tourism<sup>2</sup> – 87% were UK-born, 9% were non-EU-born and 4% were EU 27-born. Table 1 shows that those born in the UK made up the majority of workers in all tourism sectors but the proportion varied slightly across sectors.

Of the 35,580 LS members working in tourism in 1991, 27,030 (76%) of these were still present at the 2011 Census. Deaths of LS members accounted for 10% of the original sample not being present by 2011 and emigration accounted for 1%; the remainder of LS members were not present without a death or emigration record. Of those still present, over half remained in employment (59%; of which 47% were employed<sup>3</sup> and 12% were self-employed<sup>4</sup>) and the remaining had retired (31%), or were students<sup>5</sup> and other<sup>6</sup> (10%).

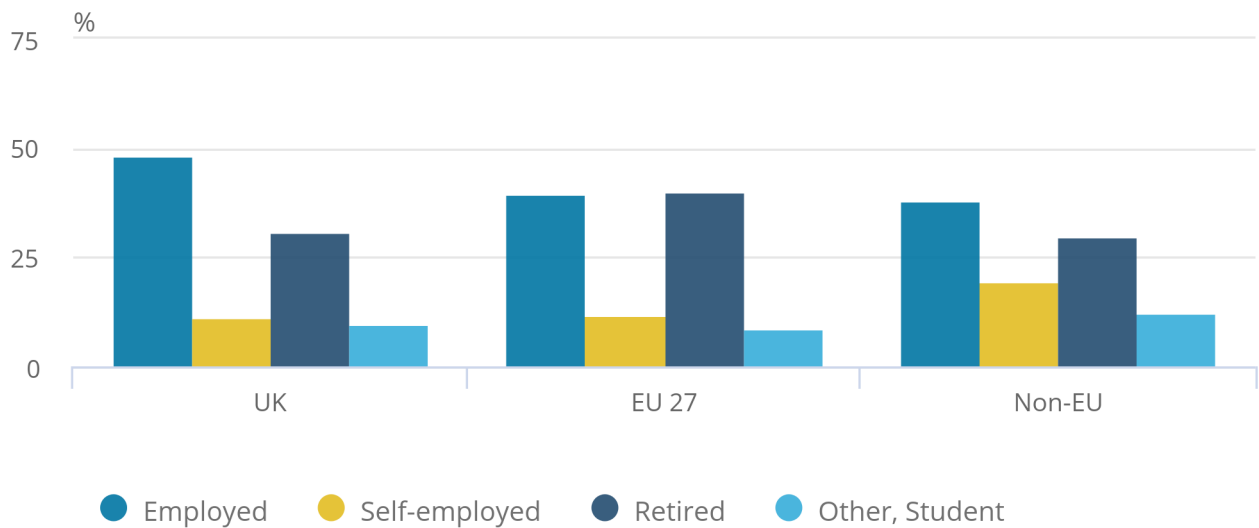
Figure 17 shows the proportion of LS members in employment by 2011 by country of birth. The higher proportion of UK-born LS members in employment by 2011 and higher proportion of EU 27-born LS members retired by 2011 could possibly be explained by [Section 5](#) of this report, which shows the younger age distribution seen from those with a British nationality compared with EU nationals and non-EU nationals in tourism in 2016 to 2018.

**Figure 17: By 2011, those born in EU 27 countries were more likely to be retired than those born in non-EU countries or in the UK**

Employment position in 2011 of LS members who were aged 16 years and over and working in tourism in 1991 and present in the 2011 Census, by country of birth, England and Wales

Figure 17: By 2011, those born in EU 27 countries were more likely to be retired than those born in non-EU countries or in the UK

Employment position in 2011 of LS members who were aged 16 years and over and working in tourism in 1991 and present in the 2011 Census, by country of birth, England and Wales



Source: Office for National Statistics – Longitudinal Study

Notes:

- 1. "Other" and "Student" have been combined due to low counts.

Of those LS members who were still in employment at the 2011 Census (16,030), 28% (4,540) remained working in tourism and 72% (11,490) were not working in tourism. LS members born in the UK were more likely to have moved to work in a different industry, with 74% no longer working in the tourism industry. This compares with 60% of those from EU 27 countries and 53% of those from non-EU countries.

Of the LS members who were still employed in tourism in 2011 (4,540), the top three industry sectors of work were: food and beverage serving activities (26%), road passenger transport (20%) and country-specific tourism characteristic activities (12%).

Of the 11,490 LS members not working in tourism in 2011, the highest proportion were working in wholesale and retail trade; repair of motor vehicles and motorcycles (15%), "public administration and defence; compulsory social security" (14%) and "human health and social work activities" (14%). This differs for those born in the EU 27 countries and not working in tourism by 2011 (230); the most common industry to be working in by 2011 was education (19% of EU 27-born LS members) compared with 13% of UK-born and 10% of non-EU-born.

## **Origins of ONS LS members employed in tourism in 2011 who were present at the 1991 Census**

In 2011, there were 36,360 LS members aged 16 years and over working in the tourism industry. Of these LS members, 76% were UK-born (11 percentage points lower than in 1991), 17% were non-EU-born (8 percentage points higher than in 1991) and 7% were EU-born (3 percentage points higher than 1991).

Similar to the 1991 Census, the most common sector for those working in tourism was food and beverage serving activities (30%). Since 1991, working in the road passenger transport sector has become more common, with 18% of those working in tourism working in this sector in 2011 compared with 8% in 1991. In addition, the travel agencies and other reservation service activities sector has become less common.

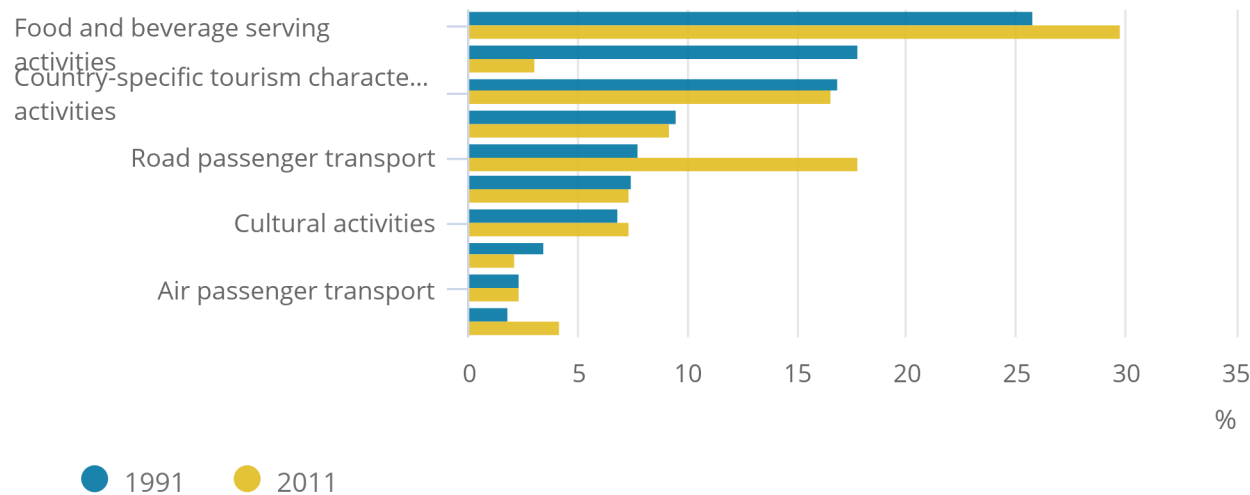


**Figure 18: The food and beverage serving activities sector remained the most common tourism sector of work by 2011**

Tourism sectors for LS members aged 16 years and over and working in tourism in 1991, compared with 2011, England and Wales

Figure 18: The food and beverage serving activities sector remained the most common tourism sector of work by 2011

Tourism sectors for LS members aged 16 years and over and working in tourism in 1991, compared with 2011, England and Wales



Source: Office for National Statistics – Longitudinal Study

Notes:

1. Due to limitations in the retrieval and coding of the industry data for 2011, for the following categories: Water passenger transport, Transport equipment rental, Travel agencies and other reservation service activities and Country-specific tourism characteristic activities, the divisional SIC codes have been used.
2. The classification and coding of industries and therefore tourism sectors change throughout time, therefore movements between sectors may instead reflect methodological differences rather than LS members' industry movements.
3. Country-specific tourism characteristic activities includes: Activities of exhibition and fair organisers, Activities of Conference Organisers and Letting and operating of conference and exhibition centres.
4. Parts may not sum to total, due to rounding.

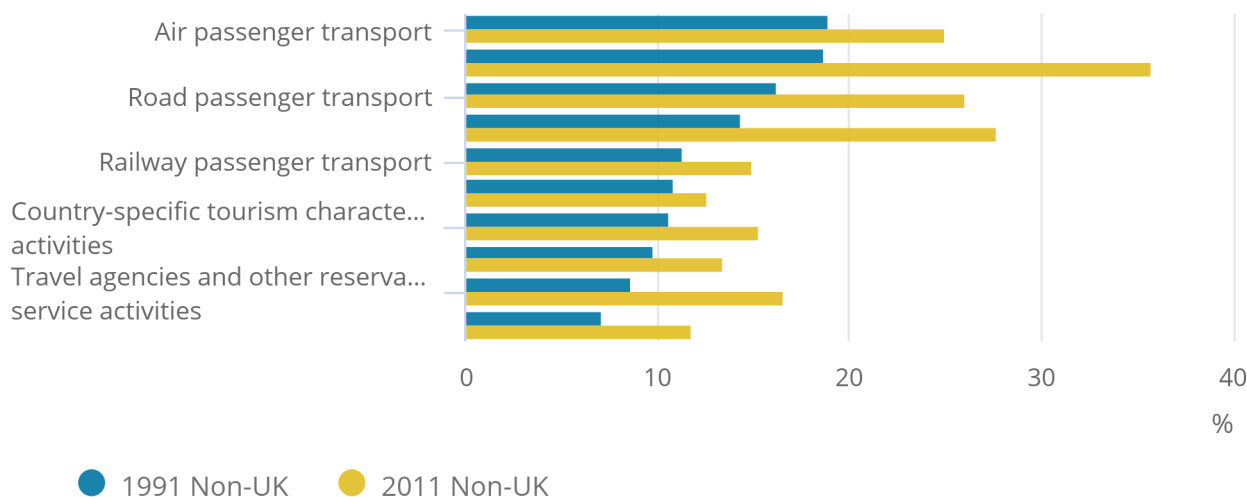
In 2011, the food and beverage serving activities sector had the highest proportion of LS members who were not born in the UK (10% from EU 27 and 26% from non-EU countries). The sporting and recreational activities sector had the lowest proportion of non-EU-born LS members (7%) and railway passenger transport had the lowest proportion of EU 27-born LS members (3%).

**Figure 19: The proportion of workers born outside of the UK increased in all tourism sectors from 1991 to 2011**

Tourism sectors for LS members aged 16 years and over and working in tourism in 1991, compared with 2011, by country of birth, England and Wales

## Figure 19: The proportion of workers born outside of the UK increased in all tourism sectors from 1991 to 2011

Tourism sectors for LS members aged 16 years and over and working in tourism in 1991, compared with 2011, by country of birth, England and Wales



Source: Office for National Statistics – Longitudinal Study

### Notes:

1. Due to limitations in the retrieval and coding of the industry data for 2011, for the following categories: Water passenger transport, Transport equipment rental, Travel agencies and other reservation service activities and Country-specific tourism characteristic activities, the divisional SIC codes have been used.
2. The classification and coding of industries and therefore tourism sectors change throughout time, therefore movements between sectors may instead reflect methodological differences rather than LS members' industry movements.
3. "Country-specific tourism characteristic activities" includes: "Activities of exhibition and fair organisers", "Activities of Conference Organisers" and "Letting and operating of conference and exhibition centres".

Of the 36,360 LS members working in the tourism industry in 2011, 17,580 (48%) were also present in 1991 Census data. Of those LS members present, 64% were employed in 1991, 11% were self-employed and 7% were students; the remaining were "other"<sup>7</sup>.

Of the LS members present in data and either employed or self-employed in 1991 (13,140), just over one-third (4,540) were working in tourism at the point of the 1991 Census. LS members born outside of the UK were more likely to have been working in tourism in 1991; 52% of those EU 27-born were in work in tourism, 48% of those non-EU-born and 33% of those UK-born.

Of those LS members not working in tourism in 1991, the highest proportion (22%) were working in the distribution, hotels and catering; repairs industry. This was true for those EU 27-born, non-EU born and UK-born LS members (30%, 25% and 22% respectively).

### **Notes for: The ONS Longitudinal Study allows tourism workers' movements to be followed through time**

1. For more information on the Standard Industrial Classification (UK SIC 2007) used in this analysis and how these classifications change through time, please see: [UK SIC 2007](#).
2. As defined by the UN World Tourism Organisation, see [Appendix 1](#) for more information.
3. Employed includes part-time and full-time employment.
4. Self-employed includes: self-employed with employees full-time, self-employed without employees part-time, self-employed without employees full-time.
5. Students include both full-time and part-time students, they can also still be working.
6. Other includes: seeking work, ready to start in two weeks or waiting to start job, looking after home, permanently sick, other. Note, this cannot be broken down further due to low counts.
7. Other includes: 'Retired', 'Active: waiting to start job', 'Active: unemployed', 'Inactive: Permanently sick', 'Inactive: looking after home/family', 'Inactive: other'. Note, this cannot be broken down further due to low counts.

## **13 . Appendix 1: Tourism industries as defined by the UN World Tourism Organization**

Tourism industries as defined by the UN World Tourism Organization according to International Standard Industrial Classification Revision 4.

Appendix 1: Estimates of employment in the Tourism Industries, 2018

<b>High level tourism industry grouping</b>	<b>Tourism industries</b>	<b>SIC2007 Description</b>	
Accommodation	Accommodation for visitors	55100	Hotels and similar accommodation
		55202	Youth hostels
		55300	Recreational vehicle parks, trailer parks and camping grounds
		55201	Holiday centres and villages
		55209	Other holiday and other collective accommodation
		55900	Other accommodation
Food and drink	Food and beverage serving activities	56101	Licensed restaurants
		56102	Unlicensed restaurants and cafes
		56103	Take-away food shops and mobile food stands
		56290	Other food services
		56210	Event Catering Activities
		56301	Licensed clubs
		56302	Public houses and bars
Passenger transport	Railway passenger transport	49100	Passenger rail transport, interurban
		49311	Urban and suburban passenger land transport
	Road passenger transport	49320	Taxi Operation
		49390	Other passenger land transport
		49319	Other urban and suburban passenger land transport
	Water passenger transport	50100	Sea and coastal passenger water transport
		50300	Inland passenger water transport
	Air passenger transport	51101	Scheduled passenger air transport
		51102	Non-scheduled passenger air transport
	Transport equipment rental	77110	Renting and leasing of cars and light motor vehicles
		77341	Renting and leasing of passenger water transport equipment
		77351	Renting and leasing of passenger air transport equipment
	Travel agencies and other reservation services activities	79110	Travel agency activities
		79120	Tour operator activities
		79901	Activities of tour guides
		79909	Other reservation service activities n.e.c.
Culture, Sport and Recreation	Cultural activities	90010	Performing arts
		90020	Support activities for the performing arts

	90030	Artistic creation
	90040	Operation of arts facilities
	91020	Museums activities
	91030	Operation of historical sites and buildings and similar visitor attractions
	91040	Botanical and zoological gardens and nature reserves activities
Sporting and Recreational activities	92000	Gambling and betting activities
	93110	Operation of sports facilities
	93199	Other sports activities
	93210	Activities of amusement parks and theme parks
	93290	Other amusement and recreation activities nec
	77210	Renting and leasing of recreational and sports goods
Country-specific tourism characteristic activities	82301	Activities of exhibition and fair organisers
	82302	Activities of Conference Organisers
	68202	Letting and operating of conference and exhibition centres

Source: Tourism industries as defined by the UN World Tourism Organization according to International Standard Industrial Classification Revision 4

#### Notes

1. Exhibition conference and fair organisers have been included in this analysis upon request although these are not included in the international recommendations. [Back to table](#)
2. Letting and operating of these facilities have been added from 2009 onward. [Back to table](#)
3. List of tourism characteristic activities (tourism industries) and grouping by main categories according to ISIC Rev. 4 [Back to table](#)

## 14 . Appendix 2: Employment in the tourism industries, taken from provisional estimates of direct tourism employment for 2017 and 2018

To get an estimate for those employed directly in tourism, the tourism direct employment (TDE) definition can be used. TDE is defined as a measure of jobs within the UK labour market that are supported directly by demand from tourists.

[The provisional estimates of direct tourism employment for 2017 to 2018](#) estimate that there were 1.56 million people who worked in TDE in 2018. To estimate the number of those employed directly in tourism, a variety of data sources<sup>1</sup> are used to create a ratio that is applied to the UN World Tourism Organization definition of tourism (the full [Tourism Satellite Account methodology \(PDF, 758KB\)](#) is available). The ratios applied to tourism direct employment are not detailed enough to look at the demographic breakdown provided in this analysis.

#### Appendix 2: Estimates of employment in the Tourism Industries, 2018

	<b>Total employment (thousands)</b>	<b>Tourism ratios (%)</b>	<b>Tourism direct employment (thousands)</b>
Accommodation services for visitors	420.5	64.1%	269.5
Food and beverage serving activities	1,567.3	26.3%	412.6
Railway passenger transport services	73.0	44.2%	32.3
Road passenger transport services	251.3	16.9%	42.6
Water passenger transport services	15.0	15.3%	2.3
Air passenger transport services	61.3	62.4%	38.2
Transport equipment rental services	32.8	5.6%	1.8
Travel agencies and other reservation services	127.9	98.2%	125.6
Cultural activities	291.0	26.6%	77.3
Sport and recreation activities	481.0	19.9%	95.8
Exhibitions and conferences etc.	32.1	1.5%	0.5
Other consumption products	31,556.1	1.5%	469.7
<b>Total</b>	<b>3,353.1</b>	<b>3.7%</b>	<b>1,568.2</b>

Source: The UK Tourism Satellite Account 2016, Workforce Jobs QMI, Annual Population Survey

#### Notes

1. Tourism totals for Tourism Direct Employment include employment data relating to "Other consumption products". For total employment they exclude these data. [Back to table](#)
2. Tourism direct employment estimates are projected using tourism ratios as at 2016. [Back to table](#)
3. Projected estimates are estimates that are not based on a full UK-TSA and are subject to revision when UK-TSAs for 2017 and 2018 are produced. [Back to table](#)
4. Data may not sum due to rounding. [Back to table](#)

## 15 . Appendix 3: EU groupings used within UK migration statistics, 2019

### EU country groupings used in this report

Appendix 3 shows the EU country groupings used in this analysis.

## EU2

Refers to Bulgaria and Romania; two countries that joined the EU on 1 January 2007. Between 2007 and 2013, EU2 nationals had certain restrictions placed on them; generally, they could work as self-employed workers but not as employees. These restrictions were lifted on 1 January 2014.

## EU8

Refers to Czechia (Czech Republic), Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia, which joined the EU at the same time (1 May 2004).

## EU 13

Refers to EU 15 excluding Ireland and the UK, countries include: Austria, Belgium, Denmark <sup>1</sup>, Finland, France, Germany, Greece, Italy, Luxembourg, the Netherlands, Portugal, Spain, Sweden.

## EU 27

Refers to Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden. This group does not include the UK.

### Appendix 3: EU groupings used within UK migration statistics, 2019



Source: Office for National Statistics

**Notes for: Appendix 3: Employment in the tourism industries, taken from provisional estimates of direct tourism employment for 2017 and 2018**

1. Data sources include: Annual Population Survey, Annual Survey of Hours and Earnings, Business Register and Employment Survey and the Annual Business Survey.