Scottish Affairs, no. 34, winter 2001

PROSPECTS FOR TOURISM EMPLOYMENT IN SCOTLAND

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Since the first Thatcher administration, tourism policy in the UK has been driven by the perceived potential of the tourism industries to generate employment to compensate for decline in traditional 'smokestack' industries and the concomitant loss of manufacturing jobs. This is perhaps nowhere truer than in Scotland where, since 1979, evolving policy initiatives have seen a growth in institutional and organizational arrangements to promote and administer tourism. Scotland's new parliament and government, elected in May 1999, will have considerable influence over tourism policy. This paper, which is a development of earlier commentaries (Macaulay and Wood 1992; Wood 1993) and current research (Kerr and Wood 1999, 2000), reviews the recent past, current status and focus of tourism policy as it applies to the creation and maintenance of employment in Scotland. In so doing, an effort is made to examine developments to date, and sketch the key issues that face policy makers in the new Scotland.

TOURISM EMPLOYMENT IN SCOTLAND: RECENT POLICY CONTEXTS

Tourism is not a clearly identifiable industry in its own right but tourism activities are generally held to create and maintain employment in a variety of relatively disparate areas of the economy, from hotels and restaurants to stately homes and leisure centres. The diverse nature of what is perceived to constitute the tourism industry is clouded by recognition that many so-called tourism sectors in fact service the all-year round needs of the local and regional communities in which they are situated. In Scotland, tourism has figured predominately in regional and local authority urban and rural

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regeneration programmes, and indeed, the evolution of government policy over the last twenty years has seen a variety of autonomous and semi-autonomous organizations become involved in aspects of tourism development. At the wider UK level, perhaps the most significant development has been the location of the tourism portfolio within the Department of National Heritage, established in 1992 and renamed, in 1997, the Department of Culture, Media and Sport. Table 1 shows the variety of organizations involved in aspects of tourism activity in Scotland (Hayton 1992; Wood 1995; Smith 1998).

Table 1
Organizations involved in tourism activity in Scotland

The Scottish Executive Enterprise and Lifelong Learning Department	Scottish Tourist Board
Scottish Enterprise	British Tourist Authority
Highlands and Islands Enterprise	Historic Scotland
Convention of Scottish Local Authorities	The Scottish Arts Council
Scottish Tourism Forum	Scottish Museums Council
Scottish Natural Heritage	The Scottish Sports Council

Sources: Hayton 1992; Smith 1998

The sheer diversity of the tourism sector in Scotland and the UK more widely is one reason why government policy in this area has tended to explicitly focus on the lowest common denominators of wealth and employment creation mediated through generic policy strategies and instruments with an occasional tourism 'twist'. In Scotland, the particular form this has taken is the involvement of arms-length (from government) public sector agencies in the affairs of, for the most part, those tourism industries in the private sector, the largest of which is the hotels, restaurant and licensed premises industry. Thus, both administration and policy development in certain sectors of the tourism industry have remained relatively untouched (e.g. in the heritage, arts, museums sectors) or largely marginalised by the central thrust of government policy. There appears to be tacit acceptance that for those tourism activities already in the public sector, or which are driven by necessary alternative philosophies (for example, in the case of historic buildings, the need for conservation) or chosen strategies (control and reduction of public expenditure) the scope for wealth and employment creation is finite.

Governments, both Conservative and 'new' Labour, have proceeded in practice with the attitude that, through limited and selective intervention in the market, government and its agencies can influence the twin aims of wealth and employment creation in the private sectors of the tourism industry. These have run alongside more lastingly traditional strategies, notably in the international, national and regional/local marketing of tourism. The former have been embodied in Scottish Enterprise (SE) (since it was created in 1991 from a merger of the Scottish Development Agency and the Training Agency in Scotland) and wider Scottish Enterprise Network (SEN) consisting of Scottish Enterprise and the 22 Local Enterprise Companies. Marketing and related activities have largely remained the province of the Scottish Tourist Board (STB). The last decade has seen increasing tension as well as necessary co-operation and collaboration between SE and the STB, an initial peak to this tension occurring in 1993-94 when a review of tourism administration in Scotland ordered by the Secretary of State saw the effective rejection of a take-over attempt by SE of the STB, the latter being confirmed as the lead agency for promoting Scottish tourism. The SE/STB relationship is made more complex by the existence of Highlands and Islands Enterprise (HIE), the successor body to the Highlands and Islands Development Board (HIDB), which performs similar functions to SE in its own geographic area but which as a result of the 1993-4 review yielded its tourism marketing role and responsibility for co-ordination of area tourist boards (ATBs) to the STB (See Smith (1998) for a fuller account.)

As public sector bodies, none of SE, HIE or the STB has been left untouched by the conservative rhetoric of enterprise and the encouragement of training and labour market flexibility. Indeed, to varying degrees such rhetoric has been internalized to the extent that it forms part of these organizations' self-justification of their respective roles, an attitude supported by successive governments' defence of established institutional arrangements for tourism administration in Scotland (and arguably reflected in the constitution of the Enterprise and Lifelong Department of the new Scottish Executive, of which tourism is a part, subsequent to the election of the Scottish Parliament on 6 May 1999). Thus during the first half of the 1990s, the tourism industry's importance to the economy of Scotland was recognised in a range of largely public sector initiatives unparalleled in the rest of the UK. In the wake of the 1993-94 Scottish Office review and reorganisation of government agency responsibilities for tourism in Scotland came a strategic plan for the tourism industry. This was the product of the Scottish Tourism Co-ordinating Group

(STCG), a committee chaired by the Scottish Office junior minister with responsibility (amongst many other things) for tourism and comprising members of twelve tourism-interested organizations (See Table 1). Both the STCG's consultative document and final report (Scottish Tourism Co-ordinating Group 1994 1994a) were light on substantive commitments to government financial support and legislative development for tourism. The final report (the 'Strategic Plan') commented on the need for more public and private investment in tourism and announced the intention of an enlarged STCG to supervise around twenty working groups who would take forward elements of the strategy.

The general tone of the Strategic Plan, then, was one of encouragement and voluntarism. Nowhere was this more clear than in the approach to employment and training in the tourism industry. The Plan's aim was to increase the number involved in tourism employment to 195,000 by the year 2000 (Scottish Tourism Co-ordinating Group 1994a, p.7). It identified poor skill levels and hence inadequate training as the main labour issues facing the industry, arguing that (1994a, p.34):

> We must also take account of the welfare and personal goals of the workforce if our industry is to recruit and retain good quality staff. This means enhancing businesses' recruitment and retention skills, using vocational qualifications to stimulate training by employers, and providing better career opportunities and structures within the industry.

Though undoubtedly well-meaning, the Strategic Plan's focus on skills and training reflected dominant concerns in the industrial and political establishment, largely ignoring (in the hotels and catering sector in particular) questions of the quality of employment and the reward and remuneration of industry employees. The irony of the 'training solutions' promoted by the STCG was that they evolved in a context of government policy committed to creating general economic and labour market conditions hostile to these key issues (Wood 1995, 1996). This was most notable in the government's abolition in 1993 of wages councils which regulated pay in several low pay industries including hotels and catering.

TOURISM EMPLOYMENT: PROBLEMS OF DEFINITION

Any understanding of how 'successful' government policy has been in encouraging employment in tourism necessarily begins with an examination of how tourism employment is defined. Two interrelated concepts are important. The first is that of the 'tourism trip' which is defined as a 'stay of one or more nights away from home for holidays, visits to friends or relatives, business/conference trips or any other purposes except such activities as boarding education or semi-permanent employment' (Scottish Tourist Board 1999). Thus if a person living in a sealed room in Glasgow travels to Edinburgh to stay overnight in a sealed room they rent there, they are a tourist even if they spend no money other than their transportation fees (for example on visits to restaurants, hotels, or even Edinburgh Castle). The absurdity of this definition of a 'tourist trip' (which has some international status for statistical and other purposes) lies in its all-encompassing nature. It is self-serving for tourism organizations because it allows for inflation of both the scope and measurement of 'tourism activity', including tourism employment. The interpretative breadth this (and similar) definitions of tourism activity allows leads directly to a second important element current in definitions of tourism employment - the so-called multiplier effect.

The multiplier effect, a relatively innocuous economic concept, seeks to define the impact of a unit of value (usually monetary expenditure) on the wider economic system in terms of level of impact (whether direct, indirect or induced) and direction of effect (on output, income and employment). It has been used with a vengeance in the tourism policy arena, largely as a device for justifying the economic benefits tourism activity and development engender. Deployed thus rhetorically, the 'multiplier effect' is often invoked in positing values for 'direct' employment creation in 'conventional' tourism industries (e.g. hotels and restaurants) and indirect employment creation in other sectors (e.g. retailing and entertainment). In the Scottish tourism policy context a major influence in the early 1990s was just such a study which sought to establish the value of the 'tourism multiplier' for a variety of levels of impact and directions of effect (The Surrey Group 1992). The key limitation of multiplier studies when focusing on employment issues centres on what might be called the 'disentanglement effect'. Put simply, many of the economic activities that conventionally come under the heading 'tourism' in fact service all-year round needs of other client groups and/or the indigenous communities in which they are located. Disentangling 'normal' non-tourism employment from that due to tourism activity, however defined, is a complex task even before consideration extends to the supposed effects of multiplier expenditure by tourists on job creation.

Nowhere is this more evident than in the largest tourism industry of them all - hotels, restaurants and licensed premises. In their seminal study of regional tourism employment in Great Britain, Bull and Church (1994, pp.252-255) note that causality or changes in such employment can be broadly attributed to three influences: tourism; the role of hotels and catering as a producer service (i.e. meeting demands from other industries); and the demands of the local community. They cite secondary evidence to the effect that around 42% of hotel and catering employment is attributable to tourism expenditure and 25% to producer service functions. They do not explicitly suggest that the remaining 33% can be attributed to meeting the needs of the local communities in which hospitality businesses are based, but the inference is not unreasonable.

However, in an interesting aside on their commentary on tourism influences on hospitality employment, Bull and Church (1994, p.255) imply that the effects of tourism on hospitality employment are limited. They observe that 'the true tourists to Britain, who actually bring additional spending power into the country' (i.e. overseas visitors) follow a well-trodden path of specific areas, suggesting that the impact of their expenditure is limited to these areas. This is consistent with other aspects of the authors' analysis which suggests both

(a) a loose relationship between the fastest growing geographical areas in terms of hotel and catering employment and long-term population growth in these areas;

and

(b) fastest sectoral growth in the UK hotel and catering industry being in restaurants, cafes and fast food operations followed by canteens, messes and contract catering.

A further difficulty with the multiplier is the way it involves crude rationalisation of complex processes of employment creation to a single measure. One consequence of this is, as Parsons (1987, p.366) notes, that:

> Attempts at measuring how many tourism and leisure jobs there are in the economy have focused on what share of jobs in various economic activities are under-pinned by tourism and leisure spending. This makes a valuable contribution to our knowledge of the direct effects of tourism and leisure spending on the labour market ... However, it makes it impossible to review structural and employment trends - since it looks at 'economic' rather than 'actual' jobs.

One might add that an over-reliance on pseudo-quantitative measures or 'indicators' of tourism employment disguises other possible definitions - for example job stability and job quality, questions frequently avoided, glossed or boldly repudiated (when presented negatively) by those with a stake in the tourism industry. Yet the 'multiplier effect' and associated concepts such as the 'tourist trip' remain ideologically entrenched in the rhetoric of tourism organizations despite, as Parsons implies, serving to make the assessment of employment levels and patterns more rather than less difficult. Moreover, in countries like Scotland where tourism has been frequently viewed as a panacea for employment decline in manufacturing, all-inclusive definitions of tourism and tourism potential raise unrealistic hopes that the quantity and quality of jobs in tourism industries can compensate across the economic board for erosion of the nation's manufacturing base.

This point is made by Leiper (1999) in a seminal article on what he terms 'tourism boosters', those organizations that have a lobby interest for the tourism industry which is characteristically expressed in terms of the employment creation and potential of the industry. In a case study of Australia, but drawing on a variety of global data, Leiper (1999, p.605) argues that tourism boosters almost invariably '... greatly exaggerate the truth [about tourism's employment potential] and have created a mythical image of tourism as a major source of jobs and careers'. The problem, Leiper argues, lies in the tendency of tourism boosters to conflate equivalent full-time jobs across macro-economies (essentially calculating those jobs not directly related to tourism but supposedly supported by the industry in some way) with real jobs in functioning industries. In tourism terms, real jobs are those where individuals' skills and knowledge are related directly to some attribute of tourism activity. Leiper illustrates this distinction with a neat example relating to the Australian medical and para-medical professions. Some tourists utilise the services of these occupations and in 1995-1996 the Australian Bureau of Tourism Research (BTR), a 'tourism booster', estimated that 50,200 equivalent full-time jobs (EFTJs) were supported directly by tourism. Focussing on the dental services component of these professions, Leiper (1999, p.607) notes that:

> Finding dentists who have fixed the teeth of individuals who happen to be tourists is not difficult. However, finding dentists whose jobs have any significant dependence on tourists, or a business relationship to tourism, is a more elusive challenge. The BTR's estimates of 'direct tourism employment' include EFTJs in dental clinics but these EFTJs comprise, almost entirely, an aggregated sum of minute fractions evenly skimmed off every job in every dental clinic around the country.

Leiper's arguments repay close study impossible to extensively detail in this paper. However, his message is a simple one that resonates with the methodological scepticism of Parsons (1987) and Bull and Church (1994).

Even a casually objective contemplation of multiplier-based definitions of employment creation and maintenance yields methodological doubts. That such definitions have become entrenched in discussions of the benefits of tourism is, as Leiper (1999) notes, a testimony to the efficacy of the lobbying tactics of tourism boosters and the (at least) tacit complicity of many academics, politicians and other interest groups in sustaining such a mythology.

Leiper's study is one of the very few to examine the lobbying of interest groups in tourism (but see Hall 1994; Wood 1996). In the Scottish context, as already noted (Table 1), the extent of public sector involvement in tourism over the last twenty years has generated many such interest groups, several of them being arms-length organizations charged with some aspect of tourism and tourism related administration. In addition, bodies such as the Scottish Tourism Forum have memberships from private industry, and industry groups such as the British Hospitality Association (BHA) exist in part to promote sectoral interests to government. Hall (1994) notes that the often fragmented nature of the tourism industry overall can make lobbying to government ineffectual: in other instances, for example in the USA and Australia, such lobbying is highly effective. Scotland falls somewhere between these two extremes. As suggested earlier, there has been considerable success on the part of interest groups in pressing the case for tourism as a major source of employment in a post-manufacturing economy. This is unsurprising, as without necessarily acting in consort, all interest groups in Scottish tourism have at some point promoted this notion. As a generalisation, when individual groups have acted alone to promote a particular cause, or in co-operation with only some other interested parties, the effect has been less successful, as in the earlier example of the perceived efforts of Scottish Enterprise to take over the Scottish Tourist Board in 1993-4 (see Smith 1998), and the more recent efforts of the British Hospitality Association in Scotland to influence the new Scottish Executive's tourism policy (see Kerr and Wood 2000). However, success in promoting a particular view is not the same as saying that such a view can be sustained in the light of hard evidence, as the case of tourism employment all too readily reveals.

TOURISM EMPLOYMENT TRENDS

One of the great ironies of tourism organizations' efforts to extend the range of activities that might be included in the definition of 'tourism' is that the use of such measures throws into relief the significant shortcomings of policy with regard to employment in the sector. Since 1991, increases in tourism employment have been at best, modest, and at worst significantly disappointing. Depending on the source employed (here we use STB-derived figures) there has been a nominal increase in the number of jobs from around 156,000 to 177,000, an increase of the order of 12-13% (see also Barrie 1999). Perhaps more significantly - and despite all the monies spent on marketing Scotland at home and overseas, the activities of local Enterprise Companies, and the financial support of new tourism business start-ups - the proportion of national employment accounted for by tourism industries has hardly varied at all, being in the bandwidth of 7-12%, the hospitality industry accounting for between two-thirds and three-quarters of this, some 5-8% of all Scottish employment (Kerr and Wood 1999). It is worth adding that most estimates, including the STB's own, tend towards the lower proportion in each case.

Table 2 shows a variety of estimates for tourism employment for the year 1991. Both Jackson and Campbell (1993) and the Scottish Tourist Board (1994) used a definition of total tourism employment to include in addition (for the Scottish Tourist Board) tourist offices and other services; libraries, museums etc.; and sport and other leisure services; and (for Jackson and Campbell) the last two of these. On this basis, hospitality industry employment accounted for 68% of all tourism-related employment on the Scottish Tourist Board's calculations and 71% in Jackson and Campbell's. The latter suggest that, for Great Britain as a whole, hotels and catering accounted for 73% of tourism-related employment, and so Scotland was broadly consistent with this trend at the time. Similarly, Jackson and Campbell's figures reveal that around 10% of all hotel and catering workers in Great Britain are located in Scotland, a figure that accords with other evidence (e.g. Macaulay and Wood 1992). Relative agreement is also evident in the proportion of total Scottish employment attributed to hotels and catering in the early 1990s. The figures are: 5.7% (Macaulay and Wood 1992); 5.5% (Jackson and Campbell 1993); and 5.4% (Scottish Tourist Board 1994).

In a later study, Ritchie, Templeton and Wilson (1996) compare three different 'methods' for estimating tourism employment, focusing on the number of full-time equivalent jobs. These methods employ, respectively, Census of Employment data, data from the Scottish Tourism Multiplier Study, and the 'expenditure share' approach whereby the proportion of tourism expenditure in a sector is assumed to be equivalent to the amount of employment sustained in that sector. The results of this exercise evidence considerable variation, estimates for the total number of jobs sustained by tourism ranging from 141,000-177,000. More interesting are the estimates for the number of full-time equivalent jobs in tourism which show the same variation but, as would be expected, offer depressed total values for tourism employment at 121,000 (Census of Employment); 80-85,000 (Scottish Tourism Multiplier Study); and 112,000 (Expenditure Share Approach).

Turning to other categories of tourism employment, Jackson and Campbell (1993, p.3) estimate that employment in the category 'sports and other recreation and libraries, museums and art galleries' rose by 22% between 1981-1991 (from 37,151 to 45,143). The Scottish Tourist Board (1994) report that in the category 'Libraries, museums etc' (sic) employment in Scotland rose from 5,000 in 1981 to 6,700 a decade later, an increase of 34%. The figures for 'Sport and other leisure services' were 32,200 for 1981 and 36,500 for 1991, an increase of 12%. Scottish Tourist Board figures for the decade 1985-1995 suggest that during this period there was an increase in the number of people employed in the 'Travel agencies/tour operators' category from 1,600 to 6,800 but increases of only 1,800 in the 'Libraries, museums and galleries' category and 10,600 in the 'Sport and other recreational categories'. Overall, for 1995, STB figures suggest a total for hospitality employment of 110,700 and for other tourism employment of 52,500. While there was growth in the latter sectors over the 1980s, from 1991 to 1995 there was barely any numerical growth in jobs whatsoever, although there was a small redistribution of jobs between sectors. Indeed, from 1995-1996 there was a reduction in all sectors of around 3,000 jobs (Scottish Tourist Board 1996) On the basis of information reviewed in this section, Table 3 shows Scottish tourism employment totals for various points since 1991. The estimate of a total of 177,000 jobs for 1998 obtained by Barrie (1999) from the STB approximates to estimates of 170,000 jobs obtained for the Summer of 1998 from the Labour Force Survey (Scottish Tourism Research Unit and Fraser of Allander Institute 1999) and this suggests an 'improvement' in tourism employment at the end of the decade although it is too early to say with any confidence whether this upward direction constitutes in any sense a trend. Early and mid-decade figures may reflect the recessionary pressures of the time and indeed, in his review of the Scottish economy, Wood (1999, p.134) describes employment as being 'virtually static' in the five years to 1995.

Overall then, the picture here is a mixed one. Certainly, the tourism industries can lay no significant claim to have been a major source of job creation. None of the tourism sectors figure in the 'top ten' employment growth sectors in Scotland although 'hotels and restaurants' is the sixth largest employer in the Scottish economy overall (Peat and Boyle 1999). Further, a deep-rooted suspicion remains that employment growth in hospitality at least is, as Bull and Church (1994) suggest, as likely to be attributable to the growth in demand from local communities and the role of the hospitality sector as a producer service as much as it is to influxes of large numbers of tourists spending quantities of sterling. To this we might add that questions remain as to the unmeasured effect of supply-side activity on employment growth: the creation of small hospitality and other tourism businesses has been actively encouraged by local enterprise companies, possibly leading to distortions of the market.

Table 2
Estimates of hospitality services employment in Scotland*

	Macaulay & Wood (1992)	Scottish Tourist Board (1994)	Jackson and Campbell (1993)
Restaurants, snack bars, cafes, etc	25,700	25,200	26,293
Public houses and bars	27,000	25,200	26,271
Night clubs and licensed clubs	12,300	10,400	10,961
Hotels	44,100	42,700	47,543**
Other tourist accommodation	2,900	2,800	
Total	112,000	106,300	111,068
Total tourism employment	N/A	156,200	156,211
Of which hospitality services		68%	71%

Notes:

* *Irrespective of date of publication all data is calculated for 1991.*

** *Combined figure for 'Hotels' and 'Other tourist accommodation'.*

Table 3
Tourism employment in Scotland, various points, 1991-1998

	1991	**1993**	**1995**	**1996**
(a) Hospitality sector	106,300	109,700	110,700	108,700
(b) All tourism employment	156,200	162,100	162,900	159.900
(c) (a) as a proportion of (b)	68%	68%	68%	68%
Source	STB	Census of Employment	STB	STB

As the largest tourism industry, the hospitality sector has always been a popular choice for the would-be business owner. Despite a growth in the activities of corporate hotel chains over the past two decades, small firms continue to dominate the sector, with some businesses offering only seasonal services and many operating at the interface between the formal and informal economy. The predominance of the small firms in the hospitality industry has led some commentators to argue that this lends the sector to inefficiency and low productivity, as many engaged in the provision of hospitality services are primarily in pursuit of a 'living' rather than being genuinely entrepreneurial, a culture that encourages inexpert and informal employment practices.

Such practices are not confined to small firms, however. Employment in the commercial hospitality sector in general is characterised by low pay, a high level of involvement in the labour force of 'marginal' workers (those for a variety of reasons who have little bargaining power) often employed on a part-time or casual basis, high rates of labour turnover (the absence of occupational development structures means that personal and career development is often through job changing), lack of unionization, and a highly competitive working environment which can be both physically demanding and emotionally stressful (see Wood 1993, 1997). Young people seeking to get off the dole, students supplementing their grants and parental allowances, married women with children seeking to earn a family wage employed in jobs that accommodate their domestic commitments - these are the main groups of workers in the industry.

The major factors stratifying the hospitality workforce are age, gender and employment status (i.e. whether full- or part-time). There is no useful information on the age structure of the hospitality workforce in Scotland but data for gender and mode of working does exist. For 1993, Jackson and Campbell (1993, pp.v and 6) state that 67% of Scottish hotel and catering employees are women and 56% of all employees work part-time. In commercial hospitality in Scotland overall, these authors record 24,948 male and 28,472 female full-time employees, 20.7% and 23.6% of the hospitality workforce respectively. The 56% of employees who work part-time are for the most part women - 49,226 (43.2%) - with only 15,017 (12.5%) of part-time workers being male (Jackson and Campbell 1993, p.6). Table 4 shows the data drawn from Jackson and Campbell's study for Scotland compared to STB-supplied figures for 1996 (the most recent STB data in the public domain and for all tourism sectors) (Scottish Tourist Board 1996). These figures suggest, then, that 80,794 tourism jobs, or 50.5% of the total are part-time, with 71% of part-time jobs performed by women. Some 61% of the tourism workforce overall are women with 59% of these working part-time compared to 37.5% of men who work part-time.

Table 4
Comparison of part- and full-time employment by gender in hospitality services in Scotland (1992) and tourism generally (1996)

	Hospitality, Scotland 1992*		Tourism, Scotland 1996**	
Male full-time	24,948	20.7%	38,623	24.0%
Male part-time	15,017	12.5%	23,192	14.4%
Female full-time	28,472	23.6%	40,541	25.3%
Female part-time	49,226	43.2%	57,602	36.0%
Totals	117,663	100	159,958	100

Notes:
* *Data drawn from Jackson and Campbell (1993).*
** *Data drawn from Scottish Tourist Board (1996).*

CONCLUDING REMARKS

Tourism is frequently hailed as one of Scotland's most important industries in terms of revenues earned and the performance of tourism in creating and sustaining employment. Existing methodologies employed in the computation of statistics to support such claims are, at best, imperfect, at worst misleading in terms of the all-encompassing definitions and inflationary scope of tourism activity employed in debate. At best, the tourism industry in Scotland is stagnating, at worst it may actually be contracting (Peat and Boyle 1999).

With regard to employment, the industry's capacity to generate significant quantities of (new) employment is questionable, STB (1996, 1999) figures suggesting that in the period 1987-1997 employment grew by 13,216 from 145,900 to 159,116 jobs, or just over 1200 jobs per annum. The limits to employment growth in tourism industries is perhaps better reflected in the fact that, for much of the last decade, the proportion of all employment accounted for by tourism has remained fairly constant at around 8% of the Scottish total. Consideration must also be made of the full-time equivalent jobs represented by the numerical totals for tourism employment which are significantly lower (Ritchie, Templeton and Wilson 1996). The very large number of part-time jobs in the tourism industry has implications for the quality of working life of the sector's employees as well as for the quality of the Scottish tourism product more generally.

Of course, it could be argued that the small(ish) increase in actual jobs and the maintenance of the proportion of all tourism-related jobs at around 8% is a victory for the productivity of the sector. In truth, no hard data exists to support such a view one way or the other. However, there is data over a very long period for the UK as a whole to suggest that tourism industry productivity is significantly lower than in other sectors (e.g. Prais, Jarvis and Wagner 1989): that Scotland has discovered the holy grail in this regard seems implausible. The harsh reality appears to be that any notion that might have existed about the ability of tourism as an element of the service sector to compensate in employment for the decline of Scotland's traditional industries should be abandoned.

Such a view is, of course, unwelcome to established interests in government and the tourism industry, the latter having received attention and resources from the former out of all proportion to the sector's economic significance on a UK-wide basis, and no less in Scotland (Wood 1996; Kerr and Wood 1999). Recent institutional pressures relating to the administration of tourism in Scotland combined with not a little obvious panic on the part of the Scottish Executive saw yet another review of the industry initiated (and published in early 2000) with the aim of formulating a revised strategic plan for the tourism sector. Precipitated by unfavourable comments in a report on tourism by the House of Commons Select Committee on Scottish Affairs, the new review attempts to address solutions for the perceived decline in Scottish tourism.

Although, as suggested earlier, it would perhaps be unwise to suggest that the tourism industry in Scotland has forged itself into an effective lobbying machine with a unified voice, there are several 'sub-lobbies', many of them highly vociferous, and including, of course, para-statal organizations with a stake in tourism such as the STB and Scottish Enterprise. Judged by the long-term development of the Scottish tourism industry it is difficult to see whether such organizations and others besides merit the resources deployed upon them. The intervention of the government, through its various agencies, in the affairs of the tourism industry is normally justified on the grounds of 'market failure' in the sector. There is little empirical evidence to support this assumption. Indeed, in the largest tourism industry - hospitality services - there is a great deal of evidence to suggest that 'the market' works only too well, in the context of employers utilizing marginal labour in a highly flexible fashion to depress costs and raise revenues (Wood 1997). Whatever the case, it is unlikely that there will be significant changes in the pattern of Scottish tourism employment in the future and there is good reason to argue that the advent of the Scottish Parliament and government affords a significant opportunity to reappraise both what government can do, and wants to do, in respect of tourism, in the light of alternative policy priorities and a possible decline in resources available to Scottish government (Midwinter 1999).

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June 2000