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TRENDS ON THE TOURISM LABOUR MARKET*

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Abstract: Tourism is an important sector in the Croatian economy. To retain its unique position in global markets, Croatian tourism has to compete with other world destinations and to attract travellers worldwide. This will not be possible without efficient human resource development policies and practices. The main problems in tourism are very similar across countries: low pay, very high demand for staff flexibility and mobility, high staff turnover, high share of informal employment arrangements and persistent skill shortages.

Key words: tourism sector trends, employment in Horeca, employment by occupational fields and by qualification needs for tourism.

INTRODUCTION

Tourism is a sector of great importance in the Croatian economy. It accounts for about 6% of all employed persons and generates about 19% of Croatia's GDP (2004-2007). To keep its position as a special destination on the global market, Croatian tourism must compete with other world destinations and it has to be appealing to travellers worldwide. This will not be possible without efficient human-resources development policies and practises that would take into account the influence of global social and economic trends and their direct effect on the tourism sector. From a long-term view, the competitive advantage of Croatian tourism on the global market cannot be based on low labour prices; instead, it should focus on the quality, diversity and uniqueness of tourism services and the travel experience. The importance that the skills and competencies of tourism workers have in achieving this goes without saying. The main problems of Croatia's tourism are similar to problems found in the tourism of EU countries and around the world: poorly paid jobs, very high demands on flexibility and mobility, high worker turnover, a high share of seasonal employment and a persistent shortage of qualified staff.

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The paper is divided into three parts. The first part analyses Croatia's tourism sector in relation to the EU with regard to the effects of tourism in encouraging employment. The second part demonstrates how employment in hotel and restaurant trade, the qualification pattern of employees by level of education, the age structure of employees and the duration of employment in Croatia lag considerably behind the EU's leading tourism countries. However, when comparing changes on the labour market in tourism in Croatia relative to trends in the qualification and skills of tourism workers in countries such as Greece, Spain, Germany and France (the third part of the paper), a similarity can be observed in the general job requirements that employees are required to fulfil, in particular with regard to the qualification level of the workforce.

1. IMPACT OF THE TOURISM SECTOR ON EMPLOYMENT IN CROATIA IN COMPARISON WITH EU TRENDS

In most countries, tourism is considered a sector that contributes to increasing aggregate domestic wealth and creating new jobs, in particular where traditional economic activities are in decline. Tourism is expected to considerably help to increase a country's GDP and its total employment, while reducing unemployment, in particular, at the regional level. In today's world, tourism has made its mark as the number-one industry in many countries and as the fastest growing economic sector when it comes to generating foreign currency earnings and creating new jobs. According to the 2006 data of the WTO, tourism and related industries account for 8.3% of global employment, 9.3% of foreign investment, 12% of exports, and 3.6% of world GDP (Vujic *et al.* 2007, 107).

Tourism is especially important for the European economy. Tourism in Europe continues to be an internal phenomenon, considering that about 87% of tourists visiting the EU are, in fact, tourists from European countries. Most travels are related to leisure, while only 20% are business travels. Trends in Europe's tourism indicate that tourist arrivals will double in the next 25 years and will be related to travelling within Europe. This means that, by the end of 2020, the annual number of tourists crossing European borders and travelling within Europe could amount to more than 720 million (WTO, 2001). At the same time, the number of senior tourists is expected to increase considerably, with the fastest growing segment of tourism being cultural and historical tourism (natural and cultural heritage), and the main driving forces of future EU tourism will be liberalisation, the internal market and the euro (Jonckers 2005, 8).

According to data from the EC DG Enterprise and Industry, tourism generates about 4% GDP of the EU; with about two million companies, it provides employment for about 4% of the total workforce (meaning 8 million jobs). When other sectors are included in the calculation, it is estimated that tourism contributes to the EU GDP with about 11% and provides employment for more than 12% of all employed persons (24 million jobs) (Mushtaq and Gregory 2007, 8).

Tourism vigorously helps towards achieving the goals of the Lisbon strategy that refer to boosting employment. Tourism is a powerful engine for creating jobs in other sectors of the EU's economy: the number of people employed in the HORECA

sector is growing at a rate faster than the rate of employment of the entire workforce in EU countries. Employment in HORECA contributes to an increase in the employment of young people, in particular. The 15-24 age group in HORECA is twice as large (22.4%) than in all other sectors of the economy (10.3%) (European Commission 2007, 3). The share of temporary employment is significantly higher in the HORECA sector in comparison with both the overall EU economy and the entire service sector. Some of the factors influencing this higher portion of temporary employment are the seasonal character of employment in tourism, as well as a high turnover of workers – in particular, those belonging to younger age groups – because of low wages, unsatisfactory working conditions and limitations to career development. Compared with the EU25 and leading tourism countries around the world, Croatia is experiencing the same trend in employing young people up to the age of 24.

2. TOURISM IN CROATIA: ITS EFFECT ON THE LABOUR MARKET

Tourism is becoming an increasingly important sector of the Croatian economy. Either directly or indirectly, it contributes to a significant extent to increasing the country's gross domestic product and it affects the growth and development of other industries. The outcome of analysing the tourism sector's development over the past decade leads to the conclusion that Croatian tourism is showing good results in the form of a strong growth tourism-generated revenue, a decline in unit cost of labour, and an increase of work productivity, employment and the GVA in the Hotel and Restaurant Sector. (Vizek 2008, 51).

The Hotel and Restaurant Sector makes a significant contribution towards increasing the gross value-added (GVA) of the Croatian tourism sector in total GDP. The share of the H Sector in total GVA has grown from 3.2 in 1997 to 3.8 in 2006. This sector recorded its highest GVA growth rate and, in turn, its greatest contribution to GDP growth in the years 2000 and 2003, when its real GVA growth rates amounted to 15.7% and 10.2%, respectively. In the same period, the average real GVA growth in the H Sector amounted to 5.3%, which is by 1.3 percentage points higher than the average growth rate of total GVA (Vizek 2008, 54).

In addition to the Hotel and Restaurant Sector generating a high real growth rate of GVA, it also generates a fairly high growth on employment. In the 1998-2006 period, the number of persons employed with legal entities and in trades (the H Sector) cumulatively grew by 11.5%, while total employment in the Croatian economy grew by only 6% in the same period, meaning that this sector has realised an above-average growth rate of employment (Vizek 2008, 55).

The tourism sector also contributes to the growth of employment at the regional level. The EU regions that have recorded a high rate of "tourism intensity" (measured in the number of tourist overnights/resident, or the number of beds/1000 residents) have also observed a trend of lower unemployment rates relative to unemployment rates at national levels. A similar trend has been noted in Croatia's tourism regions as well.

2.1. Employment in Tourism (Hotels and Restaurants)

Tourism traffic trends in Croatia affect the number of persons employed in the Hotel and Restaurant Sector. In the 2002-2006 period, the number of employed persons ranged below 90 thousand (Table 1).

Table 1: Employment in Tourism sector, Croatia, 2002-2006, in 000

Years	Employment		Share of employed in the Hotels in restaurants in total employment
	Hotels and restaurants	Total employment	
2002	87	1,521	5.72
2003	83	1,538	5.40
2004	87	1,583	5.50
2005	84	1,566	5.36
2006	82	1,548	5.43

Source: Eurostat, CBS

A comparison of employment trends in Croatia by economic activity in 2006 with trends in EU member states (Table 2) reveals a high share of women (44.8%) in total employment (EU27: 44.5%). In the Hotel and Restaurant Sector in 2006, Croatia shows an employment trend similar to that in the EU: a high share of women (51.0% of total employment).

Table 2: Total employment by economic activity, 2006, in thousands

	All economic activities *		Hotels and Restaurants*		Other tourist accommodation sector*	
	Persons employed	Share of Women (%)	Persons employed	Share of Women (%)	Persons employed	Share of Women (%)
EU 27	213,649	44.5	8965	55.7	2180	61.6
BE	4,216	44.1	138	50.3	:	:
BG	3,139	46.9	158	62.1	36	66.0
CZ	4,826	43.3	189	55.3	46	56.6
DK	2,792	46.7	77	55.2	:	:
DE	37,267	45.7	1371	60.1	367	71.7
EE	650	50.3	26	75.5	8	:
IE	2,017	42.4	116	57.2	:	:
EL	4,453	38.8	301	43.9	71	51.6
ES	19,693	40.6	1424	54.3	325	60.0
FR	24,743	46.3	891	49.3	249	54.3
IT	23,187	39.3	1163	49.0	239	54.2
CY	356	34.5	26	54.5	:	:
LV	1,072	50.0	34	94.9	:	:
LT	1,052	49.6	38	82.7	:	:
HU	3,934	45.5	164	57.5	36	55.2
MT	152	31.5	11	28.2	6	26.8
NL	8,241	44.9	335	52.2	73	55.8
AT	3,917	45.1	242	65.0	78	70.1
PL	14,459	44.7	266	67.9	75	68.9
PT	5,181	46.0	277	62.4	52	60.1
RO	9,449	46.0	145	66.0	36	64.1
SI	969	46.2	38	67.4	:	:
SK	2,295	43.8	103	64.4	25	72.3
FI	2,461	48.4	76	71.6	14	64.9
SE	4,426	47.3	134	52.7	36	63.6
UK	28,253	46.6	1221	56.0	:	:
HR	1,548	44.8	84	51.9	35	59.0
CH	4,051	45.4	160	59.1	49	59.6
NO	2,346	47.2	69	63.5	25	69.4

Source: Eurostat, LFS

* Other tourist accommodation sector EU-27 for countries BE, DK, IE, CY, LV, SI, UK are estimate. ":-": data not available

The employment pattern in hotels and restaurants in the Hotel and Restaurant Sector – H55, H55.1 and H55.2 – by level of education in the 2005-2006 period (Table 3) indicates a high percentage of employed persons with secondary education qualifications, and a low share, with higher education qualifications. Compared to its major EU rivals such as France, Spain, Cyprus, Malta and Greece, Croatia lags considerably behind with regard to the education level of persons employed in hotels and restaurants.

Table 3: Employed persons in the hotel and restaurant sector by level of education attained, 2006, in % - aged 15 years and over

	h_55 Hotels and restaurants					h551_h552 Hotels; camping sites, other provision of short-stay accommodation				
	Primary and lower secondary education - levels 1-2	Upper secondary and post-secondary non-tertiary education - levels 3-4	Tertiary education - levels 5-6	All ISCED levels (ISCED 1997)	Share of employed persons in all NACE branches (%)	Primary and lower secondary education - levels 1-2	Upper secondary and post-secondary non-tertiary education - levels 3-4	Tertiary education - levels 5-6	All ISCED levels (ISCED 1997)	Share of employed persons in all NACE branches (%)
EU 25	:	:	:	:	:	:	:	:	:	:
GR	43.0	48.7	8.3	100.0	7.0	38.9	47.2	13.9	100.0	1.7
ES	57.7	27.1	15.2	100.0	8.0	57.2	22.2	20.6	100.0	1.8
FR	35.7	50.4	13.9	100.0	3.7	30.1	45.8	24.1	100.0	1.0
IT	52.5	43.7	3.8	100.0	5.2	46.4	45.2	8.4	100.0	1.1
CY	36.0	44.0	20.0	100.0	7.4	:	:	:	:	:
MT	72.7	27.3	:	100.0	7.5	100.0	:	:	100.0	3.4
AT	31.3	62.1	6.6	100.0	6.5	32.1	61.5	6.4	100.0	2.1
PT	84.1	15.9	:	100.0	5.3	81.6	18.4	:	:	1.0
HR	10.7	83.3	6.0	100.0	5.3	17.1	74.3	8.6	100.0	2.2

Source: Eurostat

There are many reasons for the disadvantageous education level in Croatia relative to leading tourist countries (rivals). Studies on human resources in tourism and analyses of employment trends in Croatia's hospitality and tourism industry point to the following problems (Micic, 2006):

- **Temporary employment arrangements**
 - Over 80% of all work contracts represent temporary employment arrangements, even though they relate to jobs that are continuously needed (waiters, cooks, room attendants, etc.)
 - This situation fails to create favourable preconditions to enhancing service quality.

- **Employment through temporary and occasional employment agencies**
 - In recent times, this has become a very frequent form of employment, and it is used more often than the services of the Employment Office.
 - It has a direct impact on job insecurity.
- **Low wages and “black” labour**
 - Wages are in average 13-16% lower than average wages in Croatia.
 - In terms of “black” labour, this sector is ranked third behind construction and commerce.
 - “Black” labour creates unfair competition.
 - Inspection supervision needs to be intensified, and fines, increased.
 - Because of the inertia of minor-offence courts, a great number of charges made by inspectors fall under the statute of limitations or are sentenced with minimum fines.
- **Lack of job standards**
 - Some foreign hotel owners in Croatia are setting standards against which workers are not able to do a job properly in the time set out.
 - The Union has submitted to the Ministry of the Sea, Tourism, Transport and Development an initiative for developing national standards.
- **Minimum wages undefined**
 - In the national Hospitality Collective Agreement, it is necessary to establish minimum wages for all jobs.
- **Insufficient public and private sector collaboration**
 - Only a small number of employers grant scholarship to students attending secondary and higher education schools of hospitality and tourism.
- **Insufficient professional training**
 - In-service training is neglected both as a continuous quality-improvement program and as a lifelong learning program.
 - Providing professional training is in the mutual interest of employer and employee. It creates a partnership relation: the employee gains job security, while the employer gains skilled staff for continuous work.

3. NEW OCCUPATIONAL PROFILES FOR WORK IN TOURISM

The trends affecting a tourism product and services are also reflected in the work of persons employed in tourism. A comparison of the results of studies conducted in the tourism sectors of leading tourism countries such as France, Spain, Greece and Germany reveals very similar disadvantages when dealing with the characteristics of the workforce with regard to new knowledge and skills and the professional ability of workers in tourism. At the same, practise in these countries indicates a distinctive need for staff to provide diverse services, a need that impacts on change expressed as a need for entirely new occupations and a level of skilled labour.

3.1. Trends in the German Tourism

A research study in the field of attaining work qualifications in Germany, conducted as part of the project *Trend qualifications as a basis for early identification of qualification development* (Abicht et al., 2002), funded by the Federal Ministry of Education and Research of Germany. Trend analysis has shown that training processes are adapted to change in job profiles on the labour market and to the requirements of job procedures. The entire process develops is directly or indirectly dependant upon different interrelated variables changes (change in technology, the organisation of business, the political and economic environment under the impact of globalisation, as well as change in the needs of individuals and society). Development of the Internet, in particular in recent years, has brought about huge change in demand for new skills, influencing the constant presence of the need to provide training not only to people who already have jobs, but also to those who are entering the labour market for the first time.

The qualitative part of the research study on the early identification of skills and qualification development in tourism was based on a hypothesis stating that the required demands for training for new qualifications named “trend qualification” are described by demands that are just developing or have not yet been sufficiently developed in practise but which can indicate emerging trends in demand (course of movement). Various studies regarding the courses and the factors that determine qualifications (work ability) demonstrate that the development of the tourism sector as one of the service sectors is largely shaped under the influence of sociological trends such as: change in leisure behaviour, increased individualisation in society, demographic change and change related to health awareness. These trends are also reflected in change in the structure of products and services in tourism, as well as in change in the profile of qualification types for people working in tourism. At the same time, they influence change in requirements for professional improvement and training for persons already employed in the tourism sector. Tourism development is steadily accelerating and new types of tourists are constantly emerging. This, together with the rapid development of new technologies, is generating a growing demand on an individualised basis and is setting entirely new demands before tourism employees.

According to the relevant sources available, the tourism sector in Germany lacks properly schooled and trained staff for jobs with mid-level responsibility in organisations, with specific knowledge and skills for each individual segment of the offerings (for example, travel booking, designing vacations, organising business travel, travel support, guided tours). The most commonly listed weaknesses in the tourism sector are a lack of basic knowledge and skills regarding tourism products and services, target areas, marketing, selling, customer-orientation, electronic processing of booking data, booking and booking confirmation via the Internet. Employees also lack interpersonal skills, especially in jobs involving advising and direct contacts with customers.

3.2. Factors shaping professional occupation profiles in the tourism sector of Spain and Greece

Results from the FAME research project conducted in Greece and Spain have shown that the tourism sector is one of the most important sectors of the economies of these countries. An analysis of trends in a number of sectors of economic activities have shown that tourism is a major sector in the economies of both countries; its share in employment at the national level is high, and it provides huge potential for growth and the creation of value added. The challenges that face the tourism sector in both countries are very similar: wages in hotels and restaurants are quite below the national average; labour turnover is high; seasonal oscillations are a very important characteristic of the tourism offering.

In the region to which both these countries belong, the tourism sector has particularly distinctive demands on the functional flexibility and mobility of staff. Demands on flexibility are evident through the mounting pressure on the staff to possess a number of different types of skills in combination with different qualifications or in combination with specific skills that are generally related to different qualifications. This has influenced the development and appearance of new, hybrid forms of occupations, in which one individual does a variety of jobs for which special training, skills and specific knowledge are required. Such hybrid forms can especially be found in the smallest and small enterprises that have an inadequate number of employees. As a result, demand is developing based on ad hoc vocation substitution. Another form that also requires employees to possess multiple skills has been observed at the individual level due to horizontal mobility in the sector (evident as spatial mobility due to a change in the location of employment and/or mobility within a vocation) and due to high turnover of personnel. This in particular refers to temporary employment workers who work in different professions and temporary jobs, which leads to the fact that different practical and working experience is not formally recognised. Skills and qualifications are normally attained from the VET system; however, in addition to the usual skills needed for tourism jobs in these countries, there is also a growing demand for IT professionals, managers, and doctors and nurses in spa tourism, for example. On the other hand, unacceptable working conditions and the lack of opportunities for professional development on the job result in a high loss of staff and cause professionals to leave the sector. Hence, demands on personal flexibility come in direct conflict with demands on skills flexibility.

In neither of the countries are the systems of initial vocational education adjusted to the demands on the professional skills in this sector. Because of this, continued training in combination with practical experience acquired through work and on-the-job training are very effective in facilitating skills development. Despite this, most employers nevertheless fail to invest in the permanent improvement and training of their staff, no matter how important this is to the promotion, mobility and flexibility of employees. Employers refer work experience through formal education, in particular, in small firms that have neither a way of training employees on the job nor the funds to invest in the professional improvement of their employees.

3.3. Skill needs and competencies in the French hotel industry

According to the latest available Eurostat data for 2006, the sector “55 - Hotels and Restaurants” accounts for about 4% of all employed persons (or 909 thousand). Restaurants and cafes account for most persons employed in the tourism about 48%, while hotels and other forms of accommodation account for about 22% (Mériot 2005, 32). The number of hotel and hospitality jobs is generally underestimated because of the large number of self-service facilities (canteens) operated by private and special public operators that account for about 30% of all employees. In canteens, France is the leading country in Europe. The hotel and catering trade in France is characterised by high turnover and a predominantly young but insufficiently trained and skilled workforce.

One of the major activities in the hotel industry is maintenance, and it is carried out either by persons employed for this job or by external specialised companies. Luxury hotels also employ porters, door attendants and bellhops to take guests to their rooms. Although some members of this staff can be promoted to the position of work supervisor or chief, higher and top positions in the job hierarchy are reserved from people holding specialised diplomas in professional areas such as business, accounting, management, company strategy, etc. Career promotions for the operative staff are often limited, especially for those working in jobs that fall under the front desk. Only major hotels and gourmet restaurants recruit personnel with a good level of general education and training, such as waiters or other serving-related jobs, insisting that they are “educated but not skilled” for the jobs they do (Mériot 2005, 34).

Apart from managerial positions, most jobs involve serving food (fast-food preparation and waiters), cooking, and housekeeping in hotels. The three main jobs in France’s hotel and catering industry are the jobs of cook, waiter and room attendant. Staff training and professional improvement in France, which is foremost based on luxury hotels, began in a large range of areas basically for the purpose of achieving the prestige and independence of the hotel and catering trade. Over the past 30 years, this professional improvement system has been restructured in several basic fields: cooking, table service, and hotel management. This level has improved, in recent times, confronted with demands in the management of hotel chains and catering establishments to provide services that are standardised but relatively differentiated in a range that broadens parallel with the range of clients. Education in the culinary art continues to prevail as an artistic ideal. There are two initial types of vocational improvement that begin around the age of 15 years (CAP, *certificat d’aptitudes professionnelles*/vocational aptitude certificate and BEP, *brevet d’études professionnelles*/vocational studies certificate) (Mériot 2005, 36).

CONCLUSIONS

Tourism is a sector of great importance in the Croatian economy. To keep its position as a special destination on the global market, Croatian tourism must compete with other world destinations and it has to be appealing to travellers worldwide. This will not be possible without efficient human-resources development policies in tourism. From a long-term view, the competitive advantage of Croatian tourism on the global market cannot be based on low labour prices; instead, it should focus on the quality, diversity and uniqueness of tourism services and the travel experience. The main problems of Croatia's tourism are similar to problems found in the tourism of EU countries and around the world: poorly paid jobs, a very high demand on flexibility and mobility, high worker turnover, a high share of seasonal employment and a persistent shortage of qualified staff.

Employment in the Horeca Sector, the qualification pattern of employees by level of education, the age pattern of employees and the duration of employment (full time/temporary) in Croatia lag considerably behind the EU's leading tourism countries. However, when comparing changes on the labour market in tourism in Croatia relative to trends in the qualification and skills of tourism workers in countries such as Greece, Spain, Germany and France, similarities can be observed in the general job requirements that employees are required to fulfil, in particular with regard to the qualification level of the workforce.

A comparison of the results of studies conducted in the tourism sectors of leading tourism countries such as France, Spain, Greece and Germany reveals very similar disadvantages when dealing with the characteristics of the workforce in the light of new knowledge and skills and the professional ability of workers in tourism. At the same, practise in these countries indicates a distinctive need for personnel to provide diverse services, a need that impacts on change expressed as a need for entirely new occupations and, in particular, a new level of skilled labour.

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