

The Economy¹



Gross Value Added (GVA)² in 2019

Total **Tourism** GVA is: **£4,716m**
up 18% from 2009

Forecast GVA in 2029: **£5,510m**
up 17% from 2019



Productivity (GVA per job) in 2019

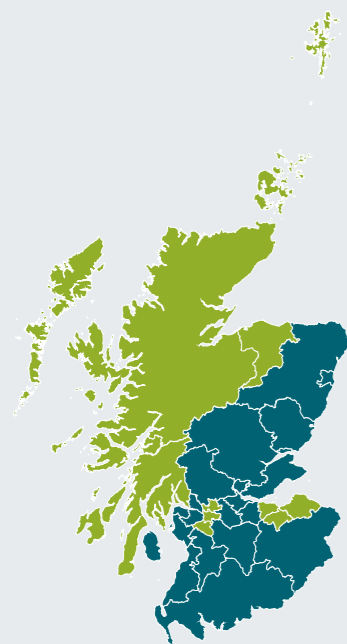
Tourism productivity is: **£22,841**
up 14% from 2009

Productivity across **all sectors** is: **£50,368**
up 13% from 2009

Forecast productivity in 2029: **£25,073**
up 10% from 2019

Forecast productivity in 2029: **£57,747**
up 15% from 2019

Employment



Top Employing Regions 2019³

Edinburgh, East and Midlothian
35,800 jobs

Glasgow
32,500 jobs

Highlands and Islands
28,000 jobs

Scotland Total⁴ Jobs in 2019
206,500 jobs
👤 2029: up by 6% to 219,800

Gender split⁵

263,700 Female  247,400 Male 

Ethnicity

32,800 Ethnic Minority  478,100 White 

Brexit 2017–18

EU Nationals working in Tourism

14.6%
Percentage of EU Nationals working in **Tourism** in Scotland



Percentage of the regions **total sector workforce** made up of EU Nationals:

Eastern Scotland:

15.5%

South Western Scotland:

12.7%

North Eastern Scotland:

27.4%

Highlands and Islands:

5.4%

Future Job Openings

From 2019 to 2029 there will be a requirement for:



¹ Forecasts by Oxford Economics (unless otherwise stated).
² GVA is the measure of the value of goods and services produced within the economy. GVA in constant 2016 prices.
³ Measured by total number of jobs.

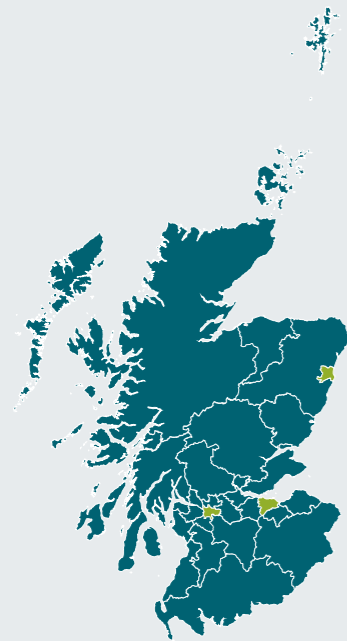
⁴ Please note that 2019 is a forecast figure.
⁵ Source: Annual Population Survey (APS) April 2018–March 2019. This dataset is different to Oxford Economics and may not sum to reflect the Scotland total above. Due to data availability the sectoral definitions vary from those we have used elsewhere in this

infographic. E.g. for Engineering we have used 'Manufacturing' and therefore figures may not sum to Scotland's total.
⁶ Expansion demand is the measure of an increase/decrease in jobs, as a result of economic growth or contraction; replacement demand is the number of job openings generated through labour market churn

(i.e. those who retire, move away, or change jobs). N.B. Some figures may not sum due to rounding.

Vacancies^{7,8}

Vacancies 2018



City of Edinburgh

6,565 vacancies
accounting for 30%

Glasgow City

4,561 vacancies
accounting for 21%

Aberdeen City

1,697 vacancies
accounting for 8%



Chefs

3,150 vacancies
accounting for 14%



Kitchen and Catering Assistants

2,888 vacancies
accounting for 13%



Waiters and Waitresses

1,654 vacancies
accounting for 8%

Total vacancies in
Tourism:
21,841 vacancies



Salary 2018

Median real-time advertised
salary in **Tourism:**
£19,000



Gender Pay-Gap⁹

3.0%

Scotland: 5.7%

Skills Shortage Vacancies and Gaps¹⁰

Skills Shortage Vacancies¹¹

Density of Skills Shortage
vacancies in **Tourism:**
20%



Scotland: 24%

Skills Gaps¹²

Density of Skills Gaps
in **Tourism:**
7%



Scotland: 5%

Sectoral Insight¹³



Raise the **attractiveness** of the sector as a career of choice.



Improve **management, leadership** and **enterprise skills** across the sector.



Support the **development of professional** and **digital skills** for all in the sector.



Address the **shortage in chefs** across the sector.



Ensure all staff at all levels understand and are able to respond to **visitor needs** and **expectations**.

⁷ Source: Burning Glass Technologies Jan 2018 - Dec 2018 (based on calendar year). <http://www.burning-glass.com>.

⁸ Burning Glass technologies gather insight on vacancies from online job postings and websites.

⁹ Source: ONS 2018, based on the Annual Survey of Hours and

Earnings based on full-time employee jobs.

¹⁰ Due to the way the Employer Skills Survey collects and reports data, the sectoral definitions vary from those we have used elsewhere in this infographic. To define the Tourism sector, we have used 'Hotels and Restaurants'.

¹¹ Base: All establishments with vacancies (only 2017 shown).

Skill-shortage vacancies as a proportion of all vacancies. This may be due to a lack of skills, qualifications or experience amongst applicants.

¹² Base: All establishments (only 2017 shown). Skills gaps: the proportion of the workforce lacking full proficiency.

¹³ Insight provided by the Key Sector Managers who work closely with industry experts and employers.