Employment in the Social Tourism Sector in Europe

Study carried out under the auspices of and

In the framework of the Grant Agreement VS/2007/0553 co-financed by the European Commission

February 2009

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Introduction:

Social tourism constitutes a relatively important segment within the tourism industry as a whole. It is widely assumed that employment in the social tourism sector can be considered as a positive example when compared to other tourism sectors. One reason for this is the geographical dispersion of social tourism facilities, which are often established in areas where the season can be staggered for a longer period, which helps reduce the negative impact of seasonality. The direct consequence is greater stability in terms of employment. Also, the status of workers is likely to be more regulated here than in other types of tourism, as it is often based on collective agreements regulating working conditions and offering training programs to help professionalize and improve service quality of social tourism assets.

However, if the above is valid for some countries, there is no clear evidence of the role of the sector within the tourism industry as such. It is also difficult to estimate the exact market share of the sector, as in most countries no particular attention is given to ‘social tourism’ as such within national statistics. While in a few countries the social tourism sector is government backed and strongly developed with public information available, others have almost no information on hand.

For these reasons, EFFAT and BITS have decided to launch a study on employment in the social tourism sector on a European basis, with the aim to obtain comparable figures throughout the whole European community. The core objective of the study is to identify the importance, the type and the conditions of employment in the social tourism sector.

The research has been carried out using two different approaches: firstly, a quantitative survey addressing social tourism organisations and accommodation facilities; and secondly, in-depth interviews with key actors in some EU countries.

The report provides a short overview of the history of social tourism in Europe and tackles diverging definitions. Moreover it outlines publications other than the EFFAT and BITS literature dealing with employment issues in social tourism. After introducing the methodology for the research, the results of the different surveys are presented. In the chapter Facts and Figures, the major outcomes of the quantitative survey are highlighted. The following chapter Practise, Trends and Opinions addresses an overview of the open questions of the survey and the qualitative research.
**State of the Art:**

**Short History**

Social tourism developed in the 19th century. Not being a commercial product per se, social tourism expanded strongly in countries with a developed social system, in particular in France, Belgium, Germany, Italy and Eastern European countries. Organized by trade unions and other social structures it aims to provide access to holidays for all.

In its early manifestations, ‘social tourism’ originated in private initiatives. In the second half of the 19th century, the middle class promoted the practice of sports (e.g.: British Alpine Club 1857), and subsequently developed youth movements and specific facilities such as youth hostels (e.g.: Deutsches Jugendherbergwerk in 1900). In France and Switzerland, Christian movements organised the first holiday camps for disadvantaged children.

At the time, public authorities did not display much concern for social tourism. It is only in the late 1930s that social tourism gained more official recognition with the appearance of paid holidays, which were introduced throughout Europe at different times. The major development of social tourism, however, was to be witnessed only after World War II, when the Universal Declaration of Human Rights in 1948 was the first to demand the right to ‘holidays for all’ on an international scale. Its article 24 stipulates that “Everyone has the right to rest and leisure including reasonable limitation of working hours and periodic holidays with pay.”

The Declaration constituted the key element for the growing consciousness that holidays are part of universal rights. Public authorities started subsidizing social tourism, which had until then been controlled by associations, works councils, popular educational movements and collectives (CHAUVIN).

From the 1950s onwards, international organizations promoting social tourism were set up in addition to national initiatives (e.g. the Federation of Popular Travel Organisations (IFPTO) 1950; the Federation of International Youth Travel Organisations (FIYTO) 1950). The creation of these international bodies was marked by the publication of different declarations and the organization of conferences on social tourism. At the Brussels international congress of social tourism in 1963, national and international social tourism organizations together with the representatives of public authorities decided to create the BITS (Bureau International du Tourisme Social), an international body aiming at common reflection, coordination and action.

During the 1960s, the Eastern countries introduced paid holidays as well, and in 1973 created the 'International Committee for Social Tourism' seeking to promote social tourism in their countries.
Over the past 50 years, several governments have integrated ‘social tourism’ into their social welfare policies, resulting in state-backed schemes to provide and promote affordable holidays and recreation. France, Belgium, Hungary, Spain, Italy, Portugal and Germany seem to dispose of the most developed systems to make tourism accessible to all.

Definitions and Understanding of the Term ‘Social Tourism’

The term ‘social tourism’ is not given the same meaning in the various European countries. The term ‘social tourism’ is used mainly in France, Belgium and Italy. The adjective ‘social’ has indeed different connotations in English-speaking countries. There ‘social tourism’ is often associated with ‘ecotourism’ or ‘volunteer tourism’. All countries, however, have organizations offering the possibility to enjoy holidays and other recreational activities to all social classes.

One reason for this difference in understanding is the fact that even the institutions and organisations working in the field themselves use a wide range of terms describing the demand-group segments. The terminological confusion blurs a comprehensive apprehension of social tourism. Furthermore, due to the differences in organisation of the sector, social tourism is not always recognised as such in different countries. A survey conducted among social workers in 2006 in the UK by the Family Holiday Association showed that 68% of 273 respondents had never heard the term ‘social tourism’; and a large majority was not familiar with the continental system of holiday vouchers (www.fhaonline.org.uk).

It is also worthwhile to place the development of social tourism within the context of changing attitudes towards tourism as a whole. Arthur Haulot (first Secretary General of the BITS) deliberately adopted the term ‘social’ rather than ‘popular tourism’ which, he argued, carried connotations of ‘cheap’ and ‘second-rate’. By the present term he sought to convey something of the therapeutic nature of a phenomenon that was formerly considered to be a frivolous privilege of the wealthy (Haulot, 1982).

Nowadays, publications on the phenomenon ‘social tourism’ come mainly from national and international social tourism organizations. Until recently academic research has not focused closely on this type of tourism. Relevant literature does exist, but is hard to locate for the simple reason that it rarely uses the term ‘social tourism’, but rather speaks of senior / youth tourism, company tourism, etc. The academic approach focuses to a large extent on the demand side, while the official organizations approach social tourism through the supply side.

The existing literature attempts to provide definitions for ‘social tourism’. In 1957, Hunziker (Revue de tourisme n°2, p52 “Cio che rimarrebbe ancora da dire sul turismo sociale”) defines
social tourism as a ‘particular type of tourism characterised by the participation of people with a low income, providing them with special services, recognised as such’ (Aguilar). For Arthur Haulot (1982), the term ‘social tourism’ means ‘the totality of relations and phenomena deriving from the participation of those social groups with modest incomes – participation which is made possible or facilitated by measures of a well-defined social character’.

In 1995, Couviera underlines the complexity of the relations within social tourism. He suggests that social tourism should be understood as a type of tourism whose main or exclusive characteristic should be the non-commercial goal. But he also includes the need of socio-cultural benefit for the tourists within a global approach of the three key actors: the tour operator, the tourist or client and the tourist product. He insists that the tour operators may not have a commercial goal and need to be recognised by the public authorities.

According to article 3 of the BITS statutes, social tourism is “all of the relationships and phenomena resulting from participation in tourism, and in particular from the participation of social strata with modest incomes. This participation is made possible, or facilitated, by measures of a well-defined social nature. To carry out these activities, BITS works on the basis of the principles defined and adopted in the Montreal Declaration of September 1996”. The Tourism Unit of the European Commission’s Enterprise and Industry DG encourages the exchange of useful practices in social tourism through a series of conferences and workshops organised since 2006. In the document ‘Social tourism in Europe’ of the European Economic and Social Committee, article 2.2.2 stipulates:

Consequently – and without any intention of giving a precise definition of social tourism, but starting from the premise that tourism is a general right which we should try to make accessible to everyone – we can say that an activity constitutes social tourism whenever three conditions are met:

− Real-life circumstances are such that it is totally or partially impossible to fully exercise the right to tourism. This may be due to economic conditions, physical or mental disability, personal or family isolation, reduced mobility, geographical difficulties, and a wide variety of causes which ultimately constitute a real obstacle.

− Someone – be it a public or private institution, a company, a trade union, or simply an organised group of people – decides to take action to overcome or reduce the obstacle which prevents a person from exercising their right to tourism.

− This action is effective and actually helps a group of people to participate in tourism in a manner which respects the values of sustainability, accessibility and solidarity.
Despite the diverging definitions, social tourism always implies some form of financial assistance for those who could not normally enjoy the benefits of tourism experience during holidays.

In recent years however the image of social tourism has undergone a change as it has become accessible to a wider public. The original goal of social tourism, i.e. the aim to provide holidays for the disadvantaged (whether socially, mentally, physically or health wise, etc.), no longer fits with present-day reality. Various ‘social tourism’ supply structures are today used to a large extent by a wider range of public, which does not have the same needs as the original target group: youth hostels, for instance, are increasingly becoming accessible to all tourists. This new understanding of social tourism influences the organisation of the sector and eventually the employment figures.
Research Methodology:

As aforementioned, no statistical data concerning the sector are available at national levels. Such figures, if available, are collected by the numerous organisations themselves for their own purposes. The challenge was therefore to contact as many social tourism organisations as possible within the different EU countries, to consolidate their figures, and to compare them. Also, taking into account the wide diversity of social tourism systems, it was felt that a more in-depth approach was needed. To achieve that goal, a double approach was chosen:

Quantitative Survey of Social Tourism Organisations and Facilities

For the collection of comparable data on the employment issues, a questionnaire including two sections has been developed. The first section (Annex 1a) addressed organisations and federations, trade unions, etc. responsible for social tourism activities. After some general information questions, this part included factual questions about figures relating to employment within their organizations (number of jobs, types of employment contracts, seasonality, recruiting methods, etc.). Furthermore, respondents were asked to express their opinions on the future development of the social tourism sector.

The second section (Annex 1b) addressed the accommodation facilities of these organizations. Detailed questions referred to employment figures and activities, as well as to issues of management and demand. Some issues such as direct or subcontracted employment, seasonal employment, and specific or multi-function jobs were tackled in order to achieve a better understanding of the specificities of the various forms of social tourism accommodation.

The questionnaire was translated into 5 languages (German, French, English, Italian and Spanish).

EFFAT and BITS sent the questionnaire to all its member organizations in Europe (excluding Switzerland). In order to obtain a high respondent rate, the questionnaire was accompanied by a letter signed by the two organizations, insisting on the usefulness of such a study. It was the responsibility of each member organisation, after filling in the A section of the questionnaire, to dispatch the B section to the members of their own sub-divisions.
The quantitative survey was first e-mailed in early June (04/06/08) to all EFFAT and BITS members, which represented approximately 120 organisations linked with social tourism. The surveys were attached in pdf format but could also be accessed via a web-survey link. In late June (26/06) a first reminder was sent out and the deadline extended till 12\textsuperscript{th} September. Considering the low rate of response, a second reminder (with another extension of the deadline) was sent in early September, and non-respondents were given a phone call by a trainee. The final deadline was extended until 31\textsuperscript{st} October.

**Qualitative Interviews with Key Actors**

This consultation aimed to gain a better understanding of employment-related conditions and issues within the social tourism sector, notably in terms of the positioning of the sector at a national and international level. Furthermore, it attempted to study the development of the social tourism sector in each particular country. It also sought to better understand recruitment procedures and perception of the sector as a market segment. Another discussion point focused on the demand side. The interview, finally, also aimed to highlight the development of the sectors over the last 10 years.

The contractor selected seven countries for an in-depth interview with key stakeholders. Countries were chosen according to geographical criteria, but also to compensate the lack of information on some countries. As announced in the study proposal, ULB contacted Atlas partners in UK, Romania, Poland and Hungary and provided them with detailed guidelines for the interviews. The ULB research team themselves conducted interviews with Belgian, Spanish and Austrian stakeholders. The partners were asked to select the most appropriate person to be interviewed. The researchers conducted interviews in the local language.

Interviews were held between July and October.

**Facts and Figures**

As mentioned above, about 120 questionnaires were sent out to member organisations of BITS and EFFAT. It may therefore be considered that this figure corresponds to all potential respondents of the ‘Section A’ questionnaire. The yield of 36 responses may consequently be regarded as a high response rate for this kind of survey.

The situation concerning the B-section is more problematic: it was not possible to calculate the response rate, as it was unknown to the authors how many B-questionnaires were eventually forwarded by the social tourism organisations. In some cases, it appeared that

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1 As BITS and EFFAT have members that are not only active in the Social Tourism sector, such as education institutions or public bodies, it is difficult to determine the exact number of organizations concerned. The figure of 120 has been advanced by BITS and EFFAT.
the questionnaire was never forwarded at all, whereas in other cases, the accommodation facilities failed to reply. Therefore, it is difficult to advance valid response rate figures. The results can consequently only constitute indications of tendencies, rather than project a reliable picture of reality. On the whole, 58 accommodation facilities from four European countries replied.

Several social tourism structures replied after the deadline of the survey by sending only their annual reports. For statistical reasons, these could not be incorporated as such within the results, but they were taken into account whenever possible in order to highlight or emphasise certain issues concerning employment figures.

![Figure 1 Response rate*](image)

The graph shows an increase in response rate after the second reminder. Subsequent to the written reminder, two research assistants reminded respondents by phone, which improved the respondent rate.

As aforementioned, the questionnaires could be submitted in two different options:
- By hand and returned by mail, fax or post (in all 5 languages)
- Online (in all 5 languages)

| Table 1: Types of return |
A clear majority resorted to the 'manual' mode of answering to the survey.

To allow convenient reading, results are shown in percentages. It is important to insist on the relatively low number of data available and the non-response rate to the questionnaires, in particular for the B-section. Results may therefore indicate tendencies, but must not be considered as exhaustive representations of reality.

‘Section A’ results

36 organisations replied from 10 different countries. The response rate is thus around 30%, which is a good average for this type of survey. It is however to be deplored that some countries are not represented at all, even though questionnaires were sent out to all 27 member states.

![Figure 2: Country of respondents](image)

The four well-represented countries allow on one hand to voice indicative inferences for the whole of the EU, but also to point to national specificities.

Of the 36 respondents, only 4 were governmental and 4 private organisations. The majority of 19 (53%) replies belonged to the non-profit sector. Among these, 3 were trade unions or insurances etc., while the others represented welfare and health organizations or social advancement agencies. 92% of all respondents (33/36) declared not to have a commercial goal. Only 3 organisations were profit-making organisations. Respondent organisations were from very different backgrounds, such as central administrations, tourism operators,
accommodation facilities for young people, family holiday centers and villages, holiday resort for children and teenagers, campsites, flats / bungalows and hotels.

One question concerned the employment contracts for workers.

Permanent contracts unlimited in time were very widely applied (62%), while 30% were subject to time limits.

The other jobs represented volunteers (5%), student contracts (1%) and 2% of 'other contracts' including traineeships, replacements, and specific educational contracts.

The management of these contracts was centralised in more than 70% of the respondents' organisations. However the facilities of the non-profit sector (associations) more often managed the contracts themselves.

The differences between the replies from different countries made comparison difficult and therefore did not allow generalisation.
Analysing the question on employment contracts, considerable differences appeared when comparing the four major respondent countries, i.e. Germany, Italy, Belgium and France. In Belgium, as well as in Italy, the majority of contracts were permanent with only a few temporary ones. The important percentage of ‘others’ and ‘volunteers’ in Germany is, notably due, to the civil service that is compulsory for young men in this country. It appears that some respondents considered civil service workers as volunteers and vice versa. Furthermore, social tourism in Germany is partly organised by church institutions, who also work on a large scale with ‘volunteers’ or ‘others’, such as members of monastic orders.

Another characteristic in the sector is the long-term commitment of its workers. As shown in Fig. 3, a large majority of workers in the field spend years in the same organisation; whereas in the commercial sector, the employment is less often considered to constitute a long-term commitment.
One reason may be that in some countries working conditions are subject to collective agreements. Overall, two thirds of the respondents declared to be subject to such collective agreements. However, differences can be observed. In Germany, for instance, none of the respondents mentioned a collective agreement, while the majority of respondents in Belgium, France and Italy had one (5 organizations in each of the 3 countries).

The existence of collective agreements is not linked to the type of organisations.

About 75% of all jobs are permanent and the remaining 25% are seasonal. These percentages however must be regarded in the context of each country. For instance, in Germany and France, there are more seasonal workers than in the other countries. But it must be remembered that due to the lower response rate of some countries, these figures cannot be generalised.

Public subsidies for employment are widely prevalent in Belgium (in 6 of 7 cases), while the rate of subsidized employment varies from 4% to 100% elsewhere. The average rate of subsidized jobs is of 30%.

Two thirds of the respondents declared that training programs are provided for their employees, although with important differences between the respondent countries.
All four major respondent countries provided training for a high proportion of their workers. In France, 5 respondent organisations offered training programs. In Belgium, fewer training programs were provided to the workers in the sector. Training policies can be summarized in four main lines:

- Training in management, legislation and new technologies
- Training related to service quality, public and knowledge of the region
- Training related to catering: laws, cooking, and technical equipment
- Training adapted to specific issues

‘Section B’ Results

The B section respondents (58) come from four countries: Belgium (31), Germany (17), France (6) and Romania (4). Not all European countries have specific social tourism accommodation facilities, but all countries do have youth hostels, though these do not depend on social tourism organisations, such as trade unions.
The distribution of the respondent accommodation facilities is as follows:

As several replies were allowed, there are several multiple responses (in 8 cases out of 58, different types of accommodation were suggested).

No specific link was established between the type of accommodation facility and the location, apart from campsites not being in cities. The distribution is as follows: Countryside: 43%; Town: 31%; Sea: 14%; Mountains: 3,5%; Lake: 3,5%; Other: 5%

Most of the accommodation facilities (42/58 or 72%) enjoy an associative status – mainly: Accommodation for young people, Family holiday centres and villages or Holiday centres for children and teenagers. The category « others » representing 17% (10/58) of the responses generally concerns non-profit organizations, while the 5% (3/58) enjoying the status of cooperative represent 2 hotels in Romania and one holiday centre in Germany. There is also one health insurance organisation, one trade union and one joint management.

One important aspect in evaluating the size of employment is the capacity of the accommodation taken into account for the survey. The average capacity of all different types of accommodation is approximately 250 beds or pitches.

In the responses where only one type is mentioned, results per type of facility are:
The average capacity varies from one country to another. It is higher in France (average of 370 beds or pitches, mainly due to large facilities like Village Vacances + camping sites).

Thanks to these responses, it is possible to voice inferences about employment in the accommodation structures under scrutiny. It is however necessary to insist on the difficulty of drawing general conclusions not only due to the respondent rate, but also due to the fact that not all respondents answered all questions, with the consequence that the averages provided are not always based on the same number of accommodation structures, for instance, the number of employees and the number of FTEs (posts adding up to a Full-Time Equivalent). This proviso needs to be taken into account when indicating tendencies. The average number of employees per structure is 26, corresponding to an average rate of 21 FTEs.

Information on seasonality of employment and types of contracts:

In general, seasonal employment is one of the characteristics of the tourism and leisure sector.
Yet, the results of the survey show that 62% jobs are permanent and 38% seasonal jobs corresponding to 70% and 30% FTEs respectively. (It is important to note that the annual report of 2007 of Vacances Bleues, Ethic Etapes, ... in France deliver approximately the same rate of seasonal jobs (20 to 25%)).

The following table provides details of employment for the whole of the responses; the non-responses vary widely between the number of employees and the number of FTEs; consequently these figures should be taken to indicate a tendency only.

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Remark: the averages per accommodation facility have left out of account a few atypically high values which did not seem reliable.
Table 2: type of employment, average number of people and FTEs

<table>
<thead>
<tr>
<th>Employment</th>
<th>Average Number of people</th>
<th>Average Number of FTEs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent employment</td>
<td>17</td>
<td>19.3</td>
</tr>
<tr>
<td>Seasonal employment – less than 3 months</td>
<td>5.9</td>
<td>3.8</td>
</tr>
<tr>
<td>Seasonal employment –3 to 6 months</td>
<td>2.4</td>
<td>2.1</td>
</tr>
<tr>
<td>Seasonal employment – more than 6 months</td>
<td>2.3</td>
<td>1.4</td>
</tr>
</tbody>
</table>

According to type of contract:

Direct jobs can be divided into “full-time” including 17 persons, “less than full-time” corresponding to 6.5 persons and “less than half-time” covering 1.3 persons.

The distribution is more heavily dependent on the type of accommodation than on the country. Here as before, only responses specific to one type of accommodation have been included.

With regard to accommodation for youngsters, we note 4 full-time jobs; in family holiday resorts, 16 full-time jobs; in holiday resorts for children and teenagers, 14 full-time jobs. For the other types, data were insufficient; for multiple-type facilities, the numbers are higher. Observing these data, one can notice that in Romania the number of people employed and the number of full-time jobs or full-time equivalents per facility lies higher; these data must however be subject to caution, first of all because of the small number of facilities studied and on the other hand because most of these facilities are hotels.

The distribution of permanent employment according to the type of facility remains largely similar, albeit somewhat lower in family holiday resorts and family villages, and slightly higher in holiday resorts for children and teenagers. The case of hotels and campsites cannot be studied due to a lack of data in the sample.

With regard to the types of employment, the following spread can be observed:

Table 3: Type of contracts, number of people

<table>
<thead>
<tr>
<th>Type of direct employment contract</th>
<th>Number of people (average)</th>
<th>% of employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent employment contracts</td>
<td>16.2</td>
<td>52</td>
</tr>
<tr>
<td>Temporary employment contracts</td>
<td>6.4</td>
<td>21</td>
</tr>
<tr>
<td>Volunteers (unpaid)</td>
<td>0.8</td>
<td>3</td>
</tr>
<tr>
<td>Student contracts (paid)</td>
<td>4.1</td>
<td>13</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>11</td>
</tr>
</tbody>
</table>

Volunteers are to be found mainly in the German facilities. In Belgium, the most prevalent form of employment takes the form of permanent contracts and student contracts; whereas in France, there are twice as many temporary contracts than permanent ones (although this
figure does not appear in the other available reports); in Romania, there are slightly more permanent than temporary contracts, and very few contracts of other types.

The data thus gathered, allow us to try and evaluate the number of persons employed and the number of FTE (full-time equivalents) per bed or pitch. The table below takes into account only those facilities in which one single type of accommodation is mentioned.

<table>
<thead>
<tr>
<th>Type of accommodation</th>
<th>Job/bed or pitch</th>
<th>FTE/bed or pitch</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>0,3</td>
<td>0,2</td>
</tr>
<tr>
<td>Accommod. for young people</td>
<td>0,08</td>
<td>0,054</td>
</tr>
<tr>
<td>Family holiday centres</td>
<td>0,085</td>
<td>0,071</td>
</tr>
<tr>
<td>Holiday centres for children</td>
<td>0,098</td>
<td>0,08</td>
</tr>
<tr>
<td>Campsites</td>
<td>0,04*</td>
<td>0,03*</td>
</tr>
</tbody>
</table>

Subsidised Employment:

Only 20 % of respondents answer that they enjoy subsidised employment. This type of assistance is most frequent in Belgium (40 % of responses) although it is also encountered in Germany (17 %) and France (17 %). The percentage of subsidised jobs varies widely, and ranges from 4 to over 90 %.

The spread of jobs across different activity sectors gives some idea of the relative importance of the different departments. The averages given here always mention direct employment expressed in FTE. The low rate of staffing in entertainment may come as a surprise, given the avowed policy of social tourism.

In general terms, the following spread of jobs may be observed across infrastructures, and it will be noticed that rates differ widely from one country to another, most likely due to the difference in types of accommodation.
Figure 9: Average number of people per type of activity

![Pie chart showing the average number of people per type of activity](image)

Figure 10: Average number of people per type of activity (4 countries)

<table>
<thead>
<tr>
<th>Country</th>
<th>Accommodation</th>
<th>Catering</th>
<th>Management</th>
<th>Reception</th>
<th>Multi-function</th>
<th>Other</th>
<th>Entertainment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Belgium</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Romania</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The degree of qualification of staff members within the different activities is as follows:\(^3\):

FIGURE 11: % employment per type of qualification

\(^3\) Figures represent an average, but it is important to note that the responses to this question vary widely from one respondent to another. Only 70% of the responses could be used for this question.
The forms of direct employment which offer the largest number of jobs are accommodation and catering, representing about two thirds of the work force employed in the facilities surveyed. The polyvalent forms of employment are found mainly in the sectors that require
the least skilled workforce, (about 40% of unskilled labour) whereas the overall proportion of jobs resorting to unskilled labour amounts to 28%.

According to the responses gathered, these facilities rely essentially on local labour, since the rate of locals employed in these facilities amounts to 92%.

Whereas the sector generates considerable direct employment, a certain amount of indirect employment is created as well, since the facilities contract out part of their activities, as can be seen in the following table. Here, percentages are calculated with regard to the number of respondents. As certain facilities both organise and subcontract some of their activities, totals per line may exceed 100%.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Organised by your association</th>
<th>Subcontracted</th>
<th>Not concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sporting activities</td>
<td>33%</td>
<td>10%</td>
<td>60%</td>
</tr>
<tr>
<td>Professional activities (seminars)</td>
<td>40%</td>
<td>3%</td>
<td>59%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>52%</td>
<td>34%</td>
<td>26%</td>
</tr>
<tr>
<td>Services for the local community</td>
<td>31%</td>
<td>3%</td>
<td>66%</td>
</tr>
<tr>
<td>Others</td>
<td>14%</td>
<td>3%</td>
<td>83%</td>
</tr>
</tbody>
</table>

The fact that more than half of the facilities organize entertainment locally explains the low rate of staffing already mentioned for this post (below 0.5 FTE). The other activities subcontracted by at least part of the respondents are:

<table>
<thead>
<tr>
<th>Subcontracted</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cleaning</td>
<td>22%</td>
</tr>
<tr>
<td>Maintenance of outdoor areas</td>
<td>21%</td>
</tr>
<tr>
<td>Catering</td>
<td>14%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>33%</td>
</tr>
<tr>
<td>Other</td>
<td>24%</td>
</tr>
</tbody>
</table>

On the average, this subcontracting represents 1.26 FTE.

This information may be supplemented with data relative to the facilities’ clients.

79% of the facilities are open all year round: 19% from spring till fall, and a mere 2% in winter only. The overall annual occupation rate amounts to 56% (20% of non-answers) rising to 70% during the summer. 54.6% of the occupants are members, while the remaining 46.4% belong to the general public. Members are entitled to reduced rates (63%), priority booking (26%), as well as a number of other advantages (upgrading, services, 45%). These advantages may be used concurrently.
The replies concerning the type of clients lack in precision and are often contradictory (not 100% or over 100%). The following figures reflect therefore overall tendencies. The types of clients are:
Groups: 47.5%  Individuals: 49%  Companies: 3.5%

There are small differences between the respondent countries: the number of groups in France and of individuals in Romania exceeds the overall average.

<table>
<thead>
<tr>
<th>Table 7: % type of groups&lt;sup&gt;4&lt;/sup&gt;</th>
<th>Table 8: % type of individuals&lt;sup&gt;5&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Groups</td>
<td>Individuals</td>
</tr>
<tr>
<td>Children (under 15)</td>
<td>Independent travellers</td>
</tr>
<tr>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>20.2</td>
<td>33.8</td>
</tr>
<tr>
<td>Young people</td>
<td>Couples</td>
</tr>
<tr>
<td>40.5</td>
<td>14.6</td>
</tr>
<tr>
<td>Adults</td>
<td>Families with children</td>
</tr>
<tr>
<td>23.3</td>
<td>40.5</td>
</tr>
<tr>
<td>Senior</td>
<td>Disabled/ill people</td>
</tr>
<tr>
<td>9.9</td>
<td>6.9</td>
</tr>
<tr>
<td>Disabled/ill people</td>
<td></td>
</tr>
</tbody>
</table>

In terms of origin of the clients, Belgium distinguishes itself from the other respondent countries. This fact is most likely due to the high respondent rate of youth hostels in this country. The average rate of all respondents is 77% of national clients. More specifically, in Germany, 94% of clients are national, 95.5% in Romania, 91% in France and 70% in Belgium.

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<sup>4</sup> The total exceeds 100% due to imprecise responses and unanswered questions.

<sup>5</sup> The total is below 100% due to imprecise responses and unanswered questions.
Practices, Trends and Opinions

This section combines the outcomes of the in-depth interview led with several key actors in different countries with the answers to the open questions in the ‘section A’ questionnaire (organizations). As aforementioned, either Atlas partners or the authors led the interviews. The authors provided guidelines with 5 major subdivisions. This chapter is structured accordingly.

The following paragraphs provide an overview of the different opinions expressed by the respondents and outline the similarities and differences between the countries where the interviews were held.

General Situation of the Social Tourism Sector

The first discussion deals with the difficult issue of the definition of social tourism in the different countries under scrutiny. It also seeks to identify the situation of the social tourism sector in comparison to the commercial tourism sector. The interview guidelines suggested the distinction of characteristics of social and commercial tourism. Finally, the status of social tourism studies was tackled in order to gain some indication about the recognition of the sector. In correlation with this last point, this summary will add comments of survey A about the role of public authorities.

The lack of an official and/or formal definition for social tourism is a recurrent issue, but also the idea that social tourism is tourism for all. The key ideas here are solidarity, humanistic concern, social mixing with a particular attention to disadvantaged people and social concern for employees.

The boundaries between social and commercial tourism are fuzzy. The increasing democratization of prices in commercial tourism results in access for a larger category of people. On the other hand, quality improvement, such as in youth hostels and an effort to offer good value for money have allowed the inclusion of a new, broader public in the social tourism sector.

From a historical perspective, most of the European countries are comparable with regard to the positioning of the social tourism sector. Especially in Eastern European countries, the old system of the socialist era with social services supported by state-owned companies, trade unions and national organizations was typical of the sector. With the arrival of free-market economy in Eastern countries and the economic development in the EU, each country has however adapted in its own approach.

In Hungary, for instance, the supported holiday system was set up in the nineties. Indeed, in 1992, the Hungarian National Vacation Foundation (HNVF) was established to apply a new support system, i.e. the system of holiday vouchers. Ever since, the central budget finances
largely the system. Employers can allocate holiday vouchers to their employees as a tax-free incentive. At the beginning, the use of holiday vouchers was limited to payment for accommodation fees, but the range of services was continuously extended (domestic travel insurance, eating out, tickets to cultural or sports events, purchase of fishing permits, etc.).

On the other hand, in Romania, the four main Labour Union Confederations have taken over almost all facilities of the former communist Labour Union. *Sind România*, which groups these four trade unions, carries out two main activities: administration of its own hotels and spas in Romania and tour-operating and the distribution of tourism products through its own agencies.

In Poland, three different ministries are responsible for social tourism. The Ministry of Sports and Tourism is responsible for the development and functioning of social tourism. It finances different non-governmental and social institutions. The Ministry of National Education finances different forms of collective tourism for children and youngsters. Finally, the Ministry of Finance provides financial support for activities of local governments, and municipalities which aid the development of sport and tourism.

Beside ministries, a couple of other institutions are linked with social tourism such as PTTK, the Polish tourist country lovers’ society (created by a union in 1873), the Polish Youth Hostels Association (PYHA) and two scout organizations (ZHP and ZHR).

On the other hand, in Austria, Belgium, France and Germany, some accommodation infrastructures are still owned by trade unions.

Even if they have a similar social tourism history, Eastern European countries have followed very different paths in developing the sector. These examples also help to understand the divergence between what is, at a national level, considered to be social tourism or tourism for all.

Indeed, in Austria, social tourism addresses union members, offering them high quality hotels or holiday villages, but the number of these traditional clients is decreasing. Hungary has developed a holiday voucher system usable in commercial facilities. *Sind România* handles 90% of its clients for treatment in health resorts and 10% in sport resorts. Its activity addresses 70% for “social tourism” and 30% for “commercial tourism”. This illustrates the permeability of the boundaries between social and commercial tourism. This openness combined with the decrease in public support for social tourism has resulted in the sector’s lack of interest to produce proper statistics. Again, the case of Poland constitutes an exception with a recent study (not yet available) on the identity of social tourism stakeholders in the country.

In other parts of Europe, other scenarios of social tourism prevail. The situation in the UK, for instance, is quite different from that in other countries, as the government acknowledged the benefit of a break or holiday only a couple of years ago. In the UK social tourism is not financially supported by the government, so this first move, recognition, meant a big step forward. Today, social tourism is becoming organised, but in terms of definition, the trend is to talk of ‘breaks’ rather than ‘holidays’, the former term being
regarded as more appropriate for social tourism as it excludes the idea of luxury potentially inherent in the term holiday. Clearly, the definition aims at breaks for people with low incomes.

In contrast to the situation in the UK, in countries such as France or Belgium, social tourism enjoys the recognition of authorities; but as the funding decreases, a new and broader public has to be approached.

In the light of these different definitions of social tourism, we can conclude that the former boundaries between social and commercial tourism are blurring. Indeed, due to the fact that the number of specifically social tourist facilities is decreasing, the characteristic of social tourism becomes more directly linked to the demand side than to the supply side. But even then, the notion of demand in social tourism covers quite different realities, from a strict definition such as in UK, Romania, Poland or in a lesser measure Spain, to an embracing definition such as in Austria or Hungary.

**Development of the sector**

This section aims to give an overview of the development of the social tourism sector within each country (infrastructure, funding, supply, accommodation facilities etc) and to compare the development between countries. Furthermore, international collaborations and practices will be attended to as well.

The common issues seem to be the constant quest for quality improvement in social tourism facilities in order to meet the needs of more demanding clients and sustain competition with commercial infrastructures. Interviews also highlighted the lack of knowledge of the social tourism sector in other countries. However there is a desire to exchange good practices (exchanges exist already between Flanders and the UK).

Finally, another common point in almost all countries is the decrease of public funding for social tourism facilities. The decrease of public funding has a heavy impact on the development of the sector. Indeed, it forces social tourism facilities to compete with other tourism facilities. To be competitive on the free market, the social tourism facilities can adapt to their demand side (extending the social-tourism target group to broader categories or to all tourists), and/or to the supply side (improving the quality and/or profitability of services).

In Austria for instance, only up to 50% (depending on the facility) of the clients are from the trade unions. Prices are comparable to the commercial sector, but union members are granted a 25% reduction. In Belgium, social tourism facilities act on both sides to remain competitive. The increase of the capacity of accommodation facilities is paralleled by money and labour saving schemes. Furthermore, the goal of social mixing justifies the enlargement of the public to non specific social tourism public. In Romania, the lack of funding halted the construction of new social tourism facilities and induced an in-depth reflexion on the possibility of introducing a holiday voucher system such as in Hungary. Contacts have been taken between those two countries on this matter.
We may here mention some concrete examples of direct or indirect funding mechanisms:

In Romania, the funding comes from two sources. The funding of a special offer (discounts and special prices) aimed mainly at people living on budget wages. The funding comes from the national budget through National House of Pensions and Health Insurances (CNPAS). Prices accepted during CNPAS’s auctions are covered only partly by the client and partly by the CNPAS: clients will pay only part of the price, calculated according to their income (pension or wage). A particularity of Poland is a law that procures a preferential 7% VAT for the organization of children’s or youth tourist trips (whether the trip is commercial or not). In Hungary, the holiday voucher system is based on a tax free system for employers.

In Poland, the development of social tourism began after World War II with the increase of leisure time. At that time, almost all tourism structures were in the state’s hands. In the years 1989-1990, those tourism facilities had to adapt to the rules of free market and most of them were sold. Nowadays, social tourism in Poland refers mostly to children and youth tourism. Still, a big problem remains in the sector: the effectiveness of the use of public funds. The only institutions funding social tourism are ministries.

The situation is quite different in the UK. Here, social tourism gathers a few associations that are the Family Holiday Association (interviewed for this research), the Family Fund (a provider of aid for families and particularly for disabled children), the Youth Hostel Association, the trade union Unison and only a couple of other smaller organisations. Only in 2007 did they formalise their collaboration with the Social Tourism Declaration. The Family Holiday Association entertains very good relationships with the travel industry, which gives them access to discounted or even free holidays. This association, as a charity, does not enjoy any government support but receives indirect funding from the National Lottery. They also receive on annual basis money from trusts and are granted corporate support through events.

There are also very different points of view on the services to be provided by social tourism. In Romania, for instance, social tourism focuses on three basic services: accommodation, meals and medical care in spas. While in Belgium, infrastructures of social tourism, in particular for youth tourism, provide additional services and activities (guided tours, parties etc.). This difference is due to the existence in Belgium of state programs allowing the hiring of the unemployed for non profit activities or services.

The development of the social tourism sector in each country (apart from the UK) is influenced by the decrease of public funding. The current tendency is to seek alternative funding and to foster the international exchange of practical experience.
Employment Issues

Employment-related issues constitute the core features of this research. The aim of this section is to compare employment aspects in the social tourism sector with other tourism sectors (for instance differences in remuneration or other payment-related issues, or questions of staff capacity and mobility). It also attempts to analyse the development of employment in the last ten years in terms of gender, turnover, and seasonality. This includes staff recruiting methods and specific qualifications.

One common point between all interviewed countries seems to be a lower salary in the social tourism infrastructures compared to the commercial sector. However, there is a lower seasonality in social tourism employment. The lack of specific statistics or even estimations on social tourism employment is a recurrent feature. The need for more qualified staff and the fact that there is no specific recruiting system are other common points. Finally, the absence of international mobility and the inexistence of organised national mobility for social tourism staff are highlighted. The gender question seems to be of little relevance in social tourism as none of the interviewees offered any information about the subject.

An estimation of the percentage of employment in the social tourism sector in relation to the commercial tourism sector has been made. In Austria, for example, employment in the social tourism sector is likely to amount up to 5%.

Considering the particularity of the holiday voucher system, the tourism sector in Hungary does not differentiate between social and commercial tourism with regard to employment; therefore no study has been written on this field. But prior to the introduction of the holiday voucher system, a report was prepared about the role of the system in the national economy, specifically about its financial impact on the central budget. According to this official report (2005), the holiday voucher system had at the time generated approximately 5,000 new posts since the start of the system.

In Spain also, no difference is made between social and commercial tourism in terms of employment. Figures of 2003 show, that the whole tourism sector represents 12,5% of the GDP. Approximately the same percentage could be inferred to hold in terms of employment, but this is only an estimation, since it takes no account of a possible impact of seasonality on the figure.

The same situation occurs in Poland, where it seems equally difficult to distinguish social and commercial employees. In 2007, the sector of hotels and restaurants represented 1,75% of the total labour force in Poland.

In the UK, the situation is quite similar. Indeed, apart from the Youth Hostel Association, social tourism uses commercial facilities and infrastructures. The Family Holiday Association brought in more than a million pounds in 2007 and helped over 1400 families enjoy a
holiday. However, this charity employs only 9 people, corresponding approximately to 8 full time posts.

The comparison of employment in the social tourism sector is complex because of the varying conceptions of social tourism, since the boundaries between social and commercial tourism for the quantitative side of employment tend to blur. For this reason, data collection as for this research is essential.

For the more qualitative side of employment, differences and similarities appear. In terms of training, the qualitative results about staff training gathered in the survey in 'Section A' highlight three categories of training: gathering, reception and computer science. Apart from those, specific thematic training programs are or can be organized. All those training sessions are either internally or externally arranged. The interviews showed that staff training exists in every country regardless of its type of tourism.

If lower wages are common in the sector on a European basis, there are also significant differences between the countries. Seasonality and staff fluctuation can also vary from country to country. Working conditions also differ from the commercial sector, even though they are managed differently.

In Austria, even if there are general collective agreements within the trade unions, Sotour has also an internal agreement which provides even better working conditions. They have 80 permanent full time employees and another 120 seasonal employees between April and October. People are chosen according to their capacities. Very little staff fluctuation exists, since most workers have been with the company for many years (15 and 20 years).

In Belgium, the social tourism sector employs proportionally more staff than the commercial tourism sector, since subsidies against unemployment for non-trade sectors allow social tourism infrastructures to propose more non-profitable activities. The lower number of employees in commercial tourism infrastructures can also be partly explained by a large proportion of undeclared staff.

Apart from reception staff, workers in the social tourism sector seem to build careers within the sector. The staff turnover is very low compared to commercial tourism infrastructures.

With increasing professionalization and regulation of specific sectors such as cleaning and catering, permanent staff is replaced by subcontractors. On the other hand, the professionalization of management issues such as reservation systems increases the need for permanent staff training, resulting in the stabilisation of staff.

In Romania, workers in the social tourism establishment often have an extra job elsewhere, while the job in the social tourism sector counts more for social insurances and pensions.

The large differences in salary between social and commercial tourism are considered to be rather normal, particularly in Romania. The commercial establishments generally meet

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6 Number of beds per employee
higher standards and higher classifications, and provide a more sophisticated level of services that allow them to pay higher salaries. They perform no social activities. For example a cook in a commercial restaurant is paid three times more than one in a social facility.

Furthermore, there is a low seasonality in spas compared to the commercial sector, as the funding is higher in off season. Certain qualifications are needed in order to fit the compulsory operation rules: room keepers (all trained and more and more expensive), waiters and cooks etc. The staff is recruited directly on the local market (area around and villages near the resort). Training is quite a problem in Romania as low incomes do not encourage young people to enrol in the tourism system.

In Spain one example of good practice in terms of seasonality is the Holiday Program for Seniors, created in 1985 and organised by Imserso (Institute of migrations and social services) : in order to reduce seasonality in tourism facilities and thus to encourage long term contract employment, this program offers discount holidays to seniors in the low season. The program was initiated because of the estimation that the loss of employment during low season was about 40% of the employment in full season. During low season (October till June) 2005-2006, the program procured holidays to more than 1.300.000 seniors. The impact on employment is considered to have maintained nearly 6.800 jobs in accommodation facilities only (not considering the indirect impact on other sectors such as transport, travel agencies, etc.). The program is financed by an investment recovery system which grants the State 1,8 euro for each euro invested in the program. The sustainability of the program appears most of all in the quality and competitiveness of the services due to the maintenance of experienced employees but also in the local services and shops that can stay open throughout the whole year.

**Demand Side**

This section deals with the clients of the social tourism sector. Issues on the demand side are highly dependent on the definition, the maintenance or the development of a specific target group for social tourism.

In Austria, an average of only 10% of the total clientele corresponds to the traditional union member clients. Yet, in low season, the clients are mainly composed by seniors, who are considered to represent a specific social tourism segment. Youth tourism activities have been reduced, but there is an ambition to redevelop them through collaboration with the trade unions. The key factor for this future redevelopment is the possibility for social tourism facilities to welcome large groups and to allow trade unions to organize camps for youngsters.

In Belgium, initially, from the thirties to the fifties, social tourism addressed only members of specific organisations providing social tourism facilities, such as trade unions. Now it has opened up to a larger public, thus encouraging social mixity, but particular attention is still given to disadvantaged people.
In Hungary, the holiday voucher is becoming more popular every year. According to the official statistics, the number of places in the commercial sector where holiday vouchers are accepted is equally increasing. Demand for indigent travel has also been growing (a 45% rise could be observed from 2006 to 2007). However, in this figure only 3% received support based on their disadvantaged social status. This is a significant drop compared to 2006, when nearly 30% of the holiday voucher owners were socially indigent.

For the above countries, the trend is to open the specific demand of social tourism to a broader public or to all tourists. On the other hand, some countries abide by a stricter definition of what social tourism should be. This is the case of Spain, where the most important public is made up by seniors.

A strict definition of the target group is also used in Romania, as social tourism in Romania addresses a specific audience determined by income and special needs. For the time being 90% of the funding comes from National House of Pensions and Health Insurances (CNPAS). The decrease of funding for social tourism will have to be compensated by commercial activities to guarantee the funds for maintenance and development of existing facilities.

In Poland, social tourism ranks specific target groups. The first group in terms of numbers are the children and the young people, followed by the disabled people. The third group are families, then comes the seniors and finally the low income group.

In the UK, finally, more than elsewhere, social tourism is inherently linked with low income. To be entitled to go for a break with the Family Holiday Association, a family must have a low income, a dependent child aged between 3 and 18, have had no holiday for the last 4 years, and be referred by a welfare agent.

**Perspectives and general comments**

There is a wish to communicate with other countries, to collaborate with international organisations in order to find new sources of funding for social tourism projects. Certain countries believe that with international collaboration and communication, they might be able to defend the specific characteristics of social tourism, to protect the employees of the sector and to produce specific statistics.

An open question in the quantitative survey shows that there is a need to structure the social tourism sector and to determine its identity. In France and in Belgium, the perspectives and objectives for the sector are to focus on the quality of services, on comfort and price, thus to meet the development of demand. Professionalization of the sector is also stressed, as well as the necessity of public funding. Environmental preoccupations are to be integrated in the sector as well. In Italy, the social tourism sector is quite active too and its development is viewed favourably. In Austria, on the other hand, social tourism is undergoing a recession.
Conclusion

The present study allows to understand certain practices and mechanisms of the social tourism sector, and also to forecast some tendencies for the future.

The analysis of the quantitative survey confirms the idea that the social tourism sector provides better working conditions than the commercial tourism sector. In some of the respondent countries in particular, a permanent high rate of employment can be observed. In contrast to the commercial sector, workers tend to stay in the same organization for several years and thus fluctuation is very low. In some countries however, wages in the social tourism sector are lower than in the commercial sector.

The study shows that instead of maintaining a distinction between social and commercial tourism, the social tourism sector spreads its benefits beyond the boundaries between the two sectors since social tourism activities provide to some extent better working conditions for employees in the commercial sector. Jobs can be maintained by sending social tourism clients to commercial facilities in low season.

The quantitative survey combined with the in-depth interviews highlighted the existence of very different approaches to and understandings of social tourism in Europe. These differences in understanding manifest themselves in very different forms of organization adopted by the social tourism sector in the different countries. Three main systems can be determined (Fig. 14), though many countries combine two systems.

Figure 14: Social Tourism Structures
Tendencies vary widely from one country to another; for instance, while Austria abandoned the system of holiday vouchers in the 1990s, Romania is about to introduce it. There is, however, general agreement as to the difficult positioning of the sector in comparison to the commercial tourism sector. Many countries are re-orientating their policies towards new focus groups such as seniors and juniors. As price factors become more competitive, many countries focus on the supply side as well. Most of the actors interviewed agree that the quality of the social tourism supply has considerably increased over the last decade. Finally, there is a tendency to change the image of the sector towards sustainability and the fostering of social exchange.
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