The Future of Work and Skills Development in Tourism | Policy Paper

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The Future of Work and Skills Development in Tourism

Policy Paper

Acknowledgments

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G20 Osaka Leaders' Declaration

"[…] Tourism accounts for a significant share of the world's GDP and is expected to continue to be an important driver of global economic growth. We will work to maximize the sector's contribution to the creation of quality jobs and entrepreneurship, especially for women and youth and in the creative industry; economic resilience and recovery; the preservation of natural resources through sustainable tourism planning and management; and the achievement of inclusive and sustainable development […]". June 2019

Background

In its 8th meeting the Ministers of Tourism of the G20 countries requested "the World Tourism Organization (UNWTO) to prepare a report on the Future of Work and Skills Development in Tourism to be presented at the next Meeting of the Tourism Ministers of the G20 economies" (8th T20 Tourism Ministers Declaration).

This paper takes into consideration the policies necessary to advance the contribution of tourism to the 2030 Agenda for Sustainable Development, which adopts the 17 Sustainable Development Goals (SDGs) as well as the UNWTO Global Code of Ethics for Tourism endorsed by the United Nations General Assembly in 2001 and the ILO Guidelines on Decent Work and Socially Responsible Tourism[1] adopted in 2017 by a tripartite meeting of experts, as well as the ILO Centenary Declaration for the Future of Work.

Objectives

The current paper aims to contribute to the G20 main objectives of promoting "strong, sustainable and balanced growth" as well as the objectives of the Japanese G20 Presidency to "lead global economic growth by promoting free trade and innovation, achieving both economic growth and reduction of disparities, and contributing to the development agenda and other global issues with the SDGs at its core" and "promote a free and open, inclusive and sustainable, human-centered future society."

Specifically, it aims to:

- Position tourism in the G20 Agenda;

- Provide a better understanding of the impact of the current social and technological changes in the future of work in tourism;

- Identify policies and initiatives necessary to support job creation and skills development in tourism in view of the current changes;

- Support countries in adapting their tourism policy to new challenges with a view to create more and better jobs; and

- Promote adoption of tourism policies and initiatives related to jobs, education and skills.

To that purpose, the paper:

- Presents a summary of the existing data on employment in tourism in the G20 economies;

- Provides a review of global trends and their impact in the future of work and skills development;

- Reviews challenges and opportunities for tourism in the framework of such scenario;

- Presents the results of a survey on the future of work and skills development addressing the four key players: public sector, private sector, workers and students, and educational institutions;

- Suggests a series of recommendations to G20 countries, including possible areas of cooperation among the G20 Ministers of Tourism, aimed at achieving the SDGs through tourism, namely:
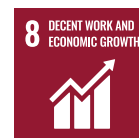
SDG 4: Quality education

SDG 5: Gender equality

SDG 8: Decent work and economic growth

SDG 10: Reduce inequalities

SDG 17: Partnerships for Delopment

Executive summary

It is clear we live a time of transformative change in the world of work. Technology developments, demographic changes, environmental and climate change imperatives, globalization and continued inequalities, all affect the future of work.

Tourism, one of the fastest growing and most resilient economic sectors in the world, is also a major job creator. It accounts directly for 6% of employment in the G20 economies.

Considering ILO category of 'employees in accommodation and food services' as a proxy for tourism, there is clear evidence that the tourism sector has been a key contributor to employment in the G20 economies in recent years, particularly following the global economic crisis.

Tourism's current value and growth potential positions the sector as a driver of economic and employment growth in G20 countries. Yet, tourism's role in employment generation and entrepreneurship is often underestimated and undervalued in policy formulation and implementation.

As a human capital intense sector, tourism is highly affected by the current social and technological transformation which are shaping new business models, consumer's patterns, changing value chain structures and demand/supply dynamics.

Research carried out for the purpose of this paper among four key groups (workers and students, public sector, private sector and educational institutions) shows that:

- All groups of stakeholders consider **digital/IT and customer focus as the profiles with the highest level of demand** in the coming five years.

- **Workers and students consider that the public sector is key in supporting employment while other groups** (private sector, public sector and educational institutions) **consider more relevant to support companies and entrepreneurship.**

- The **quality of work is considered as the most important element** for the promotion of employment in the coming years among the four groups, followed by technology as second for all groups except for the workers and students who place it last.

- **Customer focus, creativity and innovation are considered key competencies in the future of work in the tourism sector** for workers and students, public bodies and educational organizations.

- Interestingly, **none of the groups considered automation will have a major impact in the future of the work** in the sector. However, half of the workers and students consider it will reduce employment opportunities.

- **Online training is still not highly demanded by workers and students nor by the private sector** who value presential training more.

- **Big data and data analytics, together with environmental related technologies, emerge as the most valued technologies** to consider in terms of future skills development.

- **Life-work balance is the most valued aspect** for workers and students and by both educational organizations and the public sector.

As current changes impact the future of work and skills development in tourism it becomes essential to act at all levels:

1. For those responsible for **public policies**, there is a clear need to identify, from the market itself, what new functions and jobs are being created which do not match existing skills and design adequate and updated specific training programmes;

2. For **organizations**, their ability to adapt to the new forms of work will be crucial, especially in areas related to the management of people and the promotion of autonomy in decision-making at all levels. Networking – and network structures, which have redefined and expanded the classic boundaries of organizations – represent the most natural form of relationship in the knowledge society against more rigid organizational schemes, providing flexibility, agility and anticipation capacity. Likewise, societal changes demand for a higher level of work-life balance requiring a new vision on what factors are fundamental to attract and retain talent.

3. For **professionals**, it will be critical to develop their skills continuously (the 'finish studying to start working' paradigm is no longer valid), with special relevance in those less automated or more complex skills, such as problem solving, analytical skills, critical thinking, creativity, management and coordination of people, emotional intelligence or cognitive flexibility.

4. For all **players**, it will be key to encourage and promote lifelong learning, from basic to the most complex skills, such as technical and soft skills – the latter less likely to be automated (social or empathic skills such as creativity and innovation).

In all the above it is essential to stress when looking at the future of work that work is not a commodity and that all actors need to have a human centred approach in order to "act with urgency to seize the opportunities and address the challenges to shape a fair, inclusive and secure future of work with full, productive and freely chosen employment and decent work for all."[2]

Endnotes

1   International Labour Organization (2017), ILO Guidelines on Decent Work and Socially Responsible Tourism, ILO, Geneva (online), available at: www.ilo.org (16/10/2019)

2   International Labour Organization (2019), International Labour Conference – ILO Centenary Declaration for The Future of Work Adopted by the Conference at its one hundred and eighth session, Geneva, 21 June 2019, ILO, Geneva (online), available at: www.ilo.org (15-10-2019).

Tourism trends and outlook

1

Tourism – creating jobs and promoting inclusion in the G20 economies

According to UNWTO estimates tourism contributes directly to 3% of the GDP of G20 economies and 6% of total employment.

Table 1.1   Overview of international tourism and its economic importance in the G20 countries, 2018*

	International tourism		Exports			International Tourism		Tourism Satellite Account (TSA)[2]	
	Arrivals	Total revenues	Total	of which:				2016 or earlier	
				Goods	Services	Share of total exports	Share of services exports	Tourism as % of GDP	Tourism as % in total employment
	Int. Tourist Arrivals	(Exports in Balance of Payments)							
	(million)	(USD billion)			(USD billion)	(%)	(%)	(%)	(%)
World	1,401	1,704	25,296	19,451	5,845	6.7	29	..	..
G20	964	1,157	19,471	14,928	4,543	5.9	25	3	6
% of world	68.8	67.9	77.0	76.7	77.7			≈	≈
Other	437	547	5,825	4,522	1,302	9.4	42	..	..
% of world	31,2	32.1	23.0	23.3	22.3				
European Union	563	565	9,008	6,468	2,540	6.3	22	3.9	5.1
United Kingdom	36.3	51.9	863	487	376	6.0	14	3.7	4.3
France	89.4	73.3	873	582	291	8.4	25	7.1	7.3
Germany	38.9	60.3	1,892	1,561	331	3.2	18	3.9	6.8
Italy	62.1	51.6	668	547	122	7.7	42	6.0	8.4
Russian Federation	24.6	18.7	508	443	65	3.7	29	..	..
Turkey	45.8	37.1	217	168	49	17.1	76	4.3	9.5
Saudi Arabia	15.3	15.2	312	294	18	4.9	84	..	..
South Africa	10.5	9.8	110	94	16	8.9	62	..	..
China	62.9	40.4	2,754	2,487	267	1.5	15	..	..
Japan	31.2	45.3	930	738	192	4.9	24	1.9	9.6
Korea (ROK)	15.3	19.9	701	605	97	2 8	21	..	..
Indonesia	13.4	15.6	208	180	28	7 5	56	..	..
Australia	9.2	47.3	326	257	69	14.5	68	3.2	4.9
India	17.4	29.1	530	325	205	5.5	14	..	..
Canada	21.1	22.0	543	451	93	4.0	24	2.0	3.9
Mexico	41.3	23.8	479	451	29	5.0	83	8.6	5.9
United States	79.6	255.5	2,494	1,666	828	10.2	31	2.7	..
Argentina	6.9	6.0	76	62	14	7.9	43	..	..
Brazil	6.6	6.3	274	240	34	2.3	19	..	..

(Data collected Sept. 2019)

Source: World Tourism Organization (UNWTO), International Monetary Fund (IMF) and Organization for Economic Co-operation and Development (OECD)

* Data correponds to 2018 unless otherwise stated. International tourism data for 2018 is provisional.

[2] TSA data refers to direct contribution. Source for TSA country data is: OECD Tourism Trends and Policies 2018, except for Portugal: Statistics Portugal, 2018 (data corresponds to 2017).

G20 data is UNWTO estimate. EU figure is according to the European Parliament (2018).

Growing faster than other sectors

Considering ILO modelled estimates for employment in the food and accommodation services sector[1] as a proxy it becomes clear that tourism has been one of the key job creators in the G20 countries in the period 2010–2018, supporting jobs in the aftermath of the global economic crisis.

While employment in all sectors grew by 8% in the G20 economies in this period, employment in accommodation and food services grew three times faster at a rate of over 30%.

Yet, data also shows that there is a potential to expand tourism's capacity to create jobs in the G20 if we consider that, during this same period, employment in the accommodation and food services sector grew by 40% in non G20 economies.

The sector is also a major job creator for women and thus an important tool to promote women economic and social empowerment. Women account for 52% of employment in accommodation and food services in the G20 economies (naturally with diverse realities among members) as compared to 39% in all economic sectors.

Figure 1.1   Employment in accommodation and food service activities and overall, in G20 countries, 2010-2018, % change
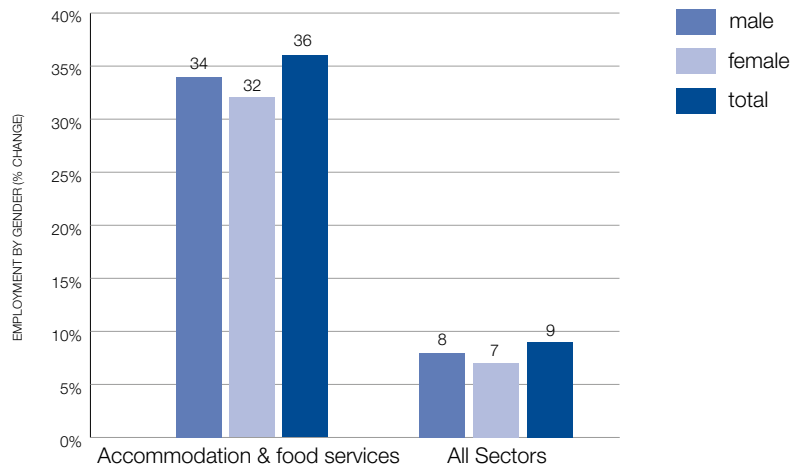
Source: Compiled by UNWTO based on International Labor Organization (ILO) modelled estimates.

Figure 1.2   Employment in accommodation and food service activities, 2010-2018, % change
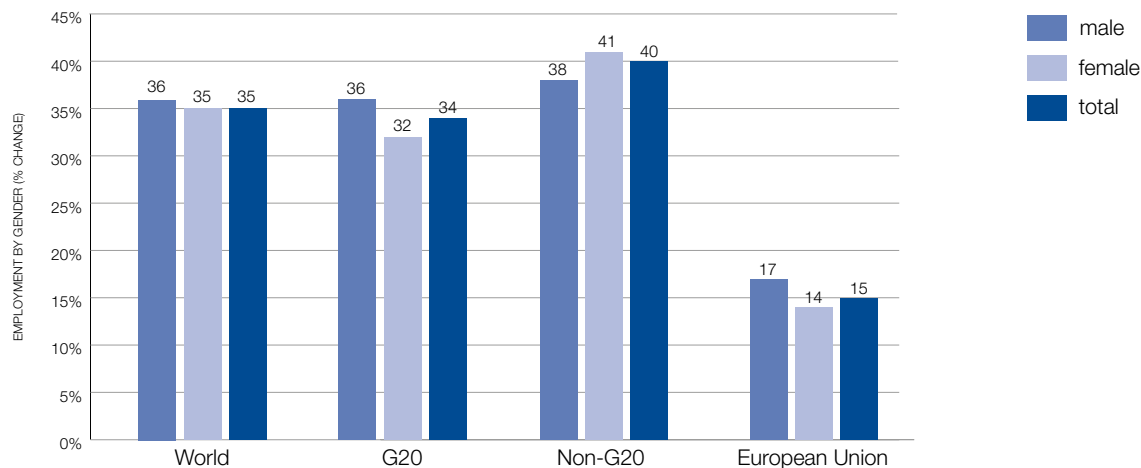
Source: Compiled by UNWTO based on International Labor Organization (ILO) modelled estimates.

Figure 1.3   Employment in accommodation and food service activities in G20 countries by gender, 2018 (%)

Source: Compiled by UNWTO based on International Labor Organization (ILO) modelled estimates

Figure 1.4   Employment in G20 countries (all sectors) by gender, 2018 (%)

Source: Compiled by UNWTO based on International Labor Organization (ILO) modelled estimates
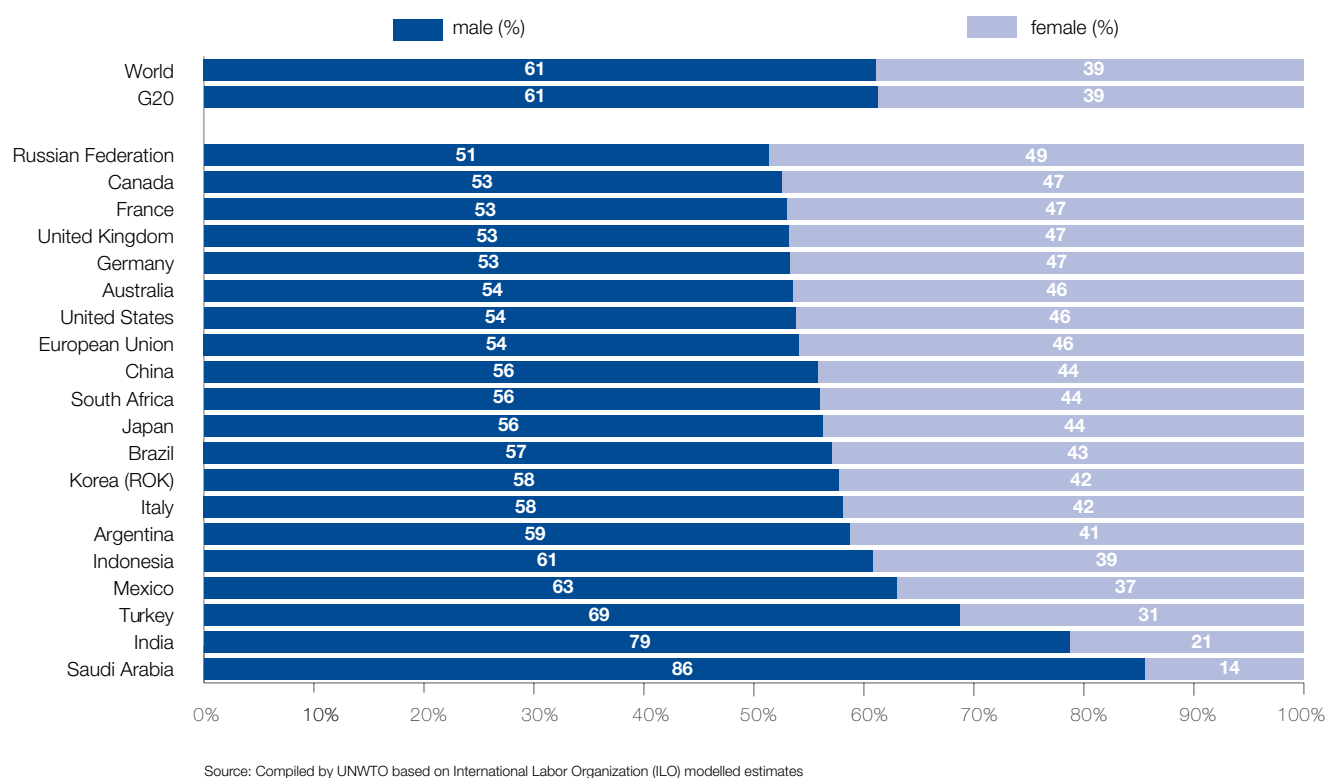
Global trends and their impact in the future of work and skills development in tourism[2]

It is well-known that the new technological and social forces are beginning to radically transform the way we work, questioning the traditional approaches to the concept of work itself. Are we prepared for it?

Predicting the future has always been something bold and risky. In 1943, IBM President Thomas Watson said "I think there will be a world market for, perhaps, five computers." Perhaps the combination of what has already happened with the projection of future scenarios is the most reasonable option to try to unravel the future of work.

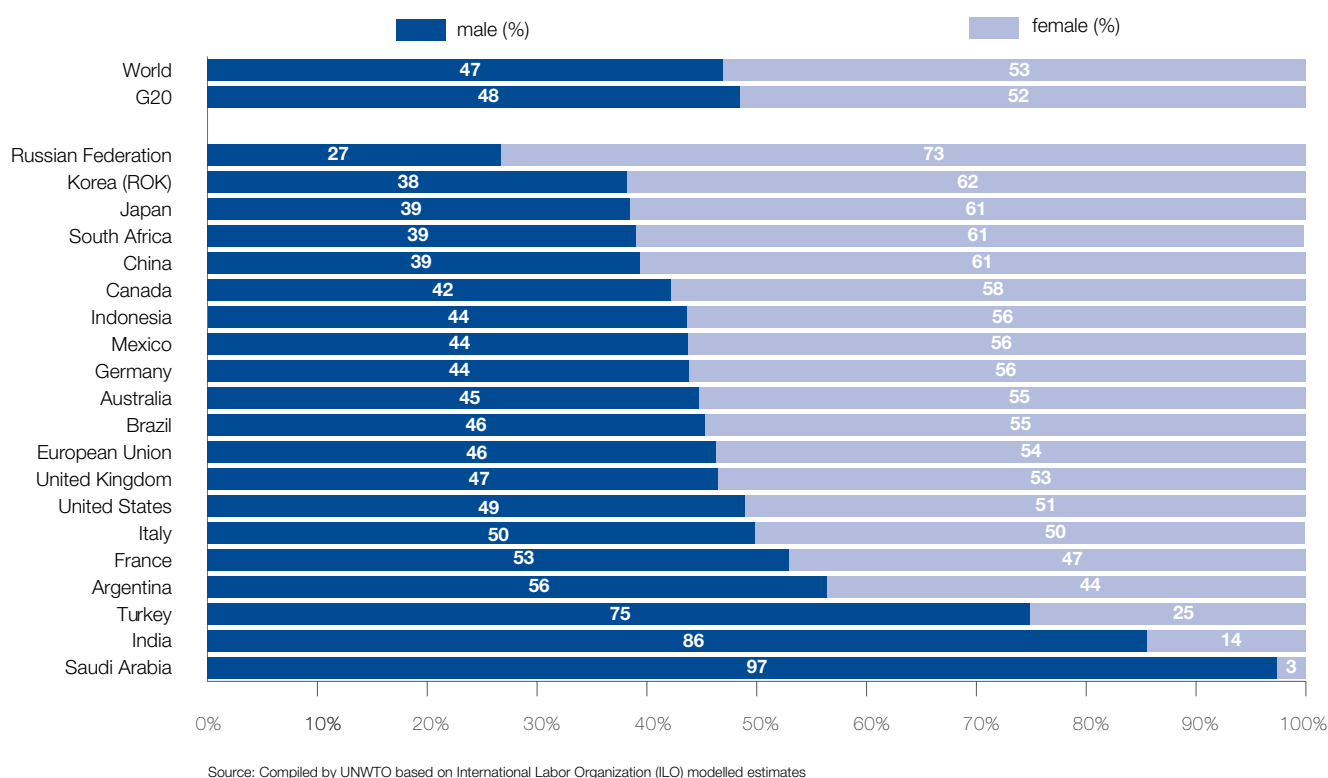As in all previous revolutions, the one we are experiencing is not exempt from pessimistic visions, such as the one that was maintained in 2016 at the Davos World Economic Forum through the 'The Future of Jobs' Report, where it was predicted that the "fourth industrial revolution" would destroy about seven million jobs before 2020 in administrative or productive tasks, and generate only about two million new jobs, essentially in the fields of the so called STEM (Science, Technology, Engineering and Mathematics).

However, as the economy – and the society – of knowledge consolidates in its successive waves of change and evolution, with advanced robotics and intelligent technology increasingly applied to everything

around us, evidence shows that we are not moving towards a general elimination of jobs (beyond the gap between lost occupation and generated occupation that usually occurs in the short term) but to a displacement from more repetitive roles towards tasks of greater added value, in which human skills are more difficult to automate (creativity, systemic thinking, empathy, etc.). The ability to adapt the workforce, transforming their skills through education and labor relations, will be key in this process, as it was the case in previous technological transformations.

"Countless opportunities lie ahead to improve the quality of working lives, expand choice, close the gender gap, reverse the damages wreaked by global inequality, and much more. Yet none of this will happen by itself. Without decisive action we will be heading into a world that widens existing inequalities and uncertainties. Technological advances – artificial intelligence, automation and robotics – will create new jobs, but those who lose their jobs in this transition may be the least equipped to seize the new opportunities. Today's skills will not match the jobs of tomorrow and newly acquired skills may quickly become obsolete. The greening of our economies will create millions of jobs as we adopt sustainable practices and clean technologies but other jobs will disappear as countries scale back their carbon- and resource-intensive industries. Changes in demographics are no less significant. Expanding youth populations in some parts of the world and ageing populations in others may place pressure on labour markets and social security systems, yet in these shifts lie new possibilities to afford care and inclusive, active societies. We need to seize the

opportunities presented by these transformative changes to create a brighter future and deliver economic security, equal opportunity and social justice – and ultimately reinforce the fabric of our societies."[3]

Before analysing the main trends that will condition the future of work (or that are already doing so), it is important to highlight that the revolution we are living is going to materialize in an increasingly acute context of scarcity of resources, in which climate change will have a dramatic impact.

The 2030 Agenda for Sustainable Development and its 17 Sustainable Development Goals, as well as the Paris Agreement on Climate Change, which entered into force in 2016, represent an inescapable framework that will influence and condition the impact of all actions taken at national level, international and individual level.[4]

Emerging realities…

One of the latest reports on the Future of Work, prepared by Deloitte in collaboration with Wikistrat, a US geostrategic and prospective analysis consultant[5], identifies **seven emerging realities** with high impact on those responsible for the definition of public policies at the international level, on the leaders of the organizations and on the workforce.

The **first** is **the emergence of the so-called exponential organizations (ExOs)**. This is a term coined by Salim Ismail, founder and director of the Singularity University, referring to newly created organizations, of reduced structure, that, in a very short time, with the advanced use of technology boost their exponential growth and with a disruptive concept of market (Uber, Airbnb, Instagram, etc.), are now top-of-mind among consumers, occupying a position which was previously reached by traditional companies (Kodak, BlackBerry, Nokia, etc.), with great effort and resources.

The influence of this type of organizations is not at all minor: The 'uberization' of the economy, as it is being called in recent years, based largely on cases of outsourcing work, is generating a complex debate between 'low cost' consumption and 'low cost' work, relating the way in which individuals and companies consume and the new forms of work.

Linked to the above, the **second emerging reality** has to do with what we can call **'regulated innovation'**.

Governments and legislators face the need to adapt and react to these new contexts that emerge, in which some of these new organizations act in areas not sufficiently legislated. As a consequence, and in that the countries where they operate can lose countries may lose taxes, the labor force loses its traditional influence and negotiation capacity, and the 'traditional' competitors of these sectors, risk losing their competitiveness.

Likewise, the emergence of disruptive technologies in virtually all dimensions of work (face-to-face, telecommuting, privacy and digital rights, creation, attraction, location, shortage of talent, employer-employee relationship, new approaches to entrepreneurship through new models of business, etc.) is also creating contexts which may be considered not sufficiently or not satisfactorily regulated. The challenge for institutions will be to regulate without limiting the development capacity of the agents involved, in a complex balance of interests between the different stakeholders.

Related to the emergence of such new business models, is the **third emerging reality: the agile organization**. Due in large part to the democratization of the access to technology, size is no longer a disadvantage if one is innovative and able to use solutions that until recently were accessible only to large organizations (cloud computing, e-commerce, internet of things -IoT-, etc.). Compared to traditional small businesses, agile organizations tend to achieve a better brand identity, a greater deployment of capabilities due to their networks with third parties and a wider spectrum of action at the geographical level, thanks to a broader view of the market and of their activity, within an extremely flexible cost structure.

The **'liberation' of the workforce is the fourth emerging reality**. The growth of independent and autonomous work, mobility, flexibility or project-based work are redefining the increasingly diffuse boundaries of the traditional work context. The rigidity of conventional hierarchical models is giving way to new forms of organization, where people work in a more fluid, distributed, mobile, collaborative and real-time way. The frank growth over the last decade of new forms of employment (as compared to the conventional concept of employment, which usually involves a full-time job, a physical workplace and a relationship between the employer and the employee defined by a contract) will generate, if it is not already doing so, important challenges. One of the first consequences will be the disconnection of work from the work place. This will give people an unknown freedom to choose where to live, although such 'physical' freedom may not compensate for the loss of autonomy derived from working at all times

and in all places and the blurring of boundaries between working and private time. The widening of the regional gaps in the creation of jobs, in education or in skills will generate, in any case, a battle for the attraction of talent as well as a concentration of talent in the most developed and attracting locations, especially in large or megacities.[6]

The concepts of professional career, balance between professional and personal life or even the end of the working life (retirement) are being reformulated and creating challenges of great importance for both people (extension of the professional career, lifelong learning and training, permanent technological adaptation, etc.) as for organizations (redesign of training plans to increase the capacity of intangible capital, management of multigenerational diversity, retention and loyalty of talent, etc.). **Lifetime reinvention is the fifth emerging reality**, with a clear focus on skills and competencies, beyond theoretical knowledge. The emphasis of educational systems on those qualities and capacities that make us different from machines, such as curiosity and creativity, the permanent capacity for adaptation or any kind of 'soft skills' will be key in this process. The potential exclusion of important layers of the population can be materialized both due to the lack of training in technological updating but also to the lack of training in unique 'human' skills'. Lifelong learning (which encompasses formal and informal learning from early childhood and basic education through to adult learning) combines foundational skills, social and cognitive skills (such as learning to learn)
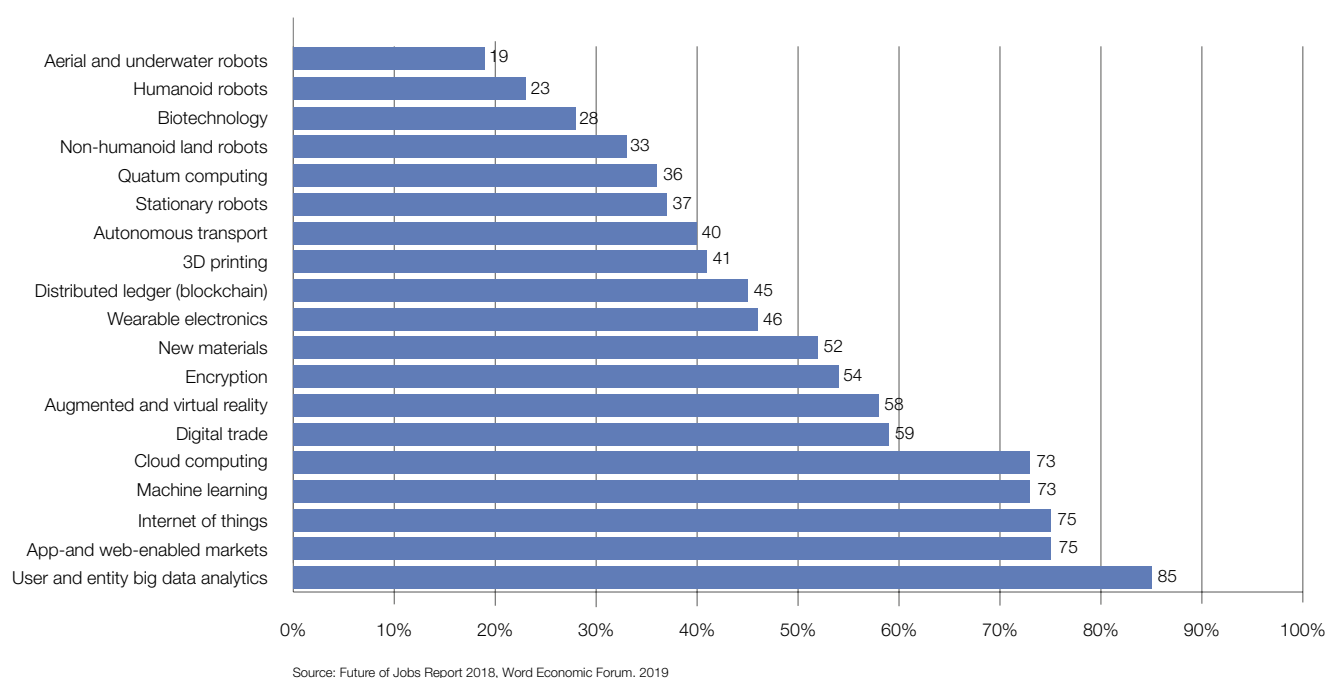
and the skills needed for specific jobs, occupations or sectors. It offers a pathway to inclusion in labour markets for youth and the unemployed. It also has transformative potential: investment in learning at an early age facilitates learning at later stages in life and is in turn linked to intergenerational social mobility, expanding the choices of future generations.[7]

The decreasing cost of automation and robotization, the emergence of artificial intelligence and the increase in the human machine-talent relationship gives rise to the **sixth reality, technology, talent and transformation**, in which there is a reallocation of tasks and where the more skilled labour or the labour linked to more complex tasks will see its market value increase as compared to other types of more automated tasks. In contrast to the perception of job losses (mainly associated with routine tasks) that this reality could generate, one of the opposite effects that can occur is the relocation of industrial processes back to their countries of origin, due to a decrease in the relevance of labor.

The automation and robotization of work[8] will generate, in any case, new scenarios in which health or social protection will be particularly affected, with contributions affected by workers who start later, irregular contributions of discontinuous duration throughout the working life.

Finally, the requirement to maintain increasingly high ethical standards pushes organizations to create efficient

Figure 1.5   Technologies by proportion of companies likely to adopt them by 2022 (projected)

Technology	Percentage
Aerial and underwater robots	19
Humanoid robots	23
Biotechnology	28
Non-humanoid land robots	33
Quatum computing	36
Stationary robots	37
Autonomous transport	40
3D printing	41
Distributed ledger (blockchain)	45
Wearable electronics	46
New materials	52
Encryption	54
Augmented and virtual reality	58
Digital trade	59
Cloud computing	73
Machine learning	73
Internet of things	75
App-and web-enabled markets	75
User and entity big data analytics	85

Source: Future of Jobs Report 2018, Word Economic Forum. 2019

relations frameworks with all their stakeholders, especially with their employees: the development of new policies and programmes aimed at protecting the 'new' work force from the uncertainties of the new work environment, both by those responsible for public policies and by the organizations themselves, give rise to the **seventh reality, the ethics of work and society**.

...the consequences

From all of the above some reflections emanate for each of the three most critical groups[9] in the future of work and skills development:

1 For those responsible **for public policies**, the need to identify, from the market itself, what new functions and jobs are being created which do not match existing skills, designing updated specific training programmes for these new occupations. Likewise, it will be key to encourage lifelong learning, both of basic skills (technical or STEM) and of the most complex of being automated (social or empathic), in a combination known as 'STEMpathy Jobs'.

2 For the **organizations' leaders**, their ability to adapt structures to the new forms of work will be key, especially in areas related to the management of people and the promotion of autonomy in decision-making at all levels. Networking – and network structures, which have redefined and expanded the classic boundaries of organizations – represent the most natural form of relationship in the knowledge society against more rigid organizational schemes, providing flexibility, agility and anticipation capacity. According to the recommendations of ILO, organizations also need to invest on lifelong learning that enables people to acquire skills and to reskill and upskill. Governments, workers and employers, as well as educational institutions, have complementary responsibilities in building an effective and appropriately financed lifelong learning ecosystem.

Similarly, organizations need to step up investments in the institutions, policies and strategies that will support people through future of work transitions. Young people will need help in navigating the increasingly difficult school-to-work transition. Older workers will need expanded choices that enable them to remain economically active for as long as they choose and that will create a lifelong active society. All workers will need support through the increasing number of labour market transitions over the course of their lives. Active

labour market policies need to become proactive and public employment services need to be expanded.

Implementing a transformative and measurable agenda for gender equality will also be central. From parental leave to investment in public care services, policies need to foster the sharing of unpaid care work in the home to create genuine equality of opportunity in the workplace. Strengthening women's voice and leadership, eliminating violence and harassment at work and implementing pay transparency policies are preconditions for gender equality. Specific measures are also needed to address gender equality in the technology-enabled jobs of tomorrow.

Finally, providing universal social protection from birth to old age. The future of work requires a strong and responsive social protection system based on the principles of solidarity and risk sharing, which supports people's needs over the life cycle. This calls for a social protection floor that affords a basic level of protection to everyone in need, complemented by contributory social insurance schemes that provide increased levels of protection.[10]

3 For any **professional**, it will be critical to develop their skills continuously (the 'finish studying to start working' paradigm is no longer valid), with special relevance in those less automated or more complex skills, such as problem solving, critical thinking, creativity, management and coordination of people, emotional intelligence or cognitive flexibility. This will be key to ensure a broader dimension of development where people have rights and opportunities to have a better life.

Peter Drucker said that "The best way to predict the future is to create it." Nothing tells us that the current wave of automation, advanced robotization and artificial intelligence will not generate the same progress and collective development that previous technological transformations provided. Maybe we all have our small share of responsibility in this and it is time to be proactive in building those scenarios that we most want to materialize...

The future of work and skills development: trends, challenges and opportunities for sustainable tourism

The emerging realities and their impact on tourism

The transformation of the tourism sector is also being affected by the trends mentioned above. The way in which these elements impact on a country, territory or a destination may vary, but many of these emerging realities are already present, with different intensity, in many parts of the planet.

In relation to the emerging reality related to the emergence of **exponential organizations**, companies such as Airbnb represents the paradigm of an exponential organization capable of transforming the competitive dynamics of an entire industry, without having any property in ownership but with more than one million rooms in the nearly 34,000 cities. The development of organizations of this type in tourism is still open, as long as these entrants in the sector incorporate in their business model a good part of the following attributes:

- M.T.P (Massive Transformative Purpose), element that expresses the real purpose of the company – to inspire and transform the community.

- S.C.A.L.E (Staff on demand, Community and crowd, Algorithms, Leveraged assets, Engagement):

  - Staff on demand: deployment of low staff demand services;
  - Community and crowd: generation of synergies and enrichment through the community;
  - Algorithms: advanced and massive information processing;
  - Leased Assets: asset rental policy;
  - Engagement: capacity to attract and engage customers;

- I.D.E.A.S Interface Processes; Dashboards: Advance monitoring of activities through dashboards;

- Experimentation: Design and permanent redesign of services through validation processes with the client;

- Autonomy: Flexibility to act and make decisions with great agility;

- Social Technologies: Application of collaborative technologies.

On the emerging reality related to **regulated innovation**, the debate on how to legislate new business models remains open and varies widely from country to country and even within each country.

The democratization of technology, real estate saturation or the economic crisis have contributed to the emergence of the so-called collaborative consumption models that will continue to emerge and expand in areas such as

transport, restoration or accommodation. Consumers themselves become service suppliers/providers, giving rise to a new type of offer that obliges countries (destinations) to evaluate new legislation and regulatory frameworks that provide equal and fair competition-based opportunities for all actors in the sector.

Related to the above, and connected with the concept of **agile organizations**, it should be noted that the impact of social networks and of collaborative platforms is behind much of the changes experienced by the tourism sector in recent years. The companies that operate under the principles of the so called 'collaborative economy' represent a new type of intermediation and a completely disruptive business model with respect to the traditional ones, being essentially technological platforms that market properties, products or services offered, in many cases by individuals in a cost-benefit balance that is difficult to overcome.

Regarding the emerging realities associated with the **'liberation' of the workforce or the reinvention for life**, the first one is related to the former, the agile organization, and the emergence of the so-called collaborative economy. The capacity that many small actors have of being part of the value chain in the sector as service providers is changing the global map of tourism services. Likewise, the concept of reinvention for life opens a new dimension regarding the training of people who are part of the sector, with special emphasis on the technological field.

Another of the emerging realities with the greatest impact in the tourism sector, **technology, talent and transformation** sector revolves around the way in which automation and various technological disciplines (mobile technology, Internet of things -IoT-, artificial intelligence -AI -, big data, data analytics, etc.) will affect the sector and if the effects will occur in the short, medium or long term.

The intensive use of ICTs in recent years has led to significant changes in consumer behavior and in the travel cycle.[11] There has been dramatic changes in the whole distribution system with the Internet becoming the central axis of transactions[12]. Technological innovation led to a new reality in tourism in which there is no longer a total control over supply and where demand (society) sets priorities, needs and expectations. A reality with a new value chain, the fading of intermediaries (as the internet becomes a direct distribution channel allowing for the comparison of prices and products) and new players, most of which with a technology profile.

This first level of changes has been very fast, and the degree of adoption of ICTs by the different actors involved has responded to this evolution. However, it is key to highlight other trends that can continue to transform the concept of tourism[13] such as the development of autonomous vehicles, the use of augmented reality technologies, the massive application of real-time translation software, the use of virtual assistants with artificial intelligence, information management and knowledge generation through big data, the increase of automation through robotics or the extension of blockchain technology in all types of economic transactions.

These trends face important barriers[14]. There are still relevant deficiencies in terms of adequate lifelong learning, vocational education, training and skills development, much of the sector does not fully appreciates the opportunities involved in adopting the use of ICT and, although to a lesser extent, there is also a lack of leadership skills or from the perspective of capital investment.

Against this backdrop, one of the key reflections relates to how technology, and specifically the robotization/automation, affects the sector. Looking towards 2030 scenario[15], some studies have found that these will impact not only on developed economies but also developing ones in terms of jobs that imply a direct interaction with customers such as hotel and travel agencies, workers, entertainment assistants or cafeteria workers. In fact, accommodation and food services are among the sectorial categories with the highest risk of automation in the USA[16].

The last emerging reality – **the ethics of work and society** – also brings to the tourism sector the challenge of managing in an efficient manner its impacts and relations.

Today, tourists will have higher trust in information provided by peers than by the sector. The image and reputation of tourism destinations and companies is thus key to their competitiveness. Companies and destination need to 'walk the talk' when it comes to their commitment to society.

The aging of the population, the increase in the number of people belonging to the middle class or the entry into the market of the Z and Millennial generations will make the management of diversity, in its broadest sense of the word, also a lever of change and differentiation.

Chapter 1 Endnotes

1   Data on the accommodation and food services serves as a proxy for tourism data in the lack of yearly data on employment in the tourism industries for all countries

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7   International Labour Organization (2019) Work for a brighter future – Global Commission on the Future of Work, ILO, Geneva (online), available at: www.ilo.org (15-10-2019).

8   Arntz, M.; Gregory, T. and Zierahn, U. (2016), 'The Risk of Automation for Jobs in OECD Countries: A Comparative Analysis', OECD Social, Employment and Migration Working Papers, number 189, OECD Publishing, Paris,

9   Bersin, J.; Hagel, J. and Schwartz, J. (2017), 'Navigating the future of work: Can we point business, workers, and social institutions in the same direction?', Deloitte Review, issue 21, published 31 July 2017 (online) available at: www.deloitte.com (15-10-2019)Navigating

10 International Labour Organization (2019) Work for a brighter future – Global Commission on the Future of Work, ILO, Geneva (online), available at: www.ilo.org (15-10-2019).

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13   Organisation for Economic Co-operation and Development (2018), 'Analysing Megatrends to Better Shape the Future of Tourism', OECD Tourism Papers, number 2018/02, OECD Publishing, Paris, DOI: https://doi.org/10.1787/d465eb68-enAnalysing megatrends to better shape the future of tourism, OECD. 2018

14 World Economic Forum (2018), The Future of Jobs Report 2018, Centre for the New Economy and Society, WEF, Geneva (online) available at: www.weforum.org (15-10-2019)

15   McKinsey Global Institute (2017), Jobs lost, jobs gained: Workforce transitions in a time of automation, December 2017, McKinsey & Company, (online), available at: https://www.mckinsey.com/~/media/mckinsey/featured%20insights/future%20of%20organizations/what%20the%20future%20of%20work%20will%20mean%20for%20jobs%20skills%20and%20wages/mgi-jobs-lost-jobs-gained-report-december-6-2017.ashx (15-10-2019)

16 Citi and Oxford Martin School (2019), Technology at work v4.0 – Navigating the Future of Work, Citi GPS: Global Perspectives & Solutions.
    Frey, C.B. and Osborne, M.A. (2017), 'The Future of Employment: How susceptible are jobs to computerisation?', Technological Forecasting and Social Change, volume 114, issue C, Elsevier, pp. 254–280, DOI: https://doi.org/10.1016/j.techfore.2016.08.019
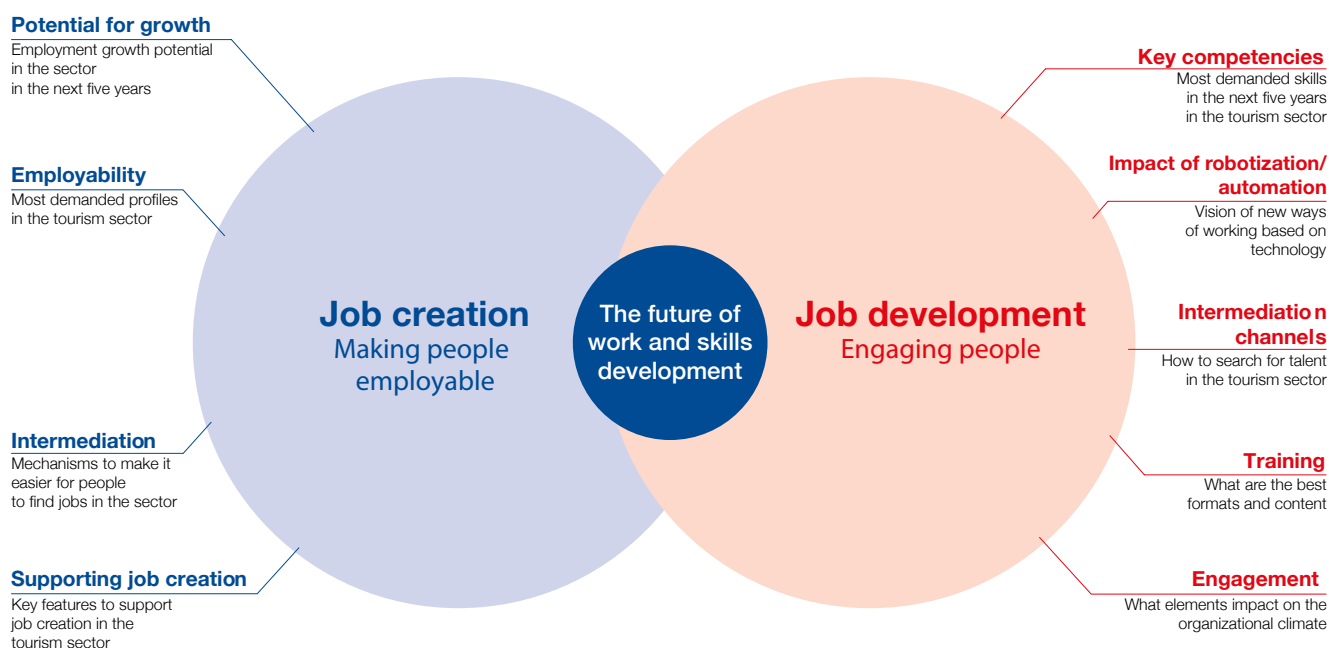
Survey – Understanding needs and expectations

2

The future of work and skills development – understanding needs and expectations

To better understand the trends related to the future of work, UNWTO in collaboration with its Affiliate Member, Cegos, carried out a survey aimed to:

■ Assess the **views of the various stakeholders**: Workers and Students, Private Sector, Public Sector and Educational institutions;

■ **Provide guidance to governments** on the key issues shaping the future of work in tourism;

■ **Setting a vision** on the future of work in tourism and its potential towards 2030.

Potential for growth
Employment growth potential in the sector in the next five years

Employability
Most demanded profiles in the tourism sector

Intermediation
Mechanisms to make it easier for people to find jobs in the sector

Supporting job creation
Key features to support job creation in the tourism sector

Job creation
Making people employable

The future of work and skills development

Job development
Engaging people

Key competencies
Most demanded skills in the next five years in the tourism sector

Impact of robotization/ automation
Vision of new ways of working based on technology

Intermediation channels
How to search for talent in the tourism sector

Training
What are the best formats and content

Engagement
What elements impact on the organizational climate

Reference model

Research was carried out based on two key elements: 1) **Policies to promote employment** (which allow the employability of workers into the labour market and promote job creation; and 2) **employment development** (once the workers are part of the labour market).

👫 **Workers and Students**

✈ **Tourism Private Sector**

🏛 **Public Sector**

🎓 **Educational Institutions**

The survey was carried out worldwide online among tourism administrations, companies, educational institutions, workers and students during August and September 2019 in English, French, Spanish and Russian.

With a total of more than 1.400 answers, the overall error is of 2.62% with a confidence level of 95% and unfavorable conditions of dispersion (p = q = 50%).

	Answers	Sample errors
Public sector	301	5,65%
Private sector	369	5,10%
Educational institution	204	6,86%
Worker & student	528	4,26%
TOTAL	**1402**	**2,62%**

Key conclusions

1 Apparently there is no coincidence between the expectations of work stability of workers and students and the vision of the private sector in terms of future recruitment.

While 80% of workers and students think that they "will work" or "will continue to work in the tourism sector", the private sector foresees the employability of workers to be below 10%.

2 All groups of stakeholders consider digital/IT and customer focus as the profiles with the highest level of demand in the coming five years.

3 Workers and students consider that the role of the public sector is key to support employment creation while other groups (private sector, public sector and educational institutions) consider more relevant to support companies and promote entrepreneurship.

4 The quality of work is considered as the most important element for the creation of employment in the coming years among the four groups, followed by technology as second for all groups except for workers and students who place it last.

5 Customer focus, creativity and innovation are considered key competencies in the future of work in the tourism sector for workers and students, public bodies and educational organizations.

It is worth noting the contrasting visions between the private sector and workers and students in terms of the competence 'commitment to work', which the private sector places second (behind customer focus) while the remaining groups consider it as fourth or fifth in importance.

6 None of the groups considered automation to have a major impact in the future of the work in the sector. However, half of the workers and students consider it will reduce employment opportunities.

7 Workers and students say they will mostly use social networks, apps and websites as a search channel.

There is a clear risk of obsolescence in the use of public services and agencies related to employment.

8 Online training is still not highly demanded by workers and students nor by the private sector who value presential training more.
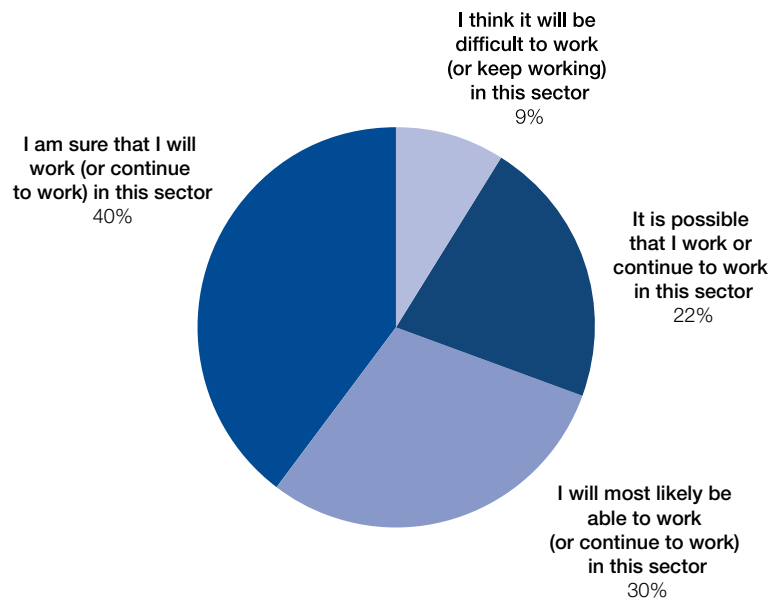
9 Big data and data analytics, together with environmental related technologies, emerge as the most valued technologies to consider in terms of future skills development.

10 Life-work balance is the most valued aspect for workers and students and by both educational organizations and the public sector.
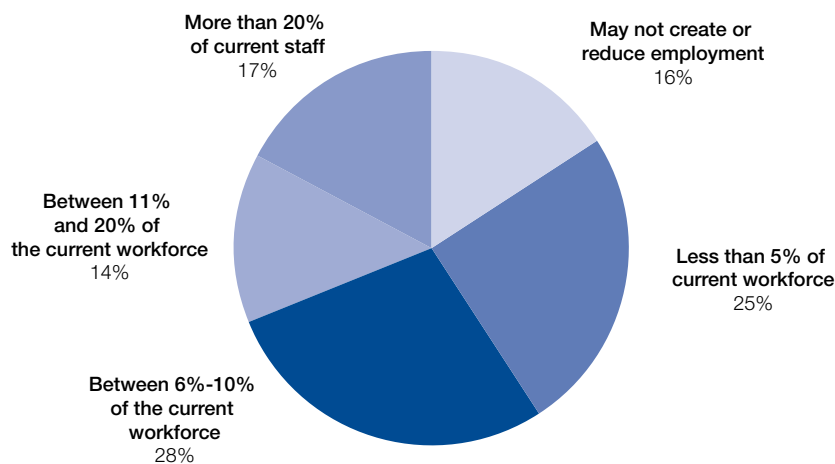
Detailed survey results[1]

Question 1: Job Creation – Potential for growth
What is the growth potential of the sector in the coming 5 years?

Figure 2.3   How likely are you to work (or continue working) in the tourism sector in the next five years?

I think it will be
difficult to work
(or keep working)
in this sector
9%

I am sure that I will
work (or continue
to work) in this sector
40%

It is possible
that I work or
continue to work
in this sector
22%

I will most likely be
able to work
(or continue to work)
in this sector
30%

7 out of 10 workers and students consider they will work or will continue working in the sector in the coming five years.

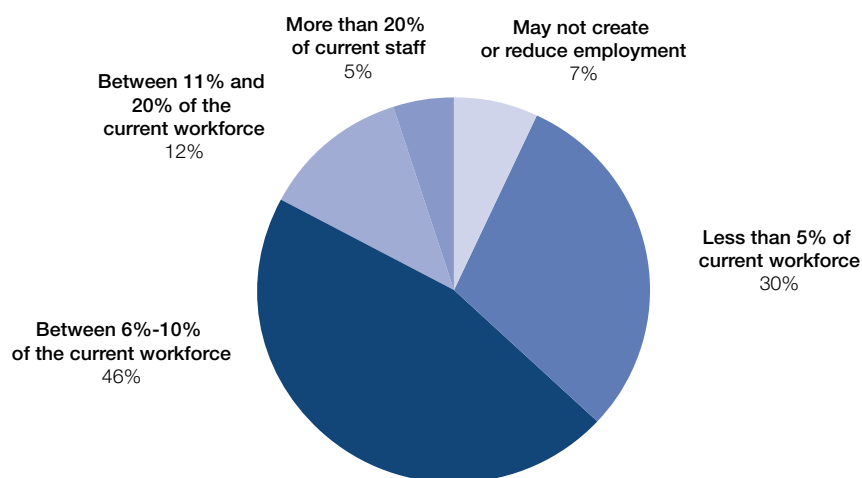**Figure 2.4   How much do you think recruitment in your organization will grow in the next five years?**

More than 20%
of current staff
17%

May not create or
reduce employment
16%

Between 11%
and 20% of
the current workforce
14%

Less than 5% of
current workforce
25%

Between 6%-10%
of the current
workforce
28%

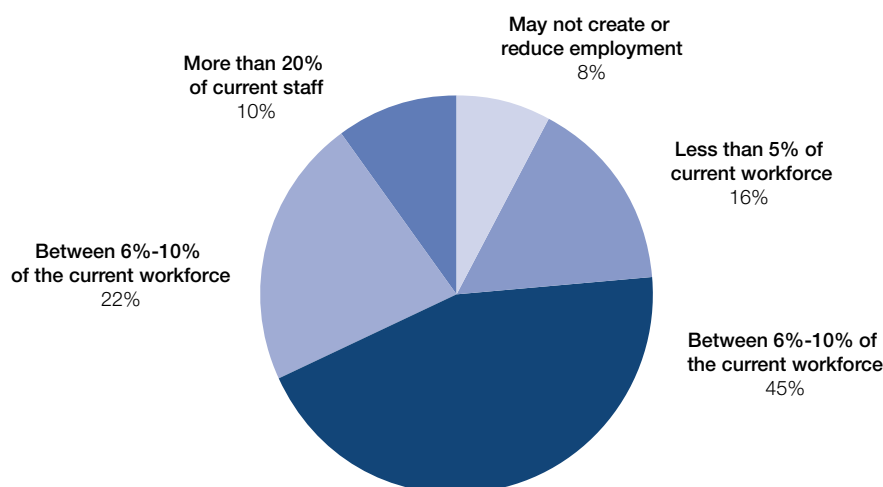7 out of 10 companies consider that employment in the sector will grow below 10%.

Figure 2.5   How much do you think recruitment in the tourism sector will grow in the next five years in your country?

More than 20%
of current staff
5%

Between 11% and
20% of the
current workforce
12%

May not create
or reduce employment
7%

Less than 5% of
current workforce
30%

Between 6%-10%
of the current workforce
46%

8 out of 10 public organizations consider employment in the sector will grow below 10%.

Figure 2.6   How much do you think recruitment in the tourism sector will grow in the next five years?

More than 20%
of current staff
10%

May not create or
reduce employment
8%

Less than 5% of
current workforce
16%

Between 6%-10%
of the current workforce
22%

Between 6%-10% of
the current workforce
45%

7 out of 10 education organizations think employment in the sector will grow below 10%.

Overview

- Private sector, public sector and academia consider employment in the sector will grow below 10% in the coming five years.
- Yet, workers and students are much more optimistic – almost 80% consider they will work or continue to work in the sector.
- Private sector and academia have a similar vision while the public sector is more conservative.

Question 2: Job Creation – Employability
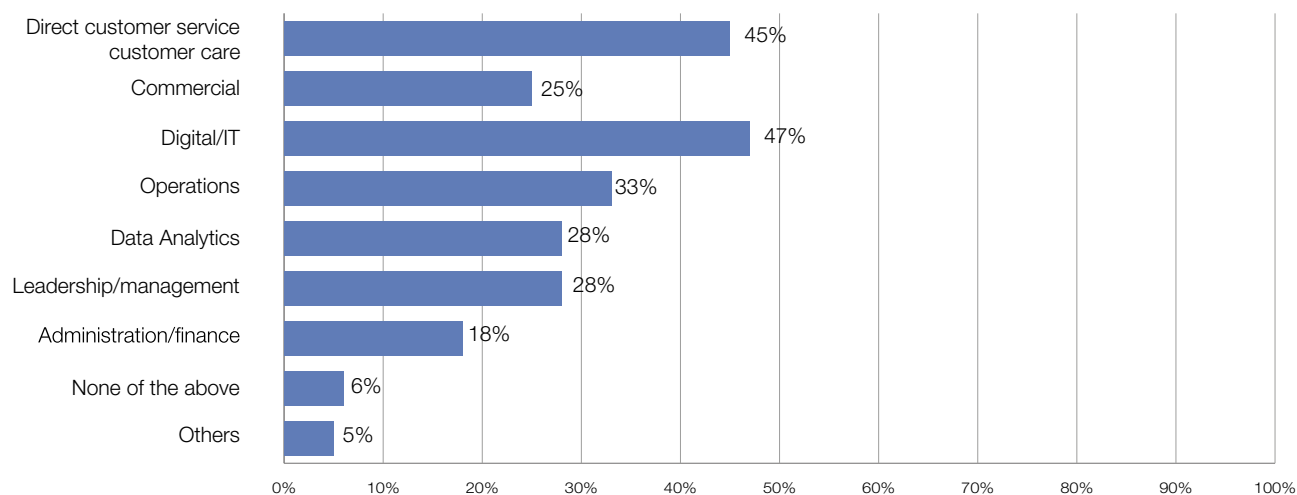**Most demanded profiles**

Figure 2.7   What do you think will be the most demanded profiles in the tourism sector in the next five years?
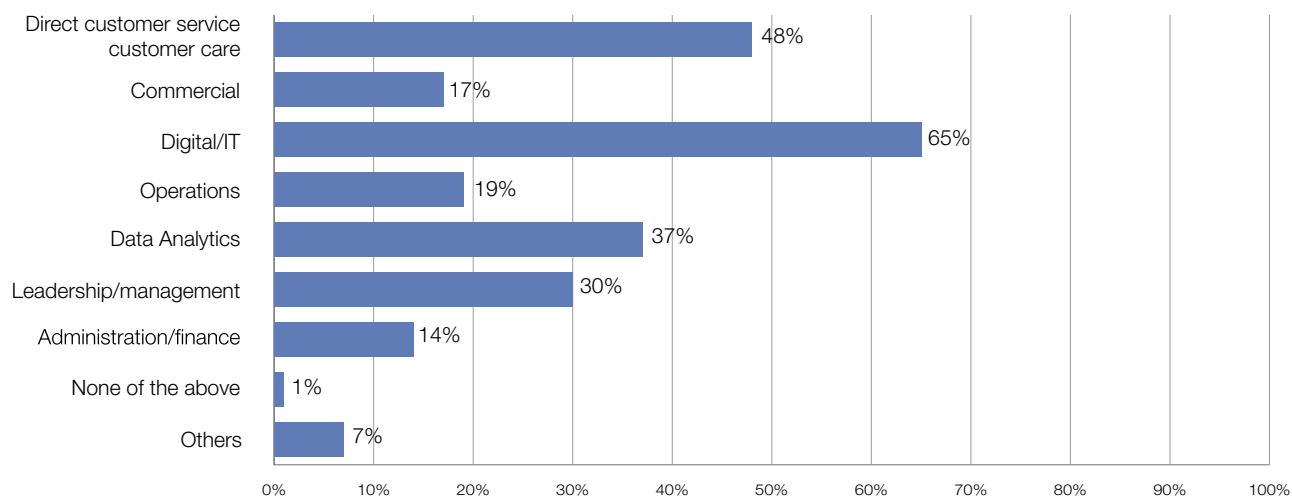
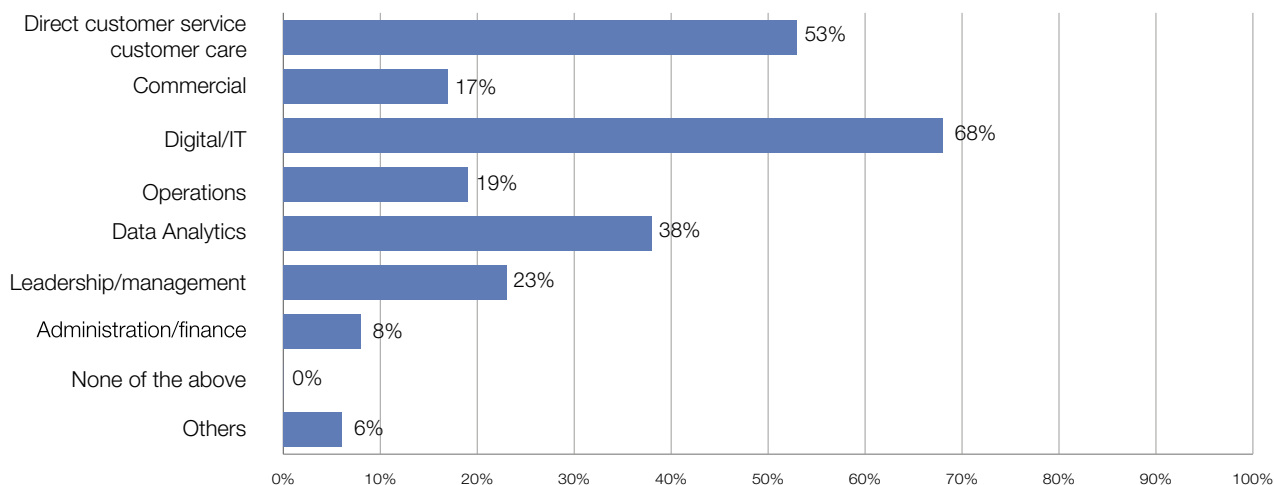Most demanded profiles: 1) Digital/IT 2) Customer service 3) Data Analyst.

Figure 2.8   Which of these profiles do you plan to incorporate into your organization in the next five years?

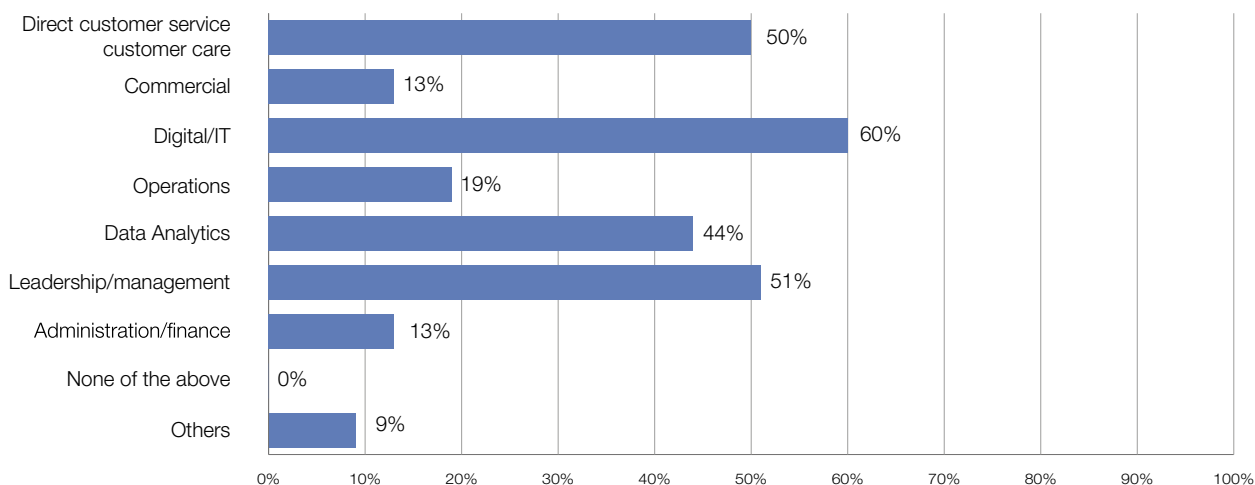Most demanded profiles: 1) Digital/IT 2) Customer service 3) Operations.

Figure 2.9 **What do you think will be the most demanded profiles by companies in the tourism sector in the next five years?**

Profile	Percentage
Direct customer service customer care	53%
Commercial	17%
Digital/IT	68%
Operations	19%
Data Analytics	38%
Leadership/management	23%
Administration/finance	8%
None of the above	0%
Others	6%

Most demanded profiles: 1) Digital/IT 2) Customer service 3) Data Analyst.

Figure 2.10 **Which of these profiles do you consider most relevant for training in your institution in the next five years?**

Profile	Percentage
Direct customer service customer care	50%
Commercial	13%
Digital/IT	60%
Operations	19%
Data Analytics	44%
Leadership/management	51%
Administration/finance	13%
None of the above	0%
Others	9%

Most demanded profiles: 1) Digital/IT 2) Customer service 3) Data Analyst 4) Leadership.
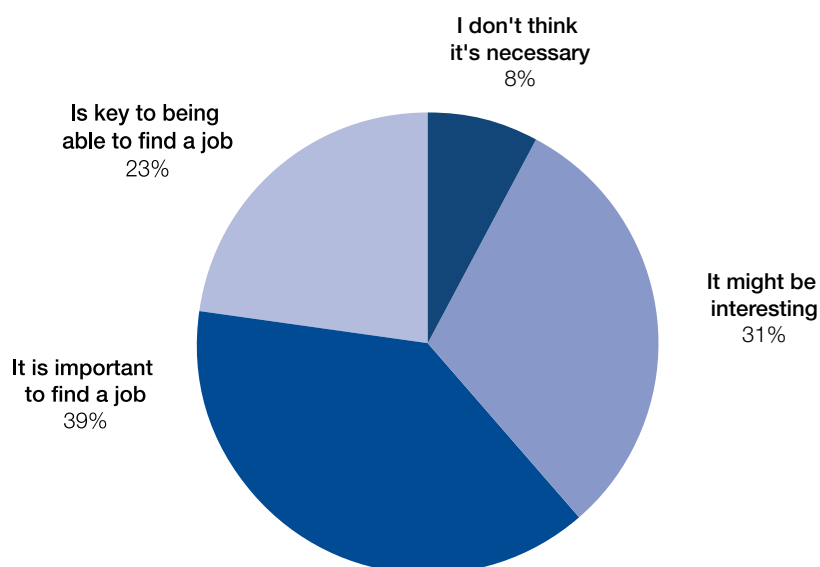
Overview

- All stakeholders agree on the most demanded profiles for the next five years to a higher or lesser extent.
- The most relevant skills are: digital/IT, customer focus, data analytics, operations, commercial, leadership/ management and administration/finance.
- Operations applies to the performance of a practical work or of something involving the practical application of principles or processes. Operations emerge as a key competence for the private sector although it is not mentioned by the educational organizations.

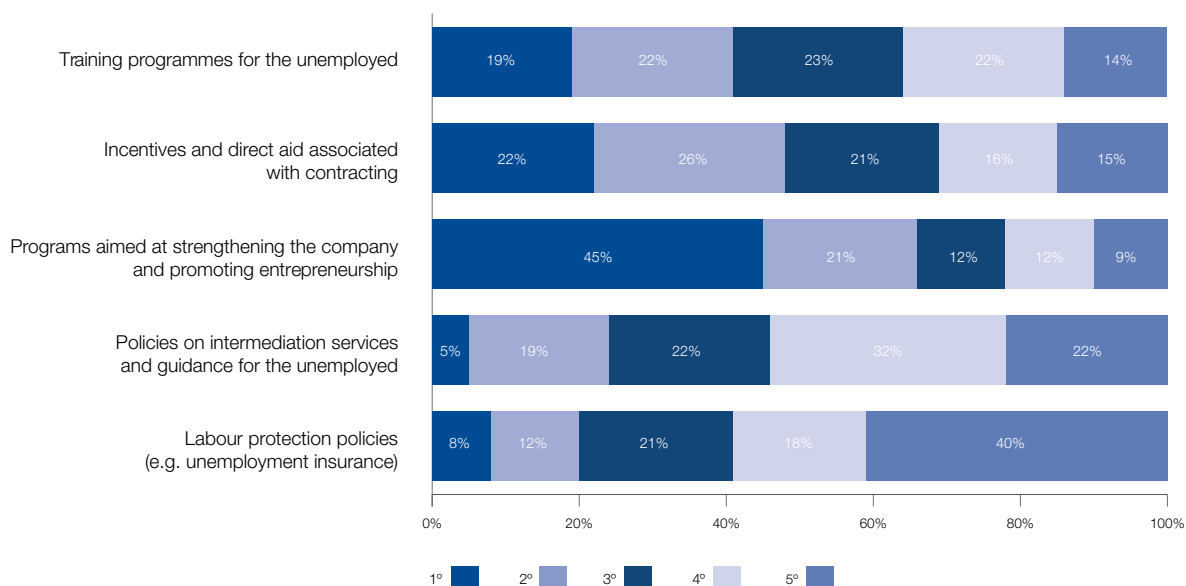## Question 3: Job Creation – Intermediation
Mechanisms to support job search

Figure 2.11   What is the role of your state or local government in helping you find (or improve) employment in the sector?

I don't think
it's necessary
8%

Is key to being
able to find a job
23%

It might be
interesting
31%

It is important
to find a job
39%

6 in 10 workers consider relevant the role of governments in supporting them find a job.

Figure 2.12   Prioritize the following policies according to their importance for the future of employment

	1°	2°	3°	4°	5°
Training programmes for the unemployed	19%	22%	23%	22%	14%
Incentives and direct aid associated with contracting	22%	26%	21%	16%	15%
Programs aimed at strengthening the company and promoting entrepreneurship	45%	21%	12%	12%	9%
Policies on intermediation services and guidance for the unemployed	5%	19%	22%	32%	22%
Labour protection policies (e.g. unemployment insurance)	8%	12%	21%	18%	40%

0%   20%   40%   60%   80%   100%

1°   2°   3°   4°   5°

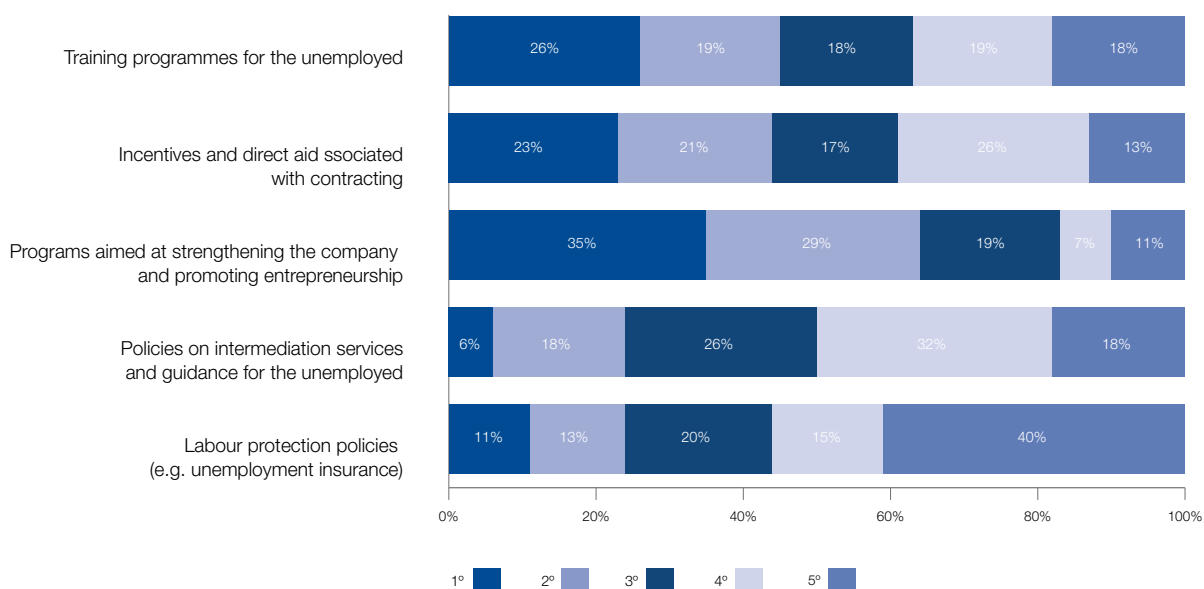For the private sector the most relevant policies are those aimed at strengthening companies and promoting entrepreneurship.

Figure 2.13 Prioritize the following policies based on how they are expected to be implemented in your state or locality in the future

Training programmes for the unemployed: 17% | 18% | 32% | 20% | 13%

Incentives and direct aid associated with contracting: 26% | 26% | 20% | 15% | 13%

Programs aimed at strengthening the company and promoting entrepreneurship: 45% | 22% | 14% | 9% | 10%

Policies on intermediation services and guidance for the unemployed: 6% | 17% | 19% | 37% | 21%

Labour protection policies (e.g. unemployment insurance): 6% | 17% | 14% | 20% | 43%

Legend: 1° | 2° | 3° | 4° | 5°

Public and private sector agree on the most important policies – strengthening companies and promoting entrepreneurship.

Figure 2.14 Prioritize the following policies according to their importance for the future of employment

Training programmes for the unemployed: 26% | 19% | 18% | 19% | 18%

Incentives and direct aid ssociated with contracting: 23% | 21% | 17% | 26% | 13%

Programs aimed at strengthening the company and promoting entrepreneurship: 35% | 29% | 19% | 7% | 11%

Policies on intermediation services and guidance for the unemployed: 6% | 18% | 26% | 32% | 18%

Labour protection policies (e.g. unemployment insurance): 11% | 13% | 20% | 15% | 40%

Legend: 1° | 2° | 3° | 4° | 5°

Educational organizations consider key training programme for unemployed people – an area not considered a priority for public organizations.

Overview

- Social protection policies are the least important to the public and private sectors as well as to educations institutions.

Question 4: Job Creation – Supporting job creation
Key features for job creation

Figure 2.15   Prioritize the following areas in terms of their importance for employment in the tourism sector

Equality	20% 33% 28% 19%	
Technology	18% 22% 27% 33%	
Social Inclusion	20% 23% 28% 29%	
Decent work	42% 22% 17% 19%	

0%   20%   40%   60%8   0%   100%

1°   2°   3°   4°
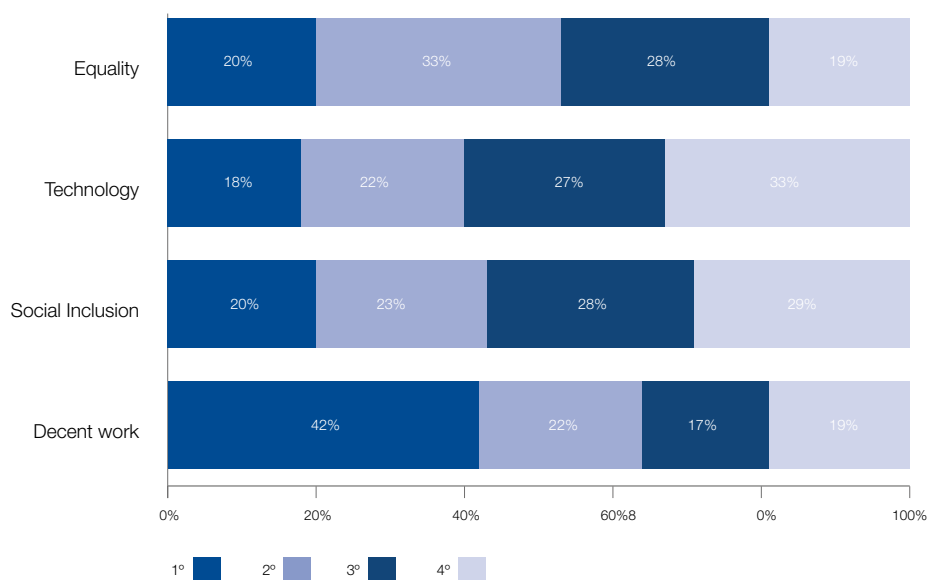
Decent work followed by equality are the areas of highest importance in the future of work for workers and students.

Figure 2.16   Prioritize the following areas in terms of importance for employment in the tourism sector

Equality	19% 25%3 4% 22%	
Technology	24% 26%2 2% 28%	
Social Inclusion	16% 23%2 6% 35%	
Decent work	41% 26% 18% 15%	

0%   20%   40%   60%8   0%   100%

1°   2°   3°   4°
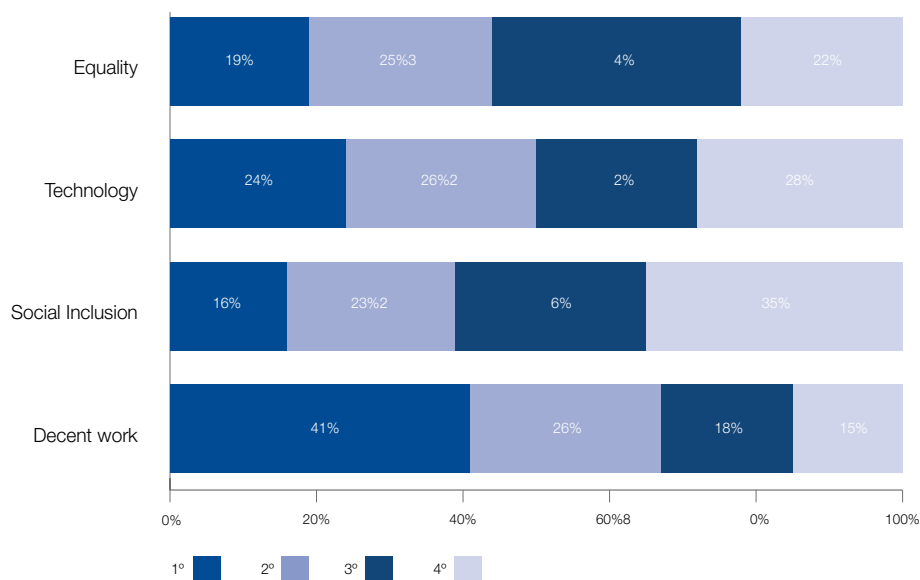
For the private sector decent work and technology are the key issues for the future of work.

Figure 2.17   Prioritize the following areas in terms of importance for employment in the tourism sector

	1°	2°	3°	4°
Equality	17%	28%	31%	23%
Technology	24%	25%	21%	31%
Social Inclusion	18%	22%	31%	29%
Decent work	42%	24%	17%	17%
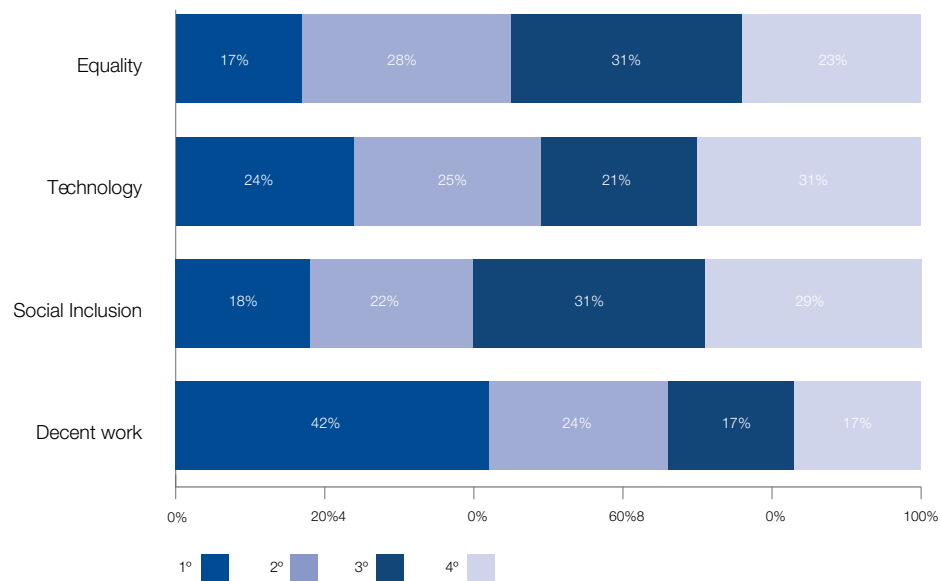
Decent work followed by technology are the key issues for the future of work for the public sector.

Figure 2.18   Prioritize the following areas in terms of importance for employment in the tourism sector

	1°	2°	3°	4°
Equality	19%2	5%3	7%	19%
Technology	25%	28%	18%	29%
Social Inclusion	19%	24%	25%3	2%
Decent work	38%2	3%	20%2	0%
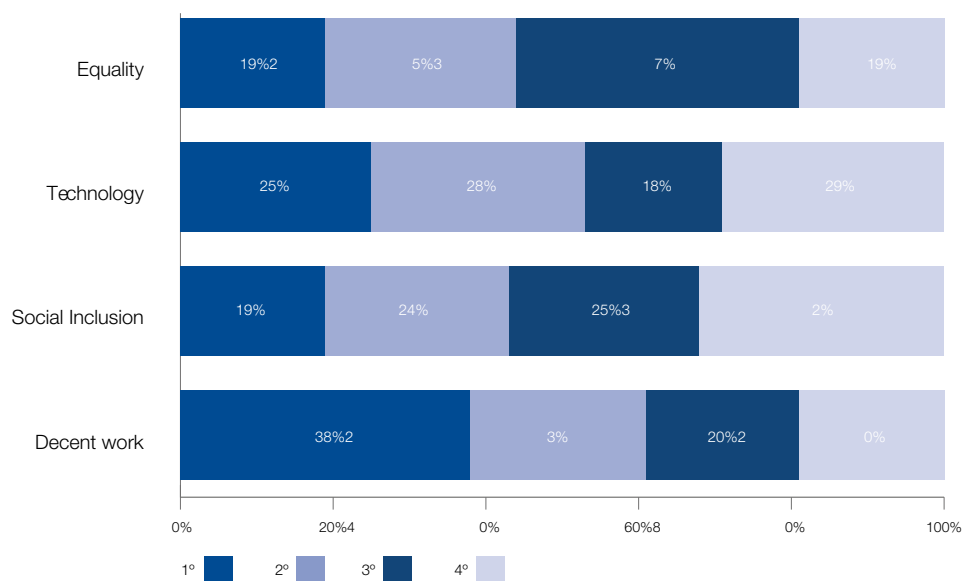
For educational institutions decent work and technology also rank first as key issues for the future of work.

Overview

- Decent work, followed by technology, are clearly the most important issues for the future of work for all stakeholders, with the exception of workers and students who place it last.
- On the other hand, social inclusion is considered as the less relevant issue.
- The importance of equality for workers and students (second option) is not reflected in the views of the remaining stakeholders (third element in importance).

Question 5: Job Development – Key Competencies
Most demanded skills in tourism in the coming years

Figure 2.19   Prioritize the following skills and abilities for people who want to work in the tourism sector (from highest to lowest)

Skill	1°	2°	3°	4°	5°	6°
Focus on the client	29%	20%	19%	14%	9%	9%
Technological and digital capabilities	9%	15%	16%	18%	17%	25%
Creativity and innovation	21%	21%	18%	16%	15%	9%
Flexibility and adaptability	16%	20%	17%	20%	15%	12%
Ability to work in a team	7%	11%	16%	20%	27%	20%
Commitment to work	18%	13%	14%	13%	18%	25%
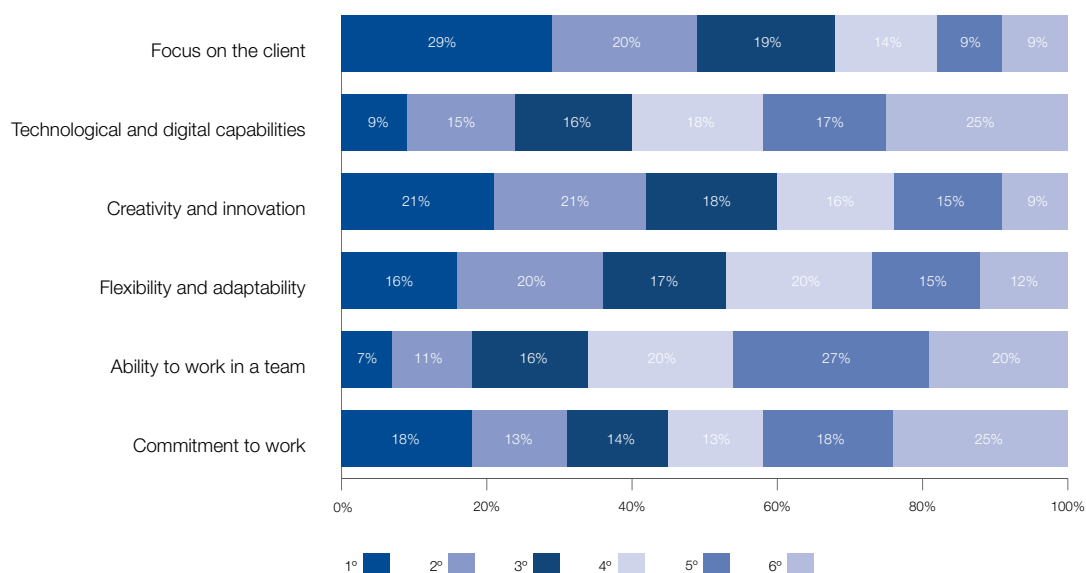
Customer orientation and creativity and innovation emerge as the key abilities for the future of work.

Figure 2.20   Prioritize the following skills and abilities for the people you would incorporate in your company (from highest to lowest)

Skill	1°	2°	3°	4°	5°	6°
Focus on the client	26%	15%	15%	16%	16%	12%
Technological and digital capabilities	9%	10%	13%	15%	23%	30%
Creativity and innovation	19%	15%	17%	17%	17%	15%
Flexibility and adaptability	8%	19%	22%	20%	15%	15%
Ability to work in a team	13%	21%	21%	17%	12%	15%
Commitment to work	25%	20%	11%	14%	17%	14%
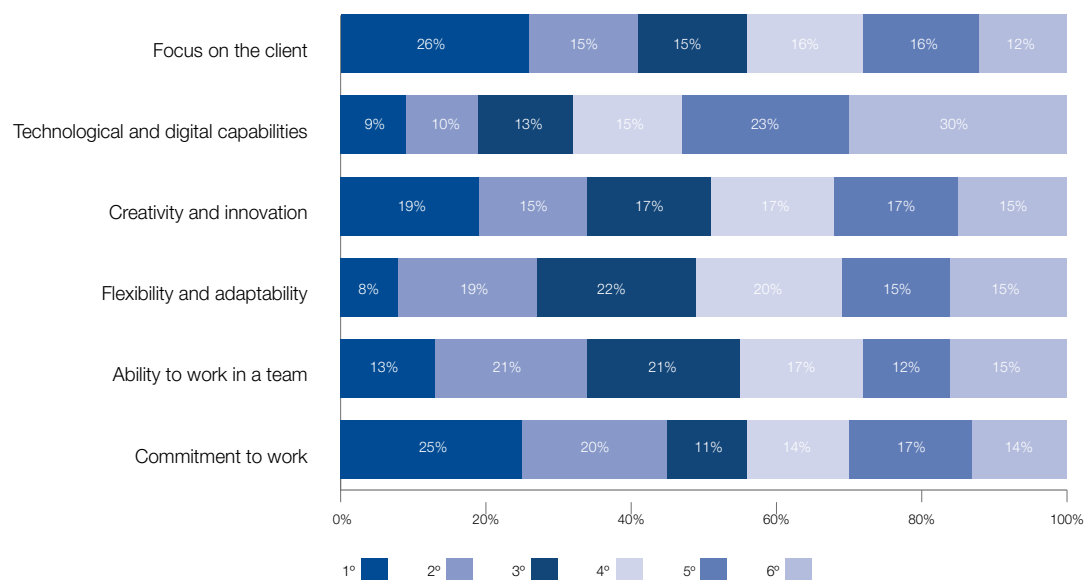
The private sector also values customer service yet points to commitment to work as second most important competence.

Figure 2.21   Prioritize the following skills and abilities that you consider will be key in the future workers in the tourism sector companies (from highest to lowest importance)

Focus on the client: 31% | 16% | 14% | 16% | 15% | 8%
Technological and digital capabilities: 15% | 21% | 20% | 17% | 12% | 16%
Creativity and innovation: 31% | 22% | 19% | 11% | 11% | 6%
Flexibility and adaptability: 9% | 19% | 21% | 21% | 20% | 11%
Ability to work in a team: 2% | 11% | 13% | 24% | 24% | 27%
Commitment to work: 12% | 12% | 13% | 11% | 19% | 32%

Legend: 1° 2° 3° 4° 5° 6°
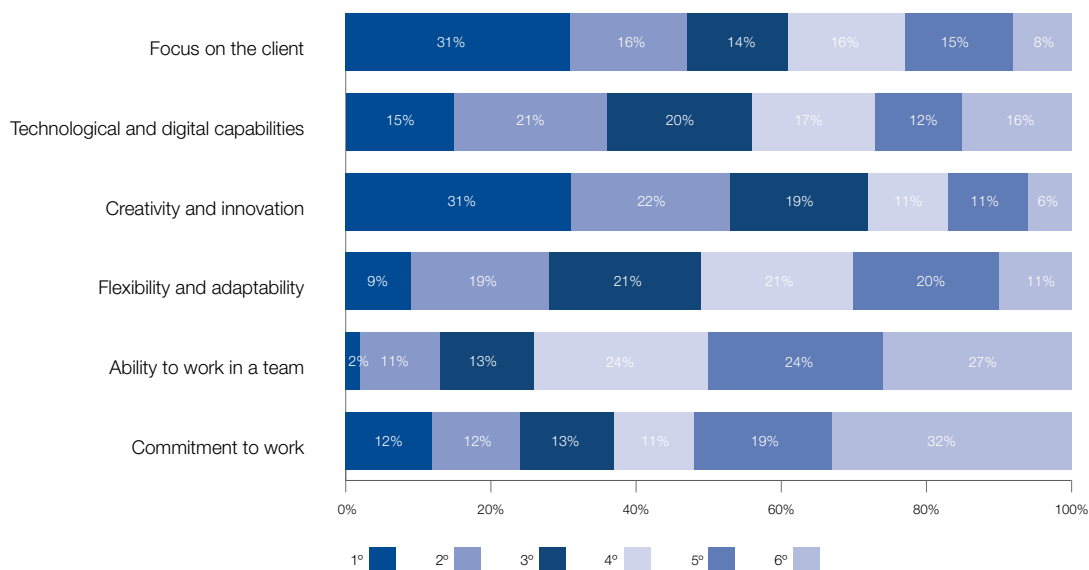
> Public sector representatives place customer service and creativity and innovation at the same level of importance.

Figure 2.22   Prioritize the following skills and abilities for future workers in the tourism sector (from highest to lowest)

Focus on the client: 25% | 22% | 10% | 14% | 12% | 18%
Technological and digital capabilities: 13% | 11% | 19% | 23% | 18% | 16%
Creativity and innovation: 25% | 25% | 22% | 11% | 10% | 6%
Flexibility and adaptability: 15% | 18% | 16% | 21% | 16% | 14%
Ability to work in a team: 5% | 12% | 21% | 22% | 23% | 18%
Commitment to work: 18% | 11% | 12% | 10% | 21% | 28%

Legend: 1° 2° 3° 4° 5° 6°
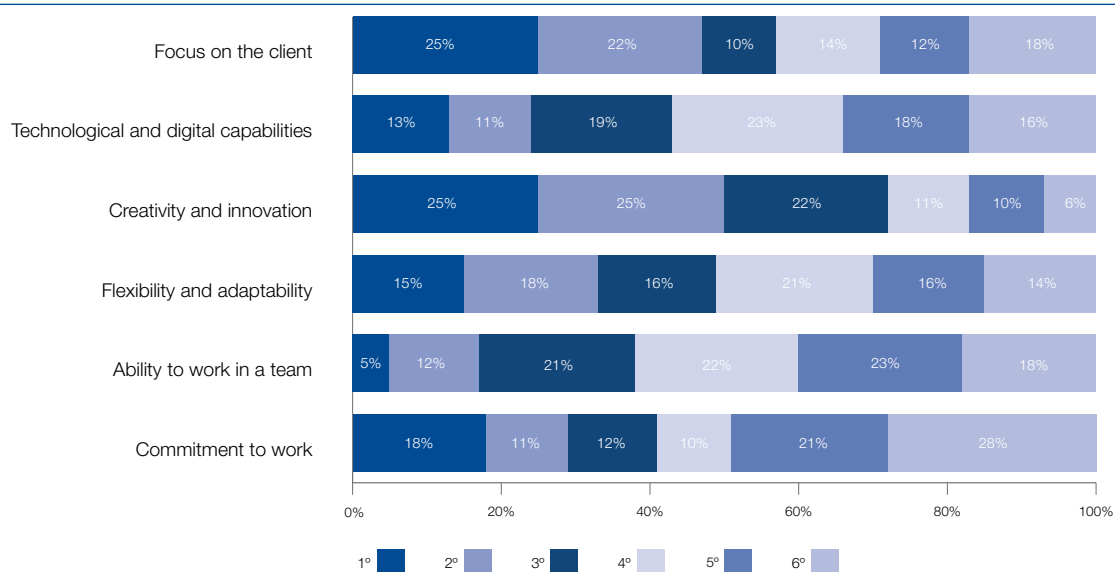
> Educational institutions place creativity and innovation first as most importance competence followed very closely by customer focus.

Overview

- Customer focus and creativity and innovation are the most valued competencies for all stakeholders.
- There is a strong difference regarding the importance of commitment to work among the private sector and workers and students.

Question 6: Job Development – Impact of robotization-automation
Impact of automation and robotization in the future of work

Figure 2.23   How do you think robotization will impact your future employability?

I think it might
be a help
15%

I think it will
drastically reduce
the options
21%

I think it will impact,
but in a positive way
45%

I think it's gonna
make it hard for
me to get to work
19%
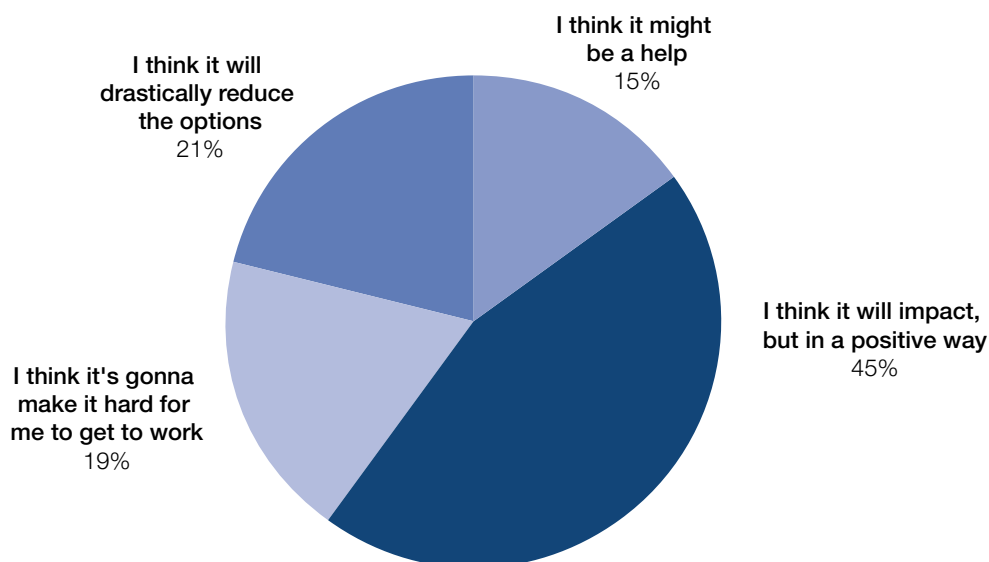
There is a polarized vision among students and workers on the impact of automation. Around 4 out of 10 workers and students see it in a positive way while others on a negative manner.

Figure 2.24   How are you developing people to coexist with robotization in your company?

Rethinking your objectives
(e.g. associated with productivity)
8%

Transition plan from
lower-value-added tasks
to automatic performance
7%

Relocating people to new,
non-automated tasks
4%

We're not doing
any relevant action
45%

Training related to the
use of new automated tools
37%
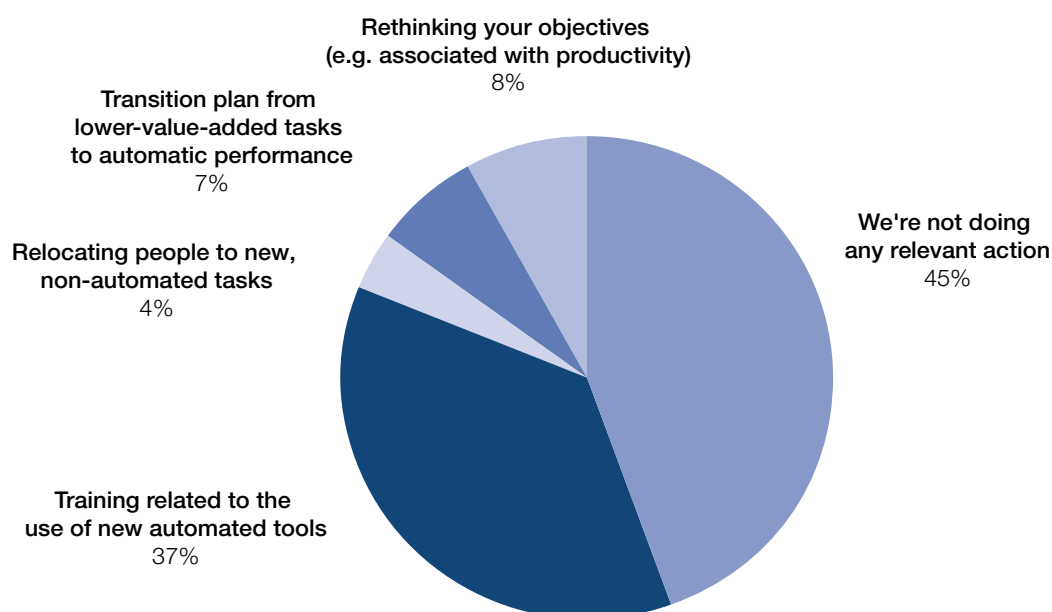
4 out of 10 private sector representatives is taking no action related to automation.

🏛 **Figure 2.25   How important do you think automating or robotizing processes is for companies in tourism?**

I think it's
imperative
5%

I think it's important
to make them
more competitive
14%

I don't think
it's particularly
relevant in the
tourism sector
23%

I think it's
important but
considering
the human
variable of jobs
57%
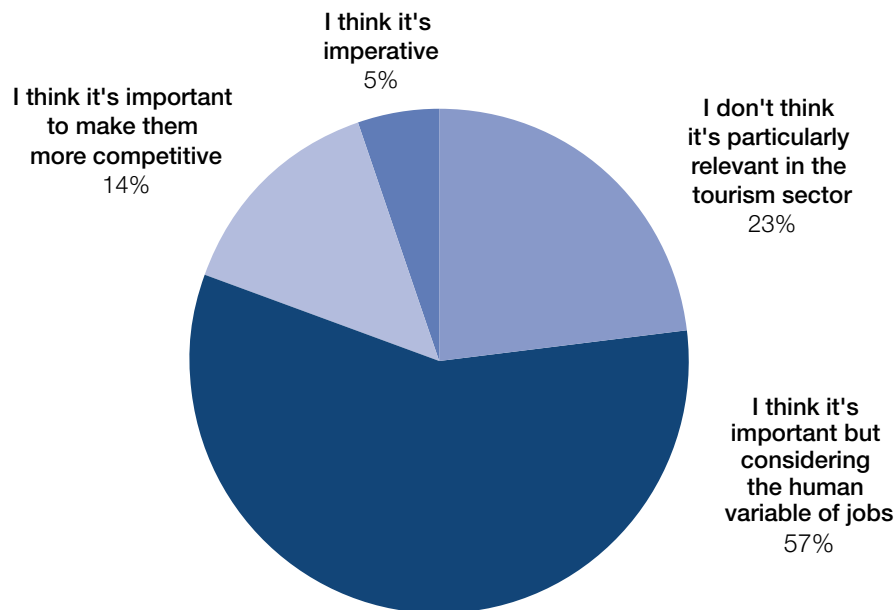
Only 2 in 10 representatives of public sector view automation and robotization as key.

🎓 **Figure 2.26   How relevant do you think robotization skills will be in the future?**

I think it will be an
indispensable knowledge
11%

I don't think it's
particularly relevant
in the tourism sector
23%

I think it will be very much
in demand by people
in the sector
20%

I think it will be
as important
as other subjects
47%
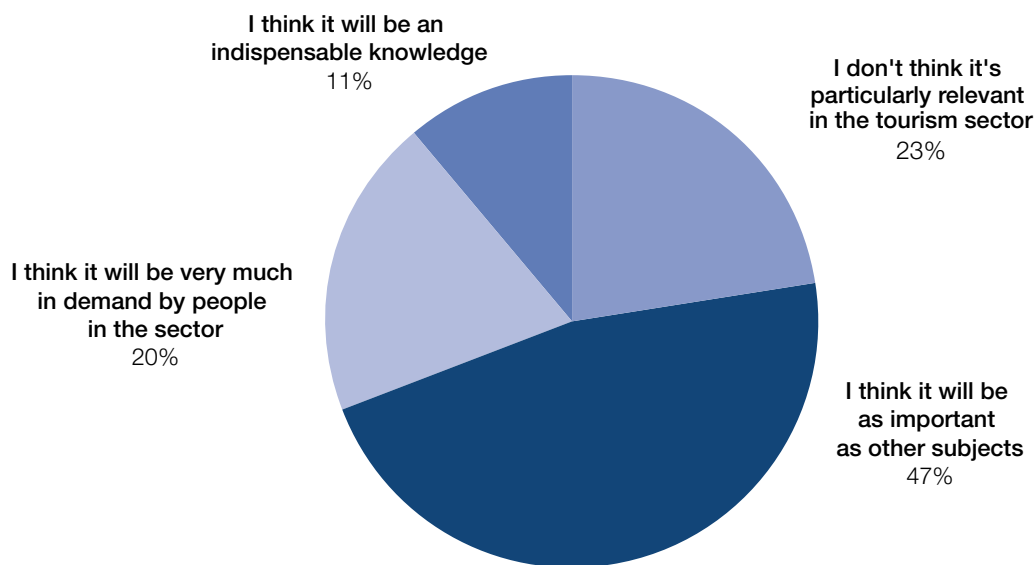
Educational institutions do not consider robotization a key feature (only10% consider it an indispensable knowledge area).

Overview

- Approximately half of the private sector representatives are not taking any action regarding robotization, yet half of the workers and students perceive this element as factor that will reduce their employment options.

Most demanded skills in tourism in the coming years

Figure 2.27   What channels will you use the most to find (or change) jobs?

Channel	1°	2°	3°	4°	5°
Friends, family and contacts	17%	16%	19%	21%	26%
Employment websites	33%	27%	20%	14%	5%
Sending my CV to companies	18%	20%	26%	25%	11%
Social networks and apps	27%	28%	19%	18%	8%
State or local job search service	5%	7%	16%	22%	50%
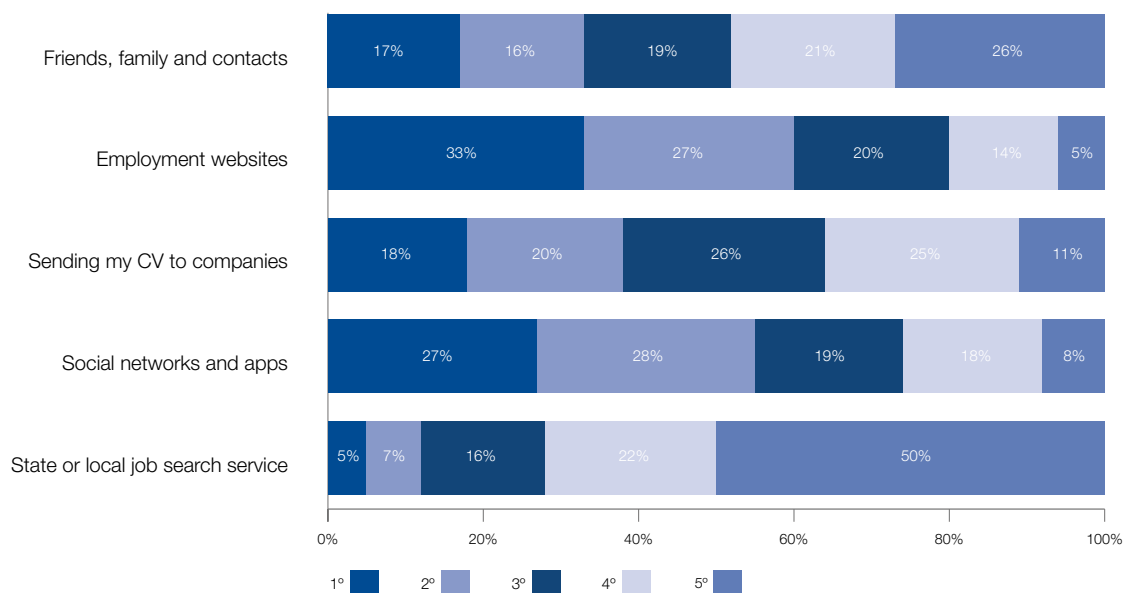
Web is the prime means to look for job while state and local job search services are not considered of importance.

Figure 2.28   What channels will you use the most to recruit for your company in the future?

Channel	1°	2°	3°	4°	5°
Friends, family and contacts	25%	19%	12%	16%	27%
Employment websites	20%	25%	23%	22%	10%
Sending my CV to companies	23%	28%	26%	18%	4%
Social networks and apps	24%	21%	25%	19%	11%
State or local job search service	8%	7%	14%	24%	47%
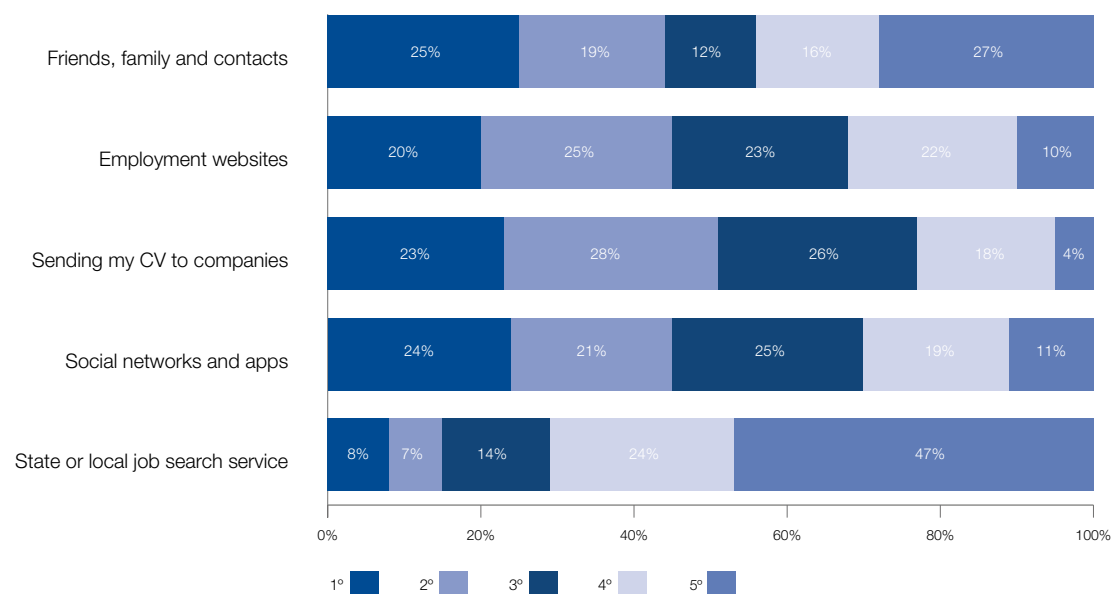
Social networks and contacts emerge as the most favoured means to recruit among the private sector.

Figure 2.29   How will your administration enhance worker placement services?

It will be the fundamental
line to connect supply
and demand of employment
30%

It will not be our fundamental
line to connect supply
and demand of employment
37%

We will expand
the existing services
in this area
18%

We will create some
services in this area
14%
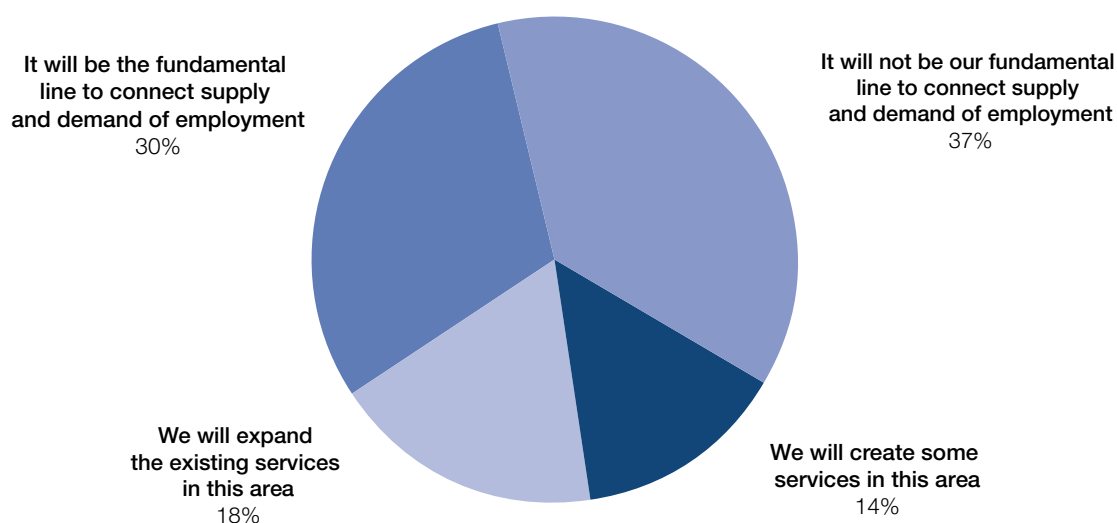
Workers placement does not appear as one of the main lines of actions of the public sector.

Figure 2.30   What do you think will be the most used channels to recruit in the future?

Channel	1°	2°	3°	4°	5°
Friends, family and contacts	11%	15%	25%	19%	30%
Employment websites	20%	41%	24%	11%	4%
Sending my CV to companies	3%	12%	27%	42%	16%
Social networks and apps	60%	22%	7%	5%	5%
State or local job search service	6%	10%	17%	23%	44%

Legend: 1° 2° 3° 4° 5°
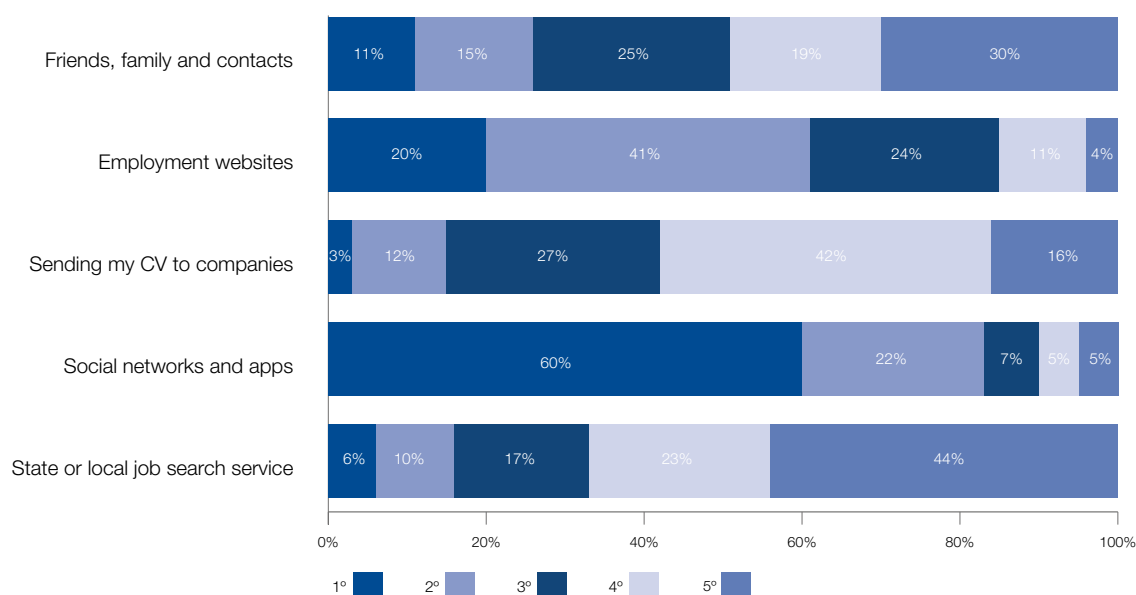
Educational institutions also agree that the preferred means of recruitment will be social networks.

Overview

- Apparently, results show that there is a risk of underutilization of public intermediation channels as this is the last means used by worker and student to look for a job and the last source of recruitment for the private sector.

Figure 2.31   Prioritize the training formats you would prefer as a professional?

	1°	2°	3°	4°
Through face-to-face training	43%	31%	15%	11%
Through online training	12%	16%	20%	52%
Through tutors to guide me	18%	25%	36%	21%
Practicing by learning from peers	26%	29%	28%	17%
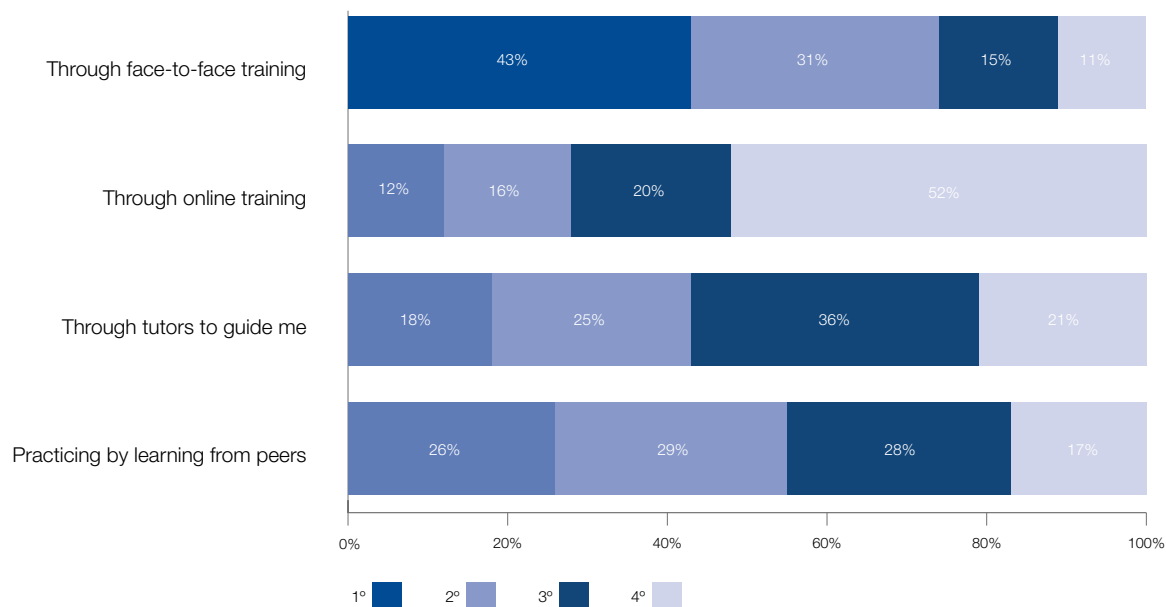
Workers and students demand mostly face-to face training.

Figure 2.32   Prioritize the training formats your company would be most prone to use to improve the skills of your workers?

	1°	2°	3°	4°
Through face-to-face training	46%	27%	20%	7%
Through online training	15%	19%	24%	42%
Through tutors to guide me	16%	25%	28%	30%
Practicing by learning from peers	22%	28%	28%	21%
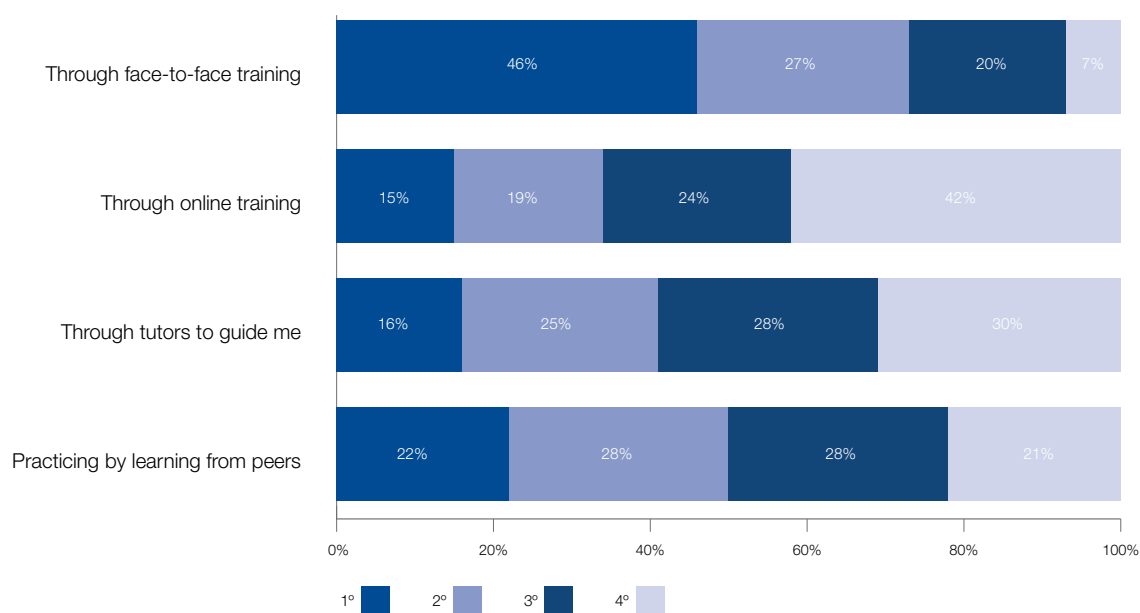
Companies use mostly face-to-face training.

Figure 2.33   Prioritize the actions taken by your organization to promote people development?

Action	1°	2°	3°	4°
Through direct aid to people for training (e.g. scholarships)	37%	24%	22%	16%
Through aid to companies (pe, tax deductions)	17%	23%	23%	38%
Through agreements with educational centres	29%	33%	26%	13%
Through tutors who guide them on the training to be carried out	18%	20%	30%	33%

Legend: 1° 2° 3° 4°
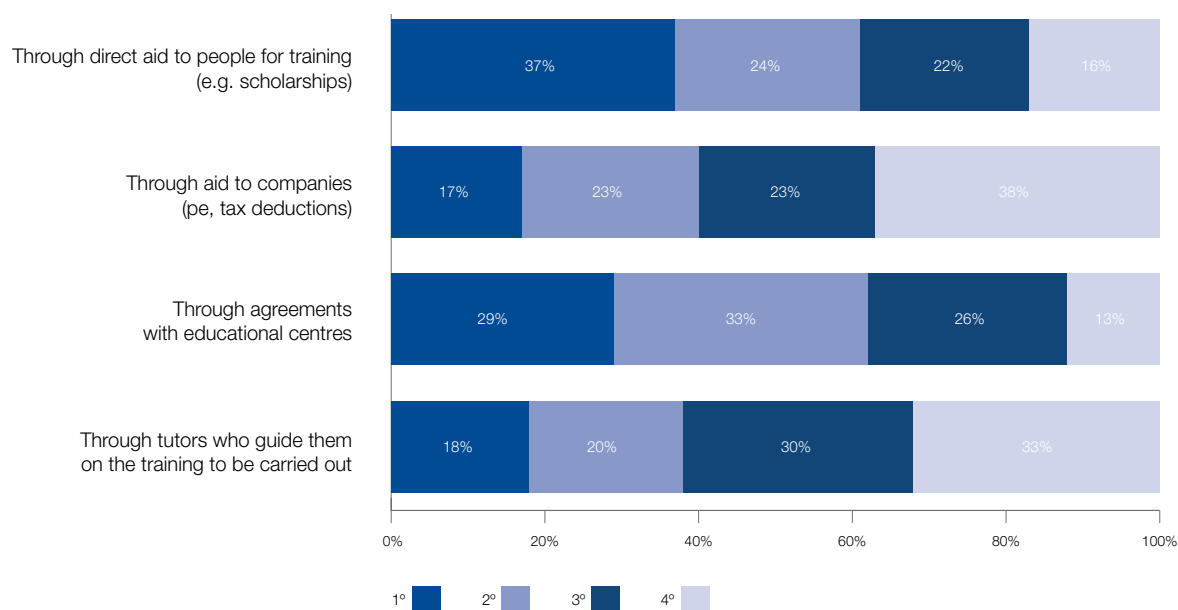
The public sector aims to support skills through direct aid to training (scholarships) and agreements with educational institutions.

Figure 2.34   Prioritize the training formats your institution would be most prone to use?

Format	1°	2°	3°	4°
Through face-to-face training	37%	23%	23%	17%
Through online training	34%	22%	16%	28%
Through tutors to guide me	13%	28%	32%	26%
Practicing by learning from peers	15%	27%	29%	29%

Legend: 1° 2° 3° 4°
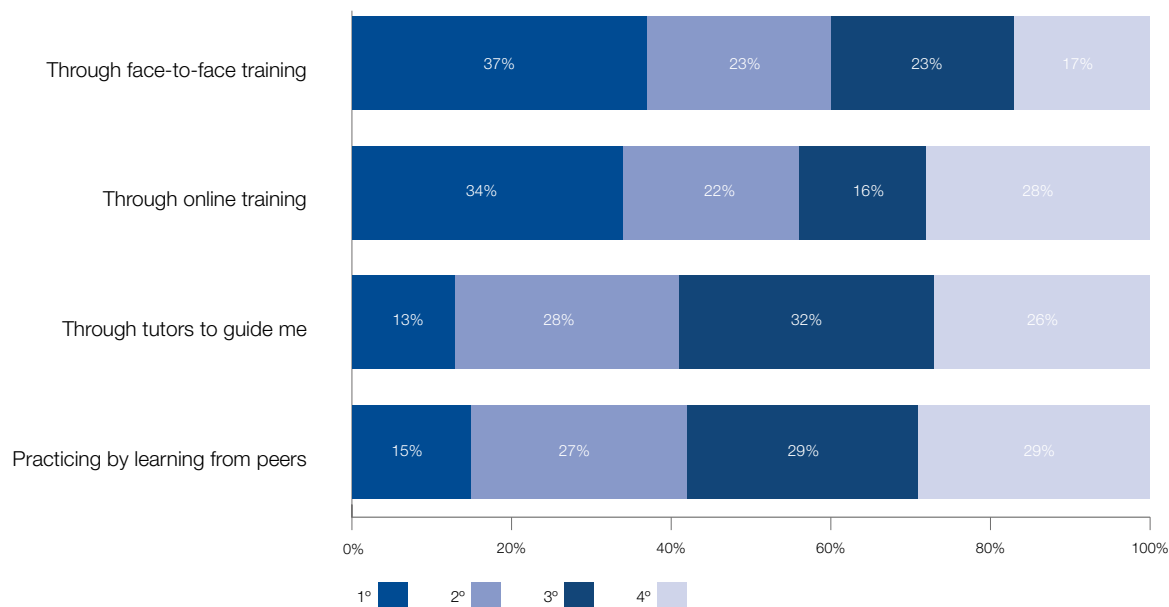
The education centres value equally online and face-to-face training.

Overview

- Workers and students as well as the private sector show a clear preference for face-to-face training, while educational institutions value online training higher.
- Public organizations aim to stimulate training through agreements with educational centers.

Question 9: Job Development – Training content needs
Technologies in demand in the coming 5 years

Figure 2.35   Which of the following technologies do you think companies will demand in the next five years?
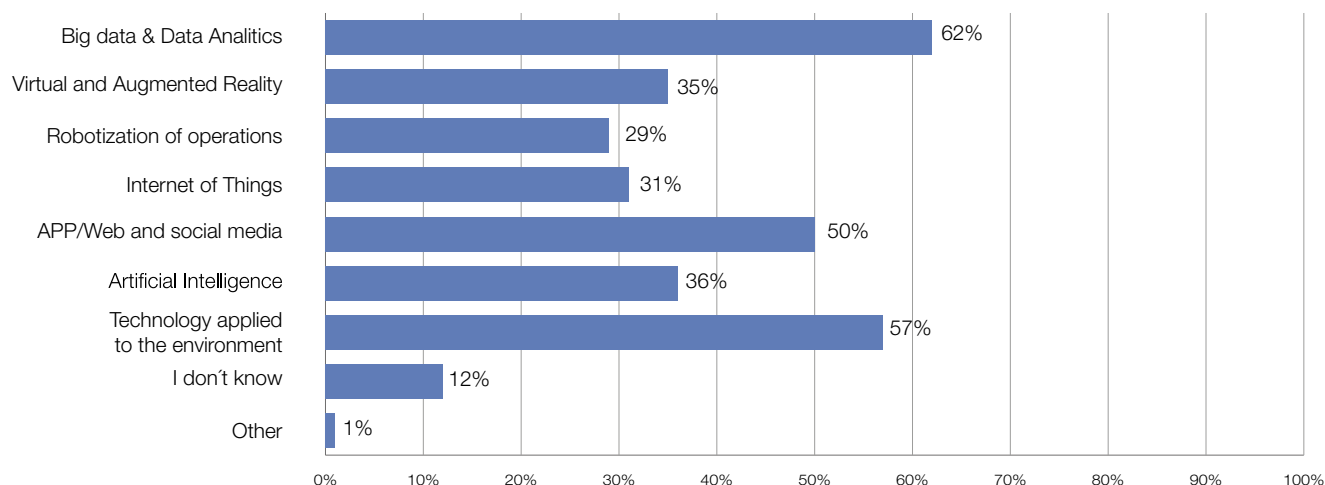
Big data and data analytics together with technologies applied to the environment rank highest among workers and students.

Figure 2.36   Which of the following technologies do you plan to implement or strengthen in your organization in the next five years?
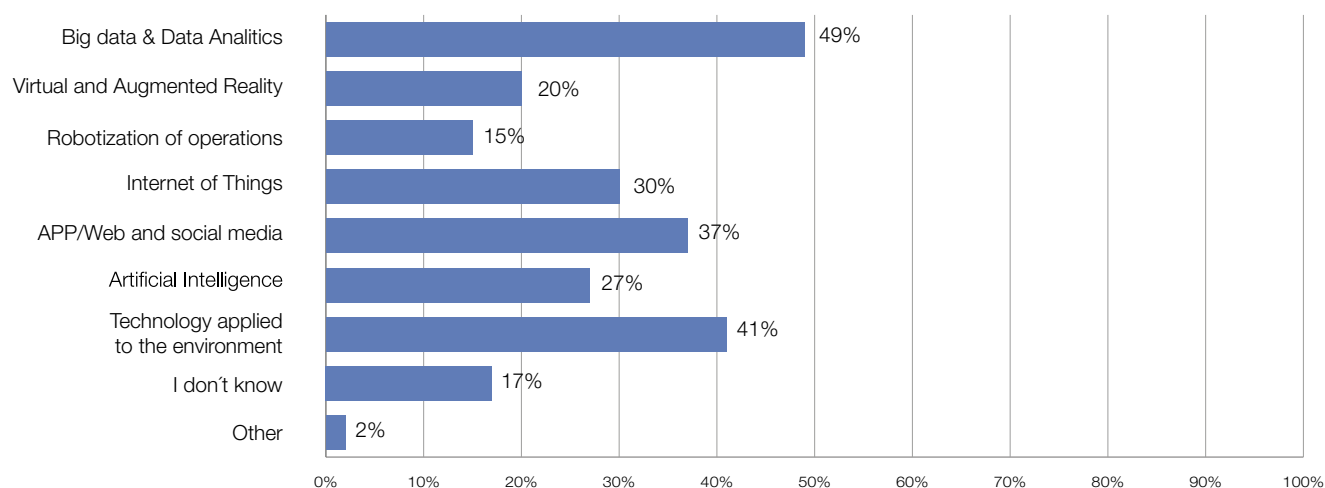
Big data and data analytics together with technologies applied to the environment also rank highest among companies.

Figure 2.37   What do you think will be the most relevant technologies in the next five years in the tourism sector?
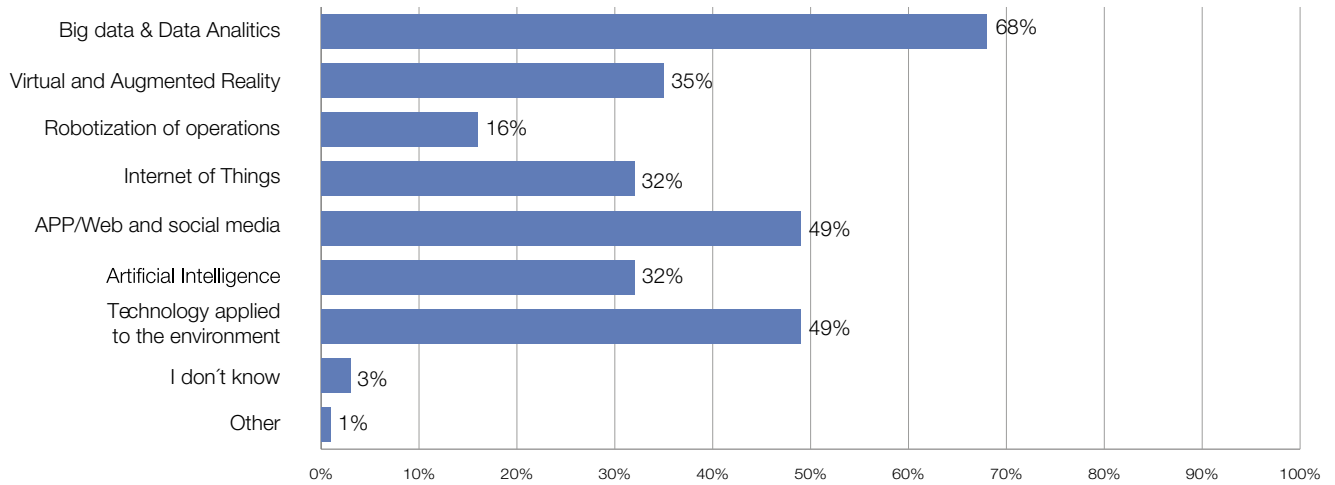
Big data and data analytics, technology applied to the environment and App/Web and social media are considered the most important technologies for the public sector.

Figure 2.38   What do you think will be the most relevant technologies in the next five years in the tourism sector?
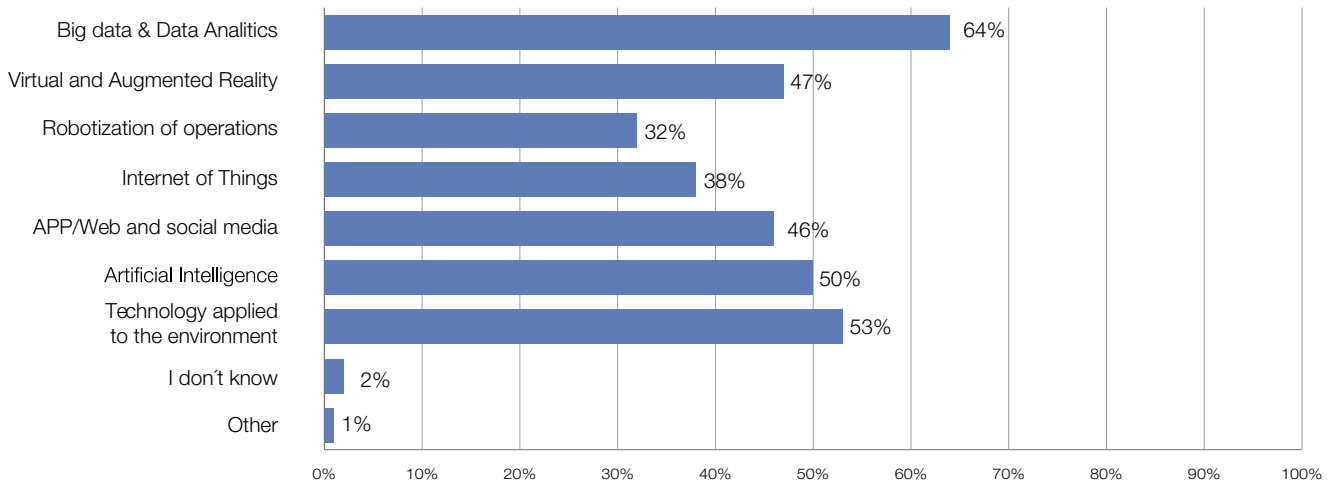
Besides previously indicated technologies educational institutions also value the importance of artificial intelligence.

Overview

- Big data and data analytics together technologies applied to the environment rank high in importance.
- The robotization of operations by contrast emerges as the least important.

Question 10: Job Development – Engagement
Key elements impacting work engagement

Figure 2. 39 Prioritize the importance of these elements in feeling engaged with a company

	1°	2°	3°	4°	5°	6°	7°
Good salary	15%	19%	23%	17%	13%	8%	5%
Recognition of my boss	4%	7%	8%	17%	15%	22%	28%
To be able to balance personal and professional life	28%	19%	13%	14%	11%	9%	5%
Good working environment	27%	23%	16%	16%	12%	5%	2%
Mobility between jobs	1% 2%	4%	6%	15%	29%	42%	
To be able to contribute to a business project	8%	11%	14%	16%	21%	17%	13%
Training and growth path in the company	18%	19%	21%	15%	13%	11%	5%
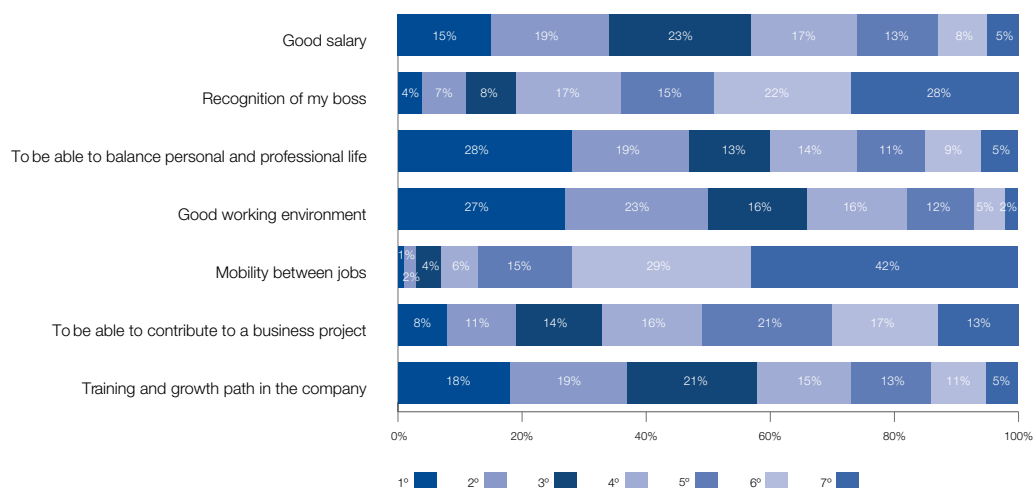
A good working environment and life-work balance are the key features valued by workers and students.

Figure 2.40   Prioritize the elements you think workers will most value in the future to feel engaged with your company

	1°	2°	3°	4°	5°	6°	7°
Good salary	31%	18%	16%	12%	11%	8%	5%
Recognition of my boss	4%	9%	11%	20%	15%	15%	25%
To be able to balance personal and professional life	27%	21%	15%	15%	10%	9%	3%
Good working environment	21%	23%	23%	17%	7%	7%	2%
Mobility between jobs	1% 4%	5%	7%	17%	23%	43%	
To be able to contribute to a business project	4%	10%	11%	14%	23%	23%	15%
Training and growth path in the company	11%	16%	19%	16%	17%	15%	7%
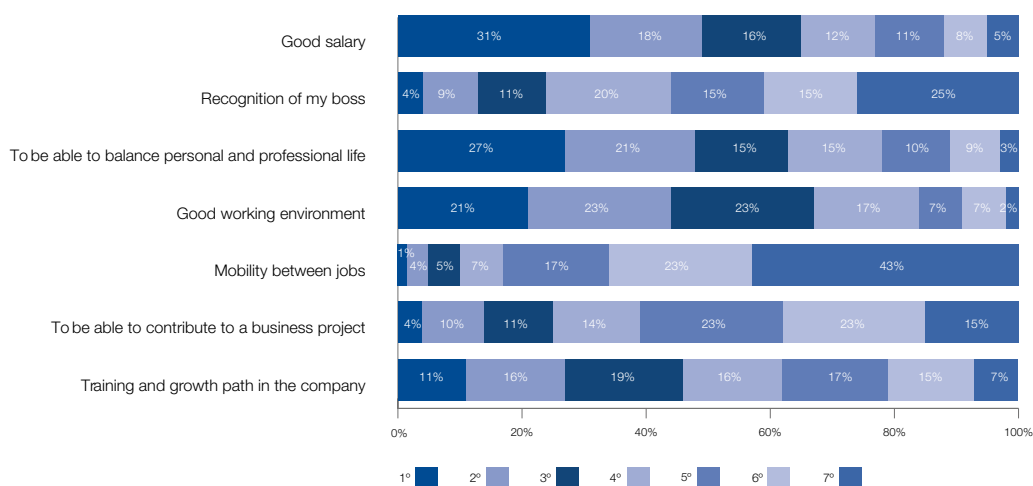
Private companies consider a good salary and life-work balance will be the key for workers to feel engaged.

🏛 **Figure 2.41   What actions do your government plan to launch to improve worker/company relationship?**
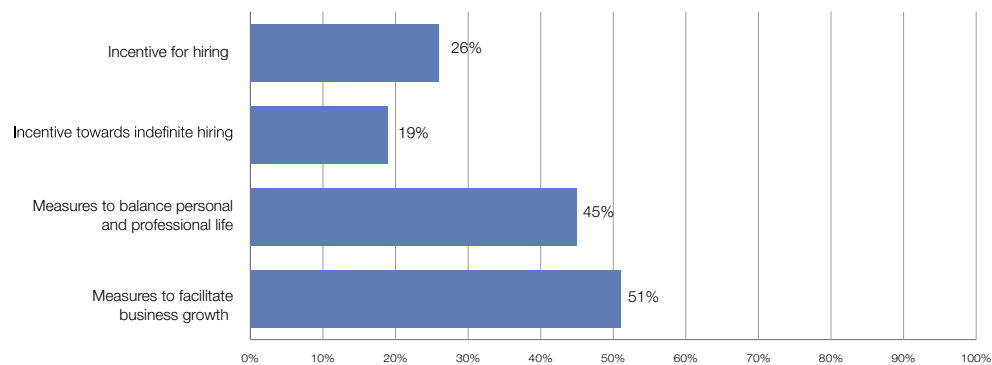
Public sectors favours the implementation of measures that promote workers growth followed by measures to promote life-work balance.

🎓 **Figure 2.42   Prioritize the elements you think workers will most value in the future to feel engaged with a company/organization**
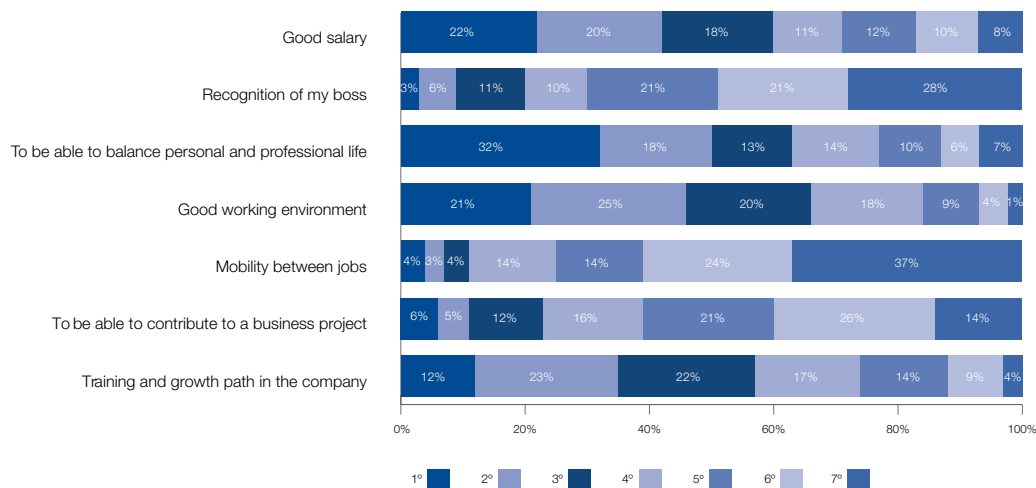
Educational institutions consider that a good salary and life-work will be key feature of the future of work.

Overview

- Mobility between jobs appears as one of the least valued features in the engagement with a company; same as having the recognition from the boss.
- The private sector considers "good salary" while workers and students value most work-life balance and a good working environment.
- The public sector also values the promotion of work-life balance as a key policy.
- Like the private sector, educational institutions consider that a good salary and work-life balance are key factors in engaging workers.

Chapter 2 Endnotes

1   Percentages in graphs may to always add up to 100% due to rounding.

Conclusions on the future of work and skills development in tourism

3

Promoting the future of work and skills development in tourism – recommendations

Considering that promoting the acquisition of skills, competencies and qualifications for all workers throughout their working lives is a joint responsibility of governments, private sector and workers themselves, the following recommendations are proposed:

Policy Framework

- Align the policy framework with the SDGs, particularly with SGD 8, target 8.9 – "by 2030 devise and implement policies to promote sustainable tourism which creates jobs, promotes local culture and products";

- Increase investment in education and skills development in tourism;

- Take action on the updating competency standards and curricula as well as on national mechanisms to drive tourism skills policy;

- Foster sustainable enterprises as generators of employment and promoters of innovation and decent work;

- Nurture the acquisition of skills, competencies and qualifications for all workers throughout their working lives;

- Advance the ratification and implementation of ILO's International Labour Standards and in particular the Working Conditions (Hotels and Restaurants) Convention, 1991 (No. 172) and Recommendation (No. 179) and the Transition from the Informal to the Formal Economy Recommendation, 2015 (No. 204) the Indigenous and Tribal Peoples Convention, 1989 (No. 169) the ILO Guidelines on decent work and socially responsible tourism (2017), the Convention on Violence and Harassment 2019 (No.190) and the Violence and Harassment Recommendation (No.206);

- Create multi-stakeholders' partnerships in education and training and engage with technology partners;

- Promote policies appropriate to national circumstances that advance decent work in tourism including improving wage-setting mechanisms, institutions for social dialogue, social protection systems, employment services and active labour market policies;

- Enhance the links between tourism and trade policies to enhance the access of SMEs to international markets and promote the integration of SMEs into the global economy;

- Set up active policies to promote innovation and entrepreneurship by supporting the digital

transformation of SMEs, connecting start-ups with investors and governments and a regulatory framework prone to innovation and open data;

- Promote policies to advance work-life balance;

- Implement policies that promote gender equality through equal opportunities, equal participation and equal treatment, including equal remuneration for women and men for work of equal value;

- Support the private sector as a principal source of economic growth and job creation by promoting an enabling environment for entrepreneurship and sustainable enterprises and the digital transformation of small and medium-sized enterprises;

- Maximize the potential of innovation and the digital transformation to advance inclusion and create jobs for youth, women and rural communities;

- Promote the potential of new technologies in creating tourism jobs that support the preservation of destination's social, cultural and natural environment;

- Raise awareness of the digital transformation and promote access to financial services particularly for tourism SMEs;

- Take actions to promote the value of employment in tourism in order to address the perception challenges of tourism jobs, and attract and retain talent in the sector;

- Strengthen the social contract by placing people and the work they do at the centre of economic and social policy and business practice;

- Increase investment in people's capabilities: promote a universal entitlement to lifelong learning that enables people to acquire skills and to reskill and upskill; step up investments in the institutions, policies and strategies that will support people through future of work transitions; implement a transformative and measurable agenda for gender equality; provide universal social protection from birth to old age;

- Increase investment in the institutions of work: establish a Universal Labour Guarantee; expand time sovereignty; ensure collective representation of workers and employers through social dialogue as a public good, actively promoted through public policies; harness and manage technology for decent work;

- Increase investment in decent and sustainable work: create incentives to promote investments in key areas for decent and sustainable work; reshape business incentive structures for longer-term investment approaches and exploring supplementary indicators of human development and well-being;

Governance

- Devise whole-government approach to the future of work engaging all relevant governmental branches;

- Establish mechanisms for collaboration among representatives of government, employers, workers and training providers, as well as between sector stakeholders at national and provincial level especially employers and workers;

Measurement

- Step up efforts in the measurement of tourism labour markets in the framework of the Tourism Satellite Accounts (TSA);

- Improve or establish the collection of labour market statistics related to tourism disaggregated by age, sex, occupation and employment status, and urban–rural divide, including for planning future skill needs;

- Devise innovative mechanisms for monitoring and evaluation of tourism policies related to the future of work;

Education and skills development

- Advance research to identify skills mismatch along the tourism value chain and identify new skills related to new businesses and organizations;

- Ensure that education and training systems are responsive to labour market needs, taking into account the evolution of work;

- Maximize the use of digitalization in education and skills development;

- Enhance the life-long education and the development of soft skills (creativity and innovation, empathy, etc.) as well as key technology competencies;

- Support the development of key skills in areas such as communication, customer focus, marketing and promotion (especially online marketing), the compliance with international standards, in particular food safety and accommodation quality, and planning and policy making at national and local level;

- Promote the transition of education to work and work to education to advance the reskilling of workers and effective tools to support people through the transitions they will face throughout their working lives;

G20 Tourism Ministers

- Promote multilateralism to address the current challenges of the future of work;

- Encourage G20 Leaders to consider tourism as a priority sector for its capacity to deliver on the objectives of creating quality jobs for all, investing in skills and reducing inequalities to promote inclusive and robust growth;

- Engage with the G20 Labour and Employment Ministers' new training strategy as well as with the G20 Employment Working Group and the G20 Education Ministers.

List of figures and tables

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This paper prepared by the World Tourism Organization (UNWTO) in collaboration with its Affiliate Member CEGOS and benefitting from International Labour Organization (ILO) contributions within the framework of the 9th Meeting of Tourism Ministers of the G20, presents the emerging realities resulting from the transformations affecting the current and future of work in tourism. It aims to provide recommendations to G20 countries to position tourism in the G20 Agenda, adapt the future of work to new realities and ensure their alignment with the Sustainable Development Goals (SDGs) and the 2030 Agenda.

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