

An abstract, colorful painting of three people. On the left, a woman with a headscarf. In the center, a man in a suit and tie holding a tray with a glass and a cup. On the right, a woman with a wide smile. The background is a vibrant, multi-colored abstract pattern.

# GLOBAL OPPORTUNITY YOUTH IN THE TRAVEL & TOURISM SECTOR

T&T's Global Potential, Workforce Challenges,  
and the Impact of COVID-19

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YOUTH NETWORK

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## About the Global Opportunity Youth Network (GOYN)

The Global Opportunity Youth Network (GOYN) is a multi-stakeholder initiative committed to creating place-based systems shifts for youth economic opportunity. Launched in 2018, GOYN is hosted by the Aspen Institute Forum for Community Solutions.

GOYN works to improve economic mobility for “Opportunity Youth” — young people aged 15-29 who are not in education, training, or employment, or who are working in informal jobs. Our approach works in communities around the world with local “Anchor Partners” who tie together local stakeholders from multiple sectors into a “collaborative.” GOYN collaboratives systematically identify the range of local challenges preventing youth from better accessing opportunity in a given place and work together on participatory solution design with an emphasis on equity, systems-level change, amplifying the voices of youth, and increasing the scale of promising existing initiatives.

As of the end of 2020, GOYN collaboratives have been established in Bogota, Colombia; eThekweni (Durban), South Africa; Mombasa, Kenya; São Paulo, Brazil; and Pune City and Ramgarh District, India. Additionally, new GOYN collaboratives will be launched in 2021 in Mexico and Senegal.

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# 1. Executive Summary

## 1.1. A DUAL CRISIS FOR YOUTH

Young people around the world are facing joint and daunting crises of global unemployment and the COVID-19 pandemic. As of 2018, over 350 million young people aged 15-29 were “Opportunity Youth” (OY) – out of work, out of school or training, or in unstable and sometimes unsafe informal work.<sup>1</sup> The pandemic has exacerbated the global youth employment crisis by forcing business closures and job furloughs worldwide. This has taken a high toll on the informal, gig, and entry-level opportunities that tend to align to OY skills, undoubtedly increasing the global OY population.<sup>2</sup>

For a number of reasons, the global Travel and Tourism (T&T)<sup>3</sup> sector could be a meaningful pipeline to connect OY to opportunity – prior to 2020, it employed a significant and increasing number of young people. However, T&T has been particularly hard-hit by the pandemic and even prior to that, there has been little clear or comprehensive guidance on how to address the challenges hindering more OY around the world from accessing opportunities in T&T. This is yet more urgent given the onset of COVID-19 and the T&T uncertainty it has created worldwide. With generous support from the Conrad N. Hilton Foundation, the Global Opportunity Youth Network (GOYN)<sup>4</sup> explores those challenges and considers potential approaches to addressing them in this landscape report on the potential for and issues around youth workforce development in the T&T sector.

This effort has comprised numerous expert interviews, candid OY input, and extensive secondary research. In this main body of this report, a number of issues pertinent to T&T’s ability to attract, skill, employ, and retain OY are explored. Appendix A highlights several initiatives that innovatively and effectively address these issues to better connect youth with T&T opportunities. Finally, Appendix B presents analyses of the T&T landscapes in eThekweni (Durban), South Africa, São Paulo, Brazil, and Mombasa, Kenya, to show how differently the combination of tourism trends, challenges, policy issues, and COVID-19 impacts manifest across geographies.

Through this work, it has become clear that the global T&T sector has been profoundly impacted in 2020 and accordingly this report explores some shorter-term considerations for youth opportunities in the sector. However, T&T industry experts have confidence in a strong recovery once vaccinations and other

measures reduce disease transmission. As T&T opportunities come back online or arise anew, and as employers work to re-staff their operations, we hope this research is and remains a valuable tool for those working to connect deserving young people with T&T opportunities in more sustainable and scalable ways.

## 1.2. T&T’S GLOBAL PROMISE AND WORKFORCE CHALLENGES

In 2019, T&T was employing some 330 million people, accounting for over 10% of the global workforce, and was growing quickly.<sup>5</sup> Prior to the onset of the pandemic, T&T was hiring people at a faster rate than the general economy and offered OY around the world both entry-level employment opportunities and long-term career paths. T&T is a vast sector: its full value chain or ecosystem encompasses accommodations, transport, food and beverage, business support, maintenance, infrastructure, and a number of other industries that serve and cater to travelers and those seeking recreation.

T&T has low barriers to entry throughout its broader value chain. Many entry-level opportunities in T&T require only basic literacy, numeracy, and an ability to work well with customers and clients. They rarely require proprietary certifications or credentials. They sometimes do not even require a high-school degree or specific spoken languages, and thus offer a potential entry point for OY who have been unable to access education or employment. On-the-job learning as well as employer-provided training build transferable skills that can enable youth to grow within T&T or transition to other sectors as their careers and ambitions grow. Accordingly, in 2019, T&T employed a higher share of youth workers than the overall economy and all other economic sectors in a number of countries.<sup>6</sup>

Though T&T holds promise, a number of systemic and endemic challenges have historically prevented yet more youth, and particularly OY, from better accessing the sector:

- **Awareness & Enthusiasm** – Young people and their families have a number of misconceptions and concerns about the viability, security, propriety, and the earning and advancement potential of T&T. When local youth lack enthusiasm for T&T opportunities in places with strong tourism demand, employers tend to turn to foreign workers or even automation, missing an opportunity to address local unemployment with decent jobs.

- **Skilling Alignment** – Skilling is not always aligned with available T&T jobs or with forecasted employer needs, and sometimes is not conducted in coordination with critical certification or accreditation bodies. It is disheartening to undergo skilling for nonexistent or obsolete opportunities, or to undergo training that is not recognized by employers.
- **Employer Practices & Culture** – Though T&T already employs many young people, some workplaces need to ensure a safer, more respectful environment for women. Discriminatory hiring practices must be eliminated though they may largely be isolated cases. Additionally, supervisors and hiring managers can be better prepared to guide junior OY colleagues given their importance to the youth experience in the T&T workplace.
- **Ecosystem Beyond Hotels** – There are T&T jobs waiting to be discovered or created: hotels and restaurants are just one part of the larger ecosystem vying for tourist attention and spending. There is potential for entrepreneurial opportunities in this larger ecosystem, but much of it remains untapped and underfunded.
- **Data & Statistics Shortcomings** – Different countries and sub-national bodies have varying methodologies for national youth unemployment data, which rarely accounts for OY. The difficulty of pinpointing OY demographics and distributions makes accurate program design a challenge, and also clouds for funders the urgency of the youth challenge in some places.
- **Additional Considerations** – Several other issues are highly place-specific. OY tend to live far from the centers of activity in some premier tourist destinations and face myriad difficulties accessing available jobs. “Low seasons” in some popular destinations see declines in tourism volume and can be harsh on seasonal T&T workers. Increases in digitization and automation must be understood and forecasted when trying to connect young people to T&T opportunities. Finally, onerous document regulations in some places can make it very difficult for OY to find work in the formal sector.

It is important to remember the importance of place for each of the above. The best ways to connect youth to opportunity in a given country or city will vary depending on how these issues manifest in that place. Skilling approaches that successfully connect young people to jobs in one place may be less needed or only part of the overall puzzle in another. If these challenges

could be better addressed by those trying to connect OY to T&T opportunities, T&T could be an even more potent conduit to opportunity than it historically has been.

### 1.3. COVID-19: IMPACT AND RECOVERY

2019’s bright picture for global T&T changed dramatically with the rapid spread of COVID-19. Lockdowns and movement restrictions around the world in early 2020 to reduce transmission of the disease impacted the entire world’s economy and caused a sharp drop in both leisure and business tourism worldwide. A corresponding precipitous decline in T&T employment soon followed.<sup>7</sup>

T&T has tried to adapt: as data and knowledge about COVID-19 has emerged throughout 2020, T&T businesses worldwide have tried to safely resume operations based on new customer safety guidelines. Some have tried to capitalize on recent trends such as increased demand for outdoor leisure activity.<sup>8</sup> New job opportunities have arisen from the need for enhanced security and sanitization at T&T establishments. While international travel remains risky, China has seen domestic tourism recover almost to pre-crisis levels in low-transmission areas.<sup>9</sup> However, other places have imposed new lockdowns and curfews amid late 2020 transmission surges. Unable to weather months-long downturns, large companies have conducted mass layoffs and numerous small T&T businesses have shut down and may never reopen. Uncertainty remains about the future. Additionally, many workplaces have become virtual. Video-based work meetings and virtual convenings are more prevalent than ever before – and far less expensive than in-person business travel. This prompts questions about the future of Meetings, Incentives, Conferencing, and Exhibitions (MICE) and other business travel, which in 2019 accounted for over 20% of global T&T revenue.<sup>10</sup>

Importantly, T&T has shown resilience by recovering from past national, regional, and global crises. For example, the 2003 SARS crisis prompted drastic short-term T&T contractions in East Asia followed by a fairly rapid recovery once more was known about preventing transmission of the disease. However, some destinations and T&T sub-sectors remain much more vulnerable to shocks. Some are almost entirely dependent on successful global vaccine delivery. While vaccines are being administered in countries around the world as of early 2021, it is still too early to predict a global T&T recovery timeline. Until there is broader worldwide immunity to the disease, there may be a long road for global T&T to return to the levels it enjoyed in 2019 and before.<sup>11</sup> Nevertheless, despite much short-term



difficulty, it is highly likely that across the next few years, T&T will bounce back as the font of opportunity and employment it has historically been.

#### 1.4. RECOMMENDATIONS

With clarity on prevention and treatment of COVID-19, people will inevitably seek to travel and explore the world again. The T&T sector will eventually bounce back, but when? What can be done to support today's OY amid the sector's currently depressed state? What is needed to better guide tomorrow's OY into T&T? When T&T needs to hire in large numbers again, what can be done to improve talent attraction, skill alignment, and retention? This report presents recommendations for both short- and long-term efforts to connect young people to T&T opportunities.

Given the sector's current uncertainty, T&T workforce development efforts in the short term should consider three approaches to help better connect young people to today's emerging opportunities:

- Some destinations are particularly vulnerable to medical and other crises; skilling and youth-focused efforts should be accompanied by efforts to better help tourism demand recover in these places, especially those that are vaccine-dependent.
- Skilling efforts should develop a flexible youth workforce whose skills can transfer well to sectors related or adjacent to T&T. Where T&T opportunities are currently scarce, this could help young training graduates pivot to available jobs and possibilities in other sectors while also building career resilience.
- The pandemic has shaped some new demand in the broader T&T ecosystem, enabling job, entrepreneurial, and gig opportunities. Despite all of 2020's challenges, some T&T business models and industries have thrived – it is important to link them to reliable, skilled labor.

In the longer term, T&T will certainly re-emerge as a global driver of revenue and employment, and there will be a need to connect young people to opportunities in the sector. Industry professionals are wary of a near-future scenario where heavy hiring is required but the labor supply is lacking. Practitioners doing this work should take into account the challenges and systemic issues presented in this report, how they vary across geographies, and their place-specific interdependencies. Often, a young person needs more than one kind of support to access opportunity – coordinating with local, complementary counterparts can better help young people

“cross the finish line” to livelihoods. Funders should commit to investing in such collective or collaborative approaches and focus on a place-based, holistic approach to youth opportunity rather than a project-by-project approach.

#### 1.5. CONCLUSION: A MORE COORDINATED, HOLISTIC APPROACH

For decades, T&T has been a powerful driver of the global economy and of opportunities for young people. Despite the downturn and challenges of 2020, T&T will eventually recover. Investors and practitioners have a chance to ensure that young people are better connected to and prepared for the new opportunities that will arise amid that recovery if they can address the systemic and endemic issues outlined herein. Youth-focused actors should carefully consider how their work fits into the full journey OY must take towards sustainable livelihoods. For example, can youth leaders and community organizations collaborate to better extol T&T's virtues to drive more young recruits to T&T skilling? Can skilling organizations in turn coordinate with employers and accreditation bodies to ensure their efforts are current and relevant? Can destinations create more local opportunities and a demand for work all year long? Can local and central governments improve transport offerings to help new recruits actually get to T&T jobs more conveniently and affordably, or simplify the documentation process to allow more OY to work legally and formally? Can youth voice be incorporated into these efforts to ensure that nothing about youth is designed without them?

By considering the issues outlined in this report, the global T&T sector can rebuild and recover from 2020's lowest points with improved talent attraction, training, and retention. There is an opportunity to help attract more OY to the sector and its array of potential pathways. There is an opportunity to help re-think education, skilling, and transport for young people so they can better access T&T opportunities. There are opportunities to help destinations improve their revenue generation and employment potential. There is also an opportunity to educate funders who have not traditionally operated in this space about the critical economic value of T&T and its vast supply chain. A post-COVID global T&T sector likely has the potential to absorb millions of young people into productive jobs with the possibility of real career advancement or rewarding entrepreneurial opportunities with promising earning potential. Young people around the world have tremendous potential to not only contribute to a recovery for T&T and the global economy, but also to support their families, contribute to their communities, and be proud of themselves.

## 2. The Global Opportunity Youth Challenge

### 2.1. INTRODUCTION: WHO ARE “OPPORTUNITY YOUTH?”

As of 2018, over 350 million young people around the world aged 15-29 were “opportunity youth” (OY). The term includes young people referred to as “NEETs” (not in employment, education, or training) as well as those who are working in the informal sector in unstable and sometimes unsafe jobs. OY require support to access pathways to meaningful livelihoods, but often they are referred to as “vulnerable,” “underserved,” or “disadvantaged.” These young people have great untapped potential, and the term “opportunity youth” speaks to a hopeful rather than a bleak outlook on their future.<sup>12</sup>

**OPPORTUNITY YOUTH (OY) ARE YOUNG PEOPLE AGED 15-29 WHO ARE OUT OF WORK, OUT OF SCHOOL OR TRAINING, OR IN UNSTABLE AND SOMETIMES UNSAFE INFORMAL WORK.**

### 2.2. WHY ARE OY DISCONNECTED FROM LIVELIHOODS?

There have been diverse past efforts by governments, development agencies, nonprofits, funders, and investors to create or grow economic opportunities for youth, but the global population of unemployed youth – and that of OY – has not decreased significantly over the past several decades.<sup>13</sup> Despite the potential that OY represent, OY have lacked coordinated and comprehensive support. OY populations persist around the world for several reasons:

- **Lack of Central Youth Policymaking** – There often is limited understanding of what the specific youth challenges are and what priorities should be pursued at the national and sub-national level. Youth livelihoods depend on a number of issues – health, education, employment, transport – that are typically managed by separate ministries or cabinet bodies. The Organisation for Economic Co-operation and Development (OECD) indicated that few of its member countries have national youth-focused ministries or cabinet departments, mandated with tying together and addressing all the issues youth face, and advocating for and marshaling the diverse kinds of support they need; this is true for the rest of the world as well.<sup>14</sup> Even fewer central governments have a clear understanding of diverse youth needs in specific states or municipalities.
- **Fragmented, Uncoordinated Support** – OY often need multiple kinds of support to round out their readiness for jobs and livelihoods, but there is rarely coordination between different youth-focused service providers in a given place. For example, a young person from a city’s periphery may undergo skilling for growing sectors within that city – but may not have connections to the employers that are hiring, or access to transport to get to those jobs, or an understanding of how to get the basic legal documentation that employers or authorities require to allow them to work in the first place. Few if any places have coordinated those various services to ensure that local OY are directed to and have access to all the support that they may need.<sup>15</sup>
- **Funding Shortcomings** – Funding that flows to youth-focused organizations sometimes reinforces the fragmentation challenge outlined above. Often, funding is offered with a “top down” approach based on investor priorities rather than carefully-diagnosed local needs.<sup>16</sup> Furthermore, funders have tended to be enthusiastic about “silver bullet” single approaches to opportunity rather than considering the mix of youth-focused interventions that may be needed in one place. These practices often encourage local organizations in a given place to vie with each other for funding, rather than collaborate on what complementary strengths and missions they might leverage to give local OY a more complete path to opportunity. Additionally, most funders employ complex proposals and applications that require inputs on how grantees intend to make their programs sustainable. However, private funders often do not include sufficient funding for operational costs or sustainability measures, forcing organizations to stretch their staffs not only to implement a program, but merely to write a proposal for one. Few if any funders cover the kinds of capacity investments that might enable locally relevant and responsive youth-focused actors to build the long-term capacity that would enable a project’s sustainability and scaling.<sup>17</sup>
- **Data Inconsistencies** – Formal measures of “youth unemployment”<sup>18</sup> do not account for a number of factors that the term “opportunity youth” covers. OY are often not in the labor force for a number of reasons beyond education and skills alone. When funders and practitioners cannot effectively target OY, young people in need are often excluded from critical programs and support that might help connect them to livelihoods.



Millions of dollars each year go to support youth-focused interventions around the world but despite this, the above issues prevent those interventions from reaching a scale that is anywhere close to meeting the global youth opportunity challenge. Furthermore, the global challenges posed by COVID-19 have only exacerbated the ongoing challenges outlined above.

MILLIONS OF DOLLARS EACH YEAR GO TO SUPPORT YOUTH-FOCUSED INTERVENTIONS AROUND THE WORLD BUT DESPITE THIS, SUCH EFFORTS HAVE NOT REACHED A SCALE THAT IS ANYWHERE CLOSE TO MEETING THE GLOBAL YOUTH OPPORTUNITY CHALLENGE.

### 2.3. A NEW APPROACH TO YOUTH OPPORTUNITY

The global youth population has immense potential, but a different approach is needed to accelerate youth economic opportunity worldwide, especially for OY. A new approach is needed to more accurately identify and track OY populations around the world. Rather than imposing solutions with a top-down approach, it is important to identify the range of challenges in a given place that hinder young people and especially OY from accessing meaningful opportunities and livelihoods. Rather than having a silver-bullet solution mentality, a range of approaches must address the range of challenges young people face in a given place by coordinating relevant local stakeholders that can lend insight and help design programs with the potential for scale. This kind of local coordination is complex, and a learning apparatus is required to help places share resources and insights as needed and learn best practices from one another.

RATHER THAN A TOP-DOWN APPROACH, IT IS IMPORTANT TO IDENTIFY THE SPECIFIC YOUTH CHALLENGES IN A GIVEN PLACE. RATHER THAN HAVING A “SILVER-BULLET” SOLUTION MENTALITY, A RANGE OF APPROACHES MUST ADDRESS THE FULL RANGE OF THOSE CHALLENGES.

Building on the proven success of such place-based approaches in the United States and an increasing global appetite for collective impact methodologies, the [Global Opportunity Youth Network \(GOYN\)](#) was launched in 2018 to pursue this much-needed new approach to youth opportunity. GOYN

is a multi-stakeholder initiative committed to creating place-based systems shifts for youth economic opportunity.

GOYN works to improve economic mobility for OY in communities around the world. In each GOYN community, local “Anchor Partners” tie together local stakeholders from multiple sectors into a “collaborative.” GOYN collaboratives systematically identify the range of local challenges preventing youth from better accessing opportunity in a given place and work together on participatory solution design with an emphasis on equity, systems-level change, amplifying the voices of youth, and increasing the scale of promising existing initiatives. GOYN’s geographic footprint is depicted in Figure 2.3.a below. As of the end of 2020, GOYN collaboratives have been established in Bogota, Colombia; eThekweni (Durban), South Africa; Mombasa, Kenya; São Paulo, Brazil; and Pune City and Ramgarh District, India. Additionally, new GOYN collaboratives will be launched in 2021 in Mexico and Senegal.

Figure 2.3.a. GOYN Collaborative Locations



GOYN’s ethos of identifying systemic barriers and challenges preventing young people from accessing opportunity has informed this research on youth workforce development in the T&T sector. Additionally, GOYN believes strongly in youth voice, agency, and potential. GOYN collaboratives ensure to include and incorporate youth voice in all analytic, strategic, and program design work. As a result, youth voice has been carefully represented in this research via interviews and surveys. We hope that this combination of systemic analysis, youth representation, and cross-sectoral input from multiple geographies is a valuable tool for those working to connect deserving young people with T&T opportunities in more sustainable and scalable ways.

# 3. The Promise of the Global T&T Sector

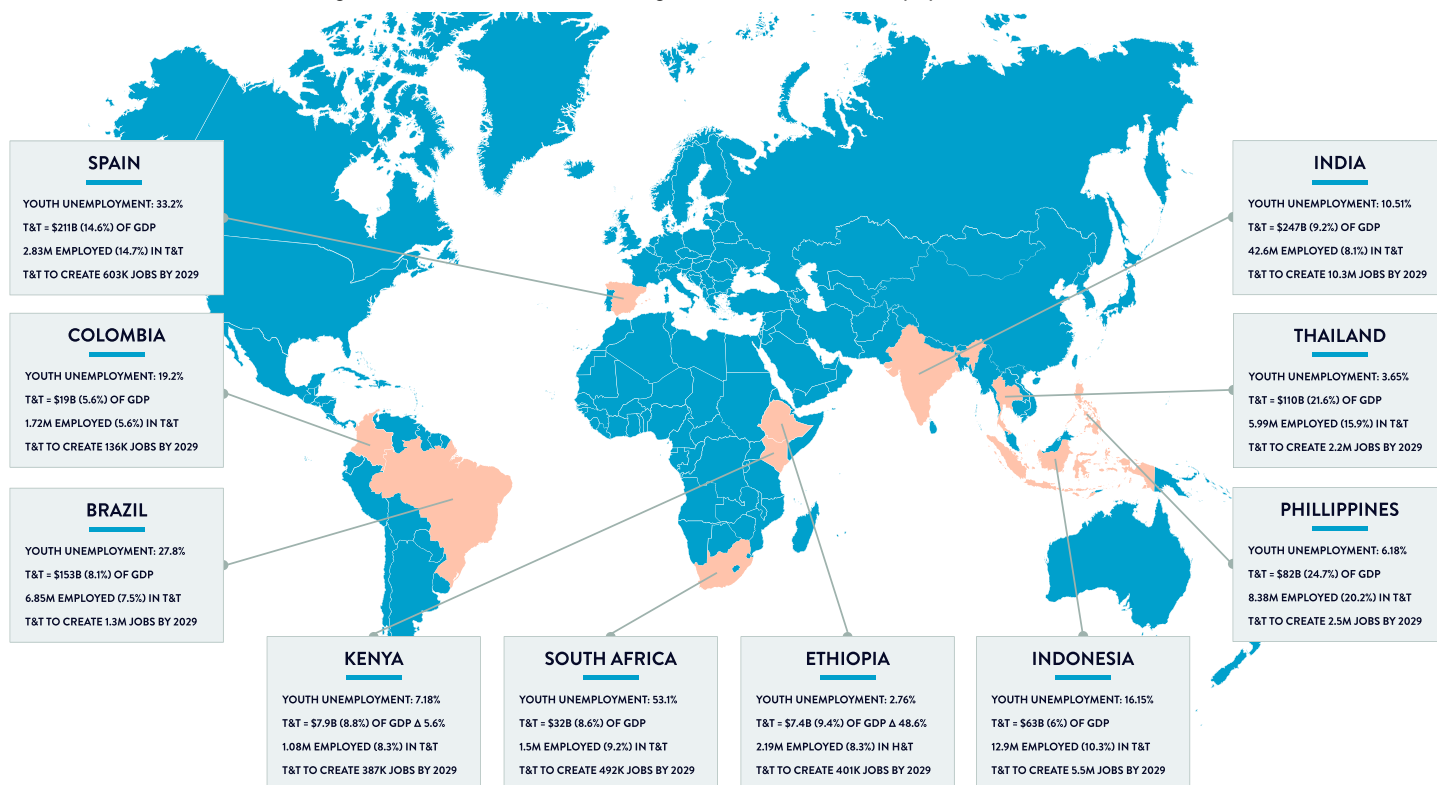
## 3.1. INTRODUCTION

Prior to the onset of COVID-19 in 2020, Travel & Tourism (T&T) was one of the world's largest and fastest growing economic sectors, creating millions of jobs, and driving production and exports for numerous countries around the world. T&T encompasses a range of large, small, and one-person companies in industries including accommodation, food & beverage, transportation, retail, culture, and sports & recreation. T&T serves and supports both domestic and international travelers, and both business and leisure tourists. Fundamentally, T&T strives to create and deliver products and services that appeal to travelers, vacationers, and thrill-seekers. The World Travel & Tourism Council (WTTC) conducts ongoing analyses to quantify the global economic and employment impact of T&T in 185 countries and 25 regions; its data suggests that when considering the full value chain or ecosystem of T&T, the sector accounted for 10.4% of global GDP and over 330 million jobs – 10.3% of total global employment in 2018.<sup>19</sup> Though T&T worldwide has been upended in many ways by the COVID-19 pandemic, this section explores aspects of the sector that have made it a promising entry point for OY.

## 3.2. T&T's EMPLOYMENT POTENTIAL

Prior to 2020, T&T has been a promising growth sector in all continents, and in higher-, middle-, and lower-income countries alike. The United Nations World Tourism Organization (UNWTO) has called T&T both an important job creator and a “lifeline for many economies at all development stages.”<sup>20</sup> In addition to already being a major global employer and revenue generator, T&T has seen substantial growth in the past decade, fueled by a growing global middle class and ongoing growth in global consumer spending and desire to travel. 2019 was the ninth straight year that growth of the T&T sector (3.5%) outpaced that of the global economy (2.5%). T&T accounted for 25% of all global net jobs created in the past five years, and when considering the broader T&T value chain beyond simply hotels and travel, WTTC projected that T&T would create over 80 million new jobs by 2029. The illustrative map below in Figure 3.2.a shows a selection of countries whose T&T sectors make a significant contribution to GDP, are large employers, and for which WTTC made strong projections for T&T job growth from 2020-2029.<sup>21</sup> Youth unemployment figures are provided but as noted in [section 4.6](#) below, unemployment statistics alone do not adequately indicate OY numbers and needs. Data from these and other countries suggest that prior to the COVID-19 pandemic, T&T stood to be a conduit to opportunity for millions of young people, including OY.

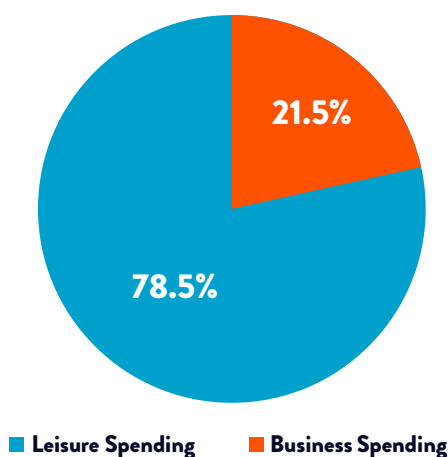
Figure 3.2.a. Selected Countries with Significant T&T Revenue & Employment (Data from 2018)



### 3.3. T&T REVENUE AND SPENDING SUBCATEGORIES

T&T revenues and spending are often considered through the binary lenses of leisure vs. business, and international vs. domestic. Figure 3.3.a below depicts the global ratio of leisure and business tourism spending.

Figure 3.3.a. Global Leisure vs. Business Tourism Spending



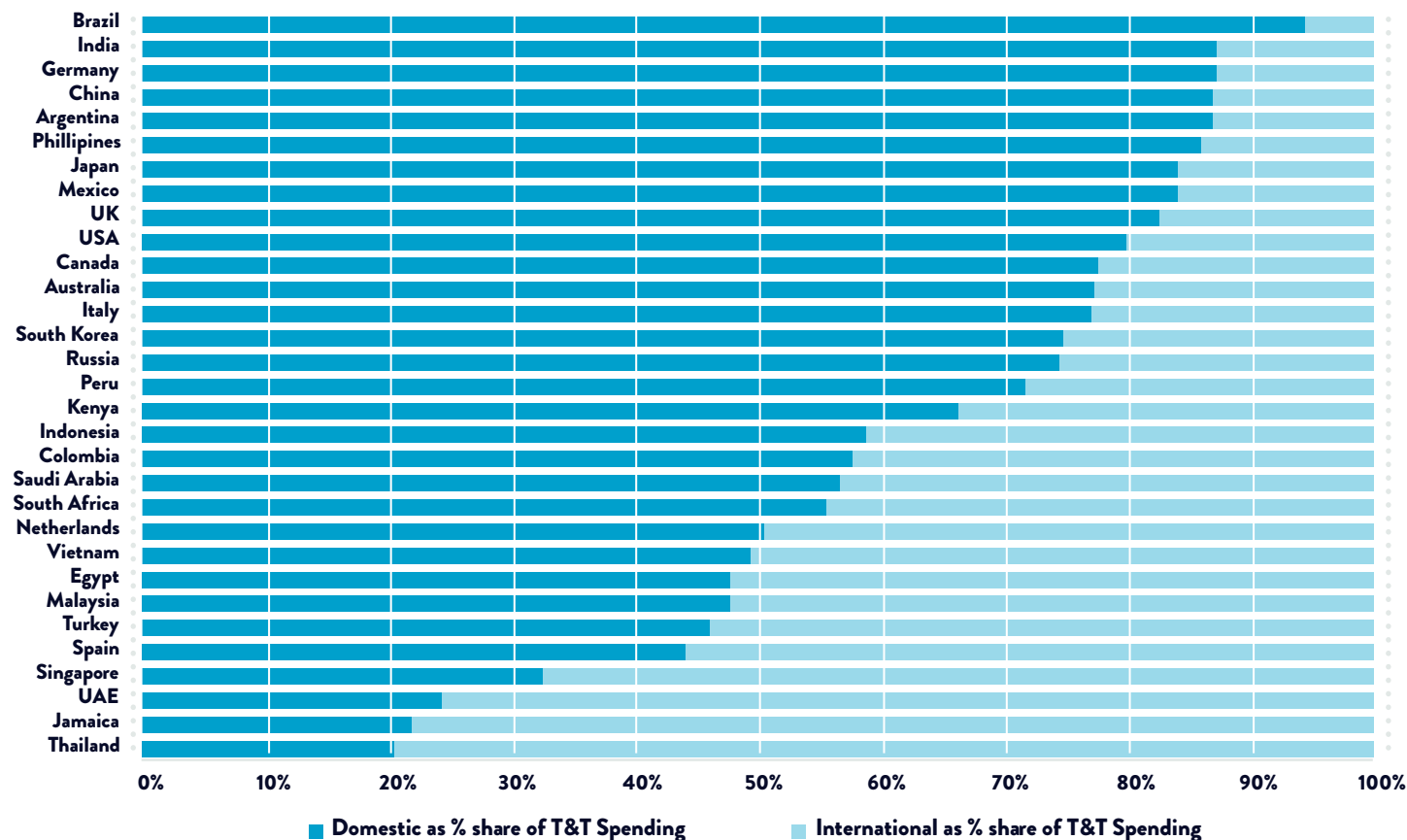
The bulk of T&T revenue worldwide is from leisure tourism, which in 2018 comprised 78.5% of total tourism spending, compared with 21.5% for business. However, business tourism is a valuable component of global T&T for a number of reasons. Business travelers attend congresses, conferences, exhibitions,

incentive travels, and events, and otherwise travel on business, domestically or internationally. These tourists also seek accommodations, transport, food, beverage, and many of the same goods and services that leisure tourists seek out. Business travel budgets typically allow a certain amount of spending, which business travelers often supplement with their own spending when making strictly personal purchases.

Many countries, regions, and cities have realized the revenue potential for business tourism as a hedge against seasonal leisure tourism decreases, and as a continuous driver of employment. More destinations are seeking to promote themselves as destinations for Meetings, Incentives, Conventions and Exhibitions (MICE) in their off-peak leisure tourism seasons. Consistent MICE and other business tourism offers a different but valuable path for destinations to attract visitors and generate year-round revenue.

Another lens used to examine T&T is international vs. domestic spending. In 2018, domestic tourism represented 71.2% of all global tourism spending, and had the strongest growth in developing nations.<sup>22</sup> Figure 3.3.b below shows a range of countries ordered by their ratios of domestic to international tourism revenues.

Figure 3.3.b. Share of Domestic vs. International T&T Spending in Selected Countries





The data shows that domestic tourism spending is a key driver of the T&T sector in many places – as high as 94% of total tourism spending in Brazil, over 85% in Argentina, China, Germany, and India, and over 80% in Japan, Mexico, the Philippines, the United Kingdom, and the United States.<sup>23</sup>

There are some countries such as Jamaica – and others not on the chart such as Aruba or the Maldives – that are deeply dependent on international tourism and have taken steps to focus their economies and infrastructure accordingly. These are highly susceptible to international tourism slowdowns such as those caused by COVID-19. However, other countries with a less acute split of international vs. domestic revenue such as Egypt, Spain, and Turkey may realize significant revenue and employment gains by increasing domestic tourism. China has been a stunning example of this: from 2008-2017, China’s domestic tourism spending increased by approximately \$600 billion, vaulting it to the top of the world in terms of domestic visitor spending.<sup>24</sup> The domestic impact of this in terms of jobs created has been remarkable, but it is unclear to what degree OY have found employment amid this boom.

### 3.4. T&T’s ECONOMIC CONTRIBUTIONS: DIRECT, INDIRECT, & INDUCED

T&T creates employment opportunities in myriad ways.. As well as its direct economic impact, the sector has significant indirect and induced impacts, all of which combine into the WTTC statistics outlined above.

The “direct contribution” of Travel & Tourism to a country’s GDP reflects the total spending on T&T businesses and attractions by residents and non-residents for business and leisure purposes, as well as government spending on T&T services directly linked to visitors, such as infrastructure investments in cultural or recreational attractions. Additional details on the methods by which T&T direct contributions are calculated can be found in the WTTC’s 2019 Economic Impacts report, and in the United Nations’ 2008 Tourism Satellite Account: Recommended Methodological Framework.<sup>25</sup>

The WTTC asserts however that the total contribution of T&T is larger than direct spending, and includes additional indirect and induced impacts on the economy. The “indirect contribution” includes the GDP and jobs supported by:

- **Supply chain spending** – domestic purchases of goods and services by businesses dealing directly with tourists including, for example, purchases of food supplies and

cleaning services by hotels, of catering services by airlines, of fuel by bus or taxi companies, and IT services by travel agents.

- **T&T investment spending** – investment activity such as the purchase of new aircraft and construction of new hotels.
- **Government ‘collective’ spending** – government spending that is not tied directly to a specific tourist attraction, but that effectively supports the T&T sector, including tourism marketing and promotion, aviation, administration, security services, resort area security services, resort area sanitation services, etc.

Finally, the “induced contribution” measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the T&T sector. The income earned by these employees and entrepreneurs further supports local economies with purchases of goods and services.

Together, these direct, indirect, and induced contributions of T&T position the overall sector as a critical global jobs creator that as of 2019 was seeing increasing demand and had room to grow. Figure 3.4.a below shows how these categories break down across the total T&T contribution to GDP. Indirect T&T spending is significantly higher than direct T&T spending in part due to the supply chain that must be accessed for direct T&T activities to be possible. This critical interconnectedness of the T&T value chain is one reason that this report supports WTTC’s broader definition of T&T that extends beyond direct T&T spending alone.

The different contributions of the T&T sector are outlined in more detail in Figure 3.4.b on the following page.<sup>26</sup>

Figure 3.4.a. Breakdown of T&T’s Contribution to Global GDP

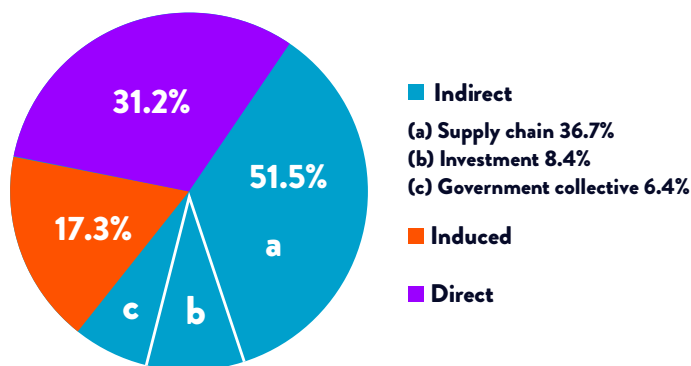
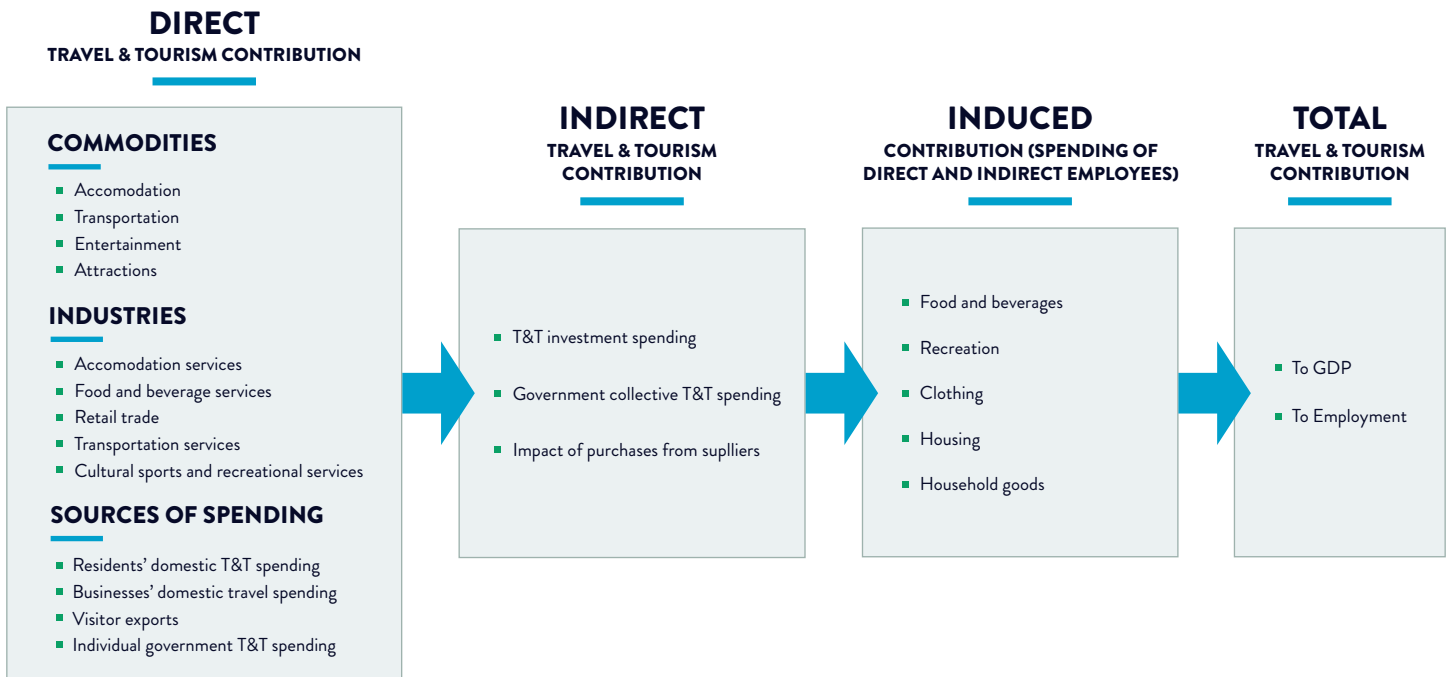


Figure 3.4.b. T&T's Direct, Indirect, & Induced Economic Contributions



### 3.5. THE BROADER T&T ECOSYSTEM

T&T encompasses much more than accommodations and air travel, which interviewed experts agreed are often the first job types that come to mind when envisioning the sector in general. T&T includes numerous sub-categories that all interact to provide a leisure or a business tourist with an end-to-end range of goods and services. When considered together, these sub-categories present a vast diversity of employment opportunities beyond hotels and airlines. The International Labour Organization (ILO) estimated that for each job created in “direct” T&T, another 1.5 jobs are created or supported along T&T’s broader supply chain, with significant income going to local communities and producers.<sup>27</sup>

The World Bank, the EU, and others have supported countries to consider how their economies can respond to growing tourism demand and to consider the full range of goods and services that are needed to serve international, domestic, leisure, and business tourists. This range of employment possibilities is presented in Figure 3.5.a on the following page, but this merely scratches the surface of the wide range of components and jobs that comprise overall T&T in any given place.<sup>28</sup>

The illustrative employers and jobs in the chart consider not just large businesses, but also numerous opportunities for small employers and entrepreneurs to fill gaps in tourist demand.

### 3.6. T&T OPPORTUNITIES FOR YOUTH

As outlined above, as of 2019 the T&T sector was one of the world’s largest employers and a key job creator. Across its broader value

chain, T&T had potential to generate new opportunities not only in large cities and developed countries, but also in local communities and across many emerging economies. To better understand the impact of T&T on youth employment, the WTTC published an analysis in January 2019 comparing youth employment relative to the overall economy in ten countries. The analysis included seven G20 countries (Canada, United States, UK, Turkey, Germany, France and Italy), and three European countries with relatively high youth and overall unemployment rates (Greece, Spain and Portugal).

While youth livelihoods practitioners may focus on countries other than these, the analysis remains informative. The examined countries had different levels of maturity of their T&T sectors and had sufficient data to allow reliable and comparative analysis between one another. Figure 3.6.a below shows how T&T employs a higher share of youth workers than the overall economies of all the examined countries, and also employs more young people than any other economic sector in those countries.

Figure 3.6.a. Youth Employment in Total Economy and T&T in Selected Countries

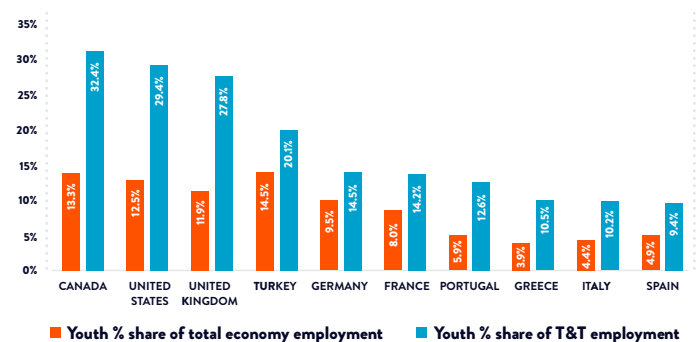
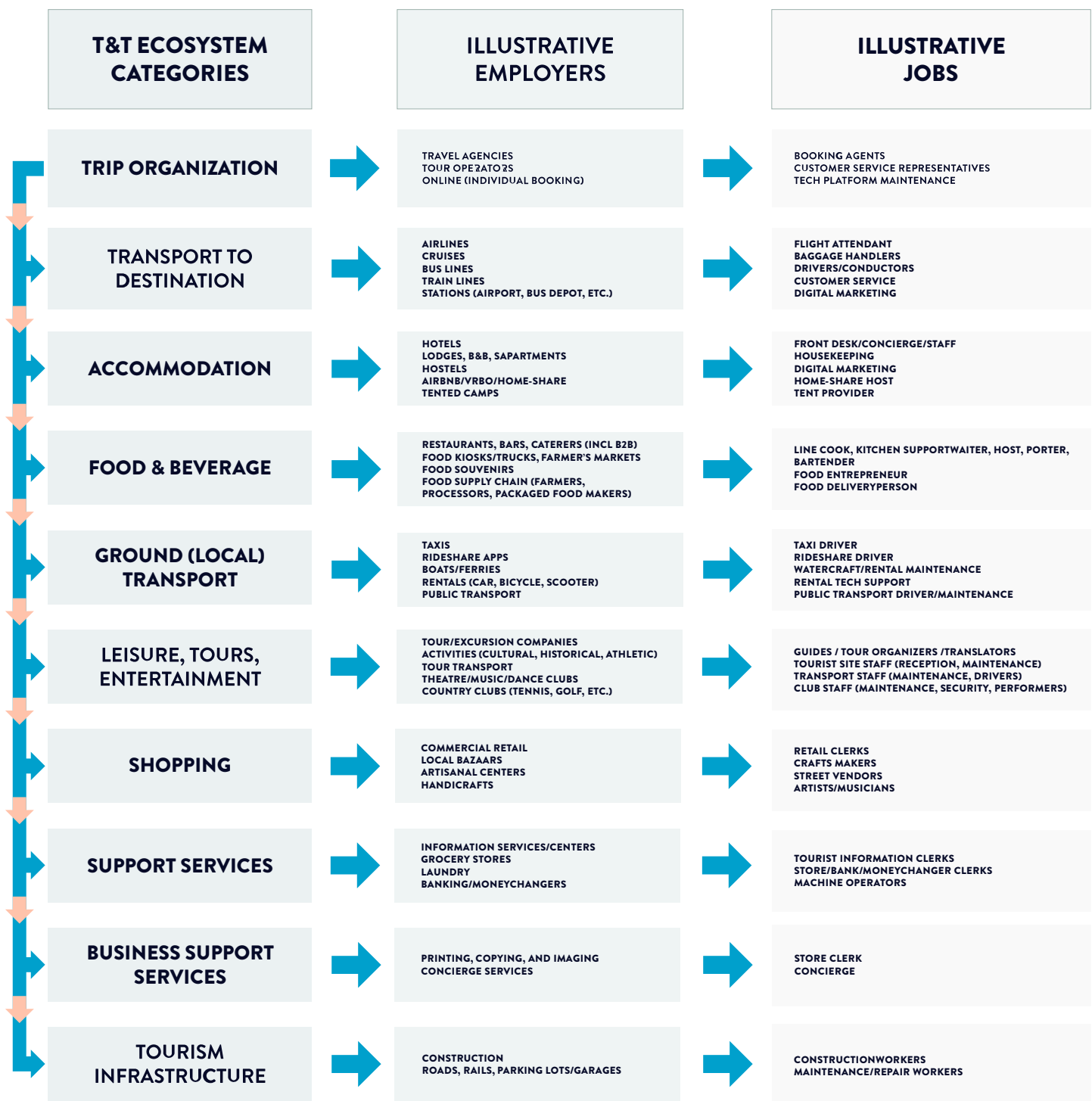


Figure 3.5.a. The Broader T&T Ecosystem



Greece, Italy, Spain, and Portugal had lower shares of youth working in the overall economy and in T&T than the others, but this can be explained by the higher levels of total unemployment in these countries leading to a larger share of unemployed older workers competing alongside youth for opportunities across all jobs, including T&T.<sup>29</sup>

WTTC and several interviewed industry experts asserted that T&T has strong potential to connect young people and OY to livelihoods for a number of reasons:

- **Low Barriers to Entry** – T&T has opportunities for not only skilled, but also semi-skilled and unskilled labor, with relatively little training required to enable prospective



or new hires to carry out their job responsibilities. Most entry-level opportunities in T&T rarely require more than a high school education; entrepreneurial possibilities in the sector require even less formal education beyond basic literacy, numeracy, and business sense. Furthermore, most opportunities in the sector typically do not require costly formal certifications or accreditations. These factors may better enable employment opportunities for certain sub-populations of OY such as women, migrants, and youth with disabilities.<sup>30</sup>

- **Employment Mobility** – Formal entry-level T&T jobs offer the possibility for upward mobility: interviewed experts emphasized that any given sub-sector of T&T in any destination has numerous competing companies all seeking skilled labor, and that they frequently poach employees from one another by offering higher pay or increased responsibilities. Experts agreed that this mobility potential ultimately results in higher paying next-level jobs and comfortable careers for high-performing OY in T&T. To corroborate this, data from the United States shows that as of 2019, T&T was one of the top ten largest employers of middle-class wage earners in the US, with more than half of all T&T (53%) earning a middle-class salary or higher.<sup>31</sup> As young people progress within the sector from their entry points into next-level jobs, the sector's promise of job security and wage competitiveness makes it a promising career consideration. Furthermore, the customer service and other skills imparted by entry-level T&T opportunities are valuable in other customer-oriented sectors and pursuits. Youth interviewees mentioned how their formal training in hotels provided them with a customer service ethos that gave them an edge in entrepreneurial pursuits such as home repair and graphic design.
- **Sector Focus on Youth** – Several interviewed experts noted that T&T companies emphasize youth employment in their hiring practices. WTTC notes that its 200-plus member companies – representing approximately 30% of the global T&T sector – nearly all offer various apprenticeship and internship programs to attract young people, and on-the-job training and education programs to upskill and better retain their young talent.<sup>32</sup>
- **Appeal of Cultural Diversity** – Interacting with tourists offers the possibility to interact with people from diverse cultures, whether from a hotel concierge desk or a food truck. Working in the sector offers young people a chance to learn or practice other languages as well. Some opportunities in T&T even offer the chance to travel, which not all OY are able to do recreationally.

- **Appeal of Flexibility** – Though seasonality is a challenge in terms of stable, year-round incomes, the prevalence of gig, part-time, and seasonal opportunities in T&T offer an entry point for young people and OY who may only have availability around family or other responsibilities.

**T&T IS ALREADY A STRONG EMPLOYER OF YOUTH, BUT A NUMBER OF CHALLENGES MUST BE ADDRESSED FOR IT TO BE MORE ACCESSIBLE TO OY**

### 3.7. CONNECTING OY TO T&T

T&T is already a strong employer of youth, and has the potential to connect OY to numerous opportunities for skilled and unskilled work. Entry-level T&T jobs are accessible even to those with only basic education or training. Myriad growth opportunities exist toward higher-level roles in the sector, whether with the same employers, with local competitors, or in other destinations. Further, a number of transferable skills required in T&T jobs can enable youth to transition to other sectors after building their work experience. Finally, the vast ecosystem serving tourists lends itself to a wide array of entrepreneurial and non-conventional livelihoods opportunities as well.

Potential certainly exists for the T&T sector to not only provide first jobs or basic incomes, but long-term careers or stable business opportunities for OY around the world. However, interviewees and research have surfaced a wide range of challenges that hinder OY from accessing opportunities in the T&T sector. These are outlined in detail in [section 4](#) below. Such challenges must be addressed through cross-sectoral and place-specific efforts to ensure that T&T's economic and employment potential can also apply to deserving opportunity youth. And, any efforts to connect OY to T&T opportunities must account for the stark realities facing the T&T sector following the global onset of the COVID-19 pandemic. This is further discussed in [section 5](#) below. Appendix A of this report profiles several organizations who are addressing the challenges identified throughout this report in innovative ways. Finally, Appendix B of this report explores how these global issues come together in eThekweni, South Africa; São Paulo, Brazil; and Mombasa, Kenya.

## 4. OY Challenges to Accessing T&T Opportunities

### 4.1. INTRODUCTION

Though the T&T sector has great promise to employ and transform opportunity youth, a number of issues must be considered to better attract, employ, and retain youth in the sector, and to ensure a decent workplace and income for them. To better understand these issues, GOYN conducted secondary research, interviewed a number of industry experts, and conducted youth surveys. This section presents a landscape of challenges and systemic barriers that are preventing or hindering more OY from accessing opportunities in the T&T sector, followed by some examples of effective or new and innovative approaches to addressing some of these issues. Appendix A of this report then profiles a selection of these examples in greater depth.

**A NUMBER OF ISSUES MUST BE CONSIDERED TO BETTER ATTRACT, EMPLOY, AND RETAIN YOUTH IN THE T&T SECTOR, AND TO ENSURE A DECENT WORKPLACE AND INCOME FOR THEM.**

### 4.2. AWARENESS AND ENTHUSIASM

The T&T sector has consistently sought talent over the past ten years, but attracting more young people to it remains a challenge. Young people and their families have a number of misconceptions and concerns about the viability, security, propriety, and the earning and advancement potential within T&T.

A key concern for the T&T industry is an unfortunate paradox: rather than considering T&T's low barriers to entry as a positive for jobseekers and especially OY, many young people across multiple geographies feel that T&T lacks the prestige that other sectors with higher barriers to entry and more stringent skills requirements have. In 2017, the MasterCard Foundation held a series of youth-led focus group discussions with young people from several African countries and many participants expressed that they felt that low qualification requirements translated to low earning potential. One Kenyan participant thought that T&T jobs are "for the uneducated" and offer "meager salaries;" a Rwandan participant saw the sector as a "last resort for those who are 'trapped by the issues and difficulty of life.'" Even those participants working in T&T expressed that this sentiment is common among their peers, with a Ugandan participant explaining,

"I fear to tell my friends that I do tourism because I know they will laugh. People always chose this course as a last alternative ... most people don't really wish to be here."<sup>33</sup> Interviewed youth in eThekweni and São Paulo shared similar sentiments, as outlined in Appendix B of this report. A study conducted by Deloitte across the Middle East and North Africa (MENA) region found that many Arab youth share similar perceptions about the sector's prestige and compensation potential.<sup>34</sup> These sentiments have held across time and geographies. Singaporean youth expressed similar beliefs about the sector's low prestige and pay in a study conducted in 2010<sup>35</sup> and even as far back as 1992.<sup>36</sup> Interviewed industry professionals who have risen up through the T&T sector also expressed they saw their early T&T jobs as a means to an income but few were keenly aware of advancement opportunities and growth paths in the sector.

Related to concerns about prestige, the service-oriented nature of T&T jobs is looked upon negatively by youth across multiple geographies. African participants in the MCF and other studies<sup>37</sup> noted that many of their peers find service-oriented T&T jobs to be "improper," and preferred to work in "good" secretarial or accounting jobs in the sector.<sup>38</sup> In the MENA region, this sometimes has to do with race, wealth, and gender dynamics: in Deloitte surveys, youth from the Arab Gulf countries expressed that T&T sector work should be performed by foreign nationals, while male youth from all MENA countries expressed that T&T's service-oriented work "seems to be more suitable for women."<sup>39</sup> Interviewed hotels and development professionals in Jordan have had difficulty connecting local youth<sup>40</sup> to numerous available hotel jobs that have proliferated in the country over the past six years despite the presence of numerous T&T training programs.<sup>41</sup> Jordanian and Egyptian T&T professionals and entrepreneurs interviewed for this report confirmed a prevailing sentiment among lower-income Arab males that service-oriented jobs such as housekeeping, restaurant waitstaff, and even bartending or customer service are seen as emasculating and undesirable compared to working with one's hands in hard-labor industries such as auto repair - although these perceptions have been evolving in recent years as the T&T industry has better positioned itself to MENA youth. Interviewees echoed these concerns when discussing lower-income Latin American youth reluctance to work in T&T. Thus, the sector faces another paradox, where good customer service skills are often the only pre-requisite for many T&T jobs, but that customer service itself is frowned upon for a number of often flawed reasons.

Furthermore, even if service-oriented jobs are seen by some in the MENA region as “more suitable” for women, interviewed experts pointed out that families with traditional, conservative, or religious leanings may prevent daughters from seeking out T&T employment. Such families have raised concerns to civil society and skilling organizations that girls should not be exposed to workplaces with single male customers, accessible private rooms, and alcohol available on-site. This was echoed by African participants in the MCF study as well, and is a valid concern given the T&T workplace sexual harassment issues covered in [section 4.4](#) below.

Interviewed youth also expressed misgivings about long hours, unpredictable shifts, and dealing with the unexpected on an almost daily basis given the varying nature of tourist needs and problems. These misgivings paint the picture that T&T jobs that are too stressful and strenuous for the pay offered. Additionally, interviewees pointed out that long T&T work shifts force young employees to leave work at late night hours. Most are unable to afford their own vehicles and have to walk, bicycle, or take public transport home, which in late-night hours may present risks for crime and violence.

Some organizations and initiatives such as the [American Hotel & Lodging Association Foundation](#), [Global Travel & Tourism Partnership \(GTTP\)](#), [Sustainable Hospitality Alliance](#), the United Kingdom’s [Big Conversation for Hospitality](#), and many others are working to better present the positives of T&T jobs and the career advancement potential of the sector. However, T&T employers need to better position T&T jobs as interesting, culturally eye-opening, and meaningful. They need to better convey to families that such jobs are safe and that there are behavioral guidelines and safeguards to protect young employees. They must also address real wage and working hours concerns so as to make T&T jobs more appealing to young people. Simultaneously, in any given place, the T&T sector, funders, and nonprofit implementers must be careful about large investments in infrastructure and/or T&T workforce skilling programs without addressing awareness and enthusiasm mismatches among the labor supply.<sup>42</sup>

**WHEN LOCAL YOUTH LACK ENTHUSIASM FOR T&T OPPORTUNITIES IN PLACES WITH STRONG TOURISM DEMAND, EMPLOYERS TEND TO TURN TO FOREIGN WORKERS OR EVEN AUTOMATION, MISSING AN OPPORTUNITY TO ADDRESS LOCAL UNEMPLOYMENT WITH DECENT JOBS.**

#### 4.3. SKILLING ALIGNMENT

The T&T sector has low barriers to entry overall and relatively few firm prerequisites for many entry-level opportunities beyond the ability to interact well with others – a foundation for customer service. T&T therefore has entry points for OY who have not been able to finish high school, let alone consider college. T&T’s ever-increasing global labor demand prior to 2020 has made it among the most viable sectors for those with limited educations and resources. However, these positives for OY recruitment have prompted T&T employers to report significant skills mismatches between labor demand and supply. Such mismatches lead to poor workplace performance, frustration, and employee turnover. Interviewees reported a difficult dynamic wherein T&T employers often poach high performers from competitors by offering higher wages and benefits, but as a result tend to forego investments in on-the-job upskilling that might improve new hire performance.<sup>43</sup>

Despite low barriers to entry, T&T’s myriad job types and opportunities require some basic training, whether for broad issues such as how to interact well with guests and customers, or for specific ones such as point-of-sale systems used in restaurants and bars. Interviewed T&T employers agreed that certain basic skills are common throughout T&T including basic literacy and numeracy, customer relations, operations, management, many of which are collectively referred to as “soft skills.” A 2012 OECD analysis of T&T skills shortages reported by employers across member countries covered the following areas:

- **Customer Relations** – general communications, social skills, customer needs-handling
- **Mathematics** – basic numeracy, point-of-sale math
- **Management** – personnel management, operations, financial and business management, team leadership
- **Multi-Culturalism** – foreign language skills, intercultural competencies (i.e. comfort with foreign cultures and business practices)<sup>44</sup>

A 2013 International Youth Foundation (IYF) study corroborated these skills needs along with several interviewed employers. The study also noted that skills shortages were a more pronounced business risk in T&T than in other sectors. For example, 38% of surveyed T&T employers in the United States reported that the “low skills levels of new employees posed a moderate or great business risk, compared with 25 percent of employers in other sectors.”<sup>45</sup> While relatively generic compared to the highly technical skills required for



petroleum field construction or software engineering, certain core skills nevertheless are important for success in T&T across multiple geographies.<sup>46</sup>

When young T&T workers encounter on-the-job difficulties without the right skills, poor performance ensues. This in turn may lead to employee burnout and employee turnover.<sup>47</sup> For example, the 2019 rate of separation – the rate at which new hires leave jobs within their first year – for accommodation and food services workers in the United States was 78.6%. Rates of separation for T&T as a whole were among the highest of any reported sector in the country for the past five years.<sup>48</sup> Burnout and separation are significant contributors to some of the youth misperceptions about the sector outlined above.

**SKILLING INITIATIVES CAN PLAY A CRITICAL ROLE IN PREPARING OFTEN-DISCONNECTED OY FOR OPPORTUNITIES IN THE T&T SECTOR. HOWEVER, ON THE WHOLE, SKILLING MUST ALIGN BETTER WITH EMPLOYER NEEDS AND AVAILABLE T&T JOBS.**

Skilling for T&T can take place in secondary schools – interviewees noted that in some countries heavily dependent on tourism such as Jamaica, Kenya, and South Africa, many secondary schools have incorporated it into their core curricula or in supplemental programs.<sup>49</sup> While these in-school tourism training programs may be good introductions for young people to the sector, they could better link youth to actual jobs and opportunities. Most teach generic hospitality principles and skills and are not necessarily up-to-date on local employer needs. Not all confer industry- or employer-recognized certifications.<sup>50</sup> Also, most of these focus on hotel management and leave out the wide array of other potential job and career paths T&T has to offer. Moreover, the quality of this preparation depends highly on teacher and material quality.<sup>51</sup>

For OY no longer in school, Technical and Vocational Education and Training (TVET) institutions and other nonprofit or private skilling organizations can help teach critical skills for opportunities in T&T. However, TVET and other skilling efforts around the world have had challenges properly preparing trainees for the specific needs and demands of local T&T employers, as well as linking trainees to real opportunities.<sup>52</sup> T&T professionals have noted that many training initiatives are “outdated” – they sometimes offer training on generic T&T concepts rather than for specific, in-demand job types,<sup>53</sup> they often fail to teach students the

core operational, management, and soft skills mentioned above, and they offer inadequate computer training and instruction, on outdated software.<sup>54</sup> Most problematically, interviewees have noted that some of these skilling organizations charge prohibitive tuition fees without offering actual job placement or job search support. Furthermore, some noted that attending skilling creates problematic indirect costs such as transportation or childcare. It is disheartening for OY who may already be in precarious financial or emotional positions to undergo skilling for nonexistent or obsolete opportunities, to undergo training that is not recognized by employers because core T&T skills are not taught, or to not be able to commit to skilling due to prohibitive direct and indirect costs.

Additionally, certain sub-populations of OY may require additional support to ensure that skilling is not only relevant, but aligns to their specific personal circumstances. Youth with disabilities have significantly higher rates of unemployment than youth in general and face invisible learning and cognitive challenges that require adjustments to instructional style. They may also require wraparound supports like mentorship.<sup>55</sup>

Ultimately, graduates of many TVET and other skilling initiatives still lack the key skills sought by T&T employers. For those who do find employment, inadequate skilling may lead to poor performance and thus the burnout and frustration problems outlined above. Interviewees have indicated that several leading hotel brands offer strong internal upskilling programs to existing employees to improve performance, but employer-sponsored upskilling remains relatively rare across the broader T&T ecosystem and outside the accommodations industry.<sup>56</sup>

Skilling alignment can be improved if employers better forecast and convey their current and future labor demand to educational, TVET, and skilling organizations. In turn, TVET and other skilling institutions need to make their curricula more practical and current, and better link their work to existing and/or future employer labor demand. They should also strive to build skilling programs for aggregate sector needs rather than for individual employers, to better enable scaling. Youth-focused and community organizations can complement this with support to youth on how to search for and apply to jobs, with placement efforts to directly link skilling graduates with existing vacancies, and tuition and wraparound support for those skilling initiatives that are better aligned to employer needs. Along these lines, organizations and initiatives such as [Education for Employment](#), [YouthBuild International](#), and many others are making strides to better align skilling with employer demand. Organizations such as

[Bridges from School to Work](#), [Migraflix](#), and others are working to support OY sub-populations including youth with disabilities and migrants, and to connect them to jobs in the broader T&T ecosystem beyond just hotels. Wraparound supports provided by the [Aspen Forum for Community Solutions](#) and numerous community organizations in the United States and elsewhere are helping youth better manage the daily requirements that come with skilling opportunities. These are only a small subset of the promising efforts helping connect youth to opportunity via skilling. Such efforts need to be scaled to support an exponentially larger number of young people than they currently do.

Though this report focuses on opportunity youth, it should also be mentioned that in some places, college graduates earn degrees for industries that are saturated with heavy competition, such as financial services and IT, while ignoring T&T which often has vacancies. This is the case in the MENA region: employers here have noted that college graduates with non-hospitality degrees lack core competencies and soft skills for entry-level jobs in T&T and require additional training.<sup>57</sup> T&T employers in other regions have also pointed out that even dedicated tourism-sector programs at higher education institutions do not always adequately prepare students for the real needs of the sector, neither from a technical nor a soft skills perspective. This is an area in which Rwanda's [Akilah Institute](#) has excelled due to its strong links to T&T employers and an emphasis on ensuring instruction is current and relevant. Thus, in addition to the above skilling alignment challenges for OY, there certainly are also challenges for youth with access to higher education.<sup>58</sup>

#### 4.4. EMPLOYER PRACTICES & CULTURE

Employer practices and workplace culture sometimes pose additional challenges that keep more OY from entering into or thriving in the T&T sector. To begin with, discriminatory hiring practices keep young people from accessing opportunities due to factors well out of their control. For those who are employed, negative workplace experiences including sexual harassment, lack of mentorship, or an inability to advance can lead to employee dissatisfaction and high turnover issues similar to those caused by skilling misalignment. In turn, these can contribute to or exacerbate the perception issues mentioned above.<sup>59</sup>

Various forms of discrimination can prevent OY from accessing T&T jobs they are qualified for. Interviewed experts and employers have mentioned that discriminatory hiring practices are typically isolated cases when it comes to leading hotel brands. However, youth interviews and secondary sources indicate that discriminatory hiring is fairly common among

smaller brands and businesses across T&T. For example, women are often scrutinized for age and appearance for flight attendant, restaurant, hotel, or other T&T jobs.<sup>60</sup> As noted in Appendix B of this report, interviewed young people of color from poor communities or *favelas*<sup>61</sup> in São Paulo and Rio de Janeiro have expressed frustration at getting to the interview stage for various T&T job opportunities, then having their candidacies terminated once hiring managers learned where they were from – the hiring managers claimed that the candidate lived “too far from” the employer’s location and thus could not be counted upon to commute to work on time. Youth felt rather that employers were unwilling to hire them for other reasons, for example equating candidates who live in poorer communities with crime and violence. In addition, properly skilled youth with disabilities, who require few significant workplace accommodations, nevertheless have found difficulty gaining employment in the T&T sector.<sup>62</sup>

DISCRIMINATORY HIRING PRACTICES MAY KEEP YOUNG PEOPLE FROM ACCESSING OPPORTUNITIES. FOR THOSE WHO ARE EMPLOYED, SEXUAL HARASSMENT, LACK OF MENTORSHIP, OR AN INABILITY TO ADVANCE CAN LEAD TO EMPLOYEE DISSATISFACTION AND HIGH TURNOVER.

Migrants also face unique challenges to hiring and employment in T&T due to discrimination and work authorizations. Interviewees mentioned that migrants often face discrimination from host-community employers who are wary of “giving away” jobs to migrants that should go to nationals. Additionally, migrants sometimes cannot obtain formal documentation to work in their new host countries. Interviewed practitioners and secondary research indicated that most T&T skilling initiatives are typically oriented toward formal employment in hotels or restaurants, for which migrants without work authorizations would be ineligible. Few initiatives exist to connect migrants to opportunities in the rest of the vast T&T spectrum that might be more accessible to them.<sup>63</sup>

Historically, women have encountered considerable difficulty in the T&T workplace compared to their male counterparts. At all levels in T&T, women are prone to sexual harassment. An Australian trade union survey found that 89% of T&T workers – the majority of whom were female – have experienced sexual harassment. A representative of the union commented, “The stories people have told us are horrible. Every day young women

go to work feeling unsafe, in fear of being groped, humiliated, or threatened by customers or managers.”<sup>64</sup> In the United States, more formal sexual harassment claims are filed in the restaurant industry than in any other sector. Interviewees and secondary research concur that sexual harassment is not only more prevalent in T&T than in other industries, it is far more accepted by both employees and management in T&T. While some of these issues are related to employee gender and power dynamics, they are also related to T&T’s global “customer is always right” ethos, and the fact that some T&T jobs include tips as part of compensation.<sup>65</sup> Some T&T employers particularly in the food and beverage space have encouraged or even required women employees to wear revealing clothing or be more flirtatious with male guests in order to generate higher revenue – and this potential for higher income is one reason for a lack of strong, organized employee opposition to such requirements.<sup>66</sup> Youth and employer interviewees in emerging markets did not raise these concerns explicitly, but in any country, OY and especially women face the risk of sexual harassment in the T&T workplace.

Advancement into leadership roles has also historically been a challenge for women in T&T. A 2020 US study found that women held only 12% of T&T industry leadership positions in 2019 despite the workforce being roughly evenly split. Further, only 21% of attendees at T&T networking events and conferences – which are important for T&T employees to grow in their roles or find new opportunities – were women; a similar proportion of women were invited to speak at T&T conferences.<sup>67</sup> This study focused on upper echelons of T&T and when interviewees were asked about women’s advancement from entry-level to higher-up roles, few mentioned endemic issues or problems. Yet the specter of sexual harassment and discrimination certainly makes T&T workplace advancement more fraught for women than for men.

T&T professionals often laud the growth and advancement potential within the industry, and interviewees have noted that on-the-job upskilling can create positive experiences for entry-level workers in T&T, particularly for OY who have had limited educational and skilling opportunities. Some interviewed employers noted that when a combination of skills mismatches and high labor demand force them to make unskilled hires, they provide in-house training to ensure that new hires can do their jobs correctly. This and similar on-the-job upskilling is a fixture at several major hotel brands but is often focused on specific skills gaps to address performance issues, or on newly required competencies for newly implemented systems. Interviewees could think of few T&T employer training initiatives that sought to be more holistic, such as ongoing mentorship and career guidance to help address

negative youth perceptions of low wages, long working hours, and stressful customer situations in T&T. Interviewed employers at large hotel brands indicated that this support occurs on a more personal and informal level: many managers and supervisors in T&T have advanced from entry-level jobs and thus have an ethos of mentoring entry-level workers, particularly when they are OY. However, interviews and research indicated that both structured employer upskilling initiatives and personal mentoring are less common among smaller hotel brands, and are more rare outside of the hotel industry.

**IN MUCH OF THE T&T SECTOR, CAREER ADVANCEMENT OFTEN DEPENDS ON “BEING NOTICED.”**

Advancement in the T&T workplace is often dependent on a worker’s visibility. Interviewed experts mentioned that in the hotel industry, formal upskilling programs do build skills valuable for next-level jobs, but cautioned that career advancement was highly dependent on “being noticed.” Young employees who are noticed by hotel leadership as consistently representing that hotel’s or overall brand’s values to customers may be targeted for promotions and supervisory roles when such opportunities come available. Being noticed in this way is typically limited to those in customer-facing roles that are consistently seen by management, such as front desk, restaurant service, and bartender work. Young, high-performing entry-level employees working in functions out of the daily sight of hotel leadership have fewer opportunities for upward mobility. Interviewees mentioned that historically, managers of lower-visibility hotel departments such as housekeeping and maintenance have also “noticed” and supported the advancement of high-performing employees both within and outside of their departments. However, hotels are increasingly outsourcing these kinds of needs, and a local specialized housekeeping contractor likely has far fewer advancement opportunities than an international hotel brand with multiple properties and departments. Interviewed hotel executives mentioned that not all hotels outsource entire functions; some merely hire external contractors for additional housekeeping or other support during peak demand seasons. Interviewees mentioned that high-performing outsourced workers do regularly get noticed, and are sometimes offered full-time positions directly at the hotels. Outside of the highly structured hotels industry, interviewed employers and young people concurred that advancement in T&T also often depends on being noticed and subsequently poached by competing



employers for higher wages or improved benefits. For those not in a position to be seen or noticed, whether by their own or by competitors' management, there is a more difficult path to advancement.

Ultimately, T&T employers can do much more to improve their own practices to ensure the safety and dignity of the workplaces and jobs they provide:<sup>68</sup>

- Discriminatory hiring practices must be eliminated. India's [Lemon Tree Hotels](#) brand has earned accolades for its discrimination-free, disability-friendly employment practices.<sup>69</sup> Hyatt Hotels launched the [RiseHY](#) program in 2018 to focus on hiring OY. As mentioned above, organizations such as [Bridges from School to Work](#), [Migrafix](#), [CEDAPS](#), and others are working to support OY sub-populations including youth with disabilities, migrants, and those from maligned communities that may face T&T employment discrimination. [Grads of Life](#) works directly with employers to address misperceptions about the capabilities of OY and other Opportunity Talent – a broad grouping of people including OY who face barriers to employment.<sup>70</sup>
- T&T workplaces must also ensure a safer, more respectful environment for women. [Workplaces Respond](#) is a US-based public-private partnership linking advocacy groups, employers, and government to combat sexual harassment in T&T and other sectors. Local advocacy initiatives like Seattle's [Legal Voice](#) are working to better support and protect women at the entry and middle levels of T&T. Such advocacy can cause governments to step in with systemic improvements, such as when the City of Chicago passed the [Hotel Workers Sexual Harassment Ordinance](#), which required all city hotels to equip housekeepers with “panic buttons,” enabling them to alert security or law enforcement in the case of sexual harassment by guests. The [Restaurant Workers' Community Foundation](#) has advocated for gender equity and violence protections, and has also made grants to locally-based organizations working on these and multiple other issues. Data-focused initiatives such as the [Castell Project](#) are highlighting gender disparity in the T&T workplace, while organizations such as [Women in Hospitality United](#) and the recently-launched [LeadingHôtelières](#) seek to improve gender equality and combat sexual harassment at the executive and management levels of T&T.<sup>71</sup>
- Upskilling can be more comprehensive to better enable OY success in the workplace. The [Passport to Success](#) program developed by [IYF](#) has been delivered to thousands of Hilton employees worldwide, with promising results in terms of employee performance, engagement, and retention.

- Mentorship can also cultivate a positive and safe environment for stressed and harried T&T workers. Voluntary programs like the [Institute of Hospitality's Mentor Me](#) program are helpful for T&T employees seeking external mentorship, but studies indicate that employer-sponsored mentorship programs may have a stronger effect on employee morale and talent retention.<sup>72</sup>
- Advancement based on visibility can take agency away from hardworking young people not in a position to “be noticed.” Employers might address this with meaningful performance review mechanisms, which establish a structured system to capture an employee's positive contributions. However, employers should align with recent research to ensure that performance reviews do not overtax managers<sup>73</sup> and focus on improving employee engagement rather than on a one-sided appraisals process.<sup>74</sup> Managers should always be mindful of the contributions of their direct reports and find ways to enrich them when possible, and owners of smaller businesses can lean more on managers to spot high performers in all departments, not just those that are most visible. Whether or not T&T jobs are highly visible, interviewees agreed that the paths to career growth for a young entry-level T&T worker may be less common and more difficult to navigate today than before. A first job is an important milestone, but young people need to be better informed about how they can pursue their own growth. External organizations can play a role here. For example, Miami-based [Hospitality Employees Advancement & Training \(HEAT\)](#) provides skilling and first-job placement support to OY, but also helps “incumbent” T&T workers seek advancement opportunities through its local network of employers.

As with all example initiatives mentioned in this report, these efforts are but a small subset of the promising work helping address the various employer and workplace challenges outlined above. There are numerous innovations and strong practices, and it is important to identify these and help them scale their efforts so that more deserving OY in the T&T industry can be more engaged, more productive, and more confident in their opportunities to advance in their careers.

**ULTIMATELY, T&T EMPLOYERS CAN DO MUCH MORE TO IMPROVE THEIR OWN PRACTICES TO ENSURE THE SAFETY AND DIGNITY OF THE WORKPLACES AND JOBS THEY PROVIDE.**

#### 4.5. ECOSYSTEM BEYOND HOTELS

Many of the above-mentioned initiatives that aim to connect OY with the T&T sector emphasize opportunities at hotels. This is understandable: major hotel brands are usually the largest and best-known T&T employers in a given place; interviewees mentioned that the arrival of one is often seen as a stamp of approval on a destination's T&T potential. Major hotel brands offer a diverse array of jobs for both skilled and unskilled labor. Many also have strong corporate and workplace culture that prevents hiring discrimination and looks out for employee engagement and welfare. Many have well-developed new hire training or employee upskilling programs and offer competitive pay, reasonable benefits, and helpful perks to entry-level employees. However, hotels are only one portion of the ever-growing T&T sector. In 2018, hotels contributed approximately \$659 billion to United States GDP,<sup>75</sup> while the country's overall T&T sector GDP contribution was \$1.595 trillion – more than \$900 billion of the United States' GDP was generated by the rest of its T&T value chain.<sup>76</sup> Despite the breadth of the T&T ecosystem as depicted in Figure 3.5.a above, few interviewees could think of skilling initiatives for T&T opportunities other than hotel jobs.

**HOTELS ARE ONLY ONE PORTION OF THE EVER-GROWING T&T SECTOR. IN 2018, HOTELS CONTRIBUTED APPROXIMATELY \$659 BILLION TO UNITED STATES GDP, BUT OTHER PARTS OF THE T&T ECOSYSTEM CONTRIBUTED MORE THAN \$900 BILLION.**

Interviewees mentioned the following promising avenues to connect young people to a broader T&T sector that is often in need of talent:

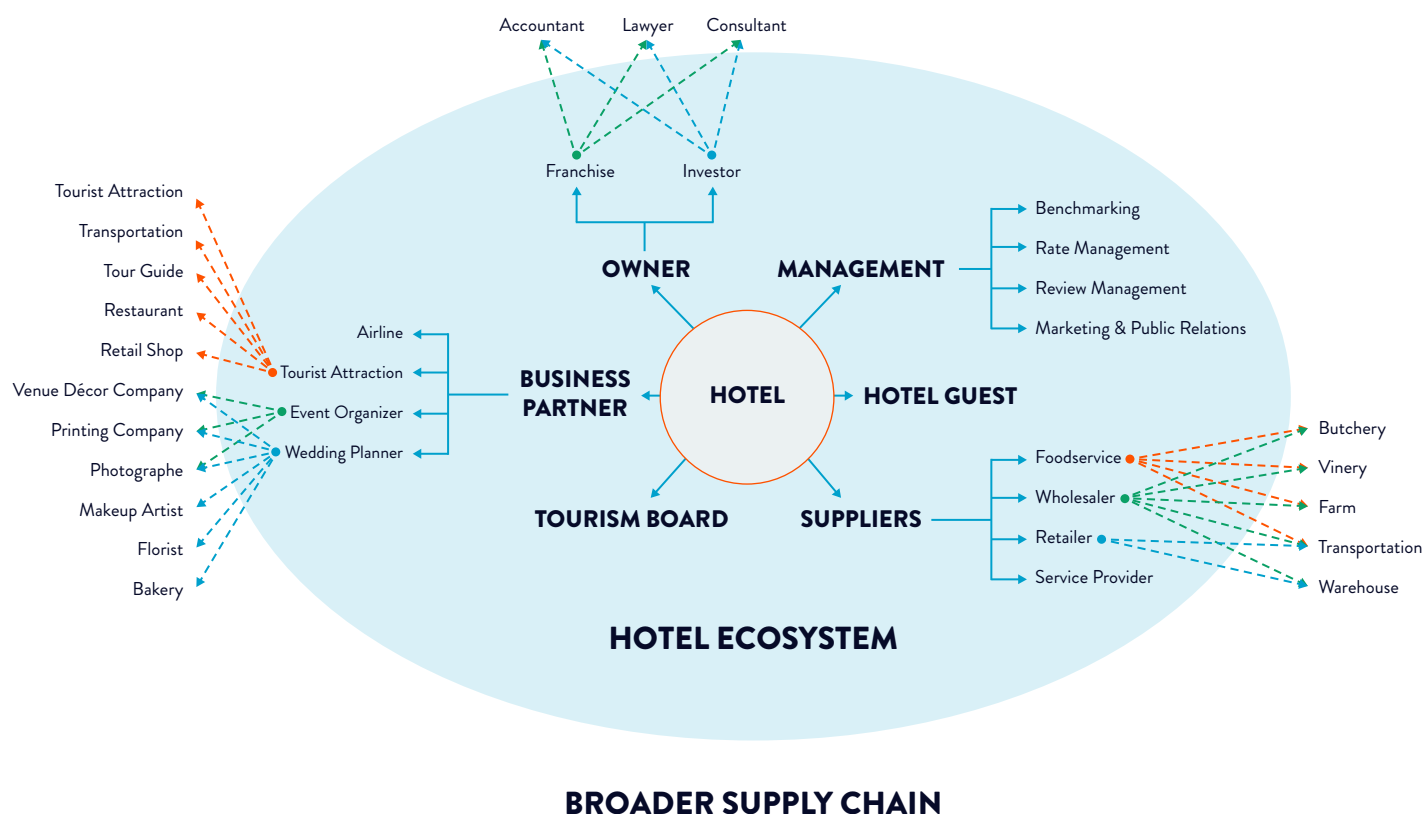
- **Foodservice** – Sometimes referred to as Food and Beverage, foodservice is an ever-growing, labor-intensive sector with low barriers to entry and strong on-the-job learning potential. In 2018, foodservice contributed approximately \$3.4 trillion to global GDP<sup>77</sup>, a large portion of the approximately \$8.8 trillion contributed by T&T overall.<sup>78</sup> Foodservice includes any establishment that sells food and beverages for immediate consumption, take-out consumption, or home deliveries. This includes commercial establishments such as fine-dining or fast-food restaurants, catering, bars, nightclubs, and recreational outlets like stadium food kiosks; and “non-commercial” outlets such as the cafeterias of government

or public facilities including schools or military bases – though these may sometimes be contracted to commercial foodservice firms. Interviewees mentioned that in foodservice, restaurants often offer promise for OY livelihoods. They may lack some of the perks of major hotel brands, but the sheer number of them that tend to exist in tourist destinations creates strong demand for both skilled and unskilled labor. Further, the ubiquity of restaurants ensures that even though entry-level workers may not have many growth paths at one restaurant, there is usually strong pool of alternative employers for future advancement possibilities. There are several organizations helping OY to connect to restaurant opportunities such as [Café Reconcile](#) and [Liberty's Kitchen](#). Additionally, [Bridges from School to Work](#) and [Grads of Life](#), among numerous others, have helped connect OY to foodservice and events management companies that operate in arenas, stadiums, airports, and other large T&T venues.

- **T&T Entrepreneurship** – The ongoing growth of tourism and diverse nature of tourist preferences and interests generates a broad potential array of entrepreneurial opportunities. These could include creating goods for sale at tourist attractions, both markets or online; drawing tourist attention to cultural and artistic performances; or attracting tourists to small-scale cultural or outdoor activities. There are some innovative approaches here. Airbnb's “Experiences” platform allows anyone to craft a locally-based cultural experience for tourists without significant up-front costs. Airbnb has helped local community organizations train young people to help build out the selection of Airbnb Experiences in Durban, South Africa, and has partnered with [Migrafix](#) to do the same in São Paulo, Brazil.<sup>79</sup> [Jordan River Foundation's](#) “[Designs](#)” initiatives help local women, including OY and Syrian migrants create and sell tourist-oriented products including handicrafts, home décor items, and woven rugs. In New Orleans, the [Trombone Shorty Foundation](#) helps connect OY to opportunities in the city's thriving music scene. Mombasa's “creative economy” has great potential to provide opportunities to OY and add cultural flavor to tourist experiences, per a [recent study](#) by GOYN and its partner [Global Development Incubator](#). However, interviewee knowledge of entrepreneur support initiatives was limited to high-growth or technology-related concepts. Few knew of initiatives to build small local T&T businesses that can earn consistent T&T revenue and generate employment. As seen by the number of Airbnb Experiences that have sprung up in a relatively short time since the platform's launch in November 2016, young people have no shortage of ideas. They need access to capital and guidance, at scale, to bring these ideas to life for the tourists they come across.

- **B2B Providers** – Hotel ecosystems and supply chains – and those of other large T&T industries – consist of many business-to-business (B2B) companies that provide critical supplies and services to companies that are the external face of T&T. Figure 4.5.a below illustrates a hypothetical ecosystem and supply chain of a hotel.<sup>80</sup> The number of direct services the hotel provides creates a need for myriad B2B services performed by unskilled farm workers, trained uniform-makers, multilingual tour guides, graphic designers for special events, and several others. Interviewees agreed that this is a significant untapped opportunity for skilling organizations to consider, yet few such initiatives surfaced during this research.

Figure 4.5.a. Illustrative Hotel Ecosystem & Supply Chain



#### 4.6. DATA & STATISTICS SHORTCOMINGS

Incomplete or inaccurate youth and tourism data can make it challenging for funders and practitioners to understand the need for workforce or youth-focused initiatives in a given place. As mentioned in [section 2.2](#) above, formal measures of “youth unemployment” do not account for a number of factors that the term “opportunity youth” covers.<sup>81</sup> One example of this issue is Niger, whose perennially low youth unemployment rate has not risen above 1% since 2007.<sup>82</sup> At the same time, 41.4% of the country’s population lives in extreme poverty, more than 70% of its youth are illiterate, and 20% of the population lacks enough food to survive.<sup>83</sup> A review of these and other metrics of quality of life in Niger suggest that its youth are deeply in need of livelihood opportunities, but very few are actually in the labor force and counted as unemployed.

Interviewees mentioned that baseline statistics such as unemployment and youth unemployment are key drivers of

geographic priorities and budget allocations for workforce development funders. Thus, Niger’s single-digit youth unemployment figures may result in it being overlooked for critical workforce development funding. Niger uses the same ILO-approved definition of unemployment as South Africa, but South Africa reports one of the world’s highest youth unemployment rates, a staggering 57%.<sup>84</sup> The significantly higher rate in South Africa may be due to numerous factors, but it more urgently conveys to funders and youth-focused actors a need for scalable youth opportunities in the country.

Similarly, most T&T data and statistics available are not instructive in helping funders or youth-focused actors understand how to better connect OY to T&T opportunities. An analysis of a sample of 350 indicators published by industry sources, tourism boards, statistics bureaus, and ministries of tourism from around the world revealed that the vast majority were related to GDP growth and revenue. Very few tried to assess the value of specific



heritage or natural attractions to local economies. Only eight addressed social issues such as employee quality of life. None covered place-specific T&T talent needs, or employer-reported skills gaps.<sup>85</sup>

Additionally, national level T&T data may obscure the challenges and pressures felt by particular destinations, communities, and populations within a country. Jordan for example faced problematic decreases in international arrivals throughout the 2010s after the Arab Spring of 2011, the Syrian civil war shortly thereafter, and the ISIL crisis that soon followed. Its tourism authorities sought to counter this downturn by promoting domestic tourism, and its Dead Sea resort area has been a success story with significant increases in overall revenue and the creation of 1300 new hotel and resort jobs between 2010-2018. On the other hand, Petra, another well-known Jordanian destination, is far more reliant on international tourism and was not able to attract new domestic visitors the way the Dead Sea did. This led to 442 hotel employees – one-third of the local hotel workforce – losing their jobs. Revenue and job losses were even more pronounced in the broader Petra T&T ecosystem, where small businesses lacked the capital to keep operating and paying employees without incoming revenue. The promising rise in Jordan's T&T GDP and employment across the past decade has been heavily skewed by one destination, obscuring the pain points felt by others. Like Petra, world-famous destinations like Machu Picchu, Angkor Wat, and the Pyramids of Giza are heavily reliant on international tourism, and it is important to ensure their challenges are not obscured by positive but misleading domestic tourism data, especially amid the drastic international tourism slowdowns forced by COVID-19.<sup>86</sup>

**WHEN FUNDERS AND PRACTITIONERS CANNOT EFFECTIVELY TARGET OY, YOUNG PEOPLE IN NEED MAY BE EXCLUDED FROM CRITICAL PROGRAMS AND SUPPORT THAT CAN HELP CONNECT THEM TO LIVELIHOODS.**

Recognizing these data and statistics shortcomings, there have been some efforts to better track the broader needs of youth in a given place and understand sub-national T&T issues. Some local South African bodies use methodologies that include more young people in unemployment calculations: interviewees noted that [eThekweni Municipality](#) uses a broader definition of unemployment in its official statistics that also includes young people that are out of school, collect disability grants, care for

their families full-time, or fall into other categories of “non-searching unemployed.”<sup>87</sup> In each of its global communities, [GOYN](#) conducts a thorough ecosystem mapping to not only accurately determine the local opportunity youth population, but identify their primary livelihoods challenges and identify sectors with the most hiring potential. An effort to better identify a place's OY population is critical for better aligning youth-focused programming. Finally, [Equator Analytics](#) is conducting and advocating for more social and employment-related data collection in the T&T sector to better promote sustainable tourism development. When funders and practitioners cannot effectively target OY, young people in need are often excluded from programs and support that might help connect them to livelihoods. Surmounting data shortcomings to better represent the number of OY and the specific T&T challenges in a given place will be a critical step to connecting OY to T&T opportunities.

#### **4.7. ADDITIONAL CONSIDERATIONS**

The issues and challenges outlined above cut across all geographies, though they may manifest differently from place to place. This section outlines other T&T challenges that may acutely affect employment and employability in some places but are not present in others. Even more than the above challenges, these issues require cross-sectoral local expertise and collaboration to develop local interventions. Any intervention for these highly place-specific issues may need adjustment to be effective in other geographies.

##### **4.7.1. SPATIAL MISMATCH AND TRANSPORTATION**

In many premier tourist destinations, OY face “spatial mismatch” – they tend to live in low-cost housing far from the centers of tourism and employment activity.<sup>88</sup> This makes it difficult for them to access available opportunities because of high transportation costs, massive commute times, and a number of challenges related to public transportation including unreliable schedules, a lack of stations forcing multiple bus transfers, and limited hours of service. There are countless destinations with spatial mismatch issues, and addressing these challenges requires place-specific solutions and coordination among numerous local stakeholders. Some illustrative examples are outlined below:

- **São Paulo, Brazil** is a major domestic leisure and international business tourism destination; it is also a sprawling urban agglomeration with the world's fifth-worst road congestion, which severely hampers bus transit.<sup>89</sup> The Urban Mobility Research Network found that city residents spend approximately 2.4 hours per day, just over one month per year,

sitting in traffic.<sup>90</sup> Youth interviewees from periphery *favelas* indicated reluctance to take a nearly 3-hour commute to the city center for relatively low-paying entry-level jobs. Though the city has a 20-hour per day metro system, which may help T&T workers working odd hours, the growth of the city has far outpaced the growth of its transit network and costs are often prohibitive for OY. Government and nonprofit interviewees mentioned that rather than pursuing an agenda to connect OY living in periphery areas to city-center jobs, it might be more effective to connect them with T&T entrepreneurship opportunities – such as the Airbnb Experiences and UberEats food delivery programs piloted by [Migraflix](#).

OY MAY NOT BE ABLE TO ACCESS AVAILABLE OPPORTUNITIES BECAUSE HIGH TRANSPORTATION COSTS, LONG COMMUTE TIMES, AND EXPENSIVE, UNRELIABLE, AND INADEQUATE PUBLIC TRANSPORTATION.

- **Orlando, Florida** has thousands of T&T opportunities given the presence of Walt Disney World and numerous other theme parks and attractions, several hundred hotels, and myriad associated businesses catering to visitors. However, most local OY live in neighborhoods outside of central Orlando, while most T&T attractions are between 12–20 miles (20–32km) southwest of the city. The city’s Lynx bus system is underfunded and bus inventory is very inadequate for rider need. T&T workers living in suburban Orlando need multiple bus transfers to get to jobs at Disney World, Universal Studios, or nearby hotels – some commute nearly three hours one-way. One rail line connects the city center to major attractions, but it does not operate on weekends, holidays, or late at night, “leaving some in the region’s 24/7 tourism industry to find a ride elsewhere.”<sup>91</sup> An interviewed employer expressed that skilling programs aimed at connecting Orlando OY to hotel jobs must also help trainees and workers actually get to hotels to be truly meaningful. An interviewed Disney World employee mentioned the resort has a fleet of almost 500 buses for guest transportation between its various parks and even a luxury motorcoach service to transport guests to and from central Orlando – but subsidizes only a few scarce transport provisions for employees. Public transport is otherwise “sorely lacking.”<sup>92</sup> With so many employers seeking talent, more employer-sponsored transport programs, or capacity-building support to the Lynx system could be critical catalysts for OY employment here.

- **New York City’s** array of historic, cultural, and eclectic attractions drew in over 65 million visitors in 2018, making it the United States’ top tourist destination. Like São Paulo it is large in area, and its peripheral neighborhoods house most of its OY population. Unlike São Paulo, New York has long had a fairly ubiquitous subway and bus system, both of which have several 24-hour options. The city’s 2016 Commuter Benefits Law requires businesses with more than 20 full-time employees to offer them pre-tax transportation benefits.<sup>93</sup> Yet even with strong transit infrastructure and government will to support workers, interviewed local T&T employees indicated that transit times from OY population centers to the city center can be very long and costs are high even with the commuter law in place. Interviewees also mentioned that T&T employers can circumvent the law for example by hiring workers as contractors rather than as full-time employees. Employer transit support could be a difference-maker here, and programs such as those conducted by [Grads of Life](#) might help to convince T&T employers that such support could yield positive returns in terms of employee attraction, engagement, and retention.

- **The Mayan Riviera** in Mexico’s state of Quintana Roo has hundreds of hotels and luxury resorts, but a shortage of labor that is related to both housing availability and transportation for workers. Quintana Roo had 101,000 hotel rooms as of 2018, of which thousands are in highly labor-intensive resorts that need an average of .95 employees per guest room for effective operations. The most proximate source of labor for these thousands of jobs would be local residents, but they typically live in interior villages far from the coastal resorts, without access to cars or mass transit. Locals simply cannot get to these jobs conveniently. One solution by the Grand Palladium mega-resort, which has a total of 1554 guest rooms and nearly as many employees, is a “staff village” with 239 apartments to house employees at no cost.<sup>94</sup> However, these can sometimes be crowded and there is only enough capacity to host a small proportion of resort employees. Cancún and Playa del Carmen have some transport options to various resorts, but local workers here tend to pay inflated rent prices aligned to the visitor market that often are a significant portion of their monthly salaries.<sup>95</sup> This housing problem is exacerbated by a skills and language gap among locals – many only speak Yucatec Mayan whereas basic worker skilling is typically provided in Spanish, and English is critical for higher-paying, customer facing jobs. Rather than paying for multi-tiered skilling to bring locals up to the right skill levels, resorts tend to seek talent from outside Quintana Roo. These outsiders may

take up employer-provided housing that might enable more local jobs, or may drive up rents in nearby cities where locals are already facing prohibitively high costs. The complexity of the situation combined with the opportunity to connect so many Quantana Roo residents to employment calls for a cross-sectoral, collaborative approach to design education, transportation, housing, skilling, and employer interventions.

#### 4.7.2. SEASONALITY

Some popular destinations see tremendous seasonal fluctuations in tourism volume, with cyclical “peak seasons” and “low seasons” that greatly affect those whose incomes rely on T&T. Seasonality can be based on climate cycles that render beach and water activity destinations popular in the summer, and mountain ski towns popular in the winter. Each summer, thousands of Saudis and Gulf country residents escape their brutally hot and humid homes for the milder, drier summers of Amman, Jordan. Amman’s hotels, restaurants, taxis, rideshares, Airbnbs, and many other T&T businesses are packed in summers with high-income and often high-tipping visitors. Conversely, popular ski destinations such as Whistler, Canada and Zermatt, Switzerland see tremendous tourist demand in winters. Outside of these peak seasons, tourism demand in these places is greatly diminished, and jobs and incomes decrease accordingly.

STRATEGIES TO PACK DESTINATIONS DURING PERIODS OF HIGH TOURIST DEMAND LEADS TO OVERCROWDING AND RESULTS IN CAPACITY CHALLENGES FOR T&T BUSINESSES, A WORSE EXPERIENCE FOR VISITORS, AND CONSIDERABLE STRESS FOR WORKERS. MOST IMPORTANTLY, THIS APPROACH DOES NOT SOLVE THE ISSUE OF LOST JOBS IN THE LOW SEASON.

Addressing seasonal challenges begins with Destination Marketing Organizations (DMOs). DMOs are typically the official tourism boards of a destination, but also include other for- and non-profit organizations that work with destinations to attract tourism revenue via marketing and travel incentives. One expert lamented however that some DMOs “double down” on peak seasons: in an attempt to maximize revenue, they offer heavy travel incentives during periods of high tourist demand. This leads to overcrowding in peak seasons and results in capacity challenges for T&T businesses, a worse experience for visitors, and considerable stress for workers. Most importantly,

this approach does not solve the issue of lost jobs in the low season. This requires generating low season demand, which requires cross-sectoral collaborative approaches to take into account and address a number of interrelated and place-specific issues.<sup>96</sup> Interviewees noted that many seasonal destinations in emerging markets have sought to establish themselves as MICE hubs to maintain revenues and employment in their low seasons, as mentioned in [section 3.3](#) above. However, as discussed in [section 5.3](#) below, dependency on business travel in the aftermath of the COVID-19 pandemic may be risky. Interviewees also pointed out the below approaches and examples to mitigating seasonality:

- **Tourism Diversification** creates more options to attract visitors during a destination’s low season to mitigate the volatility of seasonality. Chamonix, France and numerous nearby towns and villages have long depended on the ski season for T&T revenue and employment but also experienced slowdowns during the skiing off-season. To address this, local stakeholders came together to develop a number of hiking trails including the well-known Tour du Mont Blanc which connects France, Italy, and Switzerland. An annual Tour du Mont Blanc ultramarathon, summer festivals, concerts, and other events were established to bring visitors during the summer months. Ski lifts run in the summer to allow visitors to ascend and hike atop mountains that are typically clad in snow. However, this was not enough. Next, local tourism authorities had to market this summertime infrastructure to an international audience. These efforts then encouraged local entrepreneurs to offer numerous other activities that fill in the gaps of the tourist experience beyond hiking and sightseeing. An interviewed employer remarked that thanks to a collaborative effort catalyzed by tourism diversification, Chamonix has become a popular summer destination.
- **Low Season Marketing and Incentives** help attract tourists to a destination by engaging and incentivizing them to visit during a low season once relevant activities and offerings are established. Ireland sees high tourism demand in summer, but short days and cold weather prompt most tourists to overlook Ireland when considering winter holidays. However, Ireland has myriad cultural assets that do not require warm or sunny weather to appreciate. Tourism Ireland has had a years-long campaign to market Irish destinations for winter visits,<sup>97</sup> including recent efforts to capitalize on the international popularity of the Game of Thrones television show which filmed various scenes in parts of Northern Ireland.<sup>98</sup> Further, Tourism Ireland has worked with Ireland’s national air carrier,

Aer Lingus, to attract visitors with inexpensive trans-Atlantic and intra-Europe airfares in winter. This then prompted T&T agencies to work with local providers to create winter tourism packages to further appeal to budget-conscious travelers. Interviewed employers mentioned that while summer is still their peak season, the long-term effort by Tourism Ireland to catalyze winter tourism demand has greatly helped with both revenues and jobs in the wintertime.

DMOs can play a significant role in OY job creation simply by considering the above strategies to boost tourism demand in the low season. For instance, [Low Season Traveller](#) has encouraged various destinations to develop low season marketing campaigns and incentive packages to mitigate overtourism and protect livelihoods by spreading T&T revenues across the year.

#### 4.7.3. THE FUTURE OF WORK

For decades, T&T has been a very labor-intensive industry that has required significant staffing to ensure a positive experience for visitors. However, rapid technological advancements – sometimes called the Fourth Industrial Revolution (4IR) – are increasingly allowing work tasks around the world to be performed by machines and algorithms that can help companies boost production, enhance efficiency, and reach greater scale at lower cost. The World Economic Forum (WEF) noted in 2018 that while nearly 50% of companies expected automation to lead to a reduction in their full-time employee workforce in the coming years, just as many or more foresaw a need for skilled talent to design, implement, oversee, maintain, repair, and provide quality-control for any automation to come.<sup>99</sup> The 4IR affects the T&T sector in a similar way: it is allowing some T&T providers to replace jobs with automation, but is also creating new opportunities that be harnessed with the right approach.

T&T is no stranger to automation, which in many cases has improved and expedited the tourist experience. Since the late 1990s, technology began supplanting brick-and-mortar travel agents by enabling tourists to search for and compare flights, hotels, rental cars, and other aspects of their travels. By the 2000s, automated kiosks began replacing crowded airport check-in counters. By the 2010s, long rental car check-in lines were significantly shortened by automated kiosks and customer tracking systems, and even some restaurants had built fully automated ordering and payment processes. More recently, and spurred on by COVID-19 safety precautions, hotels and accommodations providers that once relied heavily on people have shifted to automated check-in and other digital

processes. An extreme case is the 290-room FlyZoo Hotel in China, which has fully mobile-enabled guest processes including facial-recognition room entry, and a staff of service and housekeeping robots.<sup>100</sup> Each of these examples has, in line with the WEF's findings, eliminated some jobs and created others. Efforts to connect young people to T&T opportunities must be aware of the kinds of 4IR shifts taking place among local T&T employers and adjust accordingly.

**T&T IS NO STRANGER TO AUTOMATION, WHICH IN MANY CASES HAS IMPROVED AND EXPEDITED THE TOURIST EXPERIENCE. EFFORTS TO CONNECT YOUNG PEOPLE TO T&T OPPORTUNITIES MUST BE AWARE OF EMERGING SHIFTS AND ADJUST ACCORDINGLY.**

At the same time, new ways to connect consumers to T&T services have enabled new income-generation opportunities. Being able to directly connect to travelers via websites such as Booking.com and Airbnb have allowed small property owners, bed and breakfasts, home stay hosts, and other accommodations providers to proliferate since the early 2000s and provide valuable local jobs. As mentioned above in [section 4.5](#), Airbnb's "Experiences" platform allows anyone to craft unique activities for visitors. Ride-sharing apps like Uber and its international variants have allowed young people around the world to generate income and begin owning cars, though there have been concerns about worker protections and wages. Portugal's CityGuru app connects visitors – most of whom do not speak Portuguese – to nearby available tour guides with a multi-lingual interface.<sup>101</sup> There are even opportunities for OY adept with social media: businesses highlighted by key social media influencers often see prominent customer demand increases.<sup>102</sup> Efforts to connect OY to these tech-enabled possibilities will involve a complex combination of awareness-raising about available possibilities, digital literacy and skills training, and support providing access to necessary devices and internet connections. However, aligning OY towards this tech-enabled ecosystem can give them resilience in a sector that is constantly evolving.<sup>103</sup>



#### 4.7.4. DOCUMENTATION TO WORK

Though the T&T sector overall has relatively low barriers to entry, governments or individual employers sometimes may have documentation, degree, or certificate requirements. The processes to obtain these can be discouragingly tedious, arduous, or expensive for youth, and pose particular challenges to migrants as outlined earlier. Selected examples are presented below:

- **Government work authorizations** have been an issue in some places. While not exclusively a T&T issue, this can be a challenging barrier to maximizing OY opportunity given T&T's promising livelihood potential. The unemployment rate of the more than 1.3 million Syrian refugees in Jordan was an astonishing 61% in 2014 and still as high as 25% in 2017.<sup>104</sup> Interviewed skilling and job placement organizations in Jordan have struggled to connect Syrian refugees to the numerous available T&T jobs at hotels and resorts throughout the country. Some believed the government was reluctant to issue work permits to a group that might compete with nationals for jobs. Jordan issued work permits to more than 100,000 refugees in the past five years but interviewed T&T employers in Jordan still reported labor shortages as of late 2019. As outlined above, unemployment and labor force statistics often do not tell the full story - hundreds of thousands of refugees have been unable to obtain work permits and been forced to turn to informal work, or have simply given up and no longer count as unemployed.<sup>105</sup> As shown in Appendix B of this report, Brazilian youth face an onerous process to become legally registered for formal work.<sup>106</sup> Skilling organizations have accordingly had difficulty connecting youth with their T&T employer partners. On top of this, these registrations list addresses, which as pointed out in [section 4.4](#) above create an opportunity for neighborhood discrimination by employers. Given the challenges involved with formal work registration, some young people said it may be better simply to work informally. Studies on Brazilian *favelas* have pointed out that many young residents who cannot access formal work turn to crime for income and a sense of belonging.<sup>107</sup>
- **Training or certification schemes** may seem helpful but can also exclude OY from opportunities. Ethiopia has a regimented TVET system for hospitality training and a "Certificate of Competency" (CoC) scheme for multiple industries including hospitality.<sup>108</sup> Numerous hotel jobs advertised in Ethiopia require completion of accredited TVET programs, and either explicitly require a CoC or state that candidates with a CoC are "at an advantage," which effectively means those without

a CoC are at a disadvantage.<sup>109</sup> Interviewees have stated that even entry-level jobs have these requirements, and that youth efforts to obtain such required certifications often come at the cost of improving more practical skills such as English language or customer service. Ethiopian T&T employers might consider instead what entry-level jobs can be accomplished with basic skilling, and consider formal TVET training and CoC requirements for next-level jobs. In an effort to help young Indians "become a part of the booming Tourism industry," the Government of India recently established the [Incredible India Tourist Facilitator \(IITF\)](#) certification program. Ostensibly, this all-digital program allows any Indian OY to obtain a government-certified tour guide credential.<sup>110</sup> However, interviewed youth wondered whether the program also creates a precedent: IITF certification may not guarantee employment, but it may become an employer prerequisite for tour guide jobs even if not mandated by the central government. Whereas these jobs once primarily required an outgoing personality and thorough local or historical knowledge, such a precedent could exclude OY who cannot afford program fees<sup>111</sup>, or who lack devices or internet connections necessary to access program courses.

Somewhat ironically, interviewed T&T employers have said that documentation and certifications help them better rank candidates, but are not guarantors of success in the workplace. Others have said that when private companies try to capitalize on certification schemes, it tends to hurt quality of instruction. Yet other employers said that government regulations on documented employees do not protect workers but just prompt informal arrangements. Addressing the challenges of work documentation, government policies, and employer requirements will require collaborative efforts in youth awareness-raising, employer advocacy, and government advocacy.

**SOMEWHAT IRONICALLY, INTERVIEWED T&T EMPLOYERS HAVE SAID THAT DOCUMENTATION AND CERTIFICATIONS HELP THEM BETTER RANK CANDIDATES, BUT ARE NOT ALWAYS GUARANTORS OF SUCCESS IN THE WORKPLACE.**

## 5. COVID-19: Impact and Recovery

### 5.1. INTRODUCTION

There was much reason to be bullish about the global T&T sector until early 2020, when the COVID-19 pandemic began to make an extraordinary global impact. Our long-interconnected world has recorded and faced pandemics as far back as the Antonine Plague that afflicted much of the Roman world for decades beginning in 165 AD. However, during this era it took nearly one month to travel between Rome and London in the best conditions;<sup>112</sup> today's remarkable travel speeds allow the same journey to be done in approximately three hours, which is problematic for pandemic containment. COVID-19 has a multi-day incubation period and studies have shown that many infected people express no symptoms and may unknowingly carry and transmit it widely. It is no wonder that COVID-19 spread so quickly.

**GLOBAL T&T WAS GROWING RAPIDLY PRIOR TO THE PANDEMIC. HOWEVER, STUDIES EXAMINING ECONOMIC RESILIENCE TO LOCKDOWNS, SOCIAL DISTANCING, AND VACCINATION REQUIREMENTS POINT TO T&T AS ONE OF THE MOST HOBBOLED SECTORS IN THE WORLD TODAY.**

By the end of 2020, the world found itself reeling from the impact of a disease that had spread to more than 100 million people, claimed more than 2.2 million lives,<sup>113</sup> and prompted numerous safety protocols including local lockdowns, restrictions on indoor activity, and a near-halt of international movement. While necessary for public health, these restrictions have contributed to a global recession that has already claimed millions of jobs worldwide and spurred unprecedented GDP contractions in most economies.<sup>114</sup> Estimates vary on the nature of and timeframe for an economic recovery. New lockdowns have been imposed in places throughout late 2020 in response to virus transmission surges, and though several vaccines have been approved for public use in late 2020, the speed of inoculations worldwide has been slow. And, studies examining economic resilience to lockdowns, social distancing, and vaccination requirements point to T&T as one of the most hobbled sectors in the world amid the pandemic.<sup>115</sup>

This report does not purport to be an authority on all the effects of COVID-19, the specific economic toll it has taken, or exactly how and when the T&T sector will recover. However, interviews and research have identified a number of themes that are reviewed in this section, including the harsh but uneven ways in which the pandemic has affected T&T around the world, shortcomings in the data being produced and evaluated, reflections for sector recovery, and some adaptations and responses that T&T workforce development efforts should consider. This section outlines the critical considerations required for youth-focused T&T workforce development efforts to be effective moving forward amid what looks to be a long-term global recovery from the consequences of the pandemic.

### 5.2. OVERVIEW OF COVID-19'S IMPACT

The UNWTO notes that T&T is “uniquely vulnerable to crises that cross borders,” which the pandemic certainly has done with alarming speed and penetration. Following early 2020 lockdowns around the world, large hotels and rural agritourism B&Bs, Michelin-starred restaurants and hole-in-the-wall eateries, luxurious nightclubs and dive bars, global airlines and one-person taxi companies have all had their business come to a near or complete standstill. Many of their employees lost their jobs as 2020 unfolded.<sup>116</sup> Small businesses have been particularly impacted as they typically lack the cash reserves to weather demand downturns while covering rent, labor, utilities, and other costs.

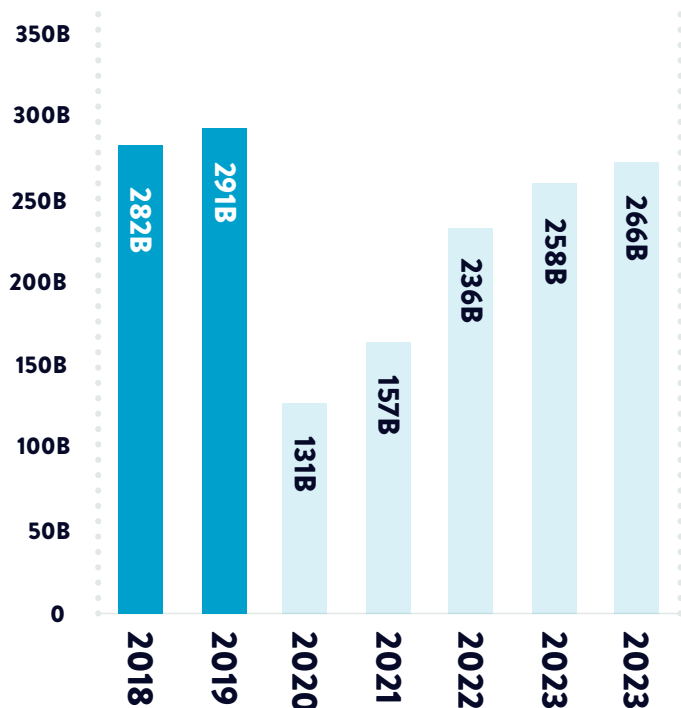
**IT IS ESTIMATED THAT ECONOMIC LOSSES OF THE GLOBAL T&T SECTOR EXCEEDED \$2 TRILLION – MORE THAN 20% OF 2019 T&T GDP. SOME STUDIES SHOW THAT 174 MILLION T&T JOBS WERE LOST IN 2020.**

Data continues to emerge about the pandemic's economic impact, but as of December 2020, the UNWTO estimated that international tourist arrivals (measured by overnight stays) in January-October 2020 were 72% less than during the same period in 2019. It also estimated that the economic losses of the global T&T sector exceeded \$2 trillion in global GDP – more than 20% of 2019 T&T GDP.<sup>117</sup> The U.S. Travel Association found that air travel in the United States declined nearly 60% year over year when compared to 2019; similarly,

year over year hotel occupancy declined 33%.<sup>118</sup> Estimates on the number of jobs lost around the world vary based on the models and calculations used, ranging from a late 2020 WTTC projection of 174 million T&T jobs lost in 2020,<sup>119</sup> to a significantly lower early 2021 ILO estimate of 114 million total jobs lost in the same period.

Business travel, which comprised 21.5% of global 2019 T&T revenues, has been drastically impacted. In the United States alone, direct business travel spending dropped nearly 55% in 2020, from \$291 billion in 2019 to \$131 billion in 2020. Similar data is emerging around the world. Furthermore, business travel downturns may not only linger, they may potentially be permanent. In response to lockdowns and movement restrictions, many workplaces have become virtual. Video-based work meetings and virtual convenings are more prevalent than ever before – and are far less expensive than in-person business travel. Some interviewees felt that in-person activity is important to conducting business and virtual meetings are poor substitutes. In line with some industry estimates, they point to a slow but eventually a full recovery of business travel to pre-pandemic levels across several years, as depicted in Figure 5.2.a below.<sup>120</sup>

Figure 5.2.a. U.S. Direct Business Travel Spending By U.S. Residents



On the other hand, other interviewees believed that the reduced costs of remote work are too appealing to corporate bottom lines to justify a return to pre-pandemic levels of business travel.

### 5.3. CHALLENGES IN ASSESSING COVID-19's IMPACT

Overall, data around the world presents staggering figures showing that global T&T and the employment it generates have been ravaged by the pandemic. However, it is important not to rely on aggregate data about the pandemic's impact on T&T. As discussed in [section 4.6](#) above, certain statistics may present an incomplete picture of the damage done by COVID-19, especially in specific places. For example, the ILO noted that that 81 million of its estimated 114 million newly jobless people have become economically inactive and are therefore no longer represented in labor force or unemployment statistics.<sup>121</sup> This casts doubt on recovery estimates and modeling that lean heavily on official unemployment data. Interviewees strongly felt that investors and youth-focused actors should consider examining livelihoods indicators and social data beyond unemployment alone when considering T&T workforce development initiatives in response to the pandemic.

Furthermore, WTTC and other bodies have published helpful data across 2020 about T&T jobs and revenues lost by continent or by region<sup>122</sup>, but interviewees felt that these alone cannot adequately help pinpoint those countries and destinations places in greatest need of workforce development support, or aid in general. [Section 3.3](#) above briefly reviewed issues around international and domestic T&T spending in selected countries; of the 20 countries most dependent on T&T as a source of GDP, 15 are small island nations whose economies have suffered greatly from COVID-19's effects due to their high dependence on international tourism and vulnerability to shocks in international travel.<sup>123</sup> As an example, T&T accounted for more than 39% of Fiji's 2019 GDP and more than 35% of its workforce, employing nearly 117,000 people. 75% percent of Fiji's 2019 tourism market depended on visitors from Australia and New Zealand. Both countries imposed outbound travel bans on their citizens and effectively cut off 75% of Fiji's annual tourism revenues, affecting approximately 80,000 jobs.<sup>124</sup> Other island countries may be even more vulnerable, such as Antigua & Barbuda where 91% of jobs are provided by the T&T sector.<sup>125</sup>

National-level statistics may also not be enough to adequately convey the need for workforce development support in specific destinations within countries. Several countries have lifted the most stringent lockdowns and movement restrictions, but still maintain lighter movement rules and regulations or precautions about mask-wearing and social distancing. This has enabled some resumption of T&T activity and ostensibly might signal the beginnings of a recovery in countries whose T&T sectors already derive most of their revenues from domestic tourism,

or in countries who are able to pivot towards domestic tourism for economic growth. However, as in the example of Jordan in [section 4.6](#) above, national-level domestic tourism data may obscure the plight of certain destinations such as Petra, Machu Picchu, or Bali whose local economies are heavily dependent on international tourism.<sup>126</sup> Workforce development efforts in certain countries with seemingly positive national data should be mindful of such vulnerable destinations when designing interventions, as international travel is largely curtailed as of early 2021.

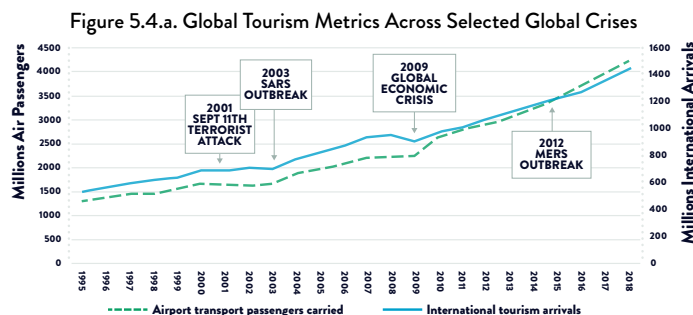
Finally, aggregate figures on business and leisure tourism cannot reveal the full range of issues facing certain industries and places. While the large ratio of global leisure to tourism spending suggests that global T&T might be able to weather long-term downturns in business tourism, there are certain industries and destinations that are highly dependent on it. For example, large airlines in the United States typically generate half their profit from the higher fares paid by business travelers. While United States hotel occupancy was down 33% from 2019, it was down a staggering 69% at luxury hotel properties – major employment generators – as leisure tourists sought out less expensive economy hotels, or pursued new accommodation options, as indicated by a 2020 boom in mobile home sales.<sup>127</sup> Industries aligned nearly entirely to business tourism such as convention centers – also large employers – have been particularly hard-hit by the pandemic. Finally, a number of highly seasonal leisure destinations that have invested in MICE opportunities to maintain T&T revenues and employment during their low seasons may again be confronted with the seasonal challenges they thought they had nimbly addressed.

Ultimately, decision-making about workforce development must avoid assumptions drawn from aggregated global, regional, or national data that might obscure the needs of certain vulnerable destinations, industries, and communities. Place-specific approaches and a focus on sub-national data will remain critical when considering workforce development investments and interventions in light of the pandemic.

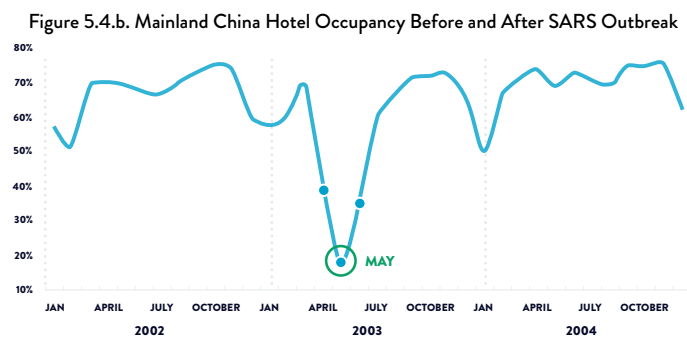
#### 5.4. CONSIDERATIONS FOR T&T RECOVERY

When considering how T&T and its great potential to connect young people to livelihoods will respond to the COVID-19 pandemic, it may be tempting to compare the sector's response to and recovery from previous global, regional, and national crises. As a whole, T&T has been resilient in the face of past crises. For example, recovery in the global T&T sector outpaced overall economic recovery from the 2008-2009 global

economic crisis<sup>128</sup>: employment globally grew by 11% between 2010 and 2018, while employment in accommodation and restaurants grew by 35%. Even when including the broader T&T ecosystem, T&T outgrew every other sector in this period. This is corroborated by statistics showing T&T's growth outpacing that of the global economy during each of those years.<sup>129</sup> In addition, as depicted in figure 5.4.a below, aggregate statistics show consistent growth in global air passengers and international arrivals from 1995-2018 apart from a leveling following the September 11<sup>th</sup>, 2001 attacks in the United States and a downturn during the aforementioned global economic crisis.



As shown above, even coronavirus outbreaks such as the Severe Acute Respiratory Syndrome (SARS) crisis in 2003 and the Middle East Respiratory Syndrome (MERS) crisis in 2012 barely registered a drop in global T&T.<sup>130</sup> In both cases these outbreaks led to travel restrictions and T&T slowdowns in the more immediate regions around the outbreaks but global T&T was relatively unaffected. However, these crises were also well contained because their namesake viruses were not very easily transmissible.<sup>131</sup> In the SARS case, once this was known and basic containment measures were taken, public fears about virus transmissibility were put at ease and T&T experienced a “V-shaped” recovery in China with hotel occupancy reverting to previously-established patterns as depicted in Figure 5.4.b below.<sup>132</sup>



Furthermore, once local restrictions were lifted and Chinese travelers were again able to take to the air, several destinations in East and Southeast Asia – which are highly dependent



on Chinese tourism - experienced similar T&T recoveries as depicted in Figure 5.4.c below.<sup>133</sup> Similar national and regional “V-shaped” recoveries took place in the United States and nearby Western Hemisphere destinations following the aforementioned September 11<sup>th</sup> attacks.<sup>134</sup>

suffered after the Al-Shabab terror attacks in 2013, with significant reductions in international arrivals across each of the following five years.<sup>137</sup>

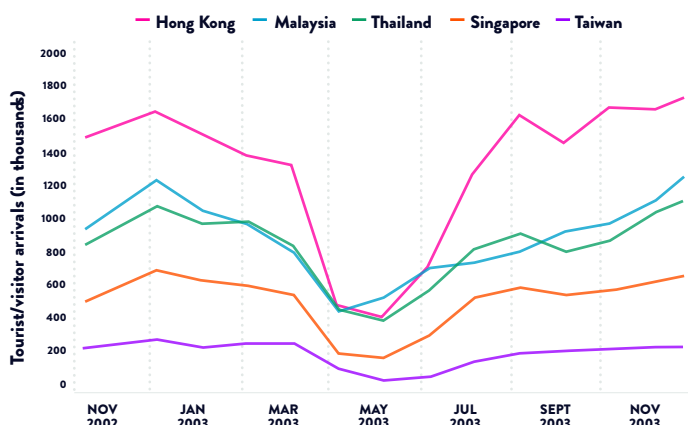
Global T&T has indeed recovered fairly swiftly from past crises, but as pointed out throughout this report, T&T issues and challenges vary greatly from one place to another. A number of factors influence the speed and quality of T&T’s recovery from crisis in a given place. Compounding this complexity is the fact that the current pandemic is unlike any of these past crises. Unlike the relatively easy containment of the SARS and MERS crises, containment of COVID-19 has been near-impossible. Many countries, destinations, and T&T industries are largely vaccine-dependent due to a dependence on international or business tourists, or business models based largely on indoor activities.<sup>138</sup> It has become clear that only mass vaccinations will enable a return to the pre-pandemic lifestyle upon which so much of global T&T depends.

However, not all destinations have had strong T&T recoveries in the aftermath of crises. Sub-Saharan Africa and the MENA region have in fact had protracted T&T downturns following crises such as epidemics and terror attacks<sup>135</sup>:

- While China and Asia had rapid tourism recoveries following the 2003 SARS outbreak, international tourist arrivals to Sierra Leone, Guinea, and Liberia dropped significantly following the Ebola outbreak in West Africa in 2013 and have yet to recover to pre-crisis levels. Furthermore, though the disease was largely contained, with 99% of cases occurring in these three countries, other West African countries such as Ghana and Senegal saw significant tourism downturns in the years following the outbreak. Tourism also suffered in places like Kenya and South Africa – both thousands of miles away from the outbreak and containment zone – with some surveyed travelers citing concerns over Ebola as a reason they eschewed travel to any African destination.<sup>136</sup>
- As noted above, T&T in the United States and neighboring destinations faced a one-year decrease in international arrivals and overall T&T revenue following the September 11<sup>th</sup> terror attacks, but then recovered relatively quickly. T&T in Europe has also weathered crises relatively quickly: France saw a one-year drop in arrivals following the November 2015 terror attacks in Paris, but arrivals grew consistently in the years that followed. However, after the 2015 Sousse terror attacks in Tunisia, international arrivals decreased for several years afterwards. Similarly, T&T in Kenya has acutely

Without clarity on vaccination timelines and the safe resumption of worldwide travel, we cannot accurately predict a recovery timeline for global T&T, and recovery prospects for certain countries and destinations remains yet more unclear. Given this reality, efforts to connect young people to T&T opportunities should take into account a number of considerations that are outlined in [section 6](#) below.

Figure 5.4.c. 2002-2003 Tourist/Visitor Arrivals in Select Asian Destinations



## 6. Recommendations: Adaptations in T&T Workforce Development

### 6.1. INTRODUCTION

As the pandemic has dragged on, millions of T&T jobs have been lost with limited visibility on when or if they will return. Interviewed youth experts noted that the global OY population has increased sharply. What can be done to support today's OY amid the sector's currently depressed state? What is needed to better guide tomorrow's OY into T&T? T&T sector interviewees have predicted that once a critical mass of successful vaccinations enables safer international travel, multiple industries within the T&T sector will rush to hire new personnel and will greatly value skilled talent. Interviewed employers noted that at the same time, because T&T confers numerous transferable skills on workers, many former T&T employees may have moved onto other opportunities or sectors upon losing their jobs. Eventually, a new generation of T&T talent is therefore likely to be needed in destinations around the world.

WHAT CAN BE DONE TO SUPPORT TODAY'S OY AMID THE SECTOR'S CURRENTLY DEPRESSED STATE? WHAT IS NEEDED TO BETTER GUIDE TOMORROW'S OY INTO T&T?

The timeline for any recovery and potential hiring rush remains unpredictable as explained in [section 5.4](#) above. Designing and developing T&T skilling programs or other workforce initiatives in the short term with this current lack of visibility can be risky as touched upon in [section 4.3](#) above – it can be very discouraging for young people to undergo training for jobs that do not exist. Moreover, the diversity of challenges facing different countries and destinations call for place-specific solutions rather than one-size-fits-all approaches. While a recovery timeline remains unclear, we recommend that workforce development efforts in places that are highly vulnerable to crises should consider a dual approach to address both skills and tourism demand. Efforts in places that are highly dependent on international tourism or business tourism should develop short-term strategies focused on sector flexibility rather than aligning strictly to T&T jobs that may not exist until mass vaccinations are conducted. Finally, workforce development efforts in places where T&T activities have resumed, and that are less dependent on international and business tourism, might consider capitalizing on new and emerging T&T demand that has arisen during the pandemic. These avenues are further explored in this section.

In the long term as T&T returns to normal activity, many of the T&T workforce challenges outlined in [section 4](#) above still need to be considered and addressed. Multi-faceted workforce development and skilling initiatives that take into account these considerations will be important contributors to T&T's global recovery and the sector's ongoing efforts to attract, skill, and retain talent.

### 6.2. A DUAL APPROACH IN VULNERABLE DESTINATIONS

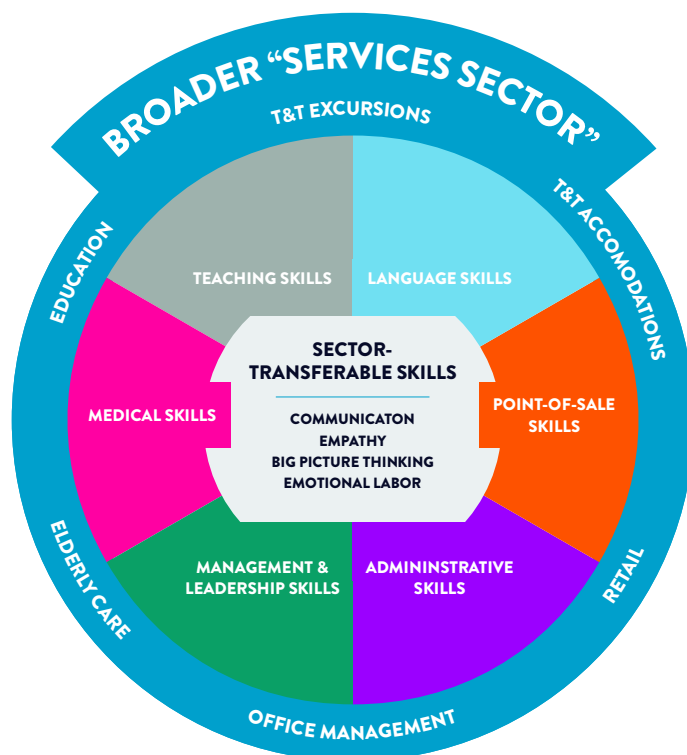
Workforce development efforts in places whose T&T sectors have been more vulnerable to shocks cannot be effective if they only consider T&T labor issues. The slow recovery from crises in parts of Africa and the Middle East suggest deeper challenges with tourism demand that must be addressed.

Skilling efforts in these places should be complemented by efforts to work with governments and DMOs on marketing, travel incentives, and attraction diversification. This will take a collaborative and cross-sectoral approach that begins with destination data analysis such as that conducted by companies like [Equator Analytics](#), followed by innovative efforts by DMOs to attract visitors. Most of all, assurances need to be made about the safety and health precautions in place in a destination to ensure tourist safety and alleviate tourist fears. This could be done by working with new global platforms such as [DragonSlayer](#), an app that collects and collates relevant information about COVID-19 safety for a number of destinations. It could also be done with simple and informative local websites or tools. For example, a number of countries have developed contact tracing apps like Ghana's [GH COVID-19 Tracker](#) or Spain's [Radar Covid](#); their purpose may be to track virus transmission but interviewees noted they can also help assure travelers that a destination is taking steps to protect public health and safety<sup>139</sup> – though it must be noted that public trust in these apps has been low and other solutions may be needed.<sup>140</sup>

Lessons from past crises in shock-sensitive destinations like these is that resumption of global or regional tourist activity is not enough. Even if vaccinations allow international tourism or business travel to come roaring back, some places have critical tasks ahead to rebuild tourist confidence and interest.

FOR DESTINATIONS SENSITIVE TO SHOCKS, RESUMPTION OF GLOBAL OR REGIONAL TOURIST ACTIVITY WILL NOT BE ENOUGH. CRITICAL TASKS LIE AHEAD TO REBUILD TOURIST CONFIDENCE AND INTEREST.

Figure 6.3.a. Illustrative Skills Overview in the Broader “Services Sector”



### 6.3. SKILLING FOR FLEXIBILITY

Workforce development efforts in places where T&T recovery may be slower than others due to a high dependence on international or business tourism should develop short-term strategies focused on worker flexibility. Skilling efforts in these places should aim to produce resilient graduates who are able to pivot to non-T&T opportunities if T&T jobs are scarce. This will also be valuable for workers in the event that these places encounter future pandemics or other systemic shocks.

A number of 2020 studies have outlined the kinds of resilient skills all workers should have to be flexible, versatile, and successful in the current and post-pandemic environment, and soft skills are typically at the core.<sup>141</sup> As outlined above and in Appendix B, T&T also requires certain customer service skills, but these are not unique to the sector. They are valuable in a number of other service-oriented sectors. One study has suggested that T&T workforce development practitioners should envision a broader “services sector” paradigm that encompasses numerous adjacent sectors as depicted in figure 6.3.a in the following column. All of these adjacent sectors require a set of foundational or “sector-transferable” skills that include communication, empathy, big-picture thinking, and “emotional labor” such as interpersonal contact and the ability to elicit positive emotions in others. Some of these individual sectors may require sector-specific skills such as foreign language abilities in T&T, point-of-sale skills in retail, administrative skills in general office management, and medical device knowledge in elderly care. Finally, there may be role-specific skills such as hotel receptionists knowing how to issue new guestroom keycards, or restaurant waitstaff knowing how to discuss customer food allergies. Workers who possess sector-transferable skills and the knowledge to apply them in situations beyond their current jobs are “sector-mobile” – they can move across sectors and require limited sector- and role-specific skilling to succeed in new jobs. The foundational skills for success on the job are already there.<sup>142</sup>

This illustrative model shows that a tour guide falling into the “T&T: Excursions” sector likely has sector-transferable skills as well as teaching and language skills. In a pandemic where

tour bookings have dwindled but there is a greater need for videoconference-based schooling, this tour guide could theoretically move to a role in the “Education” sector and would require relatively minimal new training in sector- or role-specific skills.

Under this or similar paradigms, young trainees will need to be made more aware of the transferability of the skills they are being taught. It will not suffice for a TVET institution to simply take OY robotically through a hospitality skills and soft skills curriculum – OY need to be shown the broader services sector around the T&T jobs they are currently training for, and how they might pivot their job searches to adjacent sectors if T&T jobs prove elusive, especially in this or future crises. One example of an organization that has taken this approach is the [Sustainable Hospitality Alliance](#), which thinks critically about how to enhance its T&T-specific training with information on job searching and sector adjacency.

### 6.4. SKILLING FOR NEW DEMAND

Finally, efforts to connect OY to T&T opportunities in destinations where some T&T activity has resumed due to the lifting of restrictions as well as emerging “revenge travel”<sup>143</sup> trends should consider expanding beyond typical hotel and restaurant skilling efforts and pivoting towards emerging opportunities for entrepreneurship in the broader T&T ecosystem that have arisen amid the pandemic:

- **Outdoor Experiences Demand** – Recommended safety precautions to prevent the spread of COVID-19 have increased the popularity of some niches of T&T activity. Chief among these is outdoor activities and adventures, which allow people to easily maintain social distancing in the open air.<sup>144</sup> This presents an opportunity for entrepreneurs to craft outdoor activities on existing experience platforms such as Airbnb Experiences and [Peek](#), or on their own platforms in destinations where these companies do not yet have a heavy footprint. It also presents opportunities for creative artists to cater to tourist interest in a destination's culture and heritage.
- **Economy Accommodations Support** – In some countries and destinations, particularly in the United States, there has been growing domestic tourism demand for “staycations” or “nearcations” – travel and holiday-making closer to home.<sup>145</sup> With the country's massive 2020 downturn in luxury hotel bookings, much of this demand is going toward economy hotels as well as more private options such as Airbnbs, home-stays, and other owner-rented accommodations, all of which have significant personnel needs. Interviewed Airbnb and vacation rental property owners have said that they would value service providers who could be regularly counted upon for cleaning, supply, maintenance, and other needed services related to their properties. Each of these presents business opportunities for entrepreneurs.
- **Digital Transactions** – The need to reduce virus transmission from close human contact has increased the importance of digital transactions in T&T. Per the WTTC, the pandemic has been an “unexpected catalyst” in the T&T sector's adoption of new methods of doing business, with contactless hotel stays and touch-free food delivery or pickup becoming more available.<sup>146</sup> Yet, interviewees have said that small T&T businesses such as accommodations providers, especially in emerging markets, are heavily reliant on cash. This is likely due to a lack of skills and tech-availability issues. Little has been done to map these businesses and link them with tech-adept youth that can help implement e-payment and other electronic customer management methods. Furthermore, such tools are not available in every country, creating an opening for tech-adept entrepreneurs. Per a repeated theme in this report, such needs are highly place-specific and merit additional examination.
- **New Supply Chain Needs** – Finally, large T&T businesses in 2020 have substantially increased their demand for cleaning and sanitization, delivery support, and security. This also presents opportunities for B2B entrepreneurs in the broader T&T supply chain who could become large job creators.<sup>147</sup> Skyrocketing demand for food delivery in particular aligns with

increasing demand for digital transactions. However, “big tech” app-based delivery solutions such as UberEats and Doordash pose several challenges. The jobs they create are usually low-paying, unprotected gigs with no benefits. Some of these companies have also been involved in scandals with regard to skimming or withholding deliveryperson tips. Furthermore, the restaurants underpinning their service have noted that although they have “no lifelines other than delivery platforms,” delivery app commissions are often too high to make any kind of real profit.<sup>148</sup> This presents opportunities for small businesses and entrepreneurs to offer local delivery solutions. As an analogous example, localized rideshare apps like the India's [Ola](#) or Kenya's [Little Cab](#) are now popular alternatives to Uber, which had international brand recognition but which had come under fire in recent years for a number of ruthless and underhanded business practices.<sup>149</sup> A localized response in the delivery space is DC To-GoGo, a food ordering and delivery platform based in Washington DC that promises living wages and full tips to deliverypersons, reduced commissions to restaurants, and the idea that all profits remain within the city rather than going to Silicon Valley.<sup>150</sup> Similar opportunities exist for local solutions around the world to offer restaurateurs a better alternative to the fees charged by UberEats and other international platforms while also keeping these critical T&T revenues at home to enable further investment, job creation, and growth. Additional study is merited to determine what other new supply chain needs have emerged, for which there may be ongoing labor and talent shortages and where entrepreneurs may be able to fill needs.

**THERE IS CONSIDERABLE DATA POINTING INVESTORS AND PRACTITIONERS TOWARDS NEW AND EMERGING DEMAND, PARTICULARLY FOR ENTREPRENEURS AND SMEs IN THE IMMENSE WIDER T&T ECOSYSTEM.**

As vaccination timelines still unfold in early 2021, skilling for T&T amid the pandemic need not be done in a vacuum of uncertainty about the recovery of hotel and restaurant jobs. There is considerable data pointing investors and practitioners towards new and emerging demand, particularly for entrepreneurs and SMEs in the immense wider T&T ecosystem. However, interviews and research uncovered no recent initiatives linking OY to jobs or entrepreneurship training around outdoor tourism activities, no recent efforts to better link small property



owners with able talent or B2B providers, and no OY skilling, job placement, or entrepreneur support initiatives focusing on emerging digital, supply chain, or B2B opportunities. Workforce development approaches must indeed adapt to the new normal, but depending on the needs of a given place, numerous potential avenues are available to connect OY with opportunities that have emerged despite, or even because of, the spread of COVID-19.

#### **6.5. LONG TERM T&T WORKFORCE DEVELOPMENT**

In the longer term, T&T will certainly re-emerge as a global driver of revenue and employment, and there will be a need to connect young people to opportunities in the sector amid an expected hiring rush. Practitioners doing this work should take into account the different challenges we have presented in this report, how they vary across geographies, and their place-specific interdependencies. Often, a young person needs more than one kind of support to access opportunity – coordinating with local, complementary counterparts can better help young people “cross the finish line” to livelihoods. Funders should commit to investing in such collective or collaborative approaches and focus on a place-based, holistic approach to youth opportunity rather than a project-by-project approach.

## 7. Conclusion: A More Coordinated, Holistic Approach

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For decades, T&T has been a powerful driver of the global economy and of opportunities for young people. Despite the downturn and challenges of 2020, T&T will eventually recover. Investors and practitioners have a chance to ensure that young people are better connected to and prepared for the new opportunities that will arise amid that recovery if they can address the systemic and endemic issues outlined in this report. They must also be mindful of what opportunities exist in today's reality and not jump to skilling for opportunities that have not yet arisen.

The findings in this report should encourage youth-focused actors to carefully consider how their work fits into the full journey OY must take towards sustainable livelihoods. For example, can youth leaders and community organizations collaborate to better extol T&T's virtues to drive more young recruits to T&T skilling? Can skilling organizations in turn coordinate with employers and accreditation bodies to ensure their efforts are current and relevant? Can industry experts and funders help destinations diversify their tourism draws, both creating more local opportunities and a demand for work all year long? Can local and central governments improve transport offerings to help new recruits actually get to T&T jobs more conveniently and affordably, or simplify the documentation process to allow more OY to work legally and formally?

And of course, can youth voice be incorporated into these efforts to ensure that nothing about youth is designed without them? Critical to any attempt to connect OY to the T&T sector is ensuring that youth voice and the youth experience are central in policymaking, funding deliberations, and program design.

By considering the diverse workforce development challenges outlined in this report, the global T&T sector can rebuild and recover from 2020's lowest points with improved talent attraction, training, and retention. There is an opportunity for investors and practitioners to help attract more OY to the T&T sector and its array of potential pathways. There is an opportunity to help re-think education, skilling, and transport for young people so they can better access T&T opportunities. There are opportunities to help entire tourism destinations improve their revenue generation and employment potential. There is even an opportunity to bring new capital into youth T&T workforce development by educating funders who have not traditionally operated in this space about the critical value of T&T and its vast supply chain.

A post-COVID global T&T sector likely has the potential to absorb millions of young people into productive jobs with the possibility of real career advancement or rewarding entrepreneurial opportunities with promising earning potential. We hope that the recommendations and guidance provided in this report will help better realize the tremendous untapped potential of young people around the world to not only contribute to a recovery for T&T and the global economy, but also to support their families, contribute to their communities, and be proud of themselves.

## Notes, Sources, and Citations

- 1 Jamie McAuliffe, “A Global Opportunity, Get Youth Working: State of Solutions, Gaps, and A New Global Initiative to Accelerate Youth Employment,” *Aspen Forum for Community Solutions*, September 2018. [https://goyn.org/wp-content/uploads/2020/12/2018\\_8-GlobalOpportunity\\_SCREEN9.23.18-3.pdf](https://goyn.org/wp-content/uploads/2020/12/2018_8-GlobalOpportunity_SCREEN9.23.18-3.pdf)
- 2 See, for example, Juliana Vidal, “Young Adults and the Economic Impact of COVID-19,” *USC Price Center for Social Innovation*, May 2020. <https://usc.data.socrata.com/stories/s/6xuj-27g8>
- 3 “Hospitality & Tourism” (H&T) is another term used to refer to the T&T sector and may be more often used by those more squarely in the hospitality arena, for example hotels and accommodation, food & beverage, and other industries that strive to provide customers with welcoming spaces in which to spend time. In line with the World Travel & Tourism Council, this report uses the T&T term which encompasses hospitality as well. “Home Page,” *World Travel & Tourism Council (WTTC)*, 2020. [wttc.org/en-gb/](https://wttc.org/en-gb/)
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