

Chapter 3

Policy Approaches to Skills Development in Tourism

Confronted with a looming labour and skills shortage, employers must develop strategies that will allow them to remain competitive with a smaller but better trained workforce adapted to an ageing clientele, changing lifestyles and consumer demands, the increased use of information and communication technologies, and globalisation, among other drivers. Furthermore, the seasonal and cyclical nature of the tourism industry makes the option of migrant workers an attractive solution for many employers, as they can expand and contract their workforce as demand fluctuates but it does not contribute to addressing the skills shortage. The labour-intensive nature of the tourism industry has a direct impact on the productivity of the industry, which tends to be lower than many other services. However, measuring productivity in tourism has proven to be very difficult because it requires that the quality aspects of both the inputs and outputs be taken into account. Several countries have recognised that a comprehensive national tourism strategy, that includes a workforce development strategy and tripartite partnerships between governments, industry and education, is necessary to fully address labour and skills shortages.

Introduction

Tourism is a very dynamic sector worldwide, and even in mature tourism destinations where growth is slowing due to a degree of saturation, its future prospects remain strong. Many trends are impacting the skills needed to perform competently in tourism-related jobs. With the expected long-term growth of the global tourism market, the competition for labour and skills is increasing rapidly, calling for a larger labour force. Moreover, tourism is in competition with other sectors of the economy that are often seen as more attractive on the labour market.

The increasing gap between labour demand growth and labour supply, as well as significant changes in labour force composition (*i.e.* fewer young people entering the labour force due to a contraction in these age groups, and a ballooning of the senior segments experienced by most developed countries), is putting pressure on employers to improve tourism industry attractiveness and the retention of workers. Thus, many OECD member countries have a dual challenge, as they are facing both a labour and a skills shortage in tourism. The complexity of the tourism industry and the very large number of private and public sector stakeholders also require that national governments take a lead in developing a long-term workforce development strategy.

As part of its agenda, the OECD Tourism Committee set out to determine education and training policies and programmes that support a more attractive labour market and business environment in tourism, allow the industry to maintain a sufficient and highly-qualified workforce, and hence support productivity improvements in the industry. Twenty-seven countries responded to a detailed survey and seven provided case studies to illustrate particularly successful initiatives. This chapter draws heavily on that work, although its focus is on the mega-trends that influence current and future skills needs, and policy-responses that could address these challenges, including education and training and migration. The chapter also briefly discusses skills and productivity issues.

Tourism is a fragmented sector, with many different branches. The diversity of definitions creates significant statistical limitations, making comparisons from one country to another difficult. Therefore, this chapter uses the “hospitality” sector – accommodation and food services – which represents anywhere from 50-75% of all tourism-related jobs within the industry, as a proxy for much of the discussion. In spite of the recognition for tourism’s job-creating potential and its importance to national and regional economies, it is recognised that employment has been one of the least studied aspects of tourism.

The skills challenge in tourism

Competency-based professions in tourism

When dissected from a task perspective, the majority of the tourism-related jobs are deemed to require low to medium-level technical skills. Indeed, the European Commission’s 7th Framework Programme on Work and Life Quality in New and Growing

Jobs (WALQING) determined that about two-thirds of the jobs in hospitality are low-skilled (Holman and McClelland, 2011). This is contradictory with findings in countries such as Korea and Italy. In the former, the tourism workforce has been assessed in terms of skills levels brought to the jobs – high, medium and low – and it was determined that these represent 26.6%, 51.2%, and 22%, respectively. This indicates that the medium-skilled workforce accounts for the largest share in tourism employment. Italy, taking a somewhat different approach, breaking the required skills into four categories – managers, highly specialised staff and technicians; clerical jobs, trade and service occupations; specialised workers and plant/machinery operators; unqualified occupations – determined their relative shares to be 4.6%, 83.2%, 1.3% and 10.9%. This, again, confirms that medium-level skills are the most in demand (OECD, 2011).

As for every other economic sector, technology has had a significant impact on tourism-related employment as well, both in terms of supporting and in changing how services are delivered. On the one hand, technology has replaced many repetitive jobs (*e.g.* airport check-in, hotel check-out); on the other, it has downgraded certain skills (*e.g.* hotel check-in, food preparation). Aside from these technical or “hard” skills, many of which are learned either on the job or in vocational programmes, the “soft” skills are of increasing importance. Indeed, it is the relational rather than the task-based aspect of work that makes many jobs in the service industry in general, and the tourism industry in particular, demanding. The constancy of interpersonal relations with guests and co-workers has been referred to as “emotional labour” – “the management of feeling to create a publicly facial and bodily display” – (Hochschild, 1983), which requires a high level of skill (Bolton, 2004). To this requirement must be added the equally difficult “aesthetic labour” – the skills required to look, sound and behave in a manner that is compatible with the requirements of the job and with customer expectations (Warhurst, *et al.*, 2000). Both these competencies, often referred to as a worker’s “personality”, presuppose a certain level of prior education and cultural understanding “to be able to make informed conversation with their guests or clients about politics, music, sport and almost any other imaginable topic, often from an international perspective” (Baum, 2007).

Occupational standards, certification and transferability

A number of countries have developed competency-based training programmes that lead to national recognition, often in the form of certification (Box 3.1). Unfortunately, with few exceptions, these are not required to work in the sector, and therefore do not have the uptake that would ensure higher service quality and productivity. Also, there tend to be few apprenticeable trades in this sector which lead to government-approved credentials.

Competency-based training programmes rely on occupational standards that address the competencies required to professionally carry out the duties associated with the great variety of jobs in the tourism industry. These standards are a job analysis or job profile that contains criteria-based performance statements, knowledge requirements of the job, and contextual information. They are benchmarks against which occupations (or a set of skills), and the proficiency of people in those occupations, are assessed. Many of the national occupational standards also contain essential skills profiles associated with the specific occupation. Essential skills are “enabling” or “underpinning” skills that provide a foundation for learning occupation-specific skills and enhancing people’s ability to adapt to workplace change.

Box 3.1. What are competencies?

According to the OECD's Definition and Selection of Competencies (DeSeCo) Project (2005), competencies are understood to cover knowledge, skills, attitudes and values. They enable us "to meet complex demands, by drawing on and mobilising psychosocial resources (including skills and attitudes) in a particular context. For example, the ability to communicate effectively is a competency that may draw on an individual's knowledge of language, practical IT skills and attitudes towards those with whom he or she is communicating."

Competencies are often captured in occupational standards that focus on the specifications and/or proficiencies of the work performed in a particular occupation, and outline the knowledge and skills to perform them effectively.

Since each job profile contains criteria-based performance statements, the knowledge requirements of the job, and contextual information, they can serve as effective benchmarks for assessments to be used by individual employers and education/training providers. Subject matter experts are essential to setting a national occupational standard, which is accomplished through a variety of approaches such as observation, interviews, literature reviews, and surveys. Once a standard is written, it undergoes a formal validation process by the industry.

Some countries have taken this approach a step further. For instance, Portugal has developed a National System of Qualifications (Box 3.2). The fundamental strategy involves guaranteeing the relevance of training and apprenticeship for personal development and for the modernisation of companies and the economy. The national tourism authority Turismo de Portugal has a network of 16 Hotel and Tourism Schools that occupy a leading position in terms of specific training for the tourism sector.

Box 3.2. Portugal: Examples of training and certification initiatives

The national tourism authority Turismo de Portugal is responsible for the co-ordination, creation and recognition of professional initiatives and courses, and also for fostering the development of human resources training within the tourism sector through two complementary fields of intervention.

Training

- Qualification of new professionals – training aimed at young people that grants professional certification (access to a profession) and academic certification (increased levels of schooling).
- Professional development – initiatives for recycling and updating professional skills of the existing workforce, ensuring appropriate qualifications and specialisation.

Certification

- Certification of the sector's professionals – through training, experience and recognition of qualifications
- Recognition of courses in the tourism area, organised by other bodies.

Development of measurable competence-based standards not only helps to keep the qualification provision up-to-date but can also support the validation of prior experience and learning. While formal qualifications are not always required in tourism, their existence, and a widely available opportunity to obtain qualifications by an alternative to formal education, may contribute to raising the prestige of the occupation and the sector in general. Taking into account a very high proportion of personnel without formal qualifications, but nevertheless often with adequate tacit knowledge and experience in the sector, validation of informal and non-formal learning is crucial. While not a requirement for work (i.e. it is not a regulation or control practice), certification is an industry recognised credential of an employee's competence. This is particularly important in an industry that sees a lot of turnover and where workers are highly mobile.

To facilitate worker mobility, especially across borders, the recognition of foreign credentials is imperative. Since there is no internationally harmonised approach to nationally sanctioned competencies and accreditation for some professions in the hotel, food and tourism sector, an initiative such as the creation of a European Qualification and Skills Passport (QSP) [as initiated in 2006 by EFFAT (European Federation of Food, Agriculture and Tourism Trade Unions) and HOTREC (Hotels, Restaurants and Cafés in Europe)], is very timely and much needed. The QSP was approved in 2007 and its development was being funded by the European Union. Currently, work is ongoing to insert the sector-validated skills list that forms the basis of the QSP, into EURES, the European Mobility Portal. This will allow employers and employees to find each other on the basis of skills rather than on certificates. When completed, users will be able to extract from EURES the QSP which will describe a worker's qualifications (diplomas, certificates, etc.), employment history, professional skills and competencies (acquired on the job, non-certified), and other competencies, such as languages. This passport should therefore make it possible for employers to accurately assess the skills and experiences of job candidates from their own and other EU countries, as well as facilitate a better match of offer and demand in employment in the hotel and restaurant sector.

Projected skills shortages and their drivers

A number of OECD member countries have attempted to project skills shortages, but are often unable to quantify these. Only Korea has identified numeric gaps by skill level (high, medium, low) and Canada has done so by occupation. Others identify occupations in general terms (e.g. chefs/cooks), and highlight more generic skills shortages (Box 3.3) that are increasingly in demand, such as those needed in a multicultural working environment, and requiring education for cultural diversity and language skills. The need for skills upgrading among managers, especially for leadership, strategic management, project management, entrepreneurship and innovation, has also been identified. Furthermore, there is unsatisfied demand for training in subject areas such as sustainable tourism, project management, globalisation and international business. Numeracy tends to be problematic among tourism workers, and financial management and cost control are often singled out as inadequate skills. The dynamic changes in customers' expectations, the increasingly multi-cultural and multi-generational work environment and technological advances are all contributing to a shortage of skills needed by the industry.

Overall, there would appear to be a growing demand for more skilled labour, sector-specific as well as generic. Many countries identified systemic shortages with respect to culinary skills, particularly for chefs/cooks, but also for servers. In some instances, as

Box 3.3. **Generic skills shortages**

- Leadership and management skills, specifically practical management operations, financial and business management, and core people leadership skills;
- communication and foreign language skills, which also includes an understanding of foreign cultures and business environments as well as intercultural competencies to address the increasing internationalisation of the customer base and the workforce;
- social skills and competences, which also extends into customer handling/service skills and knowledge;
- information technology and communication/presentation (ICT); and
- numeracy and financial management skills.

noted by France and other countries, positions remain unfilled even though there are personnel available, but their skill set is not deemed appropriate or they are reluctant to move to where the jobs are available. A few OECD countries, Hungary, New Zealand, and Poland, are also experiencing skills shortages in the accommodation sector for receptionists, housekeeping and hotel service management.

To provide better working conditions and address fluctuations in demand, multi-skilling of employees is seen as a partial solution. This, however, also demands a greater skill set from workers, and an adaptability and flexibility that has not been the norm previously.

Consumer demand patterns in tourism require working conditions that are frequently characterised as unsocial, and irregular working hours in the form of split shifts, weekend shifts, night shifts, or work during holiday periods (Busquets, 2010). These basic work conditions, exacerbated by many low paying, routine jobs, fewer benefits and limited opportunities for promotion and career development, have not changed to a great extent in the last 20 years. This, then, accounts for the high turnover, especially for line-level workers, and a rather poor image of the industry overall. Few countries actively promote careers in the sector, and its professions are not generally valorised or considered a prestigious employment option.

Megatrends impacting the skills needed in tourism

Beyond the working conditions, several megatrends are impacting the skills needed to perform competently in tourism-related jobs. Oxford Research (Table 3.1), as part of its comprehensive review of the European HoReCa (hotel, restaurant, catering) sector, identified a number of drivers that are influencing and changing this sector, thereby impacting on labour and skills projections:

- **Ageing population:** This impacts both the demand – tourists requiring more and more specialised services – and the workforce.

On the one hand, older tourists tend to have the time and financial resources to engage in higher quality experiences that have a definite learning component, while on the other hand they are increasingly challenged by different kinds of disabilities that require accommodation in terms of accessible facilities and the provision of specialised services. Much greater attention will need to be placed on individualised needs. This

customisation of services and experiences requires greater flexibility and responsiveness on the part of employees.

The tourism industry is characterised by a young workforce, in contrast to most other industries. However, with an ageing population, there will be greater competition for these young workers from other sectors as well. This will force the tourism industry to attract older workers, who are often less flexible and have more physical limitations than the student workforce on which it has traditionally relied heavily.

- **Changing lifestyles and consumer demands:** Today's customers are more enlightened about health, climate, the environment and politics, demanding more information about what they buy, and more services to address their specific needs.

The sophistication of modern tourists is placing increasing demands on the quality and professionalism of services delivered. For example, many tourists today have experienced a great number of products and services in many different countries. This has instilled greater awareness of global concerns, such as social and environmental conditions, and personal ones such as healthier lifestyles, nutrition and local/organic food production.

This is also placing greater demands on the organisations, how they address corporate social responsibility and incorporate sustainability in the general management of all aspects of the business. This requires knowledge about topics as diverse as traceability and fair trade, especially of food and beverage, health, climate and the environment. The increasing number of threats to the safety and security of guests also means greater skills and awareness on the part of the workforce.

- **Increased use of information technology and communication (ICT) and the Internet:** These technologies offer customers greater searchability and businesses greater marketability, and are profoundly changing the way business is conducted.

The overall Internet penetration rate for OECD member countries is estimated at 65.4% (Miniwatts Marketing Group, 2010). As a result, much of trip planning is now completed online, although booking over the Internet varies widely among countries. However, technology not only allows potential travellers to find out about the destination, its products and services, and the experience of others who have been there, it also gives small and niche products an opportunity to reach out to a world-wide clientele. This, of course, requires the capacity to handle ICT within the organisation, a strategic understanding of the use of ICT by senior management and much greater skills in developing and using new online tools such as social media by all levels of staff.

The way business is conducted within establishments has also changed. For hotels, this means tracking guest preferences over time and indeed, throughout chain properties. For the foodservice industry it means that a great variety of finished and semi-finished products are available, and preparation techniques have also seen significant changes.

- **Globalisation and economic growth:** Disposable income and spending on travel and dining are directly correlated, as is the demand for quality, specialisation and uniqueness. While globalisation allows for greater market reach, it also increases international competition.

The creation of international workplaces demands skills in diversity management. It is also changing the way business is conducted with more outsourcing, international

franchising and contract management, demanding improved control and quality systems, international branding and international administration and accounting.

Table 3.1. **Main drivers of change in the hospitality sector**

Main drivers	Technology	Technology	Economic	Economic	Organisation	Organisation	Others
Activities	Products and services	Processes	Demand	Supply	Conceptual	Executive	
Industry							
Hotels and other short stay accommodation	<ul style="list-style-type: none"> ● ICT ● Internet booking ● Online information ● Web 2.0 	<ul style="list-style-type: none"> ● Digitalisation and ICT 	<ul style="list-style-type: none"> ● High increase ● Differentiation ● Individualisation ● Value for money ● Segmented market: Price vs. quality driven 	<ul style="list-style-type: none"> ● Multinational companies ● Specialised local SMEs 	<ul style="list-style-type: none"> ● Specialisation ● Internationalisation ● New partners and specialised supply-networks 	<ul style="list-style-type: none"> ● Internationalisation 	<ul style="list-style-type: none"> ● Ageing population ● Concerns about health, environment, etc. ● International stability ● Climate and extreme weather conditions
Restaurants, bars and cafes	<ul style="list-style-type: none"> ● ICT ● Internet booking ● Online information ● Web 2.0 	<ul style="list-style-type: none"> ● Digitalisation and ICT ● Preparation, cooling and storage 	<ul style="list-style-type: none"> ● High increase ● Differentiation ● Value for money ● Convenience and snacking 	<ul style="list-style-type: none"> ● National and international restaurant chains ● SMEs: "local experience" 	<ul style="list-style-type: none"> ● Specialisation ● Internationalisation ● Chains and franchising 	<ul style="list-style-type: none"> ● Internationalisation 	<ul style="list-style-type: none"> ● Food prices ● Ageing population ● Concerns about health, environment, etc.

Source: Oxford Research 2008.

Beyond these broad, macrolevel drivers, the OECD Tourism Committee identified additional challenges that exacerbate the shortage of labour and skills in this economic sector. Results indicated that many countries do not have a national tourism strategy, which ideally would address the development of the sector's workforce in terms of quantity and appropriate skills set. Such a human resource development strategy should be developed in partnership with all stakeholders, and supported by a strong implementation plan. Without it, programme offerings that do not address the needs of the industry are inevitable. The main challenges facing tourism education and training include:

- The competencies and attitude of employers
 - ❖ General lack of a training culture: In the tourism industry as a whole, training tends to be seen more as a "cost" than an "investment". The reluctance to invest in employees is directly related to the nature of the industry, characterised by "high costs and small profit margins; unstable and insufficient demand; stark necessities of the structure and conditions of the industry, such as seasonality and small and medium-size organisations; and a low cost-low price business strategy" (Kusluvan, et al., 2010). Since most positions in the sector are not regulated, there is also a relatively low premium placed on educational qualifications, which leads directly to the low uptake of certification. In addition, the attitude of employees (see below) often contributes to the reluctance to invest in their training.
 - ❖ Lack of management skills: This is particularly noticeable at the owner / manager level in small and medium-sized businesses. As a consequence, many of these businesses fail to develop adequate policies or provide staff with a proper career development path. In particular, there is a tendency to neglect entry or lower level skills where managers have not been properly trained themselves. Lack of competency in

intercultural and diversity management: These competencies are key if employers want to successfully hire and retain diverse staff in the context of an increasingly internationalised workforce. They include, but are not limited to, culturally sensitive hiring practices, assessment of foreign qualifications (work experience, credentials, and competencies), willingness to introduce workplace adaptations to accommodate members of under-represented groups (*e.g.* newcomers, people with disabilities), etc.

- The attitude of employees
 - ❖ Unwillingness or inability of workers to upgrade: Not all employees view the sector as a long-term career prospect, and are therefore reluctant to participate in further training and professional development. Work demands are often such that the employees do not have time to pursue ongoing education and the employers are reluctant to spare the worker. This is often aggravated by the geographical distribution of the training and education establishments as opposed to where the industry is located. The training is also often seen as too expensive since the case for return on investment to the employee (*e.g.* through salary increases) or the employer (*e.g.* through greater productivity) has not been made sufficiently compelling.
 - ❖ Career aspirations: In some countries, there is inadequate motivation and interest among young people for gaining appropriate education and professional skills in this sector. Workers often assume that development must lead to staff working towards being managers rather than deepening their skills at an employee level.
 - ❖ Immaturity of school-leavers: Several countries mentioned the lack of maturity of young people and apprentices entering the sector. This translates into a greater need for excellent management skills, especially in conflict resolution, by supervisors, but also an increase in abandoned career paths. For instance, France records a 30% resignation rate while under contract (*e.g.* apprenticeship), almost twice as high as for other sectors.
- Competition from other countries and sectors
 - ❖ Graduates of hospitality and tourism programmes and employees trained in the sector, whether at the vocational or managerial level, are often sought after by other industries that require a customer service orientation. These industries can usually offer higher pay and a more regular work environment, and so graduates gravitate to these industries (*e.g.* 80% of graduates with tourism related certificates work outside the industry in the Czech Republic). In addition, labour shortages can result from countries offering more favourable remuneration and better working conditions, encouraging particularly well qualified, younger staff to migrate to these countries. This problem is particularly acute in countries such as Poland, Hungary, and Romania.

Policies to overcome the skills gap

The complexity of the tourism industry and the very large number of private and public sector stakeholders require that national governments take a lead in developing a long-term workforce development strategy. Ideally, such a strategy would be developed within the broader context of improving the industry's competitiveness and sustainability, since the increasing demand for skilled labour will continue to present a major challenge in all countries. In addition, workforce development strategies should entail a whole-of-government approach, since many other departments have a direct role to play in tourism. However, strategies and their implementation should be carried out on the basis of

partnerships with the private and education sectors and embrace agreed-upon commitments from the industry, which must step up and assume much greater responsibility for the current conditions.

Some innovative approaches that could serve as a guide for other governments include:

- setting up a private institution to handle government funding programmes for the industry (*e.g.* Austria);
- establishing collaborative councils, commissions or centres to enhance adult workers' skills through activities such as increasing employer investments in skills development and promoting workplace learning and training (*e.g.* Canada);
- approving/suppressing technical and professional diplomas at a senior government level (*e.g.* France); and
- exploring the tourism sector and its probable evolution in-depth to anticipate actions required (*e.g.* Spain).

While national occupational standards and accreditation are an important step in ensuring quality enhancement of the labour force, it must be recognised that in the tourism industry i) few professions require certification of any kind; ii) pay and promotion have a tenuous link with credentials; iii) few occupations have set educational requirements for employment; and iv) many graduates from non-tourism programs are hired into tourism occupations without any prior exposure to the industry. However, standards and accreditation serve an important function in encouraging particularly larger employers and high-end operations to ensure that staff is trained to the appropriate level. In addition, these occupational norms can assist with establishing an accreditation programme for competencies acquired through work experience that would also be accepted by educational institutions, and would smooth the path for increased professional credentials for domestic and foreign-trained workers in the industry.

Another area where governments can play a leadership role in partnership with industry is in enhancing awareness of the industry and its career opportunities. Those countries where a distinct effort has been made have noticed an improvement in attitudes towards the sector and its appeal as a career choice. The approaches countries have chosen to do so vary greatly. For instance, Canada uses all available media to target students, apprentices, immigrants, and older workers. Canada (*Discover Tourism*), France (www.metiers-hotel-restau.fr) and New Zealand (*NZ Skills Connect*) are three examples of countries that have created career and job portals through the use of the web and in partnership with industry organisations, whereas Austria launched a successful information and image campaign: "Get a Job – your Opportunities in Tourism" is an interactive vocational project to learn about career opportunities and educational possibilities in this sector. The Economic Chambers of the *Länder* of Styria and Salzburg, where it has been running the longest, can point to an increase in the number of apprentices, an improvement in the image of tourism jobs, while one out of two students can imagine an apprenticeship or school education in tourism. The Federal Ministry of Economy, Family and Youth has supported this project since 2009 (now running in six *Länder*) and has already delivered a total of 800 workshops/initiatives covering about 15 500 students and 1 100 teachers (300 schools).

The Czech Republic is another country that has developed a set of indicators to monitor the level of attractiveness of the hospitality sector.

Exposure of school age youth to the working world is another strategy used by some countries. Including vocational subjects (*e.g.* cooking) as part of their secondary studies, technological specialisations (*e.g.* hotel management, tourism), and paid/unpaid internships/on-the-job training, can be very effective in raising awareness as well as interest in pursuing a career in tourism. For instance, Portugal has recently implemented a new training model based upon alternation between schools and the workplace (on-the-job training), preparing trainees for broader and better integration in the job market. Apprenticeships are particularly encouraged in a number of countries, including through financial support for the employer and/or the employee. To ensure successful completion, Australia provides additional financial incentives, while France has introduced a peer mentoring programme in the hospitality sector.

Lastly, the underlying reasons for the skills gap between graduates entering the tourism workforce and the needs of the industry should become a particular focus of ministerial departments charged with the education and training of their country's workforce. Left to their own devices and without an external accrediting body, as is the case in many other professions, there is little incentive for educational institutions to proactively enhance the competencies of their students, and unless they are willing to work more closely with industry the gap between industry expectations and graduate competencies will not be bridged.

The role of migrant labour in addressing shortages

The UN Population Division estimated the population residing outside of their countries of origin to be 213.9 million in 2010 (United Nations, 2009), or approximately 3.1% of the global population. The International Labour Organization (ILO) estimated the number of migrant workers to be approximately 105 million worldwide (ILO, 2010b). During the period 2000-05, more developed regions of the world gained an estimated 2.6 million migrants annually from less developed regions, or 13.1 million over the whole period. North America gained the most from net migration: 1.4 million migrants annually. It was followed by Europe with an annual net gain of 1.1 million (UNWTO, 2009). Migration across national borders has been a rising trend in OECD member countries since about the mid-1970s, but has taken on an increasing role since the mid-1990s, speeding up significantly in the mid-2000s (Box 3.4).

The ILO has recognised that international migration is increasingly important in a global economy and suggests that “nearly all countries today are affected by international migration, either as origin, transit or destination countries – and in many cases all these capacities” (ILO, 2004). However, there is also significant migration within some countries (*e.g.* Canada) or trading blocks (*e.g.* European Union), that – although not captured as part of the statistics on international migration – experiences its own challenges and can, at times, contribute to the growth of the informal labour market.

Ageing populations in most of the OECD countries and the simultaneous declines in the working-age population have exacerbated the growing labour shortages. In this context, immigrant labour has increased rapidly and in many countries has started to largely exceed its initial share in total employment, particularly in Southern European countries, Ireland and the United Kingdom. This situation is even more pronounced in the hospitality and foodservice sectors, where the share of migrant workers in employment is on the whole, higher than their weight in the overall labour force (OECD, 2008), with a majority falling into the low-skills category (Table 3.2).

Box 3.4. What is labour migration?

“Labour mobility” or “labour migration” refers to the freedom of workers to practice their occupation wherever opportunities exist. Depending on the jurisdiction, workers can be referred to as migrant workers or migrants, temporary (foreign) workers or temporary migrants. In some countries, especially where regional governments have strong jurisdictional powers, *e.g.* Canada, there exist barriers to the movement of labour even within the domestic sphere. These usually relate to:

- Residency requirements, *e.g.* for health care coverage or access to other social programmes.
- Practices related to occupational licensing, certification and registration.
- Differences in occupational standards.

When this mobility includes the crossing of a national border, this migration takes on a character of immigration, whether temporary or permanent. In these cases, workers are usually referred to as non-permanent or temporary foreign workers, temporary immigrants or guest workers, if they are regular/legal migrants. However, in many countries there is also a serious phenomenon of irregular/undocumented/illegal migrants, that is to say people who enter a country without the necessary documents and permits.

The recent economic downturn put a halt to these trends in most OECD member countries, with labour market conditions deteriorating rapidly, particularly for migrant workers (OECD, 2009). In some countries such as Germany, the Netherlands, Poland, and Austria, there was no visible impact on unemployment rates, although there was a significant increase in part-time work, at least during the first two years of the crisis. This, too, affected foreign-born, and especially the younger age groups, more severely than native-born workers. In spite of this temporary setback, migration is seen as key to longer-term recovery, as well as population growth, since migrants will play a critical role in filling labour and skill shortages in most OECD member countries (OECD, 2010).

However, when queried about migrant workers as a long-term solution to labour and skills shortages, only a few countries like Australia, Canada and New Zealand are in favour of such a strategy, and indeed have a number of tools in place to ensure that professional and language training help facilitate integration into the host community. For all other countries, migrant labour is at best a short-term solution and at most a seasonal phenomenon.

Labour migration and the tourism sector

The seasonal and cyclical nature of the tourism industry makes resorting to migrant workers an attractive solution for many employers, as they can expand and contract their workforce as demand fluctuates. Table 3.2 illustrates the varying degrees to which migrants are concentrated in the hospitality sector compared to those in “low-skilled” and “all” occupations, in national economies. Their increasing number world-wide contributes to the ease with which they can be hired to fill the gaps in the local workforce. This has led to much greater precarity in the employment of migrants, who are also often willing to work for rates of pay, and under conditions of employment, that would not be acceptable to native-born workers. “Many migrant workers in the sector suffer from poor working and living conditions. They are paid lower wages and endure informal or casual employment services in a less safe and favourable working environment than native workers” (ILO, 2010a).

Table 3.2. **The immigrant share of employment, overall and in low-skilled occupations, 2011,¹ including foreign-born employment in hotels and restaurants**

	Percentage		
	All occupations	Low-skilled occupations	Employment of foreign-born workers in hotels and restaurants
Australia	27.9	31.7	..
Austria	17.1	36.2	12.12
Belgium	13.6	16.2	8.21
Canada	20.9	21.0	..
Czech Republic	2.8	3.2	5.6
Denmark	10.2	13.1	7.51
Estonia	13.2		..
Finland	4.0	4.3	8.49
France	11.6	21.2	6.97
Germany	15.0	27.5	8.83
Greece	10.4	38.4	12.07
Hungary	2.1	1.8	5.65
Iceland	9.4		..
Ireland	17.0	23.0	11.7
Israel ²	20.3		..
Italy	12.9	23.2	8.8
Luxembourg	51.5	71.9	5.85
Netherlands	11.1	24.3	6.79
Norway	11.3	19.1	6.78
Poland	0.2	0.2	..
Portugal	9.4	11.8	10.54
Slovak Republic	0.5	0.5	..
Slovenia	10.1		..
Spain	16.7	33.6	16.15
Sweden	14.8	25.1	7.21
Switzerland	30.3	46.3	7.72
Turkey	3.6	1.8	4.68
United Kingdom	13.9	14.4	9.18
United States	14.7	19.9	10.5
OECD average (without Australia)	13.7	21.2	

1. The reference group for all immigrants is the employed population 15 to 64 years of age. Low-skilled occupations are the elementary occupations (ISCO level 9), which include cleaners, domestic help, labourers, doorkeepers, garbage collectors, etc. Only persons not in education are included. Data for Turkey are for the year 2010.

2. The statistical data for Israel are supplied by and under the responsibility of the relevant Israeli authorities. The use of such data by the OECD is without prejudice to the status of the Golan Heights, East Jerusalem and Israeli settlements in the West Bank under the terms of international law.

Sources: OECD *International Migration Outlook*, based on European Union Labour Force Surveys (Eurostat); Australia and Canada: Labour Force Surveys; United States: Current Population Survey; Israel: Analysis of CBS Labor Force Surveys by Myers-JDC-Brookdale Institute.

StatLink  <http://dx.doi.org/10.1787/888932628703>

Without these migrant workers, severe shortages of labour and/or sharp labour cost increases would likely occur:

Globalisation has created a link between the growing demand for labour in the tourism sector and labour migration. Labour migration, when properly governed, can help to fill labour shortages in high-skills and low-skills parts of the market, rejuvenate populations and enhance labour market efficiency, and promote

entrepreneurship, dynamism, and diversity in destination and originating countries. The development of tourism products, the provision of labour and cultural enrichment are further positive results of migration. Migrant workers may bring new skills and knowledge to destination countries that could make companies more competitive, helping the country to grow (ILO, 2010a).

EU countries, such as Romania and Poland, where large numbers of nationals have been attracted to work in neighbouring countries, are now quite actively recruiting in other source countries, *e.g.* Russian Federation, Belarus, Ukraine and Moldova, for temporary work in their hospitality sector. In Canada, employers in the industry have been able to have recourse to the federal Temporary Foreign Worker Program in order to assist businesses in employing temporary foreign workers when identified labour shortages exist.

To facilitate worker mobility, especially across borders, the recognition of foreign credentials is imperative. In a sector where some countries have established nationally sanctioned competencies and accreditation for some professions, many others have not done so, or have a voluntary approach to their adherence. The EU certification framework is meant to address this problem and once functional, the European Qualification and Skills Passport should greatly assist with worker mobility.

Overcoming the skills gap through education and training

The main challenges facing tourism education and training

The noted gaps between the competencies of graduates entering the workforce and the needs of the industry stem largely from a number of concerns with the supply of education and training programmes. Specifically, these are:

- **Cost of programme delivery:** Vocational training tends to be more expensive in the hospitality sector than for more conventional programmes since especially the training of chefs and cooks requires extensive training facilities, equipment, and a low student to instructor ratio. This also limits the number of students that can be accepted into these programmes. Some countries have also noted a general decrease of enrolment in vocational education and training over the past few years with a concomitant loss of the prestige of vocational qualifications and jobs.
- **Facility location:** In some countries training facilities are either not located in or near tourism regions where the labour force is concentrated or they cannot attract a critical mass of students to make the offerings affordable. For example, this problem is acute in Italy and Egypt. In addition, the hours of work in the sector make it difficult for employees to participate in life-long learning and up-skilling. Although this is recognised by a significant number of countries, only a few (*e.g.* Egypt, Box 3.5) have implemented a deliberate localised training programme, *i.e.* taken the training directly to the place of work of employees without disrupting the workflow inside the establishments. Others (*e.g.* Czech Republic, Ireland) are opting for electronic teaching support through the Internet, television and/or DVDs to allow workers to access training from geographically dispersed areas or at times that are more convenient to them.
- **Up-skilling of educators:** Too often the instructors themselves lack up-to-date competencies, especially in intercultural and diversity issues, experience with new source markets and contemporary themes such as sustainability, and are not familiar

Box 3.5. Egyptian Tourism Workforce Development Program

Over the last three decades, inbound tourism has grown at an average rate of 8.5% per annum, while Egypt's lodging capacity grew at more than 9.6% per annum. Consequently, the challenge of providing skilled labour became an acute problem, made more difficult by the fact that the workforce is stretched over hundreds of kilometres in areas where no training facilities exist and most establishments did not provide any internal training.

This led the Ministry of Tourism to draw up a comprehensive strategy for developing tourism human resources. One pillar of this strategy called for training of 100 000 workers from various specialisations and functional levels of the tourism sector within three years, and provide them with basic professional skills (theoretical and practical), necessary to perform jobs. This programme has employed non-traditional methods and modern techniques to reach its overall objective through implementing the following schema:

1. Dividing tourism governorates in Egypt into four main training regions and other sub-regions.
2. Relying on groups of internationally Certified Hospitality Trainers (CHT) residing in these regions throughout the programme duration.
3. Using some distinct hotels as temporary training centers in hotel cluster areas.
4. Making use of Regional Hospitality Mobile Trainer to train employees at workplaces.
5. Using up-to-date scientific training programs used around the world.
6. Implementing the training programmes (practical and theoretical) through on-the-job training method.
7. Utilising the latest training methods applied internationally according to the concept of Competency Based Training.
8. Using the modern training aids.
9. Successful trainees get internationally accredited certificates.
10. Implementing the training programmes in a way which does not affect workflow inside the establishments.

Source: Ministry of Tourism of Egypt.

enough with best practice in industry. A very interesting and innovative approach to address this problem has been adopted by Fáilte Ireland. A small part of its budget is earmarked for research into education and training. Examples of where this research activity was turned into actionable programmes include an Educator's Development Programme, which provided an in-career professional development opportunity for lecturers in colleges. Research on e-learning resulted in a series of seminars for educators on how ICT technology could best be applied to tourism education.

- **Insufficient ties with industry:** The OECD Tourism Committee's study pointed to the long-standing communication barriers between the education and industry communities to ensure the delivery of degrees and qualifications that industry values. As well, in many regions there is insufficient co-operation from businesses to arrange for high quality placements, indispensable for workers to obtain practical work experience.

- **Curriculum revisions:** In many of the more vocational programmes, there appears to be a lack of focus on management and business skills, especially business start-ups, self-employment and entrepreneurship, as well as the development of soft skills, which help to ensure excellent customer care but also to cope with pressure (time, complaints, etc.). Also, the quantity and quality of language training is an issue for many countries, and Portugal, for one, has deliberately strengthened the number of hours devoted to linguistic components in all courses. Administrators and instructors are sometimes seen as reluctant to revise curricula, develop more responsive approaches to teaching, and provide new delivery models with greater flexibility.
- **Prior learning assessment:** With so much of the training happening on the job, educational institutions must find a way to better recognise the existing learning and skills of students, and develop accelerated career pathways. In Spain, the government has decided to implement an accreditation programme for competencies acquired through work experience, while the Portuguese National System of Recognition, Validation and Certification of Professional Skills addresses the reality of adults with no professional qualifications being able to achieve these through structured life-long learning.

Improving the connection between education and the tourism industry

The gap between jobs available in the sector and the worker qualifications are of increasing concern to governments as well as leading academics. Governments tend to try and influence how training and education is offered, to whom and under what modalities. Some different approaches can be highlighted through the French, Irish and Canadian experiences:

- In the French Alsace region, a “job objectives contract” (*contrat d’objectifs des métiers*) has been signed for the hospitality sector. This contract is meant to rationalise the utilisation of all forms of education and training, to adjust the education and training offered to the job realities, to increase the competencies of all workers and promote their employability and equality.
- Fáilte Ireland has gone a step further; to ensure that instructors have up-to-date skills, they have cancelled some scheduled training courses at their permanent centres, and in so doing, freed up a small group of instructors to work directly in industry over a three-month period. This work has involved on-site training in front-office and customer service skills, culinary advice on menu design and more recently training support to the Galway Volvo stopover.
- The Canadian Tourism Human Resource Council’s Ready-to-Work employment bridging programme is a national, industry-based, internship programme that assists individuals by preparing them for the world of work. The Ready-to-Work programme leverages regional/provincial training funding to prepare participants for the workplace by providing them with the essential workplace skills, attitudes and experience required for long-term stable employment in tourism through a mix of classroom and on-the-job training. With the labour force’s changing demographics, the programme focuses on youth and under-represented labour markets such as new immigrants, Aboriginal peoples, social assistance recipients, disabled persons, and mature workers.

Perhaps the most ambitious undertaking is that by Egypt, since so much of its workforce in the tourism industry is underqualified to provide the level of quality its national strategy for the industry demands. This led the Ministry of Tourism to draw up a three-pronged human development and training strategy of the Egyptian tourism sector. Aside from assuring the up-skilling of the existing workforce as well as new graduates, the Ministry is also actively intervening in the development of hospitality education. Through assistance from external experts, it has established national standards for a number of professions in the field of tourism.

Another important initiative is led by a group of leading academics from around the world looking at changes to the hospitality and tourism curricula from 2015 to 2030. This group – the Tourism Education Futures Institute (TEFI) – is developing a value-based approach to educating the future leaders of the industry. Common principles for successful industry-university partnerships – beyond the traditional internship or co-operative education initiatives and consultations on curriculum development – include notably i) the need to establish long-term arrangements between partners and the need to ensure continuity among partners; ii) the willingness for both industry and academic representatives to learn from each other; iii) the understanding that the building of such a partnership requires experiments, and a step by step approach; and iv) the importance of the link with the local community.

Skills and productivity issues in tourism

The labour-intensive nature of the tourism industry and its business cycles (seasonal with daily and weekly demand fluctuations) force it to employ a significant part-time, seasonal and casual workforce. This labour intensity, as well as the manner and conditions in which people deliver tourism services, has been shown to put a significant strain on businesses to attract a skilled workforce, and even more to retain and develop them over the long term. It also has a direct impact on the productivity of the industry, which already tends to be lower than some other services (Box 3.6). It can be argued that this is the case due to the lower skill levels which lead to lower salary, and therefore higher staff turnover and a greater reliance on migrant workers. But the reverse also holds true: that the lower salary, stressful and irregular working conditions, and precarious employment make it a less attractive sector in which to build a career. Hence it is people who have fewer skills to offer, are at the beginning of their working lives, or need a job that supplements their income, that are drawn, for a short while, to work in accommodation and food services. Knowing that many of these employees will not stay, employers tend to be reluctant to invest in their training and education, all but ensuring that these workers will continue to be less productive, and indeed, search for careers elsewhere.

By not valuing the education and training of their employees, employers indirectly send the message that they do not value the employees themselves. This is particularly problematic with the latest generation to enter the workplace – Generation Y or the Millennials – who are characterised by a strong focus on self development, thriving on ongoing learning and constant challenges, and have a strong sense of self worth and self interest (Ng, Schweitzer and Lyons, 2010). For this generation, and those preceding them in the workplace, the major factor contributing to the high turnover rate is the low prestige, and the low salaries paid in this sector.

Box 3.6. How should productivity be measured for tourism?

In the service sector, the traditional definition of productivity (output: input ratio) must be expanded to include the quality aspect:

$$\text{Service Productivity} = (\text{Quantity of Output} + \text{Quality of Output}) / (\text{Quantity of Input} + \text{Quality of Input})$$

The problems of measuring productivity in tourism are compounded by four factors: i) the intangible service nature; ii) simultaneous production and consumption of the services; iii) their perishability; and iv) their heterogeneity.

This leads to three difficulties in measuring productivity: i) the identification of the appropriate inputs and outputs; ii) the appropriate measures of those inputs and outputs; and iii) the appropriate ways of measuring the relationship between inputs and outputs (Anderson, 1996 as quoted in Li and Prescott, 2008). To measure the quality aspects of both the inputs and outputs in tourism labour productivity, the input ratios would have to include the measures for human capital, that is to say the level of education, training and experience attained by workers, while the output ratios would have to include the measures for service quality and the customer lifetime value.

To convince employers of the value of dollars invested in training, the Canadian Tourism Human Resource Council developed a tool that can be used for planning or to forecast the return on investment that can be expected from training employees in any department or occupation in the sector (http://cthrc.ca/en/research_publications/training_and_retention.aspx). The tool looks at six performance measures: sales, upselling, staff turnover, customer satisfaction, employee competence, and cost savings, clearly demonstrating the benefits achieved in increased sales, guest satisfaction, and productivity.

While training at the lower levels of tourism-related organisations ensure some productivity gains, it is training at the managerial level that is critical to ensure appropriate human resource management strategies, policies and supervision within businesses. Where countries have focused on upgrading the skills of employers – managers and owners, *e.g.* Australia, Ireland (Box 3.7), there has been demonstrated success in improving the overall training culture, somewhat. In addition, employer networks have shown themselves to be particularly powerful tools to change attitudes at that senior level. For instance, Fáilte Ireland launched a new business support service for small and medium-sized enterprises called “Tourism Learning Networks” in 2006. Since the network’s members set its agenda, learning is driven by real business needs. A different approach has been adopted by France where the development of employer networks aims to help offer employees of seasonal businesses, employment contracts of indefinite duration. Thereby encouraging access to continued education, as well as raising the employers’ awareness of the need for more and better training of their employees to improve service quality.

Box 3.7. Improving productivity at the level of the firm in Irish tourism

As part of its mandate to guide and promote the evolution of tourism as a leading indigenous component of the Irish economy, Fáilte Ireland, the National Tourism Development Authority, developed the Optimus programme in 2004, in partnership with the tourism industry. Its aim is to support tourism businesses to achieve improved productivity, increased competitiveness, increased levels of customer loyalty and repeat business, lower staff turnover, cost reductions, and increased profitability. Through the process of continuous improvement, Optimus focuses businesses on achieving excellence in all areas of their business.

The Optimus programme comprises three levels, each assessed, accredited and branded, so businesses can progress through the programme, building their capabilities:

1. Level One: Service Excellence (focus on the customer)

Service Excellence forms the foundation of the Optimus approach and supports management teams in setting, implementing, monitoring and measuring service standards.

2. Level Two: Best Practice (focus on the operation)

This operational improvement programme enables organisations to compare their processes against the best in industry, identify what makes the leading companies successful and apply these formulas to their business. It focuses on key management aspects of the business under the headings of management, operations and standards.

3. Level Three: Business Excellence (focus on the business)

To achieve this award, businesses need not only a deep commitment to continual improvement and superior performance, but also a proactive attitude to the changing social, economic and market conditions in which they operate.

Conclusions

The tourism industry is dominated by small and micro-enterprises that for the most part have low entry thresholds in terms of both capital and skills requirements. In many countries tourism has been growing faster than the economy as a whole, in spite of periodic setbacks, and worldwide, international tourist arrivals have increased about one percentage point faster than global GDP in real terms.

Impending labour and skills shortages in most developed countries will aggravate this situation further: such shortages will encourage employers to look for lesser skilled workers both domestically and abroad, to the detriment of the quality of the experience being delivered. According to the International Labour Organization (2010b), “the sector often crosses the fluid boundaries between the informal economy and the formal economy, with a number of formal establishments offering black market jobs”.

Major research and information gaps hinder effective analysis of the employment and social environment in the tourism industry worldwide. The industry continues to operate in what might be called an “information fog” with respect to areas such as gender balance and roles within its sectors across countries and regions; the role of tourism-related foreign direct investment and its impact on the enhancement of employment and social responsibility; and the likely long-term impact of demographic and consumer attitudinal and behavioural change on employment and social responsibility (ILO, 2010a, 63-64).

Within such an environment, it is imperative that governments assume a greater leadership role in shaping the training and education agenda. In far too many countries, jobs remain vacant for lack of appropriately skilled workers. This problem has been raised by countries such as Austria, the Czech Republic, Finland, France, Germany and Slovenia.

It is noteworthy that in countries where the national body responsible for tourism promotion is also responsible for some of the education and training and/or is able to directly influence the education agenda (e.g. Ireland and Portugal), there seems to be a much greater ability to bridge industry development, quality enhancement of the product and services, as well as knowledge, skills and competencies required to deliver on the goals. In essence, these organisations can drive all aspects of a national tourism strategy, ensuring sufficient and appropriately skilled workers as the industry expands and changes.

Even in countries where responsibility for tourism is spread among a variety of organisations and/or ministerial departments, a long-term national growth strategy for the tourism industry is essential. Such a strategy must be developed in partnership with other levels of governments, public and private sector employers, sector-specific trade unions, and educational organisations, and needs to guide a comprehensive approach to skills development. The outcome of such a social dialogue is the alignment of industry needs with detailed competency development in post-secondary education. The gap between what the industry needs and the education provided on a vocational, technical, academic and experiential level is an issue in many countries. To close it requires overhauling of curricula, up-skilling of educators, quality experiential learning opportunities, preferably in the workplace, and better linkages between vocational training and higher educational levels, to ensure that progressive paths of study are clear and open.

Through tripartite partnerships between governments, industry and education, three tracks should be pursued:

- the revision of curricula;
- the development of more responsive approaches to teaching; and
- the provision of new delivery models with greater flexibility, especially for life-long learning and up-skilling of workers.

However, financial resources must be made available to assist educational institutions with this work. Unfortunately, very few countries have a mandated responsibility that employers financially contribute to ongoing professional training of their workforce, and voluntary contributions will likely be significantly less, especially among SMEs.

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