



PREPARING THE TOURISM WORKFORCE FOR THE DIGITAL FUTURE: IN-PROGRESS REPORT

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Update on progress (at 18 Dec. 2020)

- 1st Draft of the ‘Analytical Report’ presented to OECD Tourism Committee on 14 October

- Analyses:
 - ❑ Impact of digital technologies on the nature of tourism work

 - ❑ The skills needed to adapt to changes in a post COVID-19 environment, and

 - ❑ The current policy responses supporting adjustment



Scope and approach

- Focus on travel & tourism sector before and during COVID-19 crisis
- Documentary + statistical review + OECD member/partner country survey (33 country returns to date)
- Collation of available evidence on cross-national; national and sub-national policy responses
- Production of 1st, 2nd and final draft of ‘Analytical Report’ (ongoing country feedback on 1st Draft)
- Review also at OECD-EC Policy Workshop hosted by Switzerland on 28 January 2021



Findings: Digital Technologies and Emerging Impacts on work in Tourism

- Pre-pandemic ... uneven digitalisation uptake in tourism but (disruptive) transformative of business practice (but SME lag)
- Covid-19 ... 110 million plus jobs lost BUT accelerated digitalisation aiding post 'lock down(s)' recovery
- Impacts **within** existing job structures (so far) BUT intensifying for routine/codifiable low/mid-level jobs
- Some 'new' job types emerging but new skills mixes more common
- Unclear job displacement effect of robotics – but great job loss risk

COVID+ policy challenges for tackling rigidities in SMEs



A Changing Skills Gap in the Digital Tourism Economy

- Displacement by robotics?
- Guest acceptance?

**JOB
SUBSTITUTION**

**NEW SKILL
MIXES**

- More jobs needing 'digital fluency'

AND ...

- Strong cognitive skills

- Impeded digital transformation
- Acute for unprepared SMEs

**SKILL
SHORTAGES**

**WIDER SKILLS
GAPS**

- Digital fluency + complimentary skills

- SME manager skills a key constraint to adaption



Preparing the Tourism Workforce for the Digital Future

Considerable recent policy ... 50+ initiatives identified:

- Enterprise digital awareness, uptake & adjustment (22)
- Facilitated tech support (10)
- Skills adjustment support (18) – mainly for existing workforce
- Better intelligence on tourism digital skills needs (6)

HOWEVER

- Patchy coverage (no action in 1 in 3 countries) ...
- Mostly fragmented actions ... lack join up across policy setting bodies
- Some policy responses target ‘lagging’ SMEs – but problems in reaching smaller tourism firms

AND

- Little (no?) evaluation of actions ... are these the ‘right’ policies, are they effective?



Initial policy considerations

Foresight

Strengthen national skills intelligence/foresight to inform firms and educational reform



Integrate

Encourage national responses to better integrate approaches to support tourism digitalisation policies:

- ✓ SME awareness
- ✓ Digitisation uptake
- ✓ Stronger CVET/IVET capability

Training

Encourage stronger work-related adjustment training for the existing workforce

- ✓ Enhanced managers skills
- ✓ Facilitate collaborative actions
- ✓ SME-friendly, low (no) cost 'generic' packages

SMEs

Target and improve the effectiveness of digitalisation adjustment initiatives for SMEs



Initial policy considerations (cont.)

Value Chains

Build value-chain communities of tourism digital transformation



Support

Develop support for displaced/at risk workers (early intervention & re-employment)

Resilience

Promote COVID-19 tourism recovery/resilience through digitalisation SME 'pathfinders'

Learning

Invest in continuing (adult) learning (CVET) to build vocationally centred digital fluency



Next Steps

- Production of **2nd Draft** of Analytical Report (15 Jan)
- Key findings from the review highlighted at **OECD-EC Policy Workshop on Preparing the Tourism Workforce for the Digital Future**, co-hosted by Switzerland, on 28 January 2021
- Draft final report (V3) to be **presented for approval at 107th Session** of the OECD Tourism Committee on 13-14 April 2021
- Publication of final report as an **OECD Tourism Policy Paper**, April 2021