REGIONAL HUMAN RESOURCE DEVELOPMENT KNOWLEDGE AND SKILLS AUDIT FOR THE TOURISM INDUSTRY











Submitted To:

Caribbean Tourism Organization (CTO)

December 2022

By:

A-Z Information Jamaica Limited

The E-biz Centre, 2 Trafalgar Road, Kingston 5, Jamaica W.I.

Tel: 1(876) 9979489; 1(876) 9276137

E-mail: Info@azinfojam.com; Noelwatson@azinfojam.com

ACKNOWLEDGEMENTS

'The vision of the Caribbean Tourism Organization (CTO) is to position the Caribbean as the most desirable, year-round, warm weather destination and our purpose is Leading Sustainable Tourism – One Sea, One Voice, One Caribbean'.

This project, Regional Human Resource Development Knowledge and Skills Audit for the Tourism Industry commissioned by the CTO, funded by the CDB and carried out by the A-Z Jamaica Information Limited (A-Z) consultants was intended to actualise that vision.

Acknowledgement and thanks must be given to the many who contributed to process. The list would be too long to place here, but can be viewed in Appendix 3 of the report. Among the supporters to be acknowledged are:

The Caribbean Tourism Organization (CTO) team who envisioned the project and supported the A-Z team mainly Sharon Banfield, Joan Leacock, Marvelle Sealy.
The Caribbean Development Bank (CDB) that provided the funding.
The A-Z Consultants:
Dr Noel Watson, CEO of A-Z Jamaica Information Limited
Dr Anne Crick, the team leader
Mr Robert Gregory, the Human Resource and Training expert
Mr. James Samuels
Mrs. Denise Leander-Watson, Human Resource Management
Mrs Diana McIntyre Pike- Community Tourism
The A-Z Backstopping team Phyllis Allbrook, Miranda Allbrook, Beverley Gallant and Lucinda Allbrook for their support as researchers and editors
Tourism Leaders in the Eight Tourism Sub-sectors
The National Focal Point Persons (NFPPs) on the ground in all 18 surveyed countries.
The Data Collection Assistants (DCAs) who were appointed by the NFPPs to ensure robust data collection.
The Blueprint Creative Inc. team, for their work in producing the published report.

TABLE OF CONTENTS

EXECUTIVE SUMMARY AND RECOMMENDATIONS 16
INTRODUCTION 17
METHODOLOGY 17
LIMITATIONS 18
CONTEXT 19
RECOMMENDATIONS 24

1.0 INTRODUCTION 38
1.1 GENERAL OBJECTIVES 40
1.2 METHODOLOGY 40
1.2.1 Data Collection Process 42
1.3 STRUCTURE OF REPORT 43

2.0 SKILLS SUPPLY AND DEMAND IN TOURISM 44
2.1 CONTEXT 45
2.2 TOURISM SUB-SECTORS 45
2.3 SOURCES OF LABOUR 48
2.4 CHANGES IN TOURISM 50
2.4.1 Labour Mobility and Turnover 53
2.4.2 The Impact of COVID-19 on Labour Mobility and Turnover 55
2.4.3 The Impact of Employment Policies and Laws 61
2.4.4 Recruitment Practices 66
2.4.5 Motivation and Changing Views Towards Tourism Work 74
2.4.5.1 Youth Participation 76
2.4.6 Recommendations 77
2.4.7 Staff Training and Development 78
2.4.8 Online Training 79
2.4.9 Recommendations 83
2.5 TOURISM EMPLOYEES 84
2.5.1 Career Pathing 84
2.5.2 Pay Within Establishments 85
2.5.2.1 Pay and the Pandemic 87
2.5.2.2 Benefits and Intangible Pay 88
2.5.2.3 Gender and Pay 90
2.5.2.4 Recommendations 93
2.6 UTILISATION OF HUMAN RESOURCES IN TOURISM, BY SUB-SECTOR 93
2.6.1 Accommodation 94

TABLE OF CONTENTS contd.

2.6.2	Adventure Tourism and Recreation	**97**
2.6.3	Attractions	**98**
2.6.4	Events and Conferences	**99**
2.6.5	Food and Beverage	**99**
2.6.6	Tourism Services	**102**
2.6.7	Transportation	**103**
2.6.8	Travel Trade	**104**
2.6.9	Diversification Across Tourism Sub-Sectors	**105**
2.6.10	Entrepreneurship	**106**
2.6.11	Recommendations	**108**
2.7	TOURISM SECTOR ESTABLISHMENT AND EMPLOYEE PROFILES	**108**
2.7.1	Ownership by Gender	**109**
2.7.2	Employee Breakdown in Small Establishments	**110**
2.7.3	Employee Breakdown in Large Establishments	**111**
2.7.4	Average Monthly Wages	**112**
2.7.4.1	Monthly Wages in Small Establishments	**113**
2.7.4.2	Monthly Wages in Large Establishments	**114**
2.7.5	Sub-sector Involvement Across Establishments	**116**
2.8	IDENTIFICATION OF KNOWLEDGE, SKILLS AND QUALIFICATIONS OF THE CURRENT WORKFORCE	**118**
2.8.1	Knowledge and Skills of Current Workforce	**118**
2.8.2	Workforce Development Deficiencies, Needs and Opportunities	**124**
2.8.3	Strengths, Opportunities, Aspirations and Results (SOAR)	**127**
2.9	CONCLUSION AND LIMITATIONS	**129**
3.0	**KNOWLEDGE AND SKILLS AUDIT**	**130**
3.1	INTRODUCTION AND CONTEXT	**131**
3.1.1	Context	**131**
3.2	THE CHANGING LANDSCAPE	**132**
3.3	REQUIREMENTS BASED ON MASTER PLANS AND STRATEGIC DOCUMENTS	**133**
3.4	CONCLUSIONS	**161**
3.5	REQUIREMENTS BASED ON EXISTING REPORTS	**163**
3.6	PUBLIC SECTOR	**166**
3.6.1	Requirements	**167**
3.7	PRIVATE SECTOR	**168**
3.7.1	Requirements	**168**
3.8	LIMITATIONS AND CONCLUSIONS	**170**
3.8.1	Conclusions	**170**

TABLE OF CONTENTS contd.

4.0	**HIGHER EDUCATION AND TRAINING INSTITUTIONS**	**174**
4.1	INTRODUCTION AND CONTEXT	**174**
4.2	METHODOLOGY AND APPROACH	**176**
4.3	PROFILE OF HIGHER EDUCATION AND TRAINING INSTITUTIONS	**176**
4.3.1	The Institutional Framework of Caribbean Tourism Higher Education and Training Institutions	**176**
4.4	EFFICACY OF THE EDUCATION AND TRAINING COURSES IN TOURISM	**181**
4.4.1	Higher Education and Training Institutions Meeting Knowledge and Skills Demands	**181**
4.5	CONCLUSIONS	**202**
4.6	RECOMMENDATIONS	**202**
5.0	**FUTURE KNOWLEDGE AND SKILLS NEEDS ASSESSMENT**	**204**
5.1	INTRODUCTION AND CONTEXT	**204**
5.2	METHODOLOGY AND APPROACH	**205**
5.3	TOURISM FUTURE OUTLOOK	**207**
5.3.1	Megatrends Shaping the Future of Tourism	**207**
5.3.2	The Impact of COVID-19 on the Future of Tourism	**210**
5.4	FUTURE OF TOURISM JOBS, SKILLS AND WORKFORCE DEVELOPMENT	**212**
5.4.1	Trends in Tourism	**212**
5.4.2	Future Knowledge and Skills Needs Derived from Tourism Master Plans	**214**
5.5	FUTURE DEMAND FOR TOURISM HUMAN RESOURCES	**216**
5.6	MEETING FUTURE TRAINING AND DEVELOPMENT NEEDS	**216**
5.7	FRAMEWORK FOR DETERMINING FUTURE KNOWLEDGE AND SKILLS NEEDS	**222**
5.8	EMPLOYMENT AND WORKFORCE CHALLENGES FACED BY THE TOURISM SECTOR	**228**
5.9	FUTURE KNOWLEDGE AND SKILLS REQUIREMENTS IN THE CARIBBEAN	**229**
5.10	ROLE OF GOVERNMENT	**233**
5.11	DEVELOPING A SKILLS AND COMPETENCY FRAMEWORK FOR THE TOURISM SECTOR	**234**
5.11.1	The CARICOM Qualifications Framework	**234**
5.11.2	The Singapore Workforce Skills Qualifications Framework - Comparison and Reference for Caribbean Tourism Employers	**236**
5.11.3	Education and Training to Understand Sustainability	**237**
5.12	CONCLUSION	**239**

TABLE OF CONTENTS contd.

APPENDICES 244

APPENDIX 1: DATA COLLECTION INSTRUMENTS 245
Caribbean Tourism Organization (CTO) General Establishment Survey Instrument (for Large Establishments) 246
Caribbean Tourism Organization (CTO) General Establishment Survey Instrument (for Small Establishments) 263
Employers / HR Managers / Corporate Leaders Survey Instrument 284
School and College Graduating Class Survey Instrument 290
Tourism Employees Survey Instrument 297
Educational and Training Institutions 303
Unions and Associations 308
Impact of COVID-19 on Labour Availability 313

APPENDIX 2: LIST OF NATIONAL FOCAL POINT PERSONS (NFPPS) AND DATA COLLECTION ASSISTANTS (DCAS) 315

APPENDIX 3: LIST OF INTERVIEWS WITH PUBLIC AND PRIVATE SECTOR LEADERS IN THE CARIBBEAN TOURISM SECTOR 317

REFERENCES 321

TABLE OF TABLES

Table 1:	Project Surveyed Countries	**17**
Table 2:	Data Collection Instruments	**18**
Table 3:	Chapters of the Skills Audit	**18**
Table 4:	Estimated Decline in Travel and Tourism (TT) Jobs (2019-2020)	**20**
Table 5:	Priority Actions Based on Recommendations	**37**
Table 6:	Tourism Trends and Implications for Employment	**52**
Table 7:	Reasons for Labour Shortages	**57**
Table 8:	Resolutions for Labour Challenges	**58**
Table 9:	Government Interventions to Improve Labour Shortage in Tourism Sector	**61**
Table 10:	Educational Level of Employees	**66**
Table 11:	Reasons for Hiring Expatriate Tourism Workers	**70**
Table 12:	Accommodation as a Percentage of Tourism Employment. ILO, 2020	**94**
Table 13:	Employment per Room in Different Accommodation Types	**97**
Table 14:	Associated Sub-Sectors for Tourism Establishments in Survey	**105**
Table 15:	Sample Student Responses	**106**
Table 16:	Number of Employees in Small Establishments	**110**
Table 17:	Employee Breakdown by Category in Small Establishments	**111**
Table 18:	Number of Employees in Large Establishments	**111**
Table 19:	Employee Breakdown by Category in Large Establishments	**112**
Table 20:	Average Monthly Wages Across Categories in Small Establishments (Excluding Gratuity - in USD)	**114**
Table 21:	Average Monthly Wages Across Categories in Large Establishments (Excluding Gratuity - in USD)	**115**
Table 22:	Establishment Involvement across Sub-Sectors	**116**
Table 23:	Skill/Attitude Requirements at Different Levels of Organisations	**122**
Table 24:	Proficiency/Skills at Different Employee Levels in Establishments	**123**
Table 25:	Training Needs in Tourism	**124**
Table 26:	SOAR Analysis – Strengths, Opportunities, Aspirations and Results	**128**
Table 27:	Analysis of Master Plans for CTO Member Countries	**149**
Table 28:	Policy Changes as a Result Of COVID-19	**160**
Table 29:	SWOT Analysis	**165**
Table 30:	Educational Programmes at Higher Education and Training Institutions across Project Surveyed Countries	**178**
Table 31:	Framework for Determining Future Knowledge and Skills Needs	**228**
Table 32:	Future Knowledge and Skills Requirements	**232**
Table 33:	CARICOM Qualifications Framework	**235**

TABLE OF FIGURES

Figure 1: Eight Tourism Sub-Sectors **46**
Figure 2: Typology of Skills Mismatches **49**
Figure 3: Tourism Employees since COVID-19 **55**
Figure 4: Temporariness of Labour Shortage in the Tourism Sector **59**
Figure 5: Sources of Employment **66**
Figure 6: Factors of Importance for Potential Applicants in Generation Z **68**
Figure 7: Perceptions of Tourism and Hospitality Careers **75**
Figure 8: Employee Performance (Lack of Training) **78**
Figure 9: Length of Careers in the Tourism Industry **84**
Figure 10: Promotion Opportunities for Local People **85**
Figure 11: Attractiveness of Compensation Packages **86**
Figure 12: Perceptions of Pay in Tourism and Hospitality (1) **86**
Figure 13: Perceptions of Pay in Hospitality and Tourism (2) **87**
Figure 14: Perceptions of Compensation Benefits in Tourism Sectors **88**
Figure 15: Perceptions of Physical Working Conditions in Tourism and Hospitality **89**
Figure 16: Perceptions of Working Conditions in Tourism and Hospitality for Potential Employees **90**
Figure 17: Perceptions of Pay Differences Between Male and Female Employees **92**
Figure 18: Promotion Opportunites for Women **93**
Figure 19: Female Ownership **109**
Figure 20: Finding Qualified Staff (Pre-Pandemic) **118**
Figure 21: Finding Qualifed Staff (Anticipation Post-Pandemic) **119**
Figure 22: Work Ethic in Non-Nationals vs Local Workers **120**
Figure 23: Perception of Importance of Certain Skills in Tourism Establishments **120**
Figure 24: Types of Study Being Pursued Across Higher Education and Training Institutions **182**
Figure 25: Skill Level of Jobs in Tourism **182**
Figure 26: Interest Level for Jobs in Tourism **183**
Figure 27: Use of Initiative in Tourism Jobs **183**
Figure 28: Perceived Meaningfulness of Jobs in Tourism and Hospitality **184**
Figure 29: Perception of Tourism and Hospitality Jobs **184**
Figure 30: Desire to Work in Tourism and Hospitality After Graduation **185**
Figure 31: Young Persons Perceptions of Work in Tourism and Hospitality **185**
Figure 32: Perceptions of Stress Levels in Tourism and Hospitality Jobs **186**
Figure 33: Perceptions of the Impact of Jobs in Tourism and Hospitality on Family Life **186**
Figure 34: Perceptions of Impact of Jobs in Tourism and Hospitality on Regular Life **187**
Figure 35: Perceptions of Attracting the Brightest and Best Talent to Tourism Sector **188**
Figure 36: Perceptions of Tourism in Project Surveyed Countries **188**
Figure 37: Job Seekers from Technical and Vocational Schools Preparedness for Work **189**

TABLE OF FIGURES contd.

Figure 38: Job Seekers with a Degree's Preparedness for Work **189**
Figure 39: Ease of Recruiting Managers from the Local Market **190**
Figure 40: Ease of Recruiting Supervisors from the Local Market **191**
Figure 41: Presence of Soft Skills in Uncertified Secondary School Leavers **191**
Figure 42: Presence of Soft Skills in Job Seekers with a First Degree **192**
Figure 43: Trainability of Uncertified Secondary School Leavers for Entry Level Jobs **192**
Figure 44: Lack of Training and Underperformance **193**
Figure 45: Training Offered by Industry Employers (In Conjunction with Training Institutions) **193**
Figure 46: Educational and Training Services Engaged by Industry Employers **194**
Figure 47: Partnerships between Educational/Training Institutions and Tourism Establishments **194**
Figure 48: Educational and Training Institutions Job/Career Fairs **195**
Figure 49: Educational and Training Institutions Partnering with Tourism Establishments to Place Students **195**
Figure 50: Rate of Consultations with Tourism Stakeholders **196**
Figure 51: Collaboration Among Educational and Training Institutions **196**
Figure 52: Ease of Finding Work Experience and Internships for Students **197**
Figure 53: Educational and Training Institutions Perceptions of Support from the Tourism Industry **198**
Figure 54: Speed of Graduates Finding Jobs **199**
Figure 55: Ease of Graduates Filling Positions they are Trained for **199**
Figure 56: Adequacy of Government Support in Educational and Training Institutions **200**
Figure 57: Awareness of Resources Available Through the CTO **200**
Figure 58: Utilisation of Resources and Training Available Through the CTO **201**
Figure 59: Future Education Needs **201**
Figure 60: Megatrends and Future Needs in the Tourism Sector **211**
Figure 61: Guidelines for using CARICOM Qualifications Framework **236**






The Bahamas
Turks and
Caicos Islands
Cayman Islands
Haiti
Belize
Jamaica

PROJECT SURVEYED COUNTRIES

Anguilla
Antigua & Barbuda
The Bahamas
Barbados
Belize
British Virgin Islands
Cayman Islands
Dominica
Grenada
Guyana
Haiti
Jamaica
Montserrat
St Kitts And Nevis
Saint Lucia
St Vincent And The Grenadines
Trinidad And Tobago
Turks And Caicos Islands



ACRONYMS & ABBREVIATIONS

AHLEI	American Hotel and Lodging Educational Institution
AI	Artificial Intelligence
ATTA	Adventure Travel Trade Association
B&B	Bed and Breakfast
BVI	British Virgin Islands
BPO	Business Process Outsourcing
CANTA	Caribbean Association of National Training Authorities
CAPE	Caribbean Advanced Proficiency Examination
CAPRI	Caribbean Policy Research Institute
CARICOM	Caribbean Community and Common Market
CDB	Caribbean Development Bank
CBET	Competency Based Education and Training
CHTA	Caribbean Hotel and Tourism Association
COVID-19	Corona Virus Disease of 2019
CPD	Continuous Professional Development
CPR	Cardiopulmonary Resuscitation
CTO	Caribbean Tourism Organization
CSME	CARICOM Single Market Economy
CSTPDF	Caribbean Sustainable Tourism Policy and Development Framework
CTI	Caribbean Tourism Institute
CVQ	Caribbean Vocational Qualifications
CXC/CSEC	Caribbean Examination Council/Caribbean Secondary Education Certificate
DCA	Data Collection Assistant
ECLAC	Economic Commission for Latin America and the Caribbean
EP	European Plan (Room only)
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
G.O.A.T.	Greatest Of All Time
HEART/NTA	Human Employment and Resource Training Trust/National Training Agency
HR	Human Resource
HRD	Human Resource Development
HRMAJ	Human Resource Management Association of Jamaica
HRMATT	Human Resource Management Association of Trinidad and Tobago
HRM	Human Resource Management
IDB/IADB	Inter-American Development Bank
ICT	Information and Communications Technology
ILO	International Labour Organisation
IT	Information Technology
IMF	International Monetary Fund
JHTA	Jamaica Hotel and Tourism Association

ACRONYMS & ABBREVIATIONS contd.

KYC	Know Your Customer
MSMEs	Micro, Small, Medium Enterprises
NFPP	National Focal Point Person
NTO	National Tourism Organisations
NVQ	National Vocational Qualifications
OECD	Organisation for Economic Cooperation and Development
OECS	Organisation of Eastern Caribbean States
SDG	Sustainable Development Goals
SHRM	Society for Human Resource Management
SHRM	Strategic Human Resource Management
SMART	Specific, Measurable, Achievable, Realistic and Timebound
SKN	St. Kitts and Nevis
SMA	Social Media Analytics
SME	Small and Medium Enterprises
SSTJ	Safe and Seamless Traveller Journey programme (WWTC)
SVG	St. Vincent and the Grenadines
TCI	Turks and Caicos Islands
TOR	Terms of Reference
TT	Travel Tourism
TVET	Technical and Vocational Education and Training
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNWTO	United Nations World Tourism Organisation
VR	Virtual Reality
WSQ	Workforce Skills Qualification (Singapore)
WTO	World Tourism Organisation
WTTC	World Travel and Tourism Council
3Ss (old)	Sand, Sea and Sun
3Ss (new)	Social inclusion, Sustainability, and Smart destinations and businesses

EXECUTIVE SUMMARY

AND RECOMMENDATIONS

INTRODUCTION

Following an extensive international bidding process, A-Z Information Jamaica Limited entered an agreement with the Caribbean Tourism Organization (CTO) in March 2021 to execute this project named "Regional Human Resource Development Knowledge and Skills Audit for the Tourism Industry". The project was executed during the period May 2021 to August 2022 and was funded by the Caribbean Development Bank (CDB).

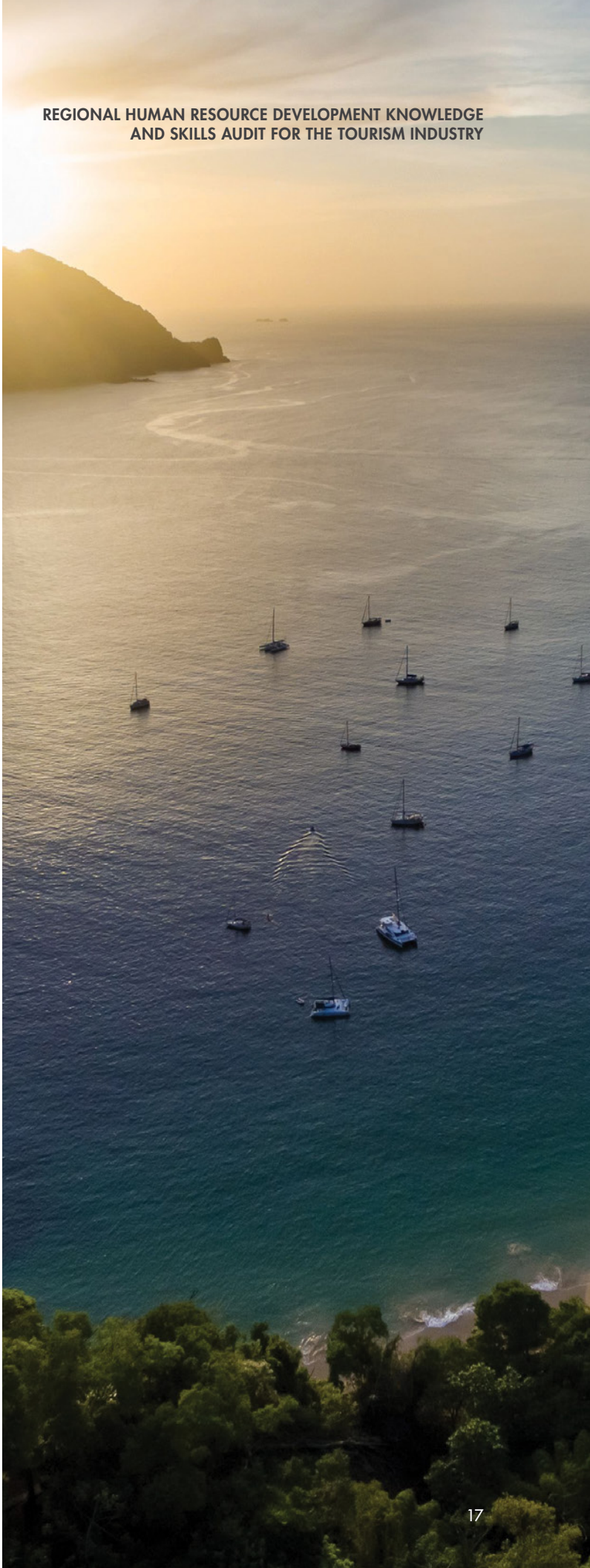
Given that the project was executed in the midst of the COVID-19 pandemic, there were many challenges relating to data collection. Furthermore, with the lockdown of most of the Tourism Sector during this period, there was great uncertainty surrounding the future of the Sector as well as the future of the human resources operating within it. As a result, the findings of the project are influenced by the impact of the pandemic.

METHODOLOGY

The team of consultants comprised experts and practitioners in the fields of tourism, human resource management and development, labour markets and economics. The team used an approach which combined secondary and primary

Project Surveyed Countries	
1. Anguilla	10. Guyana
2. Antigua and Barbuda	11. Haiti
3. British Virgin Islands	12. Jamaica
4. The Bahamas	13. Montserrat
5. Barbados	14. St. Kitts and Nevis
6. Belize	15. Saint Lucia
7. Cayman Islands	16. St. Vincent and the Grenadines
8. Dominica	17. Trinidad and Tobago
9. Grenada	18. Turks and Caicos Islands

Table 1: Project Surveyed Countries



research to generate the data and information needed to conduct this audit. The secondary research involved reviewing reports from major regional and international organisations, such as the World Travel and Tourism Council (WTTC), journal articles, and Tourism Master Plans of the 18 project surveyed countries (shown above in Table 1). The 18 project surveyed countries are those which are CDB Borrowing Member Countries and the CTO Member Countries.

Data Collection Instrument	
1	Caribbean Tourism Organization (CTO) General Establishment Survey Instrument for large and small establishments)
2	Employers/HR Managers /Corporate Leaders Survey Instrument
3	School and College Graduating Class Survey Instrument
4	Tourism Employees Survey Instrument
5	Educational & Training Institution Instrument
6	Unions and Associations Instrument
7	Impact of COVID-19 on Labour Availability (administered to informed public and private sector persons)
8	Focus Group Instruments

Table 2: Data Collection Instruments

The primary research involved the design of several data collection instruments to collect data and information from different stakeholders in the 18 project surveyed countries (see Table 1). In most cases the surveys were administered electronically using email, WhatsApp, Zoom, etc. The findings of these surveys are discussed throughout this report.

In the data collection process, the Consultancy Team was ably assisted by National Focal Point Persons (NFPPs) and Data Collection Assistants (DCAs) from the 18 project surveyed countries (see listing in Appendix 2). Information and feedback were also provided during two webinars and a series of Think Tanks involving stakeholders from the project surveyed countries. The CTO Team worked closely with the consultants, supporting in a variety of ways throughout the project.

There were more than 700 respondents to the various surveys coming from a broad cross section of stakeholders in the project surveyed countries. The data were analysed using state of the art software tools and have been presented in this report using a variety of graphs and charts.

Originally Chapters 2, 3, 4, and 5 were standalone reports in accordance with the project design. These have been combined for this final report. The chapters of this report are shown below.

Chapters of the Regional HRD Knowledge and Skills Audit for the Tourism Industry	
1	Introduction
2	Skills Supply and Demand in Tourism
3	Knowledge and Skills Audit
4	Higher Education and Training Institutions
5	Future Knowledge and Skills Needs Assessment

Table 3: Chapters of the Skills Audit

LIMITATIONS

The audit was conducted during the COVID-19 pandemic and protocols around social distancing as well as the challenges of travel, meant that nearly all data and information were collected virtually. Additionally, the unpredictable nature of the pandemic meant that it was often difficult to collect data because respondents were not always at work or available. Several attempts were made to work around these challenges in order to ensure reasonable representation of countries, sectors and groups. It is important to note that where sample sizes are small, the survey data should be interpreted as an indicative trend. This is the case, for example, with the Union and HR surveys. Despite these limitations, a reasonable representation of HR in the region was secured based on the feedback collected with information from reports, interviews and focus groups.



CONTEXT

At the time of writing this report, tourism in the Caribbean may be described as being at a crossroads as it attempts to address changing needs and demands of internal and external stakeholders as well as adjust to the changes brought about by the COVID-19 pandemic. This report highlights the challenges created by these changes and the many opportunities that may be leveraged by tourism employers.

It draws on the many reports that have been written about tourism and in particular tourism employment in the Caribbean Region, as well as dozens of interviews, focus groups and surveys of tourism stakeholders in 18 surveyed countries in the Region.

Latin America and the Caribbean was the Region recording the largest loss of working hours worldwide, at 16.2% during 2020 compared to 2019. This figure is almost double the estimated global level, 8.8%.

(WTTC 2022 – see footnote below)

Tourism is a major employer in most Caribbean countries and the impact of the COVID-19 pandemic has been significant in first curtailing employment, and then altering the context of employment as tourism reopened. Latin America and the Caribbean was the Region recording the largest loss of working hours worldwide, at 16.2% during 2020 compared to 2019.[1] This figure is almost double the estimated global level, 8.8%. The table below shows the estimated decline in Travel and Tourism jobs between 2019 and 2020.

[1] World Travel and Tourism Council: Caribbean Report 2022 "Travel and Tourism in the Caribbean: Prospects for Growth.".

Estimated Decline in Travel and Tourism (TT) Jobs (2019-2020)

	TT Jobs 2019	TT Jobs 2019	% Decline in TT Jobs
Global	334,000,000	272,000,000	-19%
Anguilla	33,700	25,200	-25%
Antigua & Barbuda	33,700	25,200	-25%
Bahamas	101,800	71,000	-30%
Barbados	46,300	34,200	-26%
Belize	64,400	46,100	-28%
British Virgin Islands	7,000	4,900	-30%
Cayman Islands	13,600	11,200	-18%
Dominica	12,600	8,900	-29%
Grenada	23,800	15,900	-33%
Guyana	13,400	11,000	-18%
Haiti	444,200	298,800	-33%
Jamaica	365,600	270,900	-26%
Montserrat	N/A	N/A	N/A
St. Kitts & Nevis	13,900	9,800	-29%
Saint Lucia	63,400	41,600	-34%
St. Vincent & the Grenadines	19,700	14,200	-28%
Trinidad & Tobago	54,100	40,500	-25%
Turks & Caicos Islands	N/A	N/A	N/A

Source: WTTC Statistics.

Table 4: Estimated Decline in Travel and Tourism (TT) Jobs (2019-2020)

Accommodation is the largest sub-sector and the easiest to track. Unfortunately, it is difficult to obtain similar statistics for the other sub-sectors of tourism, but inferences can be drawn of a similar fallout in other sectors. Tourism has rebounded as the pandemic has subsided, but tourism employers have reported challenges in finding adequate numbers of former employees to fill the gaps. Indeed, while the WTTC reports that the Caribbean decline in tourism numbers was worse than the global average, the Region experienced the second fastest recovery of all regions (WTTC, 2022).[2] This rapid recovery while welcome, creates a significant challenge in finding enough workers for the sector.

The fact that this shortage is global has exacerbated the challenge for Caribbean employers as they must now compete with international employers for scarce labour.

The pandemic created unique, challenges for tourism employers in the Caribbean but, as documented in several

[2] Ibid.

Tourism has rebounded as the pandemic has subsided, but tourism employers have reported challenges in finding adequate numbers of former employees to fill the gaps.



reports, there were pre-existing challenges in the labour market. These include:

- Finding talent in technical/specialist areas such as food preparation and management
- Retaining scarce labour
- Finding labour with the requisite 'soft skills'
- A qualitative and quantitative mismatch between what skills educational/training institutions produce and what tourism employers require
- The lingering perception that there is a glass ceiling for locals and that there is a preference for expatriates in some management jobs even where local talent is present
- Finding specialist skills in tourism management e.g. in sustainable environmental operations, heritage and cultural management
- Compensation issues.

The pandemic represents a unique moment in time as tourism in the world paused for an extended period. This period has been described by the Secretary General of the UNWTO as a 'watershed moment' in which the Sustainable Development Goals (SDG) can be aligned.[3] The Secretary General has highlighted five priority areas to align tourism:

1. Mitigate socio-economic impacts on livelihoods, particularly women's employment and economic security
2. Boost competitiveness and build resilience through economic diversification with promotion of domestic and regional tourism where possible, and facilitation of a conducive business environment for micro, small and medium-sized enterprises (MSMEs)
3. Advance innovation and digital transformation of tourism, including promotion of innovation and investment in digital skills, particularly for workers temporarily without jobs and for job seekers
4. Foster sustainability and green growth to shift towards a resilient, competitive, resource efficient and carbon-neutral Tourism Sector. Green investments for recovery could target protected areas, renewable energy, smart buildings and the circular economy, among other opportunities
5. Coordination and partnerships to restart and transform the sector towards achieving SDGs, ensuring tourism's restart and recovery puts people first and work together to ease and lift travel restrictions in a responsible and coordinated manner.

The areas listed by the UNWTO Secretary General align with goals set by many Caribbean governments (see master plan analysis in Chapter 3 of this Audit Report), but also with the redefinition of the **3Ss** by the Caribbean Tourism Organization (CTO). The 3Ss are **Social Inclusion, Sustainability and Smart Destinations and Businesses.**[4] Moreover, they are aligned with the stated intention to use the pandemic as an opportunity to establish a different development paradigm in the Organisation of Eastern Caribbean States (OECS) based on a more diversified economy with, among other factors, strong inter-sectoral linkages and the reinvention of tourism in ways which enhance the visitor experience but with safeguards for health of both visitor and tourism workers.[5]

[3] UNWTO, Secretary General's Policy Brief on Tourism and COVID-19.
[4] UNWTO – The Future of Caribbean Tourism – Redefining the 3Ss. (September 8, 2021) - https://www.unwto.org/node/12304.
[5] OECS, COVID-19 and beyond: Impact Assessments and Responses. 2020.

The challenges and shortages of labour are well documented in various reports reviewed in this document. There have been critical changes such as the introduction of new education and training programmes and the introduction of innovative human capital development initiatives at the level of the private and public sector. An important aim of this audit is to identify and promote best practices in existence and to identify where gaps continue to exist. Major points identified in this study are highlighted below. They are discussed under the supply side, which identifies those issues related to the input of labour to the market; the demand side which discusses those issues related to tourism employers, and a few miscellaneous points that are important but do not neatly fit into either category.

Key Issues on the Supply Side

- The number of Educational and, Training Institutions continues to increase and, with the utilisation of online technology, it is possible to access hospitality and tourism programmes anywhere in the Region.

- Even though countries are targeting smart destinations and businesses, many training and higher education institutions do not have the facilities and/or capacity to offer the required digital training.

- Education and training have expanded to include training in sustainability and environmental management in some cases. At the same time, there are gaps in areas such as heritage management, marketing, foreign languages, and the management of tourism.

- There does not appear to be a well-defined mechanism to match employers and graduates.

- There is a lingering perception that desirable hospitality jobs at the apex of organisations and in food and beverage management are reserved for expatriates, and that there is a limit on how far up the career ladder locals can progress. In some cases, there is evidence to support this perspective.

- The fallout from the pandemic has created and, in some cases reinforced, the feeling by workers that hospitality work is unpredictable and uncertain.

- A portion of the tourism/hospitality workforce that was laid off during the pandemic has decided not to return to their jobs and, in some cases, workers have even migrated.

- Employers outside of the Region and sector are aggressively promoting themselves as attractive employers and are offering salaries and benefits significantly higher than those currently offered by regional tourism employers. This is not unique to tourism but due to the broad scope of tourism, there is the potential to impact virtually every sub-sector. Example, bus drivers who received intensive training by tour agencies are being tempted with higher wages to drive trailers overseas.

- There is increasing acceptance that tourism/hospitality training and certification is not just for the local market, but to prepare certified workers for prospective overseas recruitment.

- Young people are increasingly entrepreneurial, but few structures are in place to either leverage or support their interests.

- Tourism/hospitality work is favourably viewed by potential job seekers.

- Tourism/hospitality work is viewed as not well paid and as having challenging work conditions.

Key Issues on the Demand Side

- Employers continue to complain that 'the brightest and the best' are not showing a first preference for tourism/hospitality as a career.

- Employers are not continuously communicating and updating their needs to schools.

- Some employers believe that tourism/hospitality work is viewed as servitude as opposed to service, and that this could be a deterrent for potential employees.

- Some employers state that job entrants lack 'soft skills' and, in particular, an attitude of hospitality.

- There is limited innovation in HRM practices in response to the changing demographics and perspectives of the workforce and the current issues emanating from the pandemic.

- As a result of the pandemic and other global trends such as concern about climate change, tourism is evolving with many visitors opting for culturally authentic and small group personalised experiences. There is therefore an increased interest in personal chefs, villas and community tourism.

- There is a decline in the appeal of tourism industry jobs compared to other sectors of the economy, such as the Business Process Outsourcing (BPO) sector and entrepreneurship.

Other Issues

- Coordination and collaboration between educational/training institutions and tourism employers are often weak, resulting in unresolved dissatisfaction on both sides.

- There are both overlaps and underlaps in the training/education sector, with some countries having multiple institutions offering the same programmes. As a result, some institutions are underutilised. At the same time, there are unfulfilled needs with respect to emerging knowledge and skill demands.

- Increased interest in entrepreneurship, deepened by the forced layoffs/reduced working hours during the pandemic, has resulted in many former tourism employees choosing to continue working for themselves rather than to return to direct employment in the industry.

Having discussed demand side, supply side and other issues, specific recommendations will now be made to address these issues under the following sub-headings:

- Strategic Human Resource Management (SHRM) by Private and Public Sector Employers

- Tripartite collaborations

- Education and training

- Public sector.

Some employers believe that tourism/ hospitality work is viewed as servitude as opposed to service, and that this could be a deterrent for potential employees.

RECOMMENDATIONS

Increased Practice of Strategic Human Resource Management (SHRM) by Private and Public Sector Employers

1. Employers must begin to value and pay for training and certification if they wish to attract and retain professionally trained staff. The current practice of valuing experience and attitude above everything else is unlikely to lift the standards of performance and to achieve the goals outlined in the various Master Plans.

2. Tourism employers of every size and in every sector need to plan for the recruitment, development and retention of their staff rather than responding reactively. At least one manager/owner should be required to have knowledge of labour laws and best practices in human resource management. Wherever possible, employers should utilise psychometric testing to select employees that are a best fit for the position.

3. Key stakeholders should identify and benchmark specific occupational standards for their countries and work closely with training institutions to ensure that these standards are used as the basis for curricula and certification.

4. In response to the labour shortage in tourism/ hospitality, employers must now sell themselves by projecting their attractiveness in the labour market using their websites and social media as well as traditional forms of advertising.

5. With respect to the tendency towards entrepreneurship within the work force, larger employers should seek opportunities to establish flexible partnerships with smaller entrepreneurs, many of whom are former employees of larger establishments. This would be a win-win outcome for larger employers and small entrepreneurs.

6. Research should be institutionalised as a part of management activity. Employers must seek to understand the ever changing intrinsic and extrinsic needs as well as the values of their workforce and use this data to develop responsive retention strategies, including career ladders, training opportunities and other innovative benefits. Specific attention must be paid to generational and cultural differences. Employers should also utilise visitor satisfaction data to identify areas of improvement.

7. Corporate social responsibility is important to potential employees and surrounding communities and therefore employers should practice and publicise the initiatives in this regard.

8. HRM strategies within establishments should be guided by data and research. For example, national surveys of salaries and wages should guide pay and benefits. Given the shortage of talent and the increased challenges associated with retention of staff, it may be necessary to increase remuneration packages in the sector to be more competitive.

9. Establishments should benchmark the HR practices of successful entities in their sector. This need not be restricted to establishments located in the Region. The goal would be to become a competitive Employer of Choice.

10. Establishments should seek external validation of employee satisfaction and workplace climate/culture by utilising established benchmarking systems, such as 'Great Place to Work' or Gallup to measure these elements.[6]

11. Given the importance of HR in the recovery, HR managers should operate as business partners in their establishments. As such they would actively integrate the business strategy with people management practices.

12. Employers should prioritise work life balance and mental wellness given that these emerged as key issues coming out of the pandemic in

[6] Great Places to Work - https://www.greatplacetowork.com.
Gallup - https://www.gallup.com/workplace/242252/employee-experience.aspx.



Tourism Sector employers and entrepreneurs must re-position and deepen their relationships with the local education and training provider institutions.

other parts of the world.[7] Given the disproportionate number of women working in the sector in lower-level jobs who were negatively impacted by the pandemic, focus should be placed on the related gender issues.

13. HR support in the form of training and mentoring should be provided for smaller establishments that are unlikely to be able to afford a dedicated HR manager. Support may also be needed to develop a quality handbook in line with the organisation's mission and strategy. A report by Quality Consultants[8] conducted in 1999 had recommended that the cost of training should be subsidised for smaller properties and this recommendation remains relevant.

Tripartite Collaborations

1. Relationships and partnerships that were developed in the COVID-19 crisis for rapid response should be retained and strengthened if necessary to continue addressing critical issues facing the sector.

2. Labour unions/employee associations, the public and the private sector employers must work collaboratively to develop appropriate standards that meet the ILO standard of decent work while fitting the unique nature of tourism.

3. Institutions involved in training and development for the sector must develop linking mechanisms that will provide each institution with information about what the others are doing and how they can effectively coordinate and broaden the scope of their support to tourism.

4. Tourism Sector employers and entrepreneurs must re-position and deepen their relationship with the local education and training provider institutions. This will help to provide more educated, trained and certified employees and entrepreneurs. Dialogue is critical to ensure that offerings are fully utilised and relevant.

5. Tourism Sector employers and entrepreneurs must be actively represented on training and education boards, and on curriculum development, assessment and certification committees of all regional education and training institutions, so as to ensure the continued relevance and currency of the education, training and certification services supplied.

6. The education and training system at all levels must be actively represented on the national tourism industry boards and councils to be consulted, to receive and coordinate the education and training system's timely response to the expressed current and future knowledge and skills needs of the tourism industry.

7. Where education/training institutions lack up-to-date facilities or expertise, arrangements for onsite classes should be accommodated by tourism/ hospitality establishments.

8. As a matter of urgency, digital penetration and training should be increased, which requires that the public and private sector work collaboratively.

9. The Hotel and Tourism Associations in each country must extend their engagement beyond the accommodation sector. Additionally, they should find ways to incorporate sole entrepreneurs, micro

[7] Rahimi, R., Akgunduz, Y, Bilghain, A., 2022. Impact of COVID-19 on mental health and career anxiety of hospitality and tourism workers in the UK. Journal of Hospitality and Tourism Insights.
[8] Quality Consultants, Feb. 1999. Tourism Training for the New Millennium: A study of Tourism Education and Training Needs in the Caribbean.

enterprises, and small entities and provide support where necessary to lift and maintain high industry quality standards in their respective countries.

10. Tourism/hospitality establishments must develop a fixed training needs and response collaborative mechanism with tourism education and training institutions, both operating in a spirit of partnership for tourism industry human resource development.

11. The CTO and National Governments should collaborate on the expanded implementation of Competency-Based Education and Training methodologies and certification, such as the Caribbean Vocational Qualifications (CVQ) and National Vocational Qualifications, (NVQ) which can enable employees to increase their certified knowledge, skills and status in the labour market. This scenario will also benefit the country/destination/employers. Furthermore, it will benefit workers who, with this portable certification, are able to move freely to work and live indefinitely in other Caribbean Community and Common Market (CARICOM) member states. This certification will also be recognised internationally.

12. While most students surveyed have a positive view of tourism as an industry, they are not as positive about tourism work. The private sector must analyse the concerns and pain points, and visibly address them to the greatest extent possible.

13. Educators, parents and guardians have a significant influence on the career choices of their children and charges, so these groups should be targeted as influencers in promoting careers in tourism.

Education and Training

1. In the context of the prevailing Caribbean market economy, Caribbean education and training institutions must re-orient themselves accordingly, and base their governance and programme offerings in alignment with labour market demands, as suppliers of appropriately educated, productive, trained and certified human resources for employment and entrepreneurship.

2. Educational and Training Institutions should develop/implement a competency framework for major tourism occupations.

3. Education and Training must be expanded beyond the hotel and accommodation sub-sectors. These should include the adventure, cultural, heritage, transportation and other tourism sub-sectors, such as tour guiding, environmental protection and cultural and heritage preservation. Training should cover topics related to the blue, green and orange economies.[9]

4. Training should also be expanded to respond to identified training needs in the arts, literature, music and other areas of cultural identity and expression. As such, tertiary institutions in particular should encourage students to broaden the scope of their learning and should facilitate this in their curriculum design.

[9] World Bank defines the blue economy as the "sustainable use of ocean resources for economic growth, improved livelihoods, and jobs while preserving the health of ocean ecosystem."https://www.un.org/regularprocess/sites/www.un.org.regularprocess/files/rok_part_2.pdf.
According to UNEP a green economy is defined as low carbon, resource efficient and socially inclusive. In a green economy, growth in employment and income are driven by public and private investment into such economic activities, infrastructure and assets that allow reduced carbon emissions and pollution, enhanced energy and resource efficiency, and prevention of the loss of biodiversity and ecosystem services. UNEP - https://www.unep.org/regions/asia-and-pacific/regional-initiatives/supporting-resource-efficiency/green-economy.
According to CARICOM Secretariat, The orange economy, also known as the creative economy includes all sectors whose goods and services are based on the creation of intellectual property, such as design and visual arts, tourism and cultural heritage, new media and software, performing arts, music, and literary arts and publications. UNEP - https://www.unep.org/regions/asia-and-pacific/regional-initiatives/supporting-resource-efficiency/green-economy.

5. Food and beverage training will need to expand beyond preparation to incorporate the newer forms of food and beverage experiences, such as farm to table experiences for visitors.

6. The curricula in Educational and Training Institutions must be digitised and regularly updated to enable students even wider access to the requisite knowledge knowledge and skills offerings and so become active change agents for the digital transformation of the tourism industry and their national economy. For example, social media marketing is an identified need by stakeholders.

7. Educational and Training Institutions should consider developing a more rapid practical response to the immediate knowledge and skills needs of tourism/hospitality employers. This could, for example, mean offering more short courses on 'in demand' topics and converting some offerings to a web-based format. The above would help to increase productivity of the sector.

8. Schools and tourism establishments must intensify their efforts to provide talented locals with the international experience that these establishments value, e.g. through work exchanges and study abroad programmes.

9. Entrepreneurship training must be incorporated in all the curricula of hospitality and tourism training. This will respond to and support the expressed entrepreneurial aspirations of the younger generation as well as the growth of small and medium sized businesses.

10. Conference and destination management training should be included in the curriculum of all tertiary institutions.

11. Supervisory and middle management training should be prioritised and made accessible to all tourism establishments utilising traditional as well as web-based training to accommodate the working schedules of participants.

12. Management training courses should be augmented to include Crisis Management, Business Continuity Planning (e.g. Insurance and Risk Planning), Team Building, and Motivation and Emotional Intelligence. Continuous Professional Development should be emphasised and rewarded.

13. The tourism industry should engage the national Educational and Training Institutions to facilitate and/or provide in-service education, training and certification services to the tourism industry workforce. They should extend this training to informal sector workers and entrepreneurs in the industry.

14. Job and career fairs and internships are low hanging fruit and provide ways in which employers and the potential workforce can be exposed to one another. Educational and Training Institutions and the Tourism Sector should institutionalise such mechanisms and events where they are not fully utilised.

15. The importance and contribution of tourism to the respective economies should be a part of the educational curricula in schools; and students should be exposed to the various opportunities for participation in the sector.

16. Tourism is viewed in a positive light by tourism students and this positive sentiment may be further leveraged by increasing the contact between the sector and students of these educational institutions through internships, work experience, shadowing etc.

17. Caribbean countries, destinations and tourism properties must not only pay close attention to megatrends but factor them into how they position themselves within the Tourism Sector and how they continually train and develop skills and knowledge of employees to meet evolving consumer needs.

18. Educators and trainers in hospitality and tourism should be provided periodic opportunities to update their industry experience in their subject areas. This may be achieved through summer furloughs in the various sub-sectors of tourism or even temporary job attachments.

19. Foreign language and sign language training must be prioritised and popularised for wider public access in order to meet the needs of an increasingly diverse group of travellers.

20. In some countries where the workforce's literacy and educational level is low, there will be the need for contextual educational remediation and upgrading for adult learners, as it enhances the trainability and advancement capacity of workers - an essential requirement for today's tourism establishments.

21. Exchange programmes with other countries may be considered as a way of exposing students and teachers to best practices in hospitality and tourism. It is noted that the CTO has for many years hosted a HR conference that allowed educators and practitioners from around the Caribbean to meet and exchange ideas and knowledge.

22. Education and training institutions should focus on developing in their students "soft skills" such as an attitude of hospitality, emotional intelligence, working in teams, etc.

Public Sector Response

1. Governments need to undertake a detailed study of the labour market within their own countries to identify trends and areas that need focus in keeping with Master Plans and aligned with the curricula of Educational and Training Institutions. Governments should consider putting in place a requirement for new tourism establishments to estimate their required labour needs. This data may then be used to identify the type and quantity of training that is needed for the sector.

2. Governments should seek to hire individuals who can attract investors in keeping with their Master Plans.

3. The public sector must be made more agile and relevant by training in environmental, cultural and heritage management, and tourism negotiation, planning and forecasting.

4. Governments should hire staff or consultants trained in analytics, research and the use of market intelligence to advise them on the nuances of market trends.

5. Governments should establish a policy that requires certification of all tourism employees so that the industry is at the level wherein the goals of Master Plans can be achieved.

6. Individual governments should commission regular audits of the sector to identify skills and knowledge gaps.

7. An IDB study of Latin America and the Caribbean[10] indicates that the labour market for the most qualified people has not been dynamic enough to absorb the huge wave of highly educated professionals who joined the labour force from 2000 to 2015.

[10] Amaral, N., Azura, O., Gonzalez, S., Ospino, C., Pages, C., Rucci, G., Torres, J. The Future of Work in Latin America and the Caribbean. IDB.

At the same time there is a need for more skilled individuals in sectors including tourism. There is therefore a need for better alignment. Where work permits are granted with the provison that a local understudy must be trained within a prescribed timeframe by the expatriate permit holder, this must be monitored and enforced by the Government authorities to ensure that the transfer of skills does take place, opening advancement opportunities in the industry for locals.

8. Governments should consider facilitating affordable housing solutions for all tourism workers in tourism areas as the lack of affordable-housing is often a deterrent to talented job seekers.

9. Foreign language training must be prioritised and accessible. There are opportunities for utilising online training sources as well as coordinating with language departments of high schools and tertiary institutions to support this thrust.

10. Entrepreneurship needs to be better supported by public and private sector entities by making concerted efforts to bring feasible tourism business ideas to fruition and to incentivise them from the informal to the formal sector where they can get support.

11. Specific proposals should be developed to facilitate persons with special needs in hospitality and tourism, e.g. wheelchair ramps and elevators. Staff should also be trained in how to manage travellers with special needs.

12. Surveys to measure perceptions of tourism, as well as problem areas facing communities, tourism workers and employers, should be conducted regularly and acted upon by the various players. St. Kitts residents' perception of tourism could be benchmarked by other countries.[11]

[11] Travel Agent Central. 2022. St. Kitts study shows local desire for community-centric tourism. https://www.travelagentcentral.com/destinations/st-kitts-resident-survey-shows-local-desire-community-centric-tourismd-pacific/regional-initiatives/supporting-resource-efficiency/green-economy.



Priority Actions

The following table contains a set of priority actions that should be considered by industry stakeholders based on the above recommendations. For each set of key actions outlined, the problem to be addressed is initially identified followed by the expected outcomes, the key stakeholders to be involved, the key actions to be taken and the identified support measures. Although a much larger number of recommendations are made in this report, the urgent implementation of the items in this list would make a significant difference.

Problem to be Resolved	Expected Outcomes	Key Stakeholders	Key Actions	Support Measures
Tourism does not attract 'the brightest and the best'	The right numbers of people with experience and expertise are attracted to tourism because they have opportunities to grow and build satisfying careers	• Tourism employers, Hotel and Tourism Associations • Educational and Training Institutions within each country	• Survey potential workforce to identify perceptions of tourism. Develop SMART objectives for addressing pain points e.g. lack of housing • Publicise the variety of jobs and career ladders in schools and to parents and teachers	• Government to conduct annual surveys about attitudes to tourism • *(St. Kitts and Nevis may be used as a model – see previous reference)*
Tourism is viewed as a low paying industry with limited opportunities for promotion	Potential entrants to the sector view intrinsic and extrinsic benefits in a positive light	• Tourism employers • National Governments (e.g. policies relating to pay, etc.)	• Have professional job evaluations conducted to ensure that pay is in line with job requirements • Assess benefits in light of international and regional best practices and implement best practices • Make changes to pay packages in line with the above and in keeping with the values/ needs of key demographic groups Provide information about pay packages, promotion opportunities etc • Utilising testimonials of existing satisfied employees	• Funding for job evaluations • Support for small operations in developing creative reward packages
Some locals feel that there is a glass ceiling in hospitality and this limits their willingness to join the sub-sector	There is equal opportunity for local talent at all levels of hospitality and tourism	• All tourism sub-sectors that have this problem, particularly the Accommodation sub-sector • Ministries of Labour	• Identify and communicate to Educational and Training Institutions the gaps in training that necessitate the use of expatriate labour and coordinate with them to fill these gaps	• Linkages with international establishments that can provide the requisite training and exposure for locals

Problem to be Resolved	Expected Outcomes	Key Stakeholders	Key Actions	Support Measures
			• Where expatriates are utilised, closely monitor the transfer of knowledge, and skills and intervene where progress is slow • Provide opportunities for international exposure for locals where this is deemed important/necessary • Highlight examples of locals in key positions in tourism	• Scholarships to support overseas training e.g. in the culinary arts if this is deemed necessary
Supervisory and middle management training is considered to be a weak link in tourism establishments	There is a pipeline of well trained and motivated personnel to fill the existing gaps	• All tourism sub-sectors • Education and Training institutions	• Develop career ladders and specific qualifications/training for each position • Offer flexible training e.g. Online to accommodate the schedules of employees • Provide coaching/ mentoring for potential middle managers	• Training for coaches/mentors • Financial support may be necessary for small establish-ments that cannot fund their employees or give them the necessary time release
Low level of certification in the sector may inhibit the ability to deliver high quality service and achieve the targets identified in master plans	Every employee is certified to perform their job as well as become well informed about key aspects of the sector	• Education and training institutions • Employers • Government	• Governments should consider making policies requiring certification for all tourism functions and preferably using a well-developed competency framework • Employers should require and support all employees in achieving the required certification • Education and training institutions should be equipped to provide certification for all levels consistent with the well-developed competency framework	• Government policy • National Training Agencies should play a major role in developing and implementing competency framework
Strategic HR is practised in a limited number of tourism	Establishments of all sizes understand the importance and the rudiments of aligning	• All tourism employers	• Align with professional HR groups such as Human Resource Management Association	• Cooperation of HR associations

Problem to be Resolved	Expected Outcomes	Key Stakeholders	Key Actions	Support Measures
establishments and primarily in the accommodation sector	HR with their strategic planning and goal setting, and they are able to utilise this understanding to become Employers of Choice		of Jamaica (HRMAJ) and Human Resource Management Association of Trinidad and Tobago (HRMATT) and tertiary institutions, to support small business HR development • Partner professionally trained HR managers working in tourism with smaller establishments • Benchmark successful Tourism companies to identify best practices and implement these	• Funding for training of small operators/ owners in HR
Educational and Training Institutions do not meet the needs of employers and entrepreneurs	People who work or operate a business in tourism can find the appropriate skills and personal attributes to deliver a quality experience and there are education and training systems/ institutions in place to recognise and deliver the knowledge and skills required	• Educational and Training Institutions • Hotel and Tourism Associations • Ministries of Education and Tourism	• Develop a survey to identify current competencies and attitudes required • Disseminate and discuss results • Collaboratively develop SMART objectives for addressing pain points and measure progress annually • Establish linking mechanisms through boards and curriculum development, assessment and certification committees of all regional education and training institutions • Ensure representation of Education and training institutions on the National Tourism Industry Boards and Councils • Create local and international internships and summer furloughs for educators	• Hotel and Tourism association and business associations e.g. Small business associations, transport unions etc. to survey membership and conduct focus group sessions where appropriate • Funding for teachers/trainers who need to travel overseas for training/ development.
Educational and Training Institutions are not providing training in	Graduates of institutions possess current and relevant knowledge and skills	• Educational and Training Institutions	• Government conducts and disseminates research generated by the public sector	• External help from individual experts and/or institutions may be needed to

Problem to be Resolved	Expected Outcomes	Key Stakeholders	Key Actions	Support Measures
emerging areas, including but not limited to: community tourism, culture and heritage, digitalisation, and environmental management	in keeping with the tourism Master Plans for the country	• Research Arms of Public Sector • Private Sector Establishments	in a timely manner to training institutions • Training institutions embed emerging areas into the curriculum. This may mean short courses and/or new degree options • Educational institutions and private sector establishments develop relationships with grassroots organisations that may already be doing work in the area, e.g. Community Tourism groups and environmental groups • Use focus groups and/or surveys to identify training needs of small entities and informal groups	provide support and training to educators • Assistance may be needed to bring together and engage formal and informal sector players • External funding may be needed for training and development for established and emerging groups and players
Tourism businesses are not able to compete with other sectors for talent	Tourism businesses are viewed as employers of choice	• Hotel and Tourism Associations and their membership	• Identify best HR practices in each sub-sector and adopt/adapt those that are appropriate • Systematically introduce those best practices • Publicise the changes	• External funding may be necessary, particularly to support small entities • Training in Strategic HR, particularly for small entities
Slow response to new trends and needs	The Tourism Sector has the structures and mechanisms in place to identify and address its emerging and future workforce and skills needs on an ongoing basis	• Ministry of Tourism • Hotel and Tourism Associations • Ministry of Education	• Specify a key function/role in the public sector that will specifically monitor trends and analyse feedback from visitors • Provide information to Tourism Sectors and facilitate planning workshops • Set and monitor SMART goals for response	• Funding for the position • Working public/private sector group to make and monitor recommendations
While the goal is continuous bench-marking of world class standards of service excellence	There are specific benchmarked occupational standards developed by the Regional TVET	• Ministry of Education • Educational and Training Institutions	• Key stakeholders should identify and benchmark specific occupational standards for their	• Funding for the development of occupational standards

Problem to be Resolved	Expected Outcomes	Key Stakeholders	Key Actions	Support Measures
as applied in the Accommodation and Food and Beverage sub-sectors, there are fewer available business operations and occupational standards for some of the other Tourism sub-sectors e.g. Adventure/ Recreation, and Attractions	system for key jobs in the dominant sub-sectors and these standards are used as the basis for training, curriculum, assessment and CVQ certification	• Hotel and Tourism Associations	countries and work closely with training institutions to ensure that these standards are used as the basis for curricula and certification	Working public/ private sector group to monitor implementation and assess feedback
Hotel and Tourism Associations are a powerful lobby and support group but they predominantly represent accommodation, with the result that other sub-sectors are under-represented and often without a voice or cohesive direction	Hotel and Tourism Associations are more inclusive of all of the sub-sectors of tourism and establishments of all sizes	• Hotel and Tourism Associations • Sub-sector Associations e.g. Taxi associations	• Hotel and Tourism Associations activate or in some cases re-activate committees/ groups that cater to the needs of all the sub-sectors and to smaller establishments • Hotel and Tourism Associations engage in a drive to increase the membership and participation of all sub-sectors • Larger and more established entities build relationships with smaller entities to mentor and support	• General approach developed by the CHTA and disseminated to members to customise to their countries' needs • Monitoring of progress by membership committees in each country
Digital penetration is slow and uneven	Establishments of all sizes will have developed strategic plans for digital utilisation and will have trained staff to support their plans	• Public Sector Ministries responsible for technology • Telecommunication companies • Educational and Training Institutions • All sub-sectors	• In each country, establish a clear digitalisation policy for tourism in line with Master Plans and evolving visitor needs • Telecommunication companies support by providing services needed • Educational and Training Institutions ensure that graduates are trained to not only manage the technology, but to use it to enhance the business	• It may be necessary for governments to subsidise digital penetration in remote areas

Problem to be Resolved	Expected Outcomes	Key Stakeholders	Key Actions	Support Measures
Small entrepreneurs remain in the informal economy and therefore cannot receive financial and other support	Entrepreneurs have formalised their status and are eligible for funding, training, mentoring and other forms of support	• Governmental Agencies • Small Business Associations • Education and Training Institutions	• Publicise the benefits of becoming a part of the formal economy • Identify and mitigate where possible, the pain points of being part of the formal economy • Develop mentorship, coaching and training opportunities using entities such as the Hotel and Tourism associations and other private sector Associations	• Funding for training of new entrepreneurs
Shortage of labour impedes growth of the sector	There is a pipeline of trained individuals to meet the growing needs of all sub-sectors	• Governmental Agencies • Educational Institutions • Tourism Developers	• Governments should consider putting in place a requirement for new tourism establishments to estimate their required labour needs. This data may then be used to identify the type and quantity of training that is needed for the sector • Individual governments should commission regular audits of the sector to identify gaps	• Funding for regular audit

Table 5: Priority Actions Based on Recommendations

1.0
INTRODUCTION

A-Z Information Jamaica Limited was selected through an international bidding process to execute this project, on behalf of the Caribbean Tourism Organization (CTO), and a contract dated 18 March 2021 was signed between the two entities. The project is entitled "Regional Human Resource Development Knowledge and Skills Audit for the Tourism Industry" and is funded by the Caribbean Development Bank (CDB). The full period of time during which the project was executed span the period May 2021 to August 2022.

The project commenced in the midst of COVID-19, which meant that there were risks associated with data collection and uncertainties about how the pandemic would affect the Tourism Sector. COVID-19 had already shut down large sections of the industry in most Caribbean countries and, at that stage, there was no indication of when the situation would normalise and return to pre-COVID-19 levels of output and employment. In fact, at the commencement of the project, COVID-19 had already started to impact the way actors in all economic and social sectors operated, and the Tourism Sector was no exception. The following are some of the ways in which operators in the Tourism Sector were forced or chose to operate:

- Complete closure of Tourism Sector establishments to the public or limited operating hours due to cancellation of visits by tourists and travellers as well as restrictions imposed by the Authorities
- Reduced activity levels due to limitations on the number of people in public places as well as requirements such as social distancing
- Greater focus and expenditure on sanitation
- Laying off and rotation of staff by tourism establishments/operators
- Increased use of technology wherever possible e.g. online check-in, use of tablets to check-in rather than filling in forms at front desks and working remotely by management and staff.

Due to factors such as those listed above, it was a challenging environment in which to conduct a Regional Human Resource Development Knowledge and Skills Audit for the Tourism Industry.



1.1 GENERAL OBJECTIVES

The general objectives of the project are to:

- Identify the specific leadership and workforce competencies required to meet the current and future needs of the Tourism Sector
- Provide a detailed review of the critical competencies and resources necessary for the development of a sustainable, high-performing Caribbean tourism workforce
- Provide valuable information and recommendations that will assist with the development of policies and better planned interventions related to human capital.

Clarifications to the scope of work

In terms of clarifications to the scope of the project the following should be noted:

- Only the 18 countries that are both CTO Member Countries and CDB Borrowing Member Countries are the focus of this study. For the purpose of this project, these countries are referred to as Project surveyed countries
- The consultants would conduct the analysis bearing in mind the impact of COVID-19 even though these factors were not included in the Terms of Reference.

1.2. METHODOLOGY

The audit was conducted by a team of six consultants, supported by a team of four individuals from A-Z. As will be indicated in the upcoming chapters, there were three distinct stages in the research process:

1. Desk Review:

The documents and other media reviewed included but were not limited to:

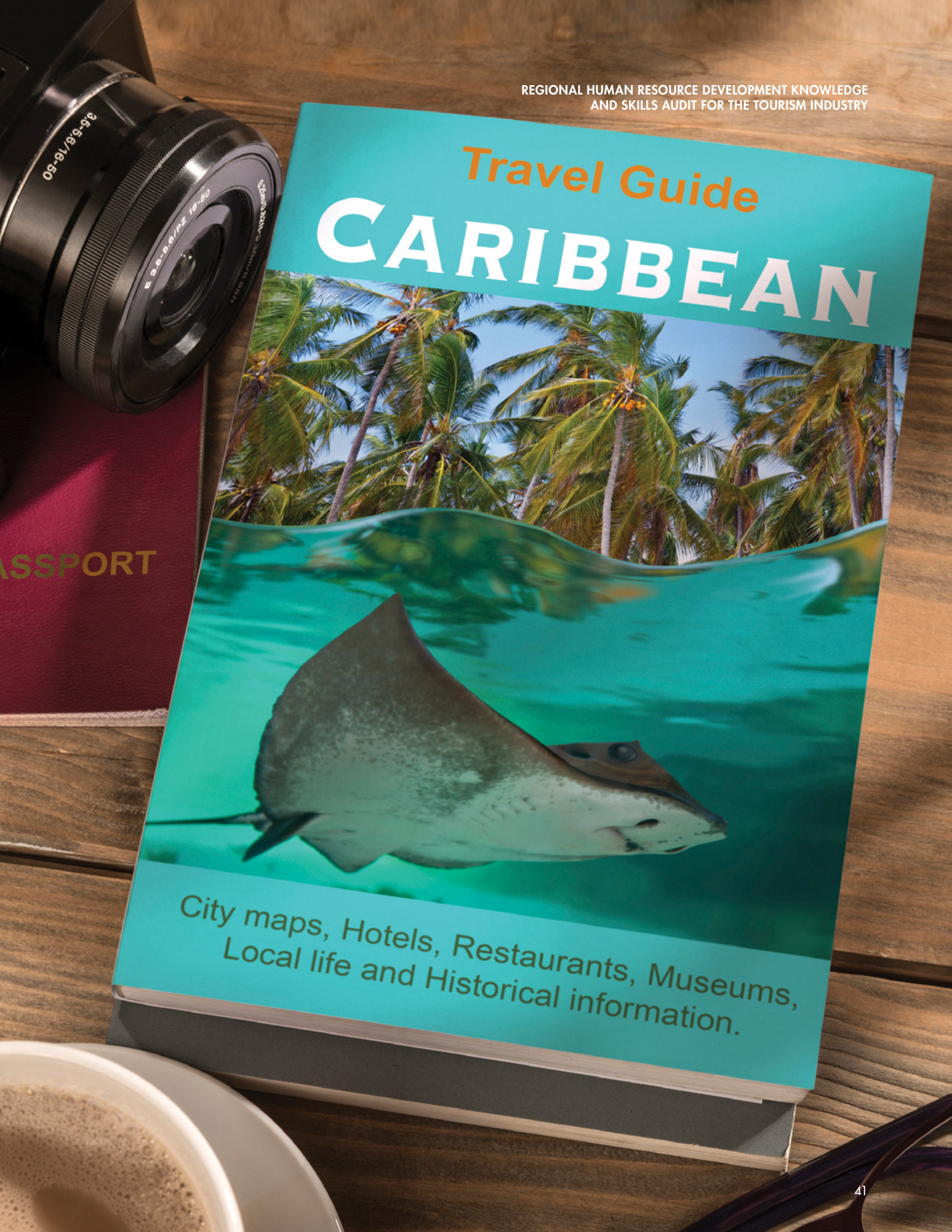
- Annual reports of the surveyed countries
- Master Plans of the countries
- Policy speeches and documents of the countries.
- Policy speeches and documents at the regional level, e.g. CTO, CHTA, CARICOM.
- Documents related to labour and tourism at the international level, e.g. WTO, ILO
- Webinars related to tourism and labour in the Region
- Labour statistics including employment, immigration and turnover
- Curricula of tourism programmes.

2. Qualitative Data Collection:

The methods utilised were:

- Individual meetings with stakeholders
- Focus groups with stakeholders
- Webinars.

Data collection was guided by a set of questions that were shared with the respondents. Meetings were held online and were recorded.


Travel Guide
CARIBBEAN
City maps, Hotels, Restaurants, Museums,
Local life and Historical information.

3. **Survey Data Collection:**
   Data collection was mainly carried out online using the following instruments:

   - Caribbean Tourism Organization (CTO) General Establishment Survey Instrument
   - Employers / HR Managers / Corporate Leaders Survey Instrument
   - School and College Graduating Class Survey Instrument
   - Tourism Employees Survey Instrument
   - Educational and Training Institutions Survey Instrument
   - Unions and Associations Survey Instrument
   - Impact of COVID-19 on Labour Availability (based on and coordinated by responses from informed public and private sector actors in the Tourism Sector coordinated by the NFPPs).

1.2.1 Data Collection Process

With respect to the data collection process, the following should be noted:

- Data for the Establishment Survey was also collected in online workshops designed to walk participants through the surveys in real time
- The data collection exercise was aided by two sets of individuals – National Focal Point Persons (NFPPs) and Data Collection Assistants (DCAs)
  - The NFPPs were the primary resource for information about their country. They provided the best contacts for key tourism stakeholders and in a few cases, set up appointments and attended them. They also appointed the DCAs and in some cases performed that role as well
  - The DCAs were responsible for following up on the surveys and ensuring that they were completed
- Meetings were held with both NFPPs and DCAs to acquaint them with their roles and responsibilities. Training sessions were also held with the DCAs. Subsequent meetings were held with the NFPPs and DCAs to identify problem areas and to lend support where necessary
- Due to the ongoing pandemic, all activities were conducted online. This facilitated greater reach and access but unfortunately it limited participation to those who were willing and able to use the technology to attend meetings. The use of the NFPPs and DCAs was designed to overcome this limitation as they were on the ground in their respective countries, but the challenges posed by the changing COVID-19 protocols and the reluctance to engage in face-to-face interactions were difficult to overcome. As a result, there may also be an over-representation of the formal sector and an under-representation of the informal sector
- It must also be reiterated that there was a great deal of uncertainty and unpredictability while this project was being conducted. This meant that at short notice, goverment employees could receive work from home orders or countries could go into shut down mode. Data collection was therefore adversely affected. As a result, with the support of the CDB, the CTO and A-Z agreed to extend the completion date of the project from January 2022 to September 2022.

1.3 STRUCTURE OF REPORT

The remainder of the report is divided into the following four chapters:

Chapter 2: Skills Supply and Demand in Tourism
Chapter 3: Skills Knowledge Audit
Chapter 4: Higher Education and Training Institutions
Chapter 5: Future Knowledge and Skills Needs Assessment.

Each chapter examines different sets of issues as follows:

Chapter 2

- Changes in tourism – including the impact of employment policies and laws, demographics and tourism employees
- Evaluation of the present utilisation of resources in tourism by the different sub-sectors
- Identification of employee profiles
- Identification of knowledge, skills and qualifications of the current workforce.

Chapter 3

- The changing landscape – based on tourism reports and Tourism Master Plans and Strategy documents of the 18 beneficiary countries.

Chapter 4

- The capacity and effectiveness of the Region's Higher Education and Training Institutions
- Profile of Higher Education and Training Institutions
- Efficacy of the Education and Training provision in core tourism related areas.

Chapter 5

- Tourism future outlook examining megatrends driving change in the Tourism Sector
- Future jobs, knowledge and skills emerging from Master Plans and Strategies
- Meeting training and development needs for future tourism workforce planning
- Developing a skills and competency framework for the Tourism Sector.

2.0

SKILLS SUPPLY AND DEMAND IN TOURISM

The Skills Supply and Demand in Tourism Audit provides an assessment of the tourism labour market focusing on supply, demand, and opportunities, in both the private and public sectors. This Chapter incorporates findings from a range of surveys, information gathered in interviews, focus groups and webinars, as well as secondary research generated from data and information from numerous sources, including: Tourism Master Plans of CTO Member Countries; Tourism Strategies; ILO data; Sustainable Development Goals (SDGs); and other documentation provided by the CTO.

This Chapter will examine skills supply and demand in the Caribbean Tourism Sector. Given the wide array of CTO Member Countries, the chapter will not always be able to provide specific details on each Member State involved in this survey but will aim to provide representative examples given their varied groupings by Tourism Sector diversity, size and focus and the profile of their wider economy.

2.1. CONTEXT

Tourism is an important socioeconomic activity and has been a leading economic driver of the 21st century service sector in the Caribbean Region. As a service activity, tourism is highly labour intensive, accounting for between 20% - 35% of employment in the Caribbean In recent years. As the Tourism Sector has diversified into new more sophisticated areas of economic activity, there has been a change in the demand and supply pattern of human capital manifested in an increasing demand for more broadly educated and also specialised trained personnel. At the same time, some countries and sub-sectors have struggled to source trained or trainable talent from a generally inadequately educated, low skilled, low wage national workforce. Additionally, new demands have emerged in tourism in this age of wide scale international travel, with the internet and the use of technology to drive economies, thereby changing the contours of the industry, its leadership and workforce.

Caribbean tourism depends on having:

a) Adequately trained and skilled human capital to meet the demands of the sector

b) Supply sources for human capital to meet the ever-changing demands of the sector

c) An understanding of current and anticipated demand for specific skills and knowledge; and

d) The institutionalised and efficient response capacity to develop the requisite skills, knowledge and competencies at the level and in the numbers required.

This chapter will examine the extent to which the project surveyed countries are meeting these needs. The capacity to do so will be discussed in detail in Chapter 4 which focuses on Higher Education and Training Institutions.

It is recognised that the notion of skills in tourism is broad and multifaceted and constantly evolving in response to the changing demographics and preferences of visitors. It also varies from sub-sector to sub-sector and as a result, meeting the demand for skills is complex. The audit observes the fact that supply is influenced not only by the availability of trained and trainable personnel, but by their willingness to participate in tourism work. The audit further observes that willingness to participate in tourism work will be influenced by economic conditions, such as wages, alternatives to tourism work in the wider economy, and the ease of entry and exit from tourism. It will also be influenced by non-economic factors, such as the perception of tourism work and the motivation to work in tourism (push and pull factors).

Approach

This chapter of the audit was prepared by drawing on relevant studies about trends in tourism, employment trends and challenges in Caribbean tourism, and issues related to the employment of women and youth.

Additionally, data was obtained from

- Online webinars
- Interviews with key stakeholders from the sub-sectors
- Surveys of human resource practitioners, tertiary students, educators, union leaders and employers.

2.2 TOURISM SUB-SECTORS

Tourism is typically broken down into eight (8) sub-sectors and this approach was followed for this audit. Each is defined below:

1. Accommodation
2. Adventure Tourism and Recreation
3. Attractions
4. Events and Conferences
5. Food and Beverage
6. Tourism Services
7. Transportation
8. Travel Trade

Figure 1: Eight Tourism Sub-Sectors

1. **Accommodation Sub-Sector** – Includes businesses that provide short term places for travellers, vacationers and others. In the Caribbean this includes hotels, resorts, villas, apartments, Airbnb and equivalent peer to peer rentals. This is the largest sector in Caribbean tourism and the largest employer. It includes international, regional, and national chains, family owned/independent operations as well as small 'Mom and Pop' operations.

2. **Adventure Tourism and Recreation Sub-Sector** - This sub-sector includes businesses that provide experiences where customers seek active, recreational experiences or travel adventures where they can learn about nature and/or culture. This sector is growing quickly because of changing trends and customer requests which continue to drive the growth of this sector. As project surveyed countries attempt to increase tourist spend, governments are actively encouraging the development of this sector.

3. **Attractions Sub-Sector** - This sub-sector includes historic sites, heritage homes, museums, halls of fame, art galleries, botanical gardens, aquariums, zoos, water parks, amusement parks, casinos and cultural attractions. Many attractions are educational in nature, others are solely for entertainment. Again, governments of project surveyed countries are encouraging the development of this sector to increase tourist spend.





4. **Events and Conferences Sub-Sector** – Like attractions and adventure tourism, events and conferences contribute directly to communities and if they are planned carefully, events and conferences can provide benefits to most of the other sub-sectors. It is for this reason that they have been targeted by some countries. As countries in the Caribbean attempt to position themselves as year-round destinations, events such as carnivals, expos, music, and literary festivals have also become more important.

5. **Food and Beverage Sub-Sector** - The food and beverage sub-sector includes all types of establishments supplying food and beverages for consumption. These range from fine dining and ethnic restaurants to institutional food outlets and catering firms; and from pubs and bars to nightclubs and lounges. It is usually the second largest sub-sector and is of increasing importance in the Region as several countries are positioning themselves as culinary destinations and are supporting this with showcasing authentic local cuisine, various food festivals and events.

6. **Tourism Services:** This sub-sector includes National Travel Organisations (NTOs), travel agencies, tour operators, online travel agencies and destination management organisations. Jobs include travel writer, visitor information staff and supervisors, tourism trainer, researcher, marketing and retail.

7. **Transportation:** Defined as an industry that provides for the movement, comfort and enjoyment of people. Categories include Air transport, Ground transport, Rail transport and Water transport.

8. **Travel Trade:** The travel trade sub-sector supports the bookings and sales in other sectors. The people that work in travel trade make reservations for accommodations, tours, transportation, food and beverage and/or attractions. These bookings can be in the form of an all-encompassing tour package or a single booking for a single traveller.

Each of the sub-sectors will have its own unique requirements, with employment in some areas being highly technical requiring advanced training and other areas therefore, requiring only limited on the job training.

The sub-sectors work together to create direct and indirect revenue and ultimately employment and economic growth. As previously discussed, the governments of the project surveyed countries have been focused on increasing tourist spend by enhancing and encouraging the development of entertainment, attractions, and conferences. Governments have also tried to diversify the types and sources of visitors. These shifts have implications for the type of knowledge and skills required. It also has implications for the number of individuals required to fulfil the plans of the governments of the Region. As a result the demand for labour must increase.

In the next section the sources of labour are discussed.

2.3 SOURCES OF LABOUR

As demand increases, the supply of labour obviously needs to increase to provide the requisite knowledge and skills for the sector to achieve the plans of the various governments. Thus far, this has been a challenge as there are often weak links between the demand and supply side and, in particular, the formal supply provided by Educational and Training Institutions.

Labour may come from any of the following sources:

1. **Unskilled Labour:** Many jobs are entry level requiring little or no experience or training. These individuals will be accepted right into the employing organisation where they will receive the training required to perform the job function. Unskilled labour may also be utilised if skilled labour is required but not available. Training institutions may be approached at some point to support the organisation's efforts through short training courses. Note that increasingly training may be provided online.

2. **Expatriate Labour:** Utilised for highly technical positions and in management positions. In general, this type of labour is not channelled through a training institution because individuals already have the expertise. Indeed, expatriate labour is often utilised to train other staff members.

3. **Labour from other Sectors:** Due to the wide scope of tourism, labour may come from other sectors and in some cases, training will be needed to prepare the new entrants for work in the Tourism Sector. This may be provided internally by the employer or by a training institution. In other instances, training will not be deemed necessary, and the person may go straight into the new employment.

4. **Internships and Management Trainees:** Tourism employers may utilise the internships and work experiences that are part of educational programmes to source employees. Some may also choose to establish trainee programmes (usually at the management level).

5. **The Latent Labour Force:** This includes individuals who are not actively seeking employment but who may be persuaded to enter the workforce, such as retirees and the self-employed. They may or may not require additional training.

6. **Temporary/Casual Labour:** Often utilised for banquets and events where there is a short term and occasional use of labour. This temporary labour is usually hourly paid, and individuals may work for several establishments.

7. **Contract Labour:** Individuals hired on short term renewable contracts.

8. **Outsourced labour:** Some organisations may utilise the services of other organisations e.g. a hotel utilising a media company to provide IT and technology support for conferences. These service providers are not part of the organisation's core work force but are part of the overall product so good relationships are essential to ensure consistently high standards of good service to the client.

9. **Entrepreneurs:** Small business owners/entrepreneurs are increasingly a part of the tourism product. Many will be self-trained but will benefit from further training in business and their specific area of operation.

This general discussion does not reflect the complexity of tourism employment and the potential for misalignments in the system. Each of the sub-sectors will have its own unique requirements, with employment in some areas being highly technical and therefore requiring advanced training, while other areas require only limited on the job training. Furthermore, even within a sub-sector, there may be many varied requirements. For example, a hotel may require gardeners and bellmen with little or no training, while also requiring financial controllers and marketers with advanced degrees. Within the same accommodation sub-sector, a large hotel may require specialised skills while a small guesthouse may require individuals who can perform multiple functions.

This diversification means that training institutions must be flexible and responsive to the needs of the different sub-sectors. Supply is therefore complex and challenging and the purpose of this audit is to identify some of the primary skills required and to make recommendations for better alignment.

As the table below indicates, it can be challenging to get the exact match between what the sector requires and what is available.

Typology of Skills Mismatches

Vertical mismatch	Overskilled
	Underskilled
Horizontal mismatch	Field of study or training relevant
	Field of study or training not relevant
Skills shortages	Unfilled vacancies
	Hard-to-fill vacancies
Skills gap	Skills to perform current job
	Lack of skills to perform current job
Obsolescence	Maintains skills relevance over time
	Skills become obsolete over time

Source: McGuinness, Pouliakas and Redmond 2017.

Figure 2: Typology of Skills Mismatches

Skills Shortages: Based on discussions with key stakeholders, it is hard to fill job vacancies in food and beverage and engineering, indicating skills shortages.

Skills Gaps: Stakeholders also indicated a skills gap where they were dissatisfied with the 'soft skills' of potential employees.

Obsolescence: There was also dissatisfaction with the training of some institutions as it was deemed as being too theoretical and, in some cases, almost obsolete. At the same time there is indication that only a limited number of establishments had a formal programme for on-the-job training that would prevent obsolescence and there was little evidence of collaboration with training institutions to fill this gap.

Vertical Mismatch: In Haiti there was evidence of vertical mismatch with the local hotel industry not employing people who had university degrees. As a result, graduates found jobs in the Dominican Republic. Some graduates also used their first degree as leverage to go overseas to pursue further studies and never returned. This brain drain is a tremendous waste of resources and may stifle the growth and development of the sector.

Horizonal Mismatch: While there has been an increase in the number of tertiary institutions offering degrees in hospitality and tourism, many employers still prefer to hire and train on the job because they find the training offered by institutions to be irrelevant.

The pandemic has had a significant impact on the way that tourism operates, and it is envisioned that while some of the changes may be temporary, others will become permanent. These changes are discussed below and will be further explored in the future skills chapter.

2.4 CHANGES IN TOURISM

The information in the following table outlines some trends in tourism and some of the implications for employment in the Tourism Sector.

Tourism Trends	Implications for Tourism Employment
• Increased emphasis on safety and hygiene • Holistic hospitality, health and well-being	• More staff to clean and monitor • Touchless/no contact service may reduce cleaning schedules leading to a reduction in staff requirements • Coordinators will need to bring together stakeholders and communities
• Interest in the 'Almost All-inclusive' (Accommodation with meal plans included)	• Opportunity for European Plan (EP) hotels and Villas that offer private chefs and unique experiences
• Increased emphasis on leisure tourism where business tourism has declined • Leisure Travellers • Increase in domestic tourism • Multigenerational trips	• Reconfiguring of existing space in hotels may lead to new requirements for service staff • Creative marketing campaigns to attract these travellers and employees trained to meet their unique needs and preferences • Creativity required to offer a range of experiences suitable for all ages and interests

Tourism Trends	Implications for Tourism Employment
• Private travel (yachts and private planes)	• Staff trained to deal with high end guests • Need to create a diversity of experiences • Delivery of responsive, customised experiences
• Growth in contactless payments/ low touch • Robots, chatbots and automation • Apps • Artificial intelligence (AI) • Virtual Reality (VR)	• Coding skills • Data analysis skills • Employees will need to be skilled and comfortable in using this technology • Artificial Intelligence (AI) may create opportunities to add value to service experiences and will require staff who are able to work creatively with the technology • Artificial Intelligence (AI) and creativity skills needed to create the VR • Opportunity for small entrepreneurs
• Eco-travel	• Greater public-private-community coordination will be needed • Sustainable and environmental management skills
• Demand for rental cars and private excursions	• Greater demand for creating unique off the beaten track trips/excursions
• Demand for personalisation/ customisation • Demand for 'greatest of all trips' (GOAT) to epic destinations	• Problem solving, critical thinking, communication, teamwork and diversity skills • Destinations will have to offer and promote extraordinary travel experiences
• Post pandemic, some workers may not wish to return to previously held jobs (the great resignation)	• Employers will need to compete more aggressively for talent and offer more creative packages to attract/retain scarce talent
• As a result of the pandemic, mental health concerns have increased, particularly among frontline workers, people living alone and those with pre-existing mental health conditions	• Leaders will need to be sensitised to symptoms and interventions of mental health issues
• Workers in the informal economy have been affected disproportionately by the pandemic	• Their situation has become even more precarious, and it will be important for them to receive various forms of support for their economic well-being. Access to retraining may be necessary

Tourism Trends	Implications for Tourism Employment
	• There is an opportunity to encourage members of the informal sector to regularise their status
• Women in tourism were disproportionately affected by the pandemic because they are overrepresented in cleaning and catering jobs. Those who remained employed may have had the additional challenge of managing children who were learning online during the pandemic	• Women may need specific support to re-integrate into the workforce
• The pandemic has affected many young people at a critical moment in their lives, disrupting their transition from school or university to work	• The inability to find work in tourism during the pandemic may discourage this cohort and future cohorts of school leavers from selecting tourism as a career as it may be seen as precarious. Recruiting efforts will need to be stepped up
• Organisations will focus more on HR retention strategies e.g. shorter work weeks, transparency in promotion decisions or increased pay	• HR will need to become more strategic and creative
• Hybrid work will continue where possible	• Work may need to be re-engineered

Table 6: Tourism Trends and Implications for Employment

Some of the changes, such as enhanced attention to sanitation and hygiene, are relatively simple. Other changes, however, require service staff to be more creative and responsive as they shape the memorable and unique experiences that are now important to visitors. There will also be a need for more technological skills. In summary, as the pandemic wanes, tourism requires workers to be more agile and technologically savvy.

There are also changes in the workforce where the pandemic has either created or reinforced a disinterest in tourism careers and led to a shortage in the numbers of people available for work. Some parts of the workforce have been more deeply affected than others and trust may have to be re-established. Turnover before and after the pandemic, as well as the existing national laws related to impact on the supply of labour, are are discussed below.

Establishments will need to be more creative in their efforts to attract and retain the type of labour that they need, and governments have a unique moment to try to reshape the way in which tourism is performed.

2.4.1 Labour Mobility and Turnover

Caribbean countries have lost 10-40 % of their labour force due to emigration to OECD member countries. The migration rates are particularly striking for the highly skilled as many countries have lost more then 70 % of their labour force with more than 12 years of completed schooling - among the highest emigration rates in the world.

Turnover in hospitality jobs is typically high and in the United States hospitality turnover is twice the national average for turnover.[13] Respondents to the Employers / HR Managers / Corporate Leaders Survey did not indicate that it was a major problem for them with over 90% of respondents indicating that they were able to retain those employees who they wanted to keep. This may represent some peculiarities of the sample since other sources suggest that it is a matter of concern. As an example, the Anguillan Master Plan notes that a substantial share of the turnover is attributable to people who leave one job in tourism to take up another in the same sector. Similarly, a Belizean hotelier explained that in her experience it was common to see talented employees moving from property to property. This may be viewed as 'poaching' from other establishments and at least one Master Plan notes this as a challenge with Anguilla taking it seriously enough to include this in their planning document: Anguilla notes that "details of such pre-opening training programmes will be required to be included in the documentation for project planning applications". In a small business environment, this poaching would be particularly enticing for organisations seeking scarce talent, but it would be particularly devastating for those who lose it. Anguilla therefore has been pre-emptive in requiring new establishments to 'make' the talent that they require. This strategy of course would not prevent existing establishments from poaching the desired talent and in Anguilla; as in other destinations, market forces would



[13] Cicerale, V. 2020. Turnover Rates in the Hospitality Industry and the Factors Contributing to Employee Loss or Retention. Hospitality Graduate Student Scholarship, 5.

mean that poachers would pay premium prices for the labour. In Jamaica a respondent highlighted turnover as an issue and related it directly to the use of untrained labour and paying that labour poorly. He highlighted the need to professionalise the industry in order to retain people.

Anguilla

"Government will require new developers to undertake pre-opening training programmes, so as to avoid disruptive poaching of existing staff.

Accommodation providers in Montserrat indicated that they share staff – a creative way of managing a situation of scarce labour. Ideally, working in close collaboration with employers, the educational system would identify areas of scarcity and fill the gap. But in most countries this collaboration is limited, causing a lag as indicated in this report. Unfortunately this is a perennial problem.

Respondents also noted that retention depended to some extent on the quality of management and supervision since people tend to leave supervisors and not just organisations. Turnover may also be an issue of economics and one respondent in Saint Lucia explained that the hard times caused by the pandemic forced some individuals to leave jobs that they liked because they needed to compensate for a family member who had lost a job.

Labour mobility may also refer to individuals leaving the sector. Tourism is in the service sector and employees who have experience or training in tourism may find jobs in the financial or other sectors. Respondents noted that work in these other sectors may be preferred because it does not involve work on weekends and holidays or late hours. One respondent agreed that people trained in hospitality would be attractive to other sectors because their people skills would be highly valued. He suggested however that rather than seeing this as a source of frustration, tourism employers should accept this reality and develop and enhance the appeal of their own jobs so people would not want to leave.

Pointing to the importance of paying attention to career ladders and glass ceilings, one respondent noted that turnover was affected by the opportunities for promotion.
"If I feel that I am unable to grow any further in this role or this organisation, then I am going to look elsewhere. If they see when they join a department that other people have been there for ten years, nobody will have time for that. They are going to move on!"

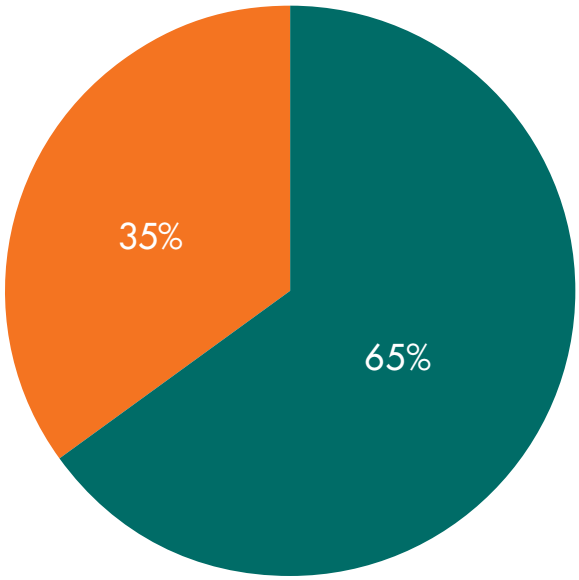


2.4.2 The Impact of COVID-19 on Labour Mobility and Turnover

In the wake of the COVID-19 pandemic there is a reluctance of some employees to return to work at all or to return to work on the same terms as before. This has led to the phenomenon commonly referred to as 'The Great Resignation'. The Final Country Survey on the Impact of COVID-19 on labour availability corroborated this finding in 65% of the 18 Member States.

Is There a Shortage of Tourism Employees Since COVID-19

20 responses*



Source: Final Country Survey on Impact of COVID-19 on Labour Availability - Question 2.

Figure 3: Tourism Employees since COVID-19

* Nevis and Tobago were interviewed separately, hence there are 20 responses to this survey.



Respondents noted many reasons for the shortage as indicated below:

Which of the following is causing the shortage?

19 responses

Value	Count	%
Employees have moved on to other activities	14	73.7%
Increased demand	10	52.6%
Wages in Tourism are uncompetitive	6	31.6%
Working hours in Tourism are too long and unpredictable	5	26.3%
Vaccination status	1	5.3%
Additional reasons for labour shortages given by individual respondents • Increase in tourist accommodation and entrepreneurship (Private Chefs/ Catering Services) • Lack of Tourists visiting Haiti - Fewer tourists than two years ago has resulted in little demand for labour • Employees left after COVID • Our tourism sector reflects a previously aging tourism sector so after Covid 19 many retired or became self-employed. Wages are not uncompetitive. Rates are relatively competitive. But with only Associate level training available many top paying positions still allude our new workforce. • Banks did not offer loans to hospitality workers during the pandemic, therefore, many moved away from the industry • Just a replenishing of labour needs due to pandemic • In some instances, employees who were working in the Tourism sector at the time of lockdown suddenly found themselves without a livelihood and had to quickly take jobs that were available. Some who had this experience decided to 'pandemic proof' their livelihood by shifting to other sectors to work • Persons decided to retire during the pandemic; some passed away; others have not been rehired to-date in the sector and some are unwell/have health issues	1	5.3%

Many respondents noted that this labour shortage has been experienced in the Region as former employees had found work that was either more lucrative or convenient during the period of layoff. Most countries responded in the affirmative to a survey question about whether they had experienced a labour shortage since COVID-19. The responses from the survey support anecdotal and newspaper reports. In Jamaica for example, there is a shortage of 20,000 workers and while most countries are unable to quantify the exact numbers, the situation is dire with the Cayman Islands for example describing recruitment issues as being bigger than COVID-19 and Barbados reporting significant shortages. The concern is not just about replacing employees but replacing core employees with years of experience and knowledge.

The impact of 'The great resignation' has exacerbated the demand and available supply of Caribbean labour and the great concern generated about its impact on the reopening of the industry.

The Caribbean has been a recruiting ground for cruise ships and resort jobs in North America for decades. This has always created some disruption, but some Caribbean employers in the audit viewed the situation positively

	Count	%
• This was the case before COVID-19, and more needs to be done in this regard to attract persons interested in working in the field • Basic salary needs to be reviewed. There is an inability to rely on steady hours • As this is a seasonal industry, local labour experiences hardship during the off-season while imported labour can move on to other opportunities • The impact of COVID-19 includes a risk to health and potential earnings including health and leave benefits • During the pandemic many chefs/cooks became entrepreneurs and been slow to return to the industry • Lack of trained persons • Having to work on weekends and holidays • Lack of specialised skills • The uncertainty caused by hotel closures • Business is now very uncertain as a confirmed booking can be cancelled at the drop of a hat due to COVID-19 scares and fears	1	5.3%
None selected- N/A	2	11%

Question 4.

Table 7: Reasons for Labour Shortages

What is being done to resolve the labour challenges etc.?

19 responses

Value	Count	%
Collaborating with training institutions	14	73.7%
Asking staff to work overtime	10	52.6%
Asking staff to refer friends or families	7	36.8%
Offer higher wages	7	36.8%
Using an employment agency	3	15.8%
Heightened PR/Ads	1	5.3%

Source: Final Country Survey on Impact of COVID-19 on Labour Availability - Question 2.

noting that workers have gained international experience. Barbados has noted for example that Royal Caribbean Cruise Line scheduled a job fair intended to recruit 1,000 individuals and Trinidad recently had to extend a one day Royal Caribbean Cruise Line recruitment fair to a second day to accommodate job seekers.

In response to a survey question that asked countries to indicate what was being done to manage the labour challenges, the most popular strategy was collaborating with training institutions which was identified by every respondent. The next most common response was asking staff to work overtime, and this was followed by asking for referrals from staff. It is concerning that overtime was the second most utilised strategy. Over the long term, it may lead to burnout and a subsequent decline in service and general performance.

Some countries have also attempted to actively manage the external demand for labour by forging relationships with potential employers. Antigua and Barbuda have for example signed a three-year partnership agreement with Jersey. Under the terms of the agreement Antiguan and Barbudan hospitality staff will go to Jersey to work during the peak summer season and potentially training will take place at the Antigua and Barbuda Hospitality Training Institute and Jersey's Highland College[14]. Jamaica which is facing a significant labour shortage, has supported a massive recruitment

Value	Count	%
Other incentives	1	5.3%
Additional comments in response to question • The challenges are that the British Virgin Islands imports most of its workforce and since IRMA and COVID-19 there continues to be a challenge with importing labour • Government challenges include time in approving work permits • CFBC College continues drive and partnership with regional and international colleges to offer further training at a bachelor level • Government continues to provide internships and various scholarships • Recently the interest rate for study loans was significantly reduced • Opportunities available with UWI, Monroe College, University of the Virgin Islands and even Taiwan • There is a discussion on increasing the minimum wage and reviewing what is called the long service gratuity for hospitality. This is usually paid after 10 years of continued service when a hospitality employee retires • The labour department and other sectors continue to host job fairs and there are significant number of school leavers annually. There is still a relative misconception among many young persons that you can only reach so far in tourism locally • National employment drives • There will be no hiring/bringing back employees for the foreseeable future. Most operators are in no position to even begin to consider the issue of staffing (rehiring furloughed employees or new employees) • Nothing however we will have to monitor closely as we have properties that are still closed due to the pandemic, a total of 700 rooms	1	5.3%
Paying a signing bonus	0	0%
N/A	1	5.3%

Source: Impact of COVID-19 on Labour Availability Survey - Question 5.

Table 8: Resolutions for Labour Challenges

drive by cruise ships and the Minister of Tourism has stated that as of June 2022, 10,000 Jamaicans will be recruited to work on cruise ships overseas.[14] Jamaica has ramped up its training through the Jamaica Centre of Tourism Innovation and has been extremely aggressive in recruiting potential students with the Director of the Centre encouraging students to speak to their department heads or guidance counsellors. Training is offered free.[15] Barbadian authorities indicated that they were meeting with learning institutions to fast-track training opportunities to boost employment prospects.

Caribbean Hotel and Tourism Association (CHTA) has noted the challenge with obtaining the labour required for the anticipated upsurge in tourism as the pandemic wanes. The President of the Association has encouraged members to be more diligent in staffing their properties with trained, qualified hospitality professionals. The President has also stressed the need to 're-energise schools, training institutions that the tourism industry put in place in the past, which played a critical role in creating employment and career opportunities for thousands of residents throughout the Region. She urged all national Hotel and Tourism Associations to continue partnering with local institutions to fast-track the training of prospective hospitality workers so

[14] Caribbean Workers to help with Jersey's hospitality staff shortage. ITV. 16 March 2022.
[15] Clayton, R. Tourism Ministry tries to train its way out of labour shortage. April 1. 2022.

they can take advantage of the increasing number of excellent career paths the industry offers.[16] The CHTA has also offered its tourism job bank as a way of bridging the gap between supply and demand. The association has also recognised what it calls the 'misinformation that has created doubts about the stability and future of the industry' and called upon its members to do more to combat that perception.[17]

The pandemic has had a direct impact on labour mobility. The CHTA reported that

- **71% of hotels had laid off staff**
- **66% had reduced the work week or hours worked**
- **53% had cut salaries**

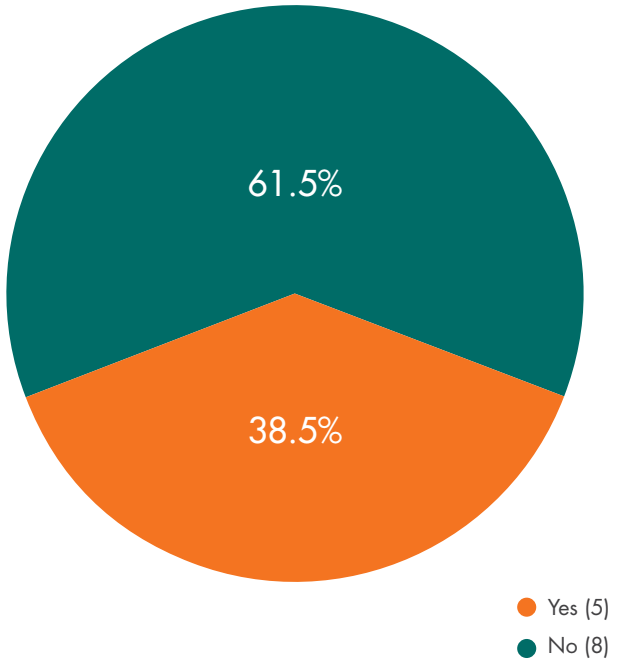
Some displaced workers have turned to self-employment during the pandemic, and some have opted to continue with these endeavours either because they enjoy the autonomy or because they can earn more on their own. HR managers noted that the pandemic also showed up the vulnerability of the sector and caused some workers to rethink their jobs. Other workers have moved into other sectors. There are reports for example of Barbadian hospitality workers moving into health care where they support in the non-technical areas. Even if employees return to the workplace, many are likely to do so with a diverse set of expectations from previous generations of workers. There is much discussion for example about quiet quitting – a phenomena in which workers re-evaluate their relationship with workand set tighter boundaries so that the can focus on other aspects of their lives.[18]

Professor Cary Cooper who has studied this shifting attitude argues that this generation is refusing to be an asset that their employer sweats and that they are unwilling to tolerate working environments that will destroy them in the long run. Employers therefore may have to not only make changes to the way that they manage their operations but signal those changes to the labour market.

Thirteen countries responded to a question that asked whether the labour shortage was deemed to be temporary. Of those the majority believed that it was a temporary shortage.

Is the labour shortage temporary?

13 responses



Source: Impact of COVID-19 on Labour Availability Survey - Question 6.

Figure 4: Temporariness of Labour Shortage in the Tourism Sector

[16] CHTA calls for Region to prepare for projected employment growth. The Virgin Islands Daily News. May 30, 2022.
[17] Madden, M. CHTA warns of growing labour needs. Barbados Today. May 19, 2022.
[18] Ellis, L,, Yang, A., 2022. Aug. 12. If your co-workers are 'Quiet-Quitting' here's what that means. The Wall Street Journal.

When asked what government could do to address the shortage in labour, the following responses were received:

What could government do to assist with the labour shortage?

20 responses

		%
Train more people for tourism	6	30%
Be more flexible with the issuing of work permits	6	30%
Stop facilitating overseas recruiters	4	20%
Review minimum wages	2	10%
Increase wages across the sector	2	10%
Government has plans to: • Create jobs by stimulating growth in the sector • Create the enabling environment for more diverse entrepreneurial activities • Increase apprenticeships and training opportunities • Improve job security and stability • Change labour codes so employers are encouraged to offer full time contracts vs. annual contracts. This would help to avoid expensive severance pay-outs.	1	5%
Additional comments in response to question • We certainly hope the challenge is temporary but can't confirm as of now. However, the government must have more promotions and taxes reduction to attract more tourists s • With a lack of true tourism data, it is hoped that the current census will help aid the discussion on this • There needs to be greater injection and diversification within the tourism here on Nevis to offer more jobs. There are limited jobs and a very small pool from which to recruit from based on skills etc. • Nevis Island Administration has been very flexible in the issuing and renewing of work permits • One most recent initiative saw the waiver of payment fees and other areas, as well as offering discounts • Be more flexible • More competitive compensation is required • Make certain positions exclusive to local hire only • Insist the previous tourism employees (if they desire to return to the sector) who were employed in Tourism in March 2020 when the islands closed due to fear of spreading COVID-19 virus be rehired by the company for whom they were working. • Man Power Audit	1	5%

		%
• Create a training institution for tourism • No custom retention, in terms of return visits. Hotels now serve a specific purpose, persons here on business are housed for the duration of their visit but because of various advisories about TT (crime, COVID-19 etc.) they do not return • There is a need to for a vocational school on the island of Nevis. This must offer degree qualifications at least up to a Bachelor. We promote ourselves as a high-end destination and must have the labour force that reflects that	1	5%
N/A	1	5%

Source: Impact of COVID-19 on Labour Availability Survey - Question 7.

Table 9: Government Interventions to Improve Labour Shortage in Tourism Sector



The most popular response was training more people, followed by a recommendation to be more flexible with the work permits and to stop facilitating overseas recruiters. Interestingly the third most common response was for the government to review the minimum wage. Employers are free to exceed the minimum wage of course so there is no need to wait on government intervention especially in a time of labour shortage.

Despite the challenges countries are continuing to hire labour. Indeed, according to responses to the General Establishment Survey even in 2020 - the year that the impact of the pandemic was most severe, responding establishments reported hiring 560 employees. In 2019, the year before the pandemic, hires were 518. In 2021, a year of recovery, the number of hires increased significantly to 1265 employees. 66% of those hired in 2020 and 60% in 2020 and 2021 respectively were females.

2.4.3. The Impact of Employment Policies and Laws

Employment policies and laws set the context in which labour may be recruited and managed. The labour laws in most of the countries in this study were forged as a result of labour unrest in the 1930s and 40s and are heavily weighted towards providing worker protection against unfair dismissal or penalties. Later adjustments to labour legislation have provided additional protections such as paid maternity leave. Caribbean states have readily identified with international standards and have ratified ILO conventions thereby signalling their desire to:

- Improve labour conditions
- Regulate international mobility of labour in an equitable manner
- Enact labour standards in line with ILO standards.

While there are variations among the different countries in the Region, the ILO has attempted to harmonise these laws and notes that "The establishment of the **CARICOM Single Market and Economy (CSME)** which allows for the free movement of labour within the Caribbean Region has brought the issue of the alignment of labour laws to the fore".[19] In 1995 and 1997, the ILO provided technical support in drafting four (4) model legislations in the areas of:

- Termination of employment
- Registration, status and recognition of trade unions and employers' organisations
- Equality of opportunity and treatment in employment and occupation
- Occupational health and safety and the working environment.

As a follow-up to the model legislation and considering the CSME, the ILO has implemented a project on the Harmonization of Labour Legislation in 13 ILO member States in the Caribbean. It aimed to evaluate the extent to which national legislation and policies are consistent with fundamental principles and rights, relevant ILO Conventions and CARICOM model labour laws. A study of 13 Caribbean countries, 12 of which are in this study,[20] indicates that governments have signed off in large numbers on most of the ILO conventions. Of note to this study are the conventions on equal remuneration, discrimination, minimum wage, tripartite consultation, protection of wages, and accident compensation. Of note also is that at the time of the report only two countries had signed off on working conditions for hotels and restaurants. CARICOM has also declared a set of labour and industrial relations principles which are described as an important policy guide on labour matters for the Social Partners. These principles are intended to contribute to the development of a healthy industrial relations climate and enhanced social partnership. The principles underscore the rights and responsibilities of the Social Partners and provide the bases for the development of national labour policies and inform the enactment of labour legislation.

Downes et al.[21] note that national insurance and social security benefits are provided in all countries in their study and as such the ILO provisions are maintained. Policies relating to termination were noted as a contentious area because the burden of proof lies on the employer who must indicate just cause. There are provisions for severance and redundancy with some countries such as Barbados having a contributory scheme which may be used to offset such costs, whereas countries like Jamaica and Trinidad and Tobago have no such funds. Qualifying service to earn this severance ranges from a low of 1 year to a high of 5 years. The rate of benefit starts with a low of 5 days per year and goes to a high of 12.5 years.

Some employers have considered these laws to be inflexible and have called for changes that will make the labour market more responsive to the dynamics of operating in the global arena. There is also a call to align wages more closely with productivity.[22]

The collective bargaining activities of unions is an important part of the Caribbean labour-employer relationship, but in interviews with employers and industry leaders, there was significant pushback on unionisation not only from employers, but from governments. As an example, a minister of tourism proffered the view that unionisation was no longer necessary or even desired by workers because they could become their own entrepreneurs. An HR manager expressed the same sentiment but couched it as employees having greater control over their labour and compared it to the gig economy where individuals took on

[19] ILO, Labour Law. https://www.ilo.org/caribbean/areas-of-work/social-dialogue/labour-law/lang-en/index.htm Retrieved September 24, 2021.
[29] Goolsaran, S.J. 2005. Caribbean Labour Relations Systems: An Overview, 2nd Ed. ILO, Port of Spain.
[21] Downes, A., Mamingi, N., Antoine, R.B., 2004. Labour Market Regulation and Employment in the Caribbean, In Law and Employment: Lessons from Latin America and the Caribbean. Ed. J.J. Heckman & C. Pages, pp. 517-51.
[22] Golding, B. 2019. "Jamaica's labour market regulations in perspective." *Jamaica Observer*, March 3.

a range of projects that suited their talents. These sentiments were echoed by some employers who believed that they should be free to bargain directly with employees. Further, many employers who were asked about unionisation were visceral in their negative response to the mere mention of unions. In the HR surveys just over half of respondents agreed or strongly agreed that unions and employee associations were viewed favourably in their organisations. One respondent suggested that it was time for unions to reinvent themselves so that they focused more on supporting workers in terms of capacity building and less on the traditional areas of wage negotiations.

The collective bargaining activities of unions is an important part of the Caribbean labour-employer relationship, but in this audit, there was significant pushback on unionisation.

This may explain why 75% of union employee associations expressed that it was difficult to function in tourism and hospitality. Interestingly the union/employee associations seemed to be aware of the challenges in attracting interest from their key customers with most union respondents disagreeing or strongly disagreeing that they were viewed in a positive light by tourism employees.

These sentiments coupled with the obvious decline in unionisation throughout the Region, suggest that employers desire to move away from collective bargaining and prefer that the issues of wages and working conditions be determined on an individual basis and perhaps determined solely by issues of supply and demand.

The IMF notes that many countries in the Region have seen real wages growing in excess of productivity, reflecting inflexible wage arrangements.

These sentiments coupled with a decline in unionisation throughout the Region, suggest that employers desire to move away from collective bargaining towards determining issues of wages and working conditions on an individual basis and perhaps determined solely by issues of supply and demand. It is not clear how this would work on a practical level with potentially hundreds of workers negotiating independently with an employer, but the expression of the idea indicates a desire to move away from structured systems that reward all employees in the same way, irrespective of their contribution to the establishment. An important caveat is that this view came from employers and not from employees. The International Monetary Fund (IMF) notes that many countries in the Region have seen real wages growing in excess of productivity reflecting inflexible wage arrangements.[23] As a result of this the IMF had a number of specific recommendations:

- restructuring and refocusing the system of education and training
- boosting labour productivity
- mobilising demand for employment by enhancing competitiveness to grow exports while ensuring adequate supply of skills in demand and addressing shortcomings in regulations to enhance flexibility and adaptability
- strengthening the dialogue among social partners to achieve the objective of labour market policy reforms
- revising labour rules and regulations to be compatible with the need to strengthen the legal framework for necessary reforms, and

[23] Kandil et al., 2014. Labour Market Issues in the Caribbean: Scope to Mobilise Employment Growth. IMF Working Paper.

- strengthening data availability for analysis and policy recommendations.

Some countries such as Barbados have a more robust tripartite arrangement than others and have been able to make more strides along the lines of the IMF recommendations but in general the movement to address these issues has been slow.

The practice of short-term contracts not only erodes the trust between labour and management, but negatively impacts the quality of life.

Some employers have sought to minimise overheads and benefits by utilising contract labour. In this instance employees are hired on short term contracts which must be renewed after a short break of employment. It is possible for employees to work for years on these contracts and therefore have no job security. In one instance, the head of a school reported that an employer requested graduates and then after a few months terminated all of them, citing general dissatisfaction with their abilities. The employer then requested another set of graduates. The conclusion drawn was that the employer simply wanted to avoid engaging in a long-term employment arrangement and was not operating in good faith. The practice of contract labour as a way of reducing labour costs may be restricted to Jamaica because it was not mentioned elsewhere. It should be noted that the Jamaican Government has called for an end to the practice and has linked this call to the government's efforts to upgrade the skills of the workforce.[24]

The practice of short-term contracts not only erodes the trust between labour and management but negatively impacts the quality of life and income stability as workers may find it difficult to obtain loans and mortgages in the absence of permanent employment. At the same time, many regulations and policies may be outdated. These are issues that have not been contended with in many countries and there is a more general challenge - one of creating "powerful, influential and modern labour ministries with adequate resources to enable them to contribute to national development, through a proactive programme of advisory services designed to promote enterprise partnership and national agreements." (Goolsaran, 2005).[25] This theme of needing to modernise and synchronise existing systems is one that has been recognised by many of the Master Plans in the project surveyed countries.

While contract and informal employment provides well needed flexibility for employers and improves their bottom line, it does however mean fewer protections for workers and may make this work less attractive to potential applicants.

Finally, labour legislation is predicated on established formal establishments, but many tourism establishments are informal operators who are also employers. Indeed, a recent report by the Caribbean Policy Research Institute (CAPRI) estimates that the informal sector constitutes 40% of total employment in Caribbean tourism. These employees are not covered by any legislation and are not likely to benefit from government subsidies and other forms of assistance – a point that was brought sharply into focus during the pandemic.

CAPRI estimates that the informal sector constitutes 40% of total employment in Caribbean tourism.

[24] Hines, H. 2019. April 15. Minister calls for end to short-term contracts for hotel workers. Daily Observer.
[25] Goolsaran, S.J. 2005. Caribbean Labour Relations Systems: An Overview, 2nd Ed. ILO, Port of Spain.



Employment laws and regulations set the framework for the management of human resources. Within establishments however, there are significant choices about how to engage with the recruitment, motivation, reward and development of the human resources. These are discussed in subsequent sections.

2.4.4. Recruitment Practices

Untrained and unskilled staff were utilised in entry level positions. As the table below indicates, the largest number of people that respondents reported hiring were not formally trained and had either no certification or a high school certification.

Employers did utilise formal educational and training institutions but, as has been mentioned, there was some dissatisfaction with the graduates of these institutions. Employers and HR managers interviewed did not indicate that they looked for staff who were already working but some mentioned losing staff to other employers so poaching clearly does take place. In one instance, small proprietors shared staff and considered this beneficial for themselves and for their employees. Some employers noted that tourism was not favourably viewed, and this made local recruitment more difficult. One respondent put it this way: *"Tourism has still not established itself as a permanent and viable occupation. People still moonlight – do it part-time and not full-time. Tourism has not sold itself". Another respondent noted that the intervention needed to be early pointing out that countries needed to "stop waiting until the tree was already grown to start shaping it."* This call for early intervention also came from some employers who felt that socialisation to tourism should start from primary school.

This was varied however with Saint Lucian representatives noting, for example, that young persons saw tourism as good work and preferred it to office work. Interestingly however the survey of graduates and potential graduates found that a whopping 85% agree or strongly agree that tourism and hospitality is the most important industry. The same percentage agree that tourism played an important economic role in their country.

20 responses

	No high school certification	High school certification	Technical and vocational school qualification	First degree	Second degree	Foreign (non-national) job seekers
Total	99	226	88	66	16	40
	(33% of respondents hired staff in this category)	(81% of respondents hired staff in this category)	(43% of respondents hired staff in this category)	(34% of respondents hired staff in this category))	(20% of respondents hired staff in this category)	(12% of respondents hired staff in this category)

Source: Establishment Survey - Question 29.

Table 10: Educational Level of Employees

Employees may come from the following sources:

1. **Employment agencies**
2. **The untrained/unskilled general population**
3. **Educational and Training Institutions**
4. **Other jobs**
5. **Overseas**
6. **Latent**

Figure 5: Sources of Employment

Discussions with HR managers and industry leaders do not indicate a heavy reliance on employment agencies except for those that serve as contracting agencies for contractual staff. There was however some utilisation of online employment sites. The dominant online employment agency in the Region is **Caribbeanjobs.com** and at the time of writing it had a total of 66 jobs in the hospitality, tourism and catering sector which was in line with the other major sectors in the Region. The vast majority were jobs in hotels and many hotels advertised multiple positions. Jobs advertised ranged from room attendant to human resources manager to executive chef. The management positions generally asked for a first degree in a related area and all positions requested experience. No jobs stated salaries although some used the term 'competitive salary'. As noted earlier in this report, the CHTA also has a job bank that is free to members and job seekers.

Career sites are underutilised as a recruitment pool and they are not used to promote the establishment as a desirable place to work.

Many employers use local newspapers, and some have adopted the practice of utilising their websites to advertise specific jobs and to promote themselves as an employer. This practice is increasingly common as it allows employers to provide significant detail about their firm and about the job itself at minimal cost. It is a practice that is not heavily utilised in the Caribbean however and even when it is used, it may be underutilised by providing information about the job title and requirements but not much about what it would be like to work for a firm.

A review of a selected sample of business sites suggested that high end resorts competing for the best talent tended to market themselves more. The Bahamian based Baha Mar and Atlantis for example, utilised the terms **'reimagined associate recruitment portal'** in the case of Baha Mar and advised visitors to the Atlantis site that **'career options within today's hospitality industry go far beyond those you might imagine – and opportunities with us go farther still'**. Most other resorts reviewed provided much less information about themselves and either invited interested applicants to send in a resume or to fill out an online application form. In some cases, the vacant positions were listed, often without any description. Food and Beverage establishment followed suit with USA based Margueritaville being an exception as it provided information about core values and benefits. LIAT simply stated that there were no vacancies and did not provide any information about the types of occupations available within the company. Caribbean Airlines listed current vacancies but did not describe the jobs or the mission/vision. Major tour companies reviewed had no career site except for Chukka Cove which listed vacant positions and gave the company's story. Royal Caribbean Cruise Lines which attract many Caribbean workers lists jobs under different headings and includes video testimonials from current staff members. Their site also lists 11-week internship opportunities.

In general, career sites are underutilised as a recruitment tool and they are not used to promote the establishment as a desirable place to work. The use of websites is an easy and cheap way for organisations to promote themselves as a good place to work and of course to advertise positions. In this regard some recent data from the Centre for Generational Kinetics[26] is instructive as it indicates the type of information that is important to younger applicants in particular.

[26] Roman, E. 2022. Most "Gen Zers" would not work five days a week in an office, researchers says. Yahoo! Finance. https://finance.yahoo.com/news/gen-z-work-five-days-office-173640467.html

What will most get Gen Z to apply when reading a job posting?

(Working-age Gen Z only, 16-25; N=1,021; Ranked #1/#2/#3; Top 6 of 18)

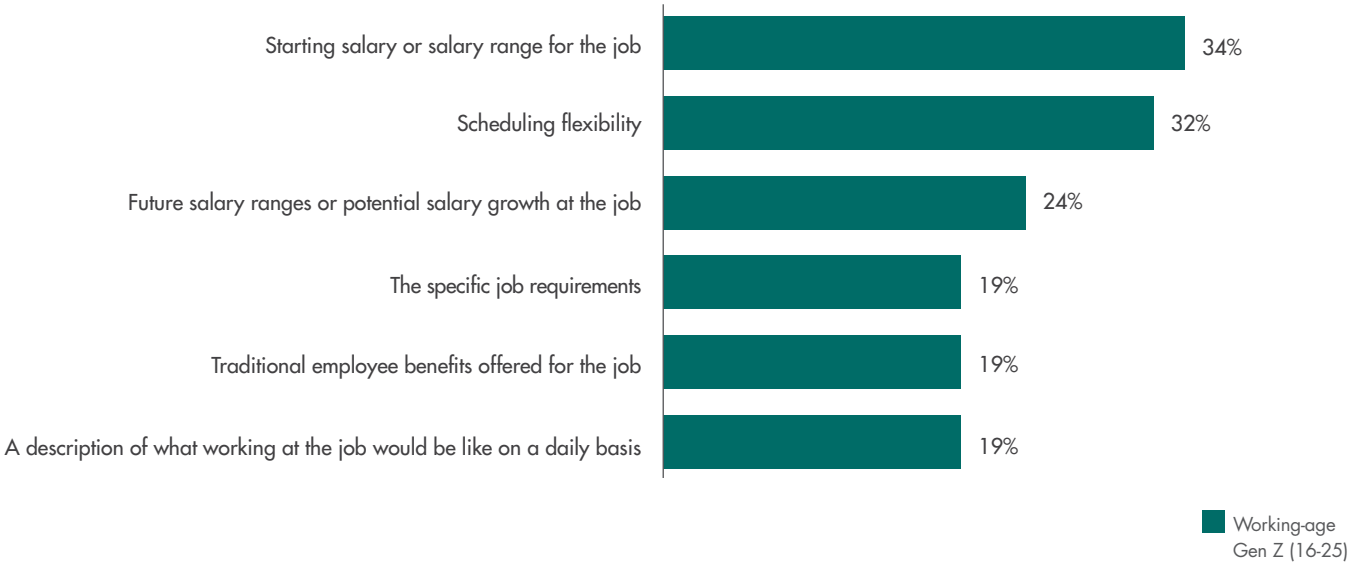


Figure 6: Factors of Importance for Potential Applicants in Generation Z

The figure shows the top 6 important factors considered by Gen Z (16-25 year olds) when applying for a job. The most important factor is the starting salary/salary range (34%) followed by scheduling flexibility (32%) and future salary ranges/potential salary growth (24%). Specific job requirements, employee benefits and a description of the day-to-day work life feature at the lower end of the scale (19% each).

It is recommended that the tourism sector focuses more on trying to pay higher salaries to employees from Gen Z because starting salaries was seen as the most important factor when applying for a job. Gen Z employees also put a premium on scheduling flexibility so employers must also factor this into their employment conditions if they wish to attract Gen Z employees.

The Untrained/Unskilled General Population continues to be a source of labour. Almost half of survey respondents indicated that they hired first time job seekers. This was the easiest area for employers to fill with only 29% of HR respondents indicating that it was difficult to fill pre-pandemic. In keeping with the labour shortage this increased to 33% post-pandemic.

In general, there seemed to be little urgency for certification although employers appreciated work experience. There is some disconnect between this this lack of interest in certification and the actions of regional governments which are focused on developing their tourism workforce through formal assessment and certification.

It should be noted that women who work in tourism in unskilled or semi-skilled jobs in the informal economy are more likely to be subject to poor working conditions and

inequality of opportunity and treatment, including in the form of gender pay gaps and violence and harassment at work.[27] For reasons of gender equality, it is therefore desirable to reduce the size of the informal economy and to increase the skills of the workforce.

Educational and Training Institutions are an important source of labour, but data collected suggests that there are few institution-to-institution mechanisms such as job fairs. Further, internships do not appear to be considered as a source of employment except in a few instances. This may be because, as indicated earlier, some employers were dissatisfied with the output of these institutions.

The HR survey indicates that only 37% of the HR respondents agreed that certified job seekers from technical and vocational schools were well prepared to work. This increased only slightly to 41% for degreed job seekers.

In support of this, responses to the Employers / HR Managers / Corporate Leaders Surveys indicate that only 37% of the HR respondents agreed that certified job seekers from technical and vocational schools were well prepared to work. This increased only slightly to 41% for degreed job seekers. Put another way, 6 out of 10 individuals with formal certification are not deemed to be well prepared for work and this represents a significant waste of resources. With the current labour shortage, governments and hotel and tourism associations have indicated that they intend to work more closely with educational and training institutions going forward and it is hoped that this will result in better alignment.

Recruitment may begin long before an actual job vacancy occurs. Collaboration between the Tourism Sector and academia will allow tourism stakeholders to share information and build excitement about the sector. This may influence the course of study of students in tertiary institutions and increase the number of skilled applicants seeking work in the sector. One example of this type of collaboration is at the UWI Mona Campus where the tourism society was formed to increase knowledge about tourism. The society conducts field trips, facilitates career talks by industry experts and generally increases exposure about tourism. The society is associated with a hotel chain which regularly sponsors developmental workshops. Importantly the association is not limited to those who major in tourism, so it does expose other students to the sector.

The broad scope of tourism and hospitality jobs means that it is possible to recruit individuals from other sectors to tourism. Unfortunately, based on the information from respondents the recruitment tends to work the other way with tourism/hospitality losing employees to other sectors.

Overseas labour can be broken down into two categories – highly skilled and low skilled labour. Highly skilled include hospitality managers and in particular managers in food and beverage. At the other end of the continuum are low skilled labour which will work for lower pay.

Expatriate labour appeared to be found primarily at the higher levels of the accommodation sector. This practice led to the perception of a 'glass ceiling' for locals and it was a source of irritation for many of those interviewed.

Expatriates were primarily hired in foreign owned hotels and some of those interviewed hinted that these hotels were creative in crafting job descriptions so that they could only be filled by expatriates. It is important to stress that this practice was a pain point even for the HR practitioners interviewed because it was felt that it limited local participation in tourism and discouraged young people from choosing a career in hospitality. Survey respondents

[27] ILO The Future of Work in the Tourism Sector: Sustainable and Safe Recovery and Decent Work in the Context of the COVID-19 Pandemic. Geneva 2022.

indicated however that they utilised expatriates where the skills were not available locally (see table below). They did not indicate that cost, productivity, and turnover were key factors in their decision making. This suggests that if the talent were available locally, these employers would hire locally.

It was felt by some respondents that jobs such as that of Executive Chef were reserved for expatriates not because locals were not available and qualified, but because hotel managers used foreign chefs as part of their marketing appeal and strategy. One respondent even commented that investors in the Caribbean no longer believe that they should accept a regional labour force and train

Please rate how much each of these factors contributed to the hiring of non-nationals/foreigners

	Did not contribute	Marginally contributed	Neutral	Contributed fairly significantly	Contributed significantly	N/A
Skills not available locally	3	2	4	5	11	10
More cost effective to recruit workers from abroad	13	1	3	1	0	15
High turnover amongst locals	8	3	3	2	1	15
Foreign workers are more productive than local	9	3	3	1	1	16
Smaller pool of qualified applicants	2	3	2	9	7	8
Better Return on Investment	7	3	2	4	1	16
Lack of skills/ certification and experience of local persons	3	1	3	7	7	13
Lower foreign staff turnover	7	2	4	2	0	16
Foreign workers have better work ethic/attitude than local workers	9	2	3	1	1	16
Positive Government Legislation/ Work Permit Policies	4	3	4	3	0	17
Other	1	0	2	1	0	12

Other responses include: *International company transfer, needed vaccinated workers to work in villas and CSME certification.*

Source: General Establishment Survey - Question 27c.

Table 11: Reasons for Hiring Expatriate Tourism Workers

them from the bottom up. Some respondents were more nuanced and indicated that they did not have a problem with the idea of expatriates because they help to develop local talent. A recruiter who had indicated the difficulty in finding the right talent for senior positions in the Region explained that the issue was really one of experience and expertise. To that point, almost 60% of the HR respondents surveyed agreed or strongly agreed that they found it difficult to recruit for management positions from the local market. Others noted that while this was true, expatriates were not held accountable for training and developing locals. They indicated that HR is not empowered to follow up on this matter and the government is not monitoring the senior positions held by expatriates. They suggested that there should be a timeframe on how many times a work permit can be renewed. Some also noted a difference in the way that black expatriates were treated compared to non-black expatriates and suggested that there was in effect a 'glass ceiling' for black expatriates. They also noted that local labour was not compensated as well as expatriates. The exception noted was for locals who have accumulated international experience. This suggests that exposure to international standards is highly valued and that creative ways may be found to provide it for locals.

Almost 60% of the HR respondents surveyed agreed or strongly agreed that they found it difficult to recruit for management positions from the local market.

Interestingly cruise ship labour is also stratified with workers from developed countries usually occupying higher levels onboard and more menial jobs being filled by people from the developing world.[28] While a cruise ship is different, because it is neutral territory, the acceptance of a stratified workforce suggests that perhaps the issue in the Region is less about who occupies what jobs and more about the implications for financial remuneration.

Some employers appear to be sensitive to this issue of expatriates vs. locals. Playa Resorts for example, like many other hotels, practices promotion from within and notes that most resort managers are from the country where the resort is located. This admission of a deliberate effort to ensure local mobility represents somewhat of a shift. Another model described by a Bahamian respondent was a structured training programme where a local person was developed by being trained onsite and then sent overseas to spend two months understudying a manager in a hotel overseas.

The key was for HR managers to identify the weaknesses of local talent and to find ways of addressing the weaknesses rather than simply looking to fill vacancies from overseas.

As is always the case this issue must be contextualised. In countries that experience a heavy outflow of residents, expatriates may be viewed differently as they bring well needed skills. In one of the project surveyed countries the expatriate population was temporary as many were in the country primarily to gain British status. In at least one country audited the government is tightening up on the number of times that a permit can be renewed and establishing shorter timelines. The cost of permits was also being increased. Where countries are highly dependent on expatriate labour it was relatively easy to obtain and renew work permits. This dependence led HR managers to conclude that if companies really wanted expatriate labour, then the cost would not really be a deterrent and another manager even wondered if the fee from permits was a 'cash cow' for her government.

[28] Terry, W. 2011. Geographic limits to global market flexibility: the human resources paradox of the cruise industry. Geoforum 42 (1) 660-670.



One regional hotel chain advertised regionally for applicants to its management development programme and then rotated them through positions and countries as part of the training process. In this instance, the trainee managers could be outside of their home country and technically expatriates but there was no indication that this was perceived negatively. At the same time the respondent noted a deliberate attempt to ensure that there was a fair representation of candidates selected so that it would not appear that any one country was favoured. The benefit was not just a perception of fairness but also better learning because of the diversity of the candidates selected for management training. As he explains *"It created a regional Caribbean leader who can manage anywhere in the Caribbean that you are stationed …. and has respect for diverse groups of people"*. The goal was to develop social learning and the soft skills that were so important. This approach of deliberately targeting regional representation provides a model that could be used to source and utilise talent across the Region. In Jamaica the Jamaica Centre of Tourism Innovation was also planning to develop a database of middle managers which could then be accessed by foreigners seeking them. This is another innovation that could be replicated in other countries.

The issue of low skilled migrants was not addressed frontally by respondents although anecdotal evidence indicates that this is a source of labour. These migrants usually fill jobs at lower rates than locals and may artificially suppress wages. From an employer's perspective however, they lower operating costs. It is an issue of concern to the extent that these migrants, particularly those who are undocumented, may be exploited financially and otherwise.

The Latent Workforce refers to those workers who are not currently looking to re-join the labour market but who might be enticed if they get the right offer. It is of particular importance in the current labour shortage in tourism. This group might include retirees or self-employed individuals and in the post-pandemic period, it might include people who were laid off from tourism and have chosen not to return. In this instance employers may offer permanent employment or extended contracts. As previously mentioned, casual employment may be offered to employees for banquets and events and in this case, there is usually an hourly wage. The influential Society for Human Resource Management notes that the labour shortage issue is being experienced around the world and recommends several mitigation strategies including:

- Incentivising employee referrals
- College newspapers
- Billboards
- Virtual job fairs
- Internal Ambassador Programmes
- Offering relocation bonuses and increasing wages.

The audit did not reveal that many of these strategies were being utilised even in the face of severe shortages. There are of course exceptions. In Grenada's Spice Island Resort for example, high school students are regularly brought into the hotel to learn about working in hospitality. The goal is to introduce them to the diversity of jobs in hospitality.

One issue that impacts recruitment is location since many tourism establishments are in resort areas where tourism workers cannot afford or find accommodation. One HR manager explained for example, that the problem severely impacted her ability to attract managers because her hotel was located an hour and a half from the capital. She tried to alleviate the shortage by targeting students from the area for hotel internships that may lead to permanent employment, but it remains a challenge.

Jamaica has initiated a partnership with the National Housing Trust to build housing specifically for tourism workers. The issue as described by the Jamaican Minister of Tourism is not just about the long distances for tourism workers but also the quality of the housing. He explains *"It is not fair to ask our tourism workers to be on the job at very posh hotels, villas and apartments and ensuring that guests have*

a great time by smiling for them, engaging in conversations about how great Jamaica is as a vacation destination, then at the end of the workday, have to be going home to inadequate housing where they have to struggle to make sure the rent is paid." The comments made in the Jamaican context are relevant to most tourist destinations and the effort to facilitate the purchase of homes nearer to work is an idea that other countries might wish to emulate. It is also an example of how different sections of the government can be utilised to support the sector.

Destinations therefore use diverse ways of signalling their opportunities to the marketplace and face different challenges. Despite the significant investment that governments put into training institutions, there are few structured ways of ensuring that graduates and potential employers interact. The system can be considered very inefficient as absent a strong motivation to enter tourism, many graduates opt to enter other professions. There is also a "chicken and egg" situation as the absence of willing local talent leads to a reliance on expatriate labour and this reinforces the perception that locals cannot get certain jobs.

The existence of a labour supply does not necessarily mean that individuals will choose to work in tourism. The next section discusses the motivation towards work in tourism based on responses from the Tourism Employees Survey, interviews with employers and current reports and studies of attitudes towards tourism work.

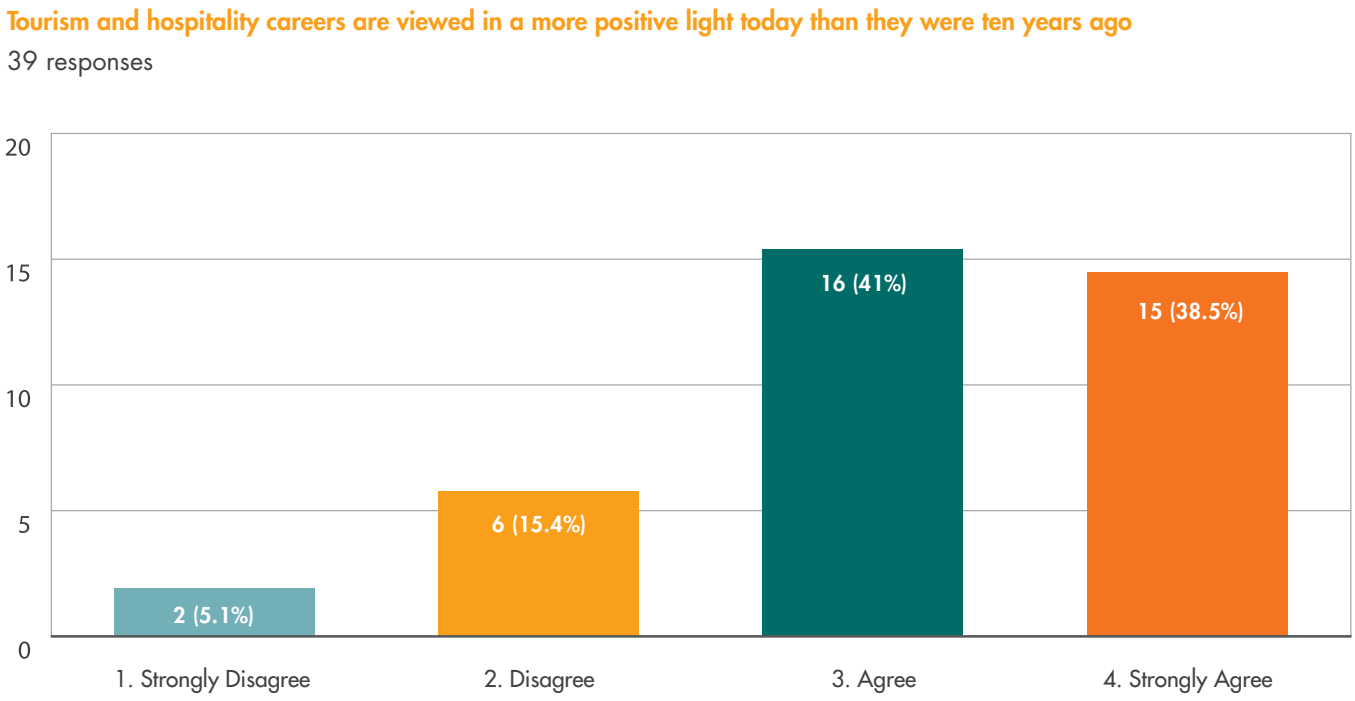
2.4.5 Motivation and Changing Views Towards Tourism Work

In response to the statement *"Working in the tourism and hospitality industry is seen as a respected career choice",* two thirds (66%) of the graduates agreed or strongly agreed. However, a similar percentage agreed or strongly agreed with the statement "People in my country believe that tourism and hospitality graduates will end up in low status jobs". It should also be noted that more than 54% agreed or strongly agreed that promotion opportunities are limited for local people working in tourism and hospitality and perhaps that helped to explain some reluctance to participate in the industry.

Respondents to the graduate survey indicated that tourism was important to their country and economy and more than 96% believed that jobs in hospitality and tourism are meaningful.

68% agreed or strongly agreed that they would want to work in tourism and hospitality after graduation, a percentage that is slightly lower than the approximately 75% who agreed or strongly agreed that young persons that they know feel proud to work in tourism and hospitality. There is good news however as almost 80% of training institutions agreed or strongly agreed that tourism and hospitality careers are viewed in a more positive light today than they were ten years ago.





Source: Educational and Training Institutions Survey - Question 11.

Figure 7: Perceptions of Tourism and Hospitality Careers

The generational shift in attitudes towards work may also factor into the way that people think about work in general and hospitality work in particular. One respondent reported that when his company attempted to recall laid off workers as the pandemic receded, many of those called indicated that they had started their own businesses and were not quite ready to return. Another trainer who worked extensively with young people regionally noted that there had been an increased interest in entrepreneurship and that this had grown during the pandemic. He noted for example that it was easier for young people to access the latest equipment and resources to create content and that they were using this to share their own explorations around the country, and in some cases to become local tour guides or to start their own travel blogs. As a result, it made the elements of the traditional hotel service sometimes look pale in comparison to the excitement of creating those experiences. His suggestion was that hotel service work can be made more attractive by honouring person's contribution and highlighting the importance of the technical details of the job. Bartending for example was a world class skill for people at the top of their game and this could be highlighted to job seekers. As he put it, help people to realise that every activity can be thought of as an experience that must be mastered by the job holder.

People want to be able to engage in entrepreneurial activities while working so that jobs would have to be designed to be more flexible.

This trainer described how he tried to motivate employees to perform excellently giving an example of using YouTube videos of international car washers detailing a car to capture the imagination of car washers for a car rental agency. This approach of using content to show people that the job was a lot more than it looked on the outside was in his opinion, critical for the younger generation.

"People want to be entrepreneurs… but people also want to be part of something that they can talk about and feel fulfilled and have a sense of honour and purpose in what they do …. they want to be able to communicate to the world that this is what I am a part of, something great and excellent. So you have to help them build that content, so that they can tell that story about themselves". Along those lines it was also noted that many people want to be able to engage in entrepreneurial activities while working so that jobs would have to be designed to be more flexible.

Another respondent noted that the pandemic had shifted attitudes towards work with particular emphasis being placed on work-life balance. This desire represents a particular challenge for hospitality because it requires individuals to work while others were relaxing. HR managers therefore have to be creative in finding ways to meet the needs of the workforce while satisfying the needs of customers.

A 2019 UNWTO study[29] determined that life/work balance was the most valued aspect for workers and students, public sector, private sector and educational institutions and this is an area that must therefore be attended to. Another issue as highlighted in this report is that jobs are more than just a way of earning a living and employers must highlight the value of their jobs beyond a pay cheque. One respondent described this succinctly as 'vision over position'. In general, tourism has focused primarily on the latter and not a lot on the former. One respondent, in noting that the workforce is not putting up with what they used to put up with before, notes that HR needs to be the 'culture driver' so that the workplace is transformed to a place that people want to come to. The ability to recruit the brightest and the best also begins with the perception of tourism's role in the country. If job seekers do not see their values reflected by firms in that sector, they may not be motivated to seek employment with them. In that regard a 2014 study of the Region by Herbert and Christian[30] which found that respondents believed that tourism was not sufficiently aligned towards community involvement, and is therefore concerning.

Concerns about employment and environmental practices followed by tourism establishments may also act as a deterrent to visitors. A recent GALLUP[31] survey also ranked the Latin America and Caribbean Region as being last with a 30% satisfaction score in response to the question "In (country) are you satisfied or dissatisfied with efforts to preserve the environment".

Failure to respond to employee concerns may create serious public relations problems for tourism stakeholders. As an example, in one country in the study a videorecorded rant by a disgruntled hotel worker went viral creating a public relations nightmare for the hotel in question. The hotel worker subsequently wrote out his grievances and demonstrated extending the public relations nightmare even further. In a world in which every employee has access to millions via social media, it is important for tourism establishments to be proactive in their HR practices and to train supervisors and middle managers in conflict resolution in order to protect their brand.

2.4.5.1 Youth Participation

Young people between the 16-24 age cohort comprise an average of 25% of the labour force in the English-speaking Caribbean.[32] Even before the COVID-19 pandemic, the ILO noted that formalisation of employment opportunities had not progressed as predicted in emerging economies and developing countries.[33] Crises like the pandemic lead to even greater job loss for the youth because they are overrepresented in the hard-hit sectors and in the informal economy. Those who start work in the informal economy

[29] UNWTO/CEGOS. 2019. The Future of Work and Skills Development in Tourism.
[30] Herbert, B., Christian, C. 2014. Regional Tourism at the Cross-Roads: Perspectives of Caribbean Tourism Organization's Stakeholders. Journal of Sustainable Development, 7, 1, 17-32.
[31] GALLUP, 2022. State of the Global Workplace 2022 Report: The Voice of the World's Employees.
[32] https://www.ilo.org/wcmsp5/groups/public/--americas/--ro-lima/--sro-port_of_spain/documents/publication/wcms_224314.pdf.
[33] ILO, 2021. Is the Future Ready for Youth: Youth Employment Policies for Evolving Labour Markets.

are noted in the ILO report as being more likely to remain in it or return to it in later life. Further, 40% of youth in developing countries would migrate to another country if given the chance.

Young women were generally more vulnerable than young men with the 2021 ILO study indicating that in Latin America and the Caribbean, around 80% of female workers were in informal employment. Moreover, only 1 in 2 paid female workers had a contract that was longer than 12 months. While the number of females exceeded the number of males with tertiary education, gender gaps in the youth labour force participation were the highest leading the ILO to conclude that there is a disconnect between female education and the potential for productive transformation of economies because females are unable to find work.

This data suggests that Caribbean youth and in particular female youth, are extremely vulnerable to economic shocks. Individual countries that have invested in their education and training are also at high risk of losing this investment. At the same time, this demographic represents an important economic opportunity for the Region especially in the diverse and dynamic field of tourism. As reported in this audit, young people see the value of tourism in general but not specifically for them. They also have strong entrepreneurial interests in tourism. The challenge for employers will be to convince talented youth that they have a bright future in tourism. The challenge will be for governments to encourage young people to shift from the informal to the formal economy where they will enjoy better social protection and support.

2.4.6 Recommendations

1. Tourism/hospitality establishments should establish a structured pipeline between themselves and training/educational institutions to facilitate internships and job placement.

2. Tourism/hospitality establishments should seek to have an advisory board/council that includes tourism education/training representatives.

3. Governments should have a well-defined policy that relates to hiring and developing local talent and this should be shared with every potential investor. Government should also monitor the work permits they issue more closely. This might include ensuring that successors are indeed being trained to replace the person being hired.

Expatriate labour appeared to be found primarily at the higher levels of the accommodation sector. This practice led to the perception of a 'glass ceiling' for locals and it was a source of irritation for many of those interviewed.

4. Establishments need to utilise a wider range of recruitment strategies including job fairs, use of career websites and targeting the latent workforce. Best practices should be identified and adapted and/or adopted.

5. Establishments should highlight their corporate social activities, their values and brand as a way of distinguishing themselves and attracting tourism labour especially young talent.

None of the respondents indicated that there was a structured process for transferring knowledge and skills to ensure that there was a trained local.

6. Providing affordable housing in resort areas should be prioritised and/or promising young people from the area should be targeted for tourism.

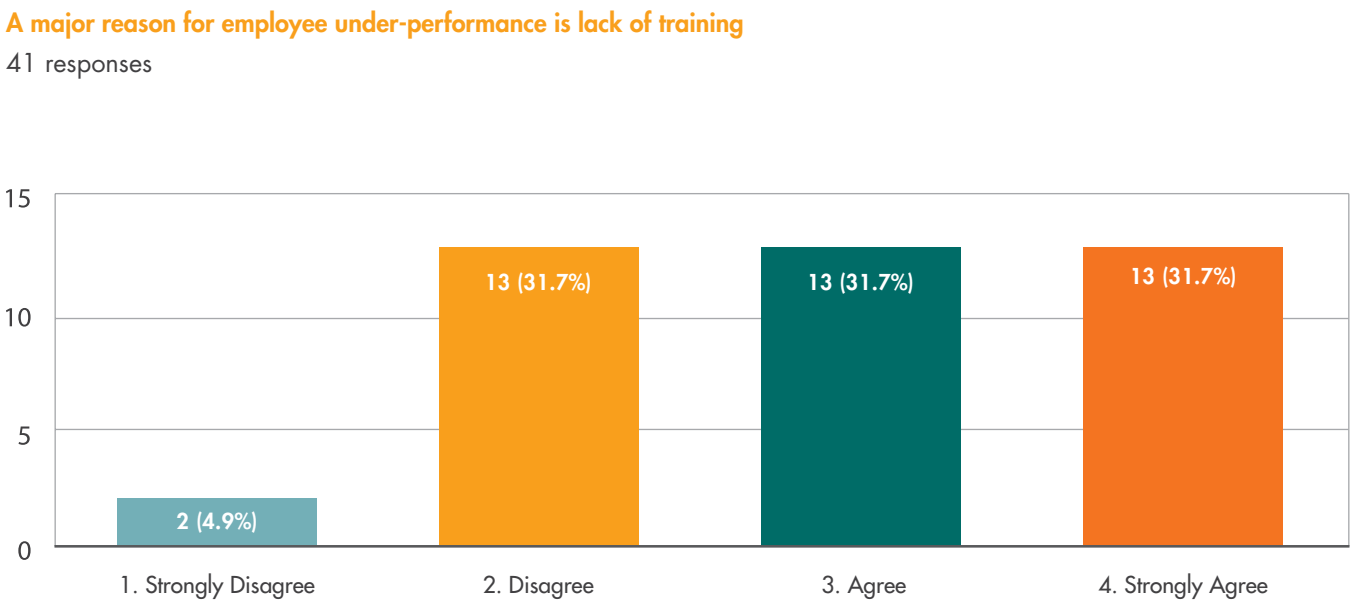
2.4.7 Staff Training and Development

Training and development have a direct bearing on the quality of service and the productivity. A well-trained (prepared to perform) employee adds value and may differentiate one establishment from another. Conversely, a poorly trained employee may alienate customers and cost money through waste and unproductivity.

Almost two thirds of the HR managers surveyed (63%) agreed or strongly agreed that a major reason for employee under performance is lack of training.

Educational and Training Institutions provide formal certification in tourism that may be supplemented by internal customised training. Larger employers have indicated a willingness to train employees to their standards. Below are some examples of this in operation.

- **The Sandals chain** launched its own corporate university (SCU) in 2012. Through partnerships with internationally recognised universities such as Canada-based Ryerson University, the SCU's programmes offer degrees. Similar partnerships with the Western Hospitality Institute in Jamaica offer SCU participants the chance to obtain Associate and Bachelors degrees. In 2021 The Sandals chain also announced the construction of The Gordon "Butch" Stewart International School of Hospitality and Tourism at the Mona Campus of the University of the West Indies in conjunction with Florida International University's (FIU) Chaplin School of Hospitality and Tourism Management. Sandals also has a structured internal management training programme which exposes participants to different departments so that they can find a fit.



Source: Employers / HR Managers /Corporate Leaders Survey - Question 22.

Figure 8: Employee Performance (Lack of Training)

- **The Hilton Hotel Chain** offers what it refers to as an ecosystem of programmes that support employees' development throughout their career.

- **The Ritz-Carlton Chain** offers an impressive range of training programmes for line staff and leaders.

- **The Bahamas based Atlantis** resort which employs more than 6,000 employees has its own corporate university which like other corporate universities depends on external corporate providers. This is coupled with a 'professional growth platform' that offers structured and self-paced learning. During the pandemic employees were encouraged to use their downtime to participate in a range of activities for academic exposure and self-improvement.

All of these training programmes are brand specific and represent a significant commitment to the continuous development of human capital. It is to be expected that the firms that have made this investment in developing their human capital will try to retain it through attractive opportunities for further development and payment and incentive schemes. Indeed, a stated goal of the Sandals programme is not only to train in the required skills, but to aid in succession planning and retention. Notably, these tourism establishments utilised a holistic model of training and career pathing so that there was structure to the type of training that job occupants would receive.

Some of the more high-end hotels in the survey were focused not only on the technical skills required for the job, but on the ability of the workforce to think creatively and to respond to the needs of others.

One training manager for example emphasised the importance of action learning and reflection. In the hotel chain that he represented trainee managers were exposed to specific 'challenges' which were related to the chain's strategic focus. This focus on practical knowledge was in contrast to the training offered by many training establishments which stakeholders complained were out of touch with what business really needed. As an example, an important skill was resilience, and the hotel's training programme was designed with that in mind by deliberately planning in a lot of uncertainty by moving management trainees around. The stated goal was to create a certain level of comfort with uncertainty.

There is evidence that some establishments are utilising online training to support their efforts. This provides them with access to a wide range of courses and importantly on a flexible time schedule that is suitable for the sector or as one respondent put it **'learning on demand'**. In most instances these courses were available without cost to every employee. Some establishments – notably the larger hospitality organisations offered training that was not just job specific but was also for personal development.

2.4.8 Online Training

There is also online training available through other agencies,including the following:

- In 2021, the CTO launched an online training and development learning centre in conjunction with a Canadian based e-learning courseware development company. The new portal has been described as an open online educational, training and development learning centre designed to provide affordable access to training opportunities for everyone who works, or aspires to work, in the Caribbean tourism and hospitality sector. The courses offered through the Caribbean Tourism Institute (CTI)[34] include a range of disciplines and at different levels. This offers a significant opportunity for individuals or sponsoring organisations to receive on demand training at an affordable cost anywhere in the Region.

[34] Caribbean Tourism Institute - https://caribbeantourisminstitute.com.

- Some countries such as Jamaica also offer free online training through government agencies and some utilised the pandemic downtime as an opportunity to offer such training. Currently the Jamaica Centre of Tourism Innovation is partnering with the Ministry of Tourism's Tourism Enhancement Fund to facilitate certification from internationally benchmarked institutions.

Take up of some of the recently launched online programmes is low. It is not clear why this is the case, but it is important for providers to identify the reasons before they undertake the expense of more programmes. For example, online training is predicated on some level of computer and general literacy and some entry level employees may not have one or both of these. Indeed, the CAPRI report on tourism noted that access to reliable internet and devices as well as limited computer literacy was a deterrent for some levels of staff.[35]

The issue of basic literacy skills has also been referred to by the CDB as a factor that limited participation of locals and encouraged the use of foreigners who had the necessary skills. In interviews the problem of low levels of literacy was referred to even in Barbados which is widely thought of as a country with an exceedingly high level of literacy. As the world becomes increasingly digitalised this is an issue that will hamper the development of tourism.

Another concern is that Educational and Training Institutions provide some skills and knowledge, but respondents noted that this training was often irrelevant or outdated and expressed a desire for more practical and less theoretical training. One respondent expressed the view that training was transitioning to a situation in which training is much more content driven and may even be considered to be micro learning. He noted that it would not be a situation in which everyone would be fully prepared for everything at all points in time, but the information should be accessible. He stressed that the information should be able to give them answers to the questions that they have. An Anguillan respondent noted that there was an increasing demand for shorter courses rather than for associate degrees. These observations suggest that the structured training programmes offered by educational institutions may not be flexible enough for a new generation of learners and industry leaders. Another respondent looked to the future in her concern that training should prepare tourism workers for the future of the industry for growth, resilience and competitiveness. It was also noted that training needed to be more broadly focused by looking at destination management to incorporate communities rather than just focusing on working in tourism establishments.

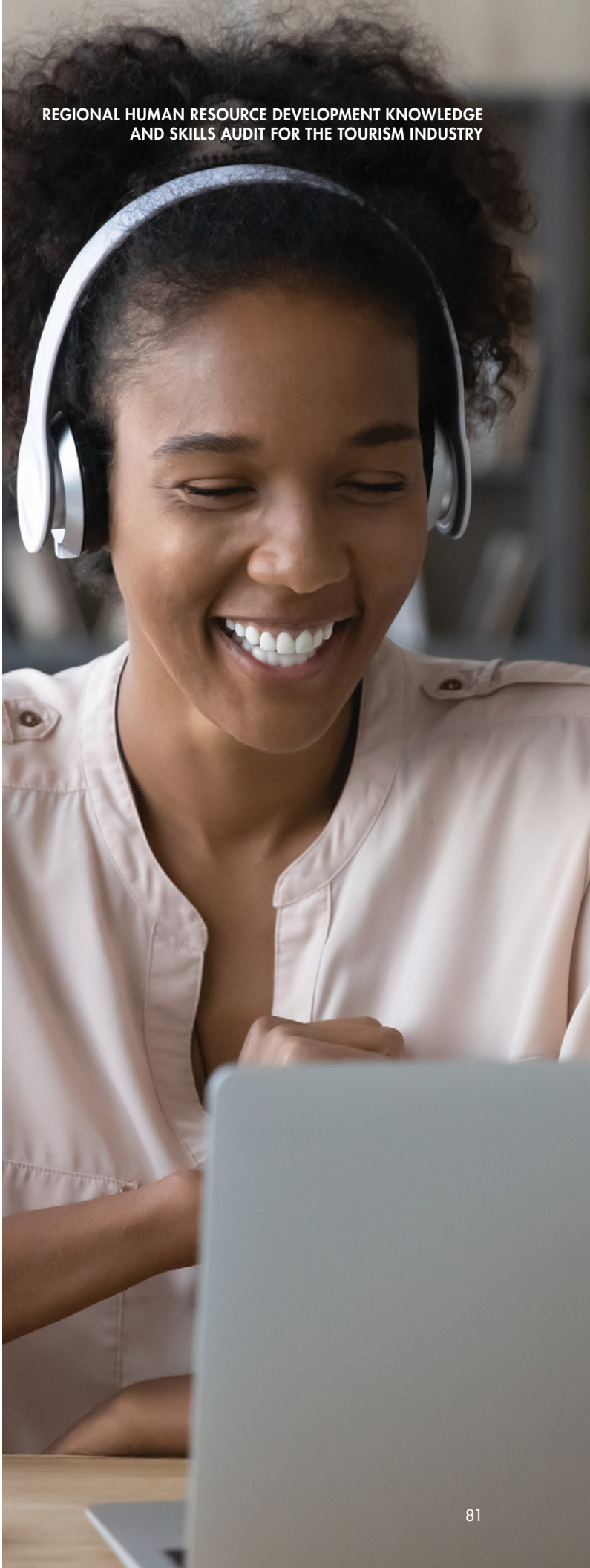
A previous survey on training needs conducted by Quality Consultants indicated HR management, leadership, communication and computer literacy to be the primary management needs. Basic computer literacy is no longer an issue but the issue of supervisory skills which may encapsulate management/leadership and communication has emerged as an issue. A recent Organisation of American States (OAS) webinar on skills missing in Caribbean hospitality indicated that the supervisory level proved to be one of the most difficult to fill. The President of the Jamaica Hotel and Tourism Association (JHTA) reiterated this point noting that there was a 'crisis within the middle management sector in Jamaica'.[36] A company was launched in 2021 to fill this gap in Jamaica and a memorandum was signed with the JHTA.

The structured training programmes offered by educational institutions may not be flexible enough for a new generation of learners and industry leaders.

[35] CAPRI, Sun, Sand and Sustainability: A way forward for Caribbean tourism. June 2021.
[36] Silvera, J 2021. Key Advantage to Fix Middle-Management Crisis in Tourism Sector. July 26.

Language training, which was highlighted in the Quality Consultants survey, continues to be an issue in the Region although this has been flagged as an area of concern for many years. Even in Spanish chains such as Riu, few staff spoke that language. Countries in the Region have tended to focus on attracting visitors who speak the same language. There is however a regional push to attract visitors from as far away as Dubai, China and Eastern Europe and the need for greater language training has become more critical. In Haiti for example, it was listed as a deficiency as many tourism employees spoke only French although there was demand for Spanish, English and to a lesser extent, Mandarin. Some larger entities such as hotels offer this training to their staff, but this does not seem to be extended to the other sectors. The head of one taxi drivers' union explained that this was a need and explained that they sometimes depended on tapes to explain to passengers what they were seeing. He noted that this was a partial but somewhat inadequate solution. The owner of a Jamaican tour and transportation company admitted that the need for language skills was severe enough that he was planning to bring in expatriates to support his business. Even where there are foreign language speakers, the potential for poaching exists. Sources in Belize explained for example, that their bilingual tour guides readily found better paying work in neighbouring Guatemala.

The 1999 Quality Consultants Survey had indicated customer relations as an important training need for individuals in the professional, skilled/semi-skilled and unskilled group. Many respondents in the current study referred to this need as soft skills and unfortunately it is still a concern. Gaps in Soft Skills is an important issue as the ability to create a warm, welcoming atmosphere is generally seen as a source of competitive advantage for individual establishments but also for the destination. This intangible is hard to define and harder to train as this perspective from one of our respondents indicated when she said that ***"Hospitality is something that although you might go to school and you might have a college degree, it is not something***



that you can literally teach. You can teach about policies and processes and all these things but hospitality – you either have it or you don't. So, you'll find that even though some persons have the highest degree in hospitality they will not be successful because that is not just their field". This concept that tourism and hospitality was something that could not be readily taught was held by other respondents and was explained succinctly by one respondent as "Experience is what matters in the tourism industry". This therefore meant that even well-trained individuals could be found wanting because they lacked experience or the appropriate hospitality attitude.

The examples of training mentioned are primarily in the accommodation sector and usually in large hotels. There were of course exceptions but in general training outside of accommodation appeared to be limited. This is not a new finding and indeed a 2018 CARIFORUM report identified the need for training to go beyond the accommodation sector. The report noted in particular, the need to incorporate spas, boutiques and other non-direct tourism services such as banks and customs.[37] There is little evidence that this call has been heeded. Moreover, as some webinar participants noted, it was challenging for small businesses to do training because it might necessitate shutting down their business to accommodate the training. While there are more training options than before including online options, there is limited take up in the majority of the sectors. Courses like BahamaHost and Team Jamaica provide some exposure to basic customer service and knowledge about the destination but not job specific content. Governments also offer free training, but smaller entities may find it difficult to spare staff to participate in this training. This poses a significant threat to overall quality since many of the entities are small and are therefore unable to pay for the talent and experience and they may lack the capacity to do internal training that is necessary.

The uneven nature of training in the Tourism Sector is a matter of concern. Visitors experience destinations holistically and therefore pockets of excellence surrounded by pockets of mediocrity or even average service are unacceptable.

Some webinar participants recommended giving employees the opportunity to experience hospitality so they can relate what they do to what they receive at another establishment and ask them to give some feedback on the experience. This is an important recommendation in the context of the Caribbean where unlike their counterparts in developed countries, many Caribbean tourism workers cannot afford to consume tourism products in their own country.

Some organisations use the qualifications of their staff in their promotional material. The Sandals chain for example promotes its butlers as being trained by the Guild of Professional English Butlers. This branding represents both an opportunity and a challenge for Caribbean training institutions. The opportunity is to provide specific training that provides the skill at the level that employers require. The challenge is that few Caribbean institutions will have attained the reputation of international institutions and may therefore struggle to convince employers of the quality of their output.

Many establishments also emphasised hiring the attitude and training the skill.

Many employers viewed the 'attitude' as being friendly, hospitable and so on, but one training manager was more specific in noting that it was about a positive feeling towards the industry itself. In both cases employers viewed these as being traits that were innate to the person and were a prerequisite to success. Hiring for attitude was a

[37] CARICOM/Caribbean Export. 2018. Tourism Services Final Project Report.

viable strategy when there was a mechanism for training the skill. Larger establishments, and in particular hotels were able to supplement the desired attitude with structured training programmes but not all establishments had these programmes. In the smaller establishments there was even less emphasis on hiring trained workers. This was likely a matter of economics since they generally would find it difficult to pay for trained workers. Indeed, one respondent commented that the whole concept of hiring for attitude rather than skills is an excuse for hiring low wage people.

Certification and credentials are prerequisite for efficient worker mobility locally and internationally, leaving uncertified workers at a distinct disadvantage in the global labour market. There are planned collaborative efforts that may facilitate certification. For example, in Jamaica a leading rum distiller will be partnering with the national training agency (HEART) and NCTVET to provide certification for bartenders. This type of innovation is an example of how the public and private sector can work together to solve a human resource problem.

Regional tourism employers' low regard for tourism related certification and credentials as prerequisite for employment, undermines the perceived utility value of study and certification to potential learners, as well as the regional imperative to lift the education and trainability quality and investment attractiveness of the Region's Workforce.

2.4.9 Recommendations

1. Tourism establishments should encourage individuals who are trained in specific skills and who have the capacity to respond to challenges and learn new skills quickly in order to respond to problems, to be ready to adapt as necessary. Tourism establishments should prioritise hiring and/or developing individuals who are professionally trained in their roles as well as in problem solving. The relationship between tourism establishments and training institutions needs to be strengthened so that Industry needs can be effectively communicated to Training Institutions and responded to.

2. Some large hotels have adopted new philosophies to training and development that should be shared with other sectors via mechanisms such as the CTO HR conference.

3. Training must be expanded beyond the accommodation sector and online opportunities should be fully explored.

4. Governments should explore opportunities for cooperation with private sector agencies that can train the skills required for tourism.

5. Foreign language training must be prioritised, popularised and made available in the Region. There are opportunities for access to online training sources as well as coordinating with language departments of high schools and tertiary institutions to support this thrust.

6. Establishments should consider staff exchanges between small businesses to facilitate the training of staff.

7. As a way of exposing them to hospitality, consider giving employees the opportunity to experience the services that they and other tourism establishments sell.

8. Management and supervisory training must be prioritised. A recent GALLUP survey indicated that a manager's effect on a workplace is so significant that GALLUP can predict 70% of the variance in a team's engagement just by getting to know the boss.

2.5 TOURISM EMPLOYEES

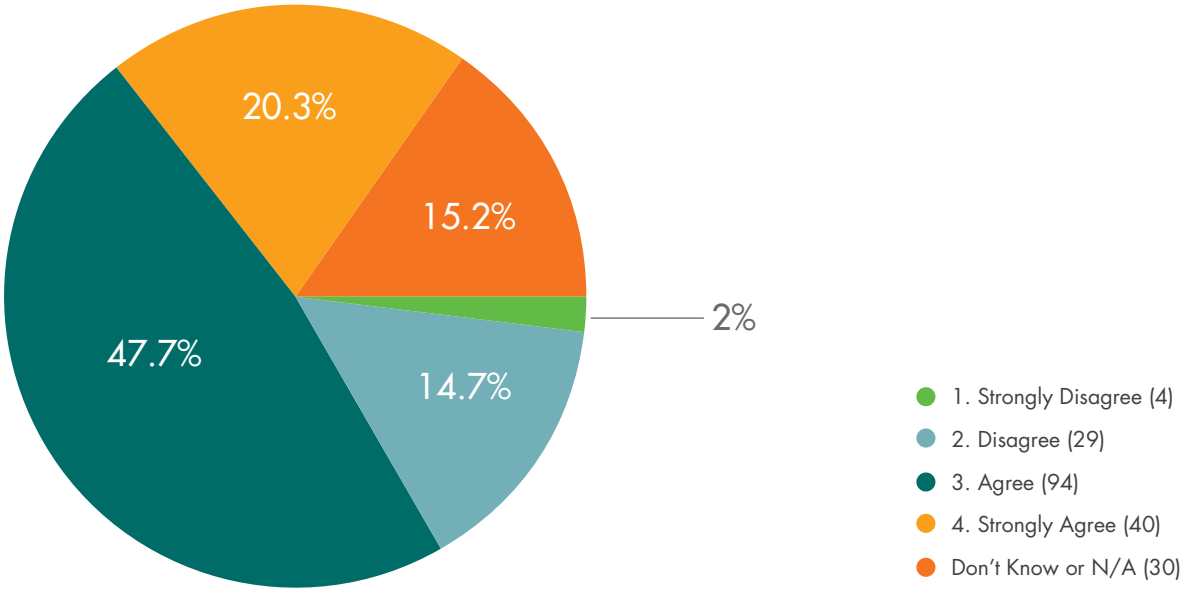
Pay and benefits are likely to impact attraction and retention to tourism work. These are discussed below utilising the findings of student survey and data from reports about tourism work in the Region. Benefits include opportunities for promotion and intangible benefits such as contributions to the country as a whole.

2.5.1 Career Pathing

Several entities including CTO, some governments and some tourism and hotel associations have created publications that promote the various careers in tourism. This information was not always utilised especially since many stakeholders complained that potential job holders still had a very limited perception of the jobs available in tourism/hospitality.

Potential entrants to hospitality and tourism were not optimistic about their future careers in tourism. More than half of the students surveyed (55%) agreed or strongly agreed that people in their country felt that tourism and hospitality graduates will end up in low status jobs. Moreover, more than two thirds (68%) disagreed or strongly disagreed that people have long careers in hospitality and tourism. Tellingly, almost two thirds (64%) agreed or strongly agreed that tourism work is seasonal work. More than half of the sample (54%) agreed or strongly agreed that promotion opportunities are limited for local people working in the sector. There is therefore significant work needed to shift the perceptions that jobs are low status, dead end with limited scope for upward mobility.

People have long careers in the tourism and hospitality industry
197 responses

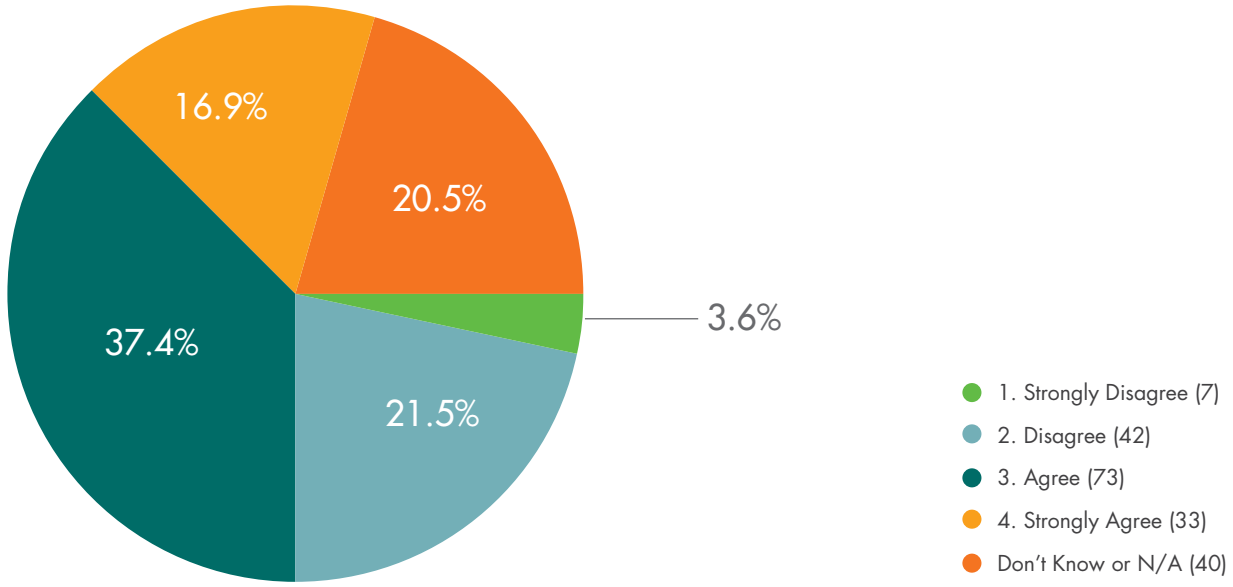


Source: School and College Graduating Class - Question 15.

Figure 9: Length of Careers in the Tourism Industry

Promotion opportunities are limited for local people working within the tourism and hospitality industry

195 responses



Source: School and College Graduating Class - Question 26.

Figure 10: Promotion Opportunities for Local People

Structured HR activity of career pathing was practiced primarily by the accommodation sub-sector and by the large hotels in that sub-sector. Some hotels had management development programmes that exposed potential managers to the different areas of the hotel and gave them an opportunity to identify where they wanted to work. In general, however there was little indication of career paths within establishments. It was also noted that there was limited succession planning in many establishments and training tended to be for the current jobs and not for probable future jobs. This meant that in some situations locals were not trained for senior positions and this in turn made it necessary for these positions to be filled from outside of the country.

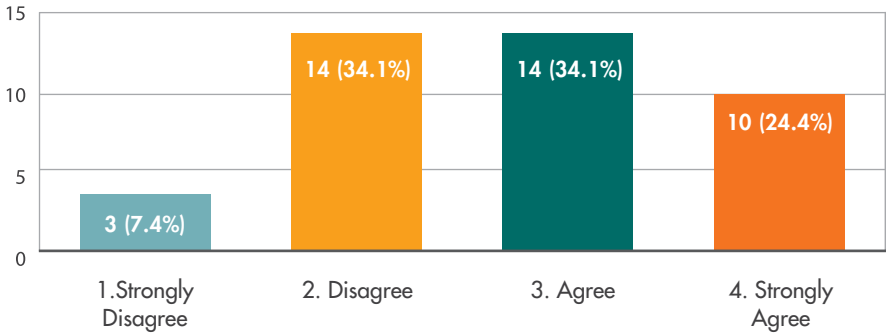
It was noted that there was limited succession planning in many establishments.

2.5.2 Pay Within Establishments

Pay in tourism is viewed by some employees as low. One interview respondent noted for example that the importance of the industry is not commensurate with how much pay is offered. The high rates paid by visitors for accommodation, which is a major employer, compared to the low remuneration of employees also makes the difference even more stark. The issue of low pay in the sector is not just an issue with employees but even with guests and outside observers.

Compensation packages in our sector make tourism work less attractive to potential employees

41 responses

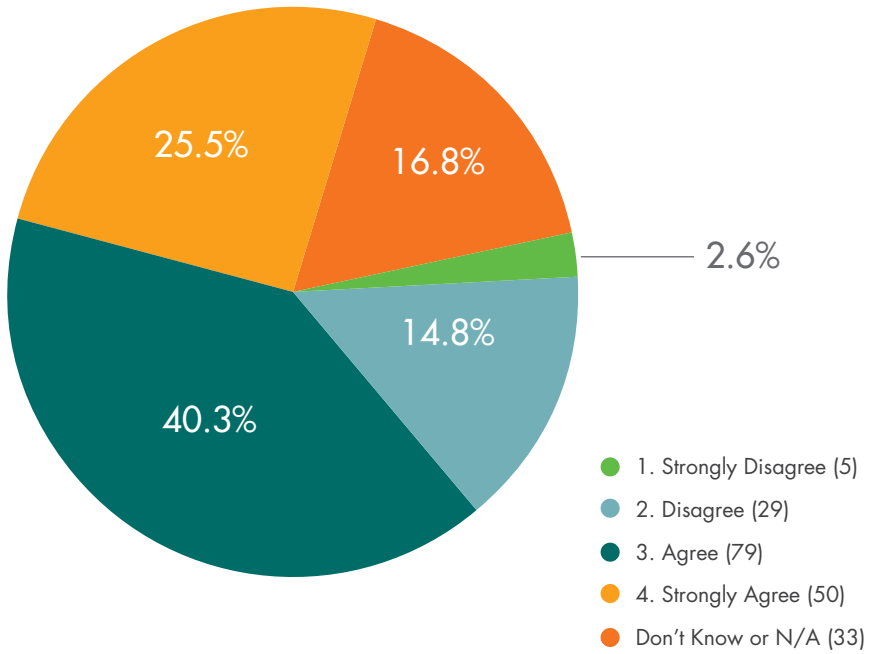


Source: Employers / HR Managers /Corporate Leaders Survey - Question 7.

Figure 11: Attractiveness of Compensation Packages

I think the pay is low for most jobs in tourism and hospitality when compared to other industries in my country

196 responses



Source: School and College Graduating Class - Question 18.

Figure 12: Perceptions of Pay in Tourism and Hospitality (1)

For example, a 2016 article compared the annual salary of a Jamaican waiter with 10 years of experience earning U$333 a month in a hotel with an average room rate of U$700 a night. The same article commenting on the TCI "But how can locals survive with food prices this high, one-bedroom apartments renting at around U$1,200 a month, and a minimum wage of $6.25? A local souvenir shop owner in Providenciales put it to us straight. We can't."[38]

Additionally, there was a practice in at least one country of utilising contract labour which meant that employees did not receive benefits or assurance of continued employment. These short-term contracts may make it difficult for job holders to think of tourism work as a career.

41% of HR managers either disagreed or strongly disagreed that compensation packages in the sector made tourism work less attractive to potential employees.

By contrast 66% of students agreed or strongly agreed with the statement that pay is low in most hospitality and tourism jobs when compared to other industries in their country.

Moreover, more than 70% of respondents thought that the pay was low relative to the expectations of that work.

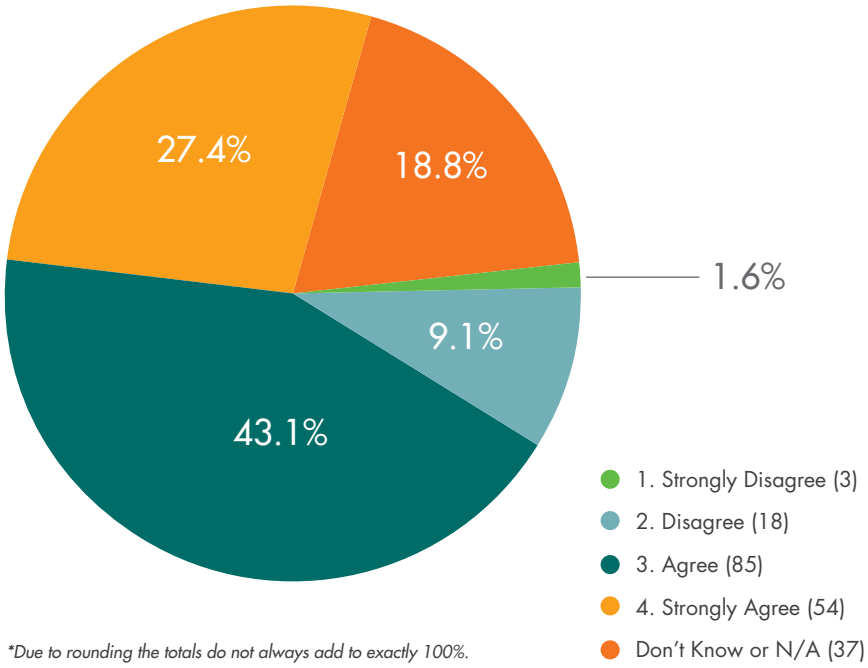
[38] Beaven, K. 2016. The Staggering Difference between Average Hotel Rates and Minimum Wage in the World's Most Popular Destinations.

The results indicate that there is a disconnect between the perceptions of tourism/hospitality HR managers and their potential workforce that needs to be addressed. Two types of potential inequity were revealed in the survey – inequity as compared to other sectors, and inequity as compared to the requirements of the job. These need to be addressed separately and fulsomely by employers. Employers may also need to highlight some of the intangible benefits such as on the job training as well as the opportunity to earn tips where this is a possibility.

While tourism consists of eight sub-sectors, the two most dominant sub-sectors are food and beverage and accommodation, and these two sub-sectors are often used as the benchmark for all tourism work. Unfortunately, the reputation of work in these areas is that it is generally low paid. Indeed, pay in tourism is internationally regarded as low, but, in many instances, it may be compensated for by tips and in some cases independent tour operators may even forego a salary in exchange for tips presumably because the tips are so lucrative. In the Caribbean, the accommodation and food and beverage sub-sectors have generally adopted the practice of charging an automatic gratuity which is then distributed to employees based on a pre-determined formula. Cruise ships also strongly encourage a per person gratuity rate which is distributed to staff. Additional tips are usually permitted except in the case of some all-inclusive hotels where the no tipping rule is an important marketing strategy. There is evidence however that this no tipping rule is being relaxed and may eventually become a practice of the past.

Given the hours and work laad, I think the pay is low in the tourism and hospitality industry

197 responses



**Due to rounding the totals do not always add to exactly 100%.*

Source: School and College Graduating Class - Question 21.

Figure 13: Perceptions of Pay in Hospitality and Tourism (2)

2.5.2.1 Pay and the Pandemic

The COVID-19 pandemic was an outlier, but it brought into stark relief the precarious nature of employment as well as pay arrangements in the Tourism Sector. During the pandemic most tourism establishments were forced to temporarily close or to significantly reduce their operations. In many instances Caribbean governments provided some funding through national insurance schemes paid out either on a monthly basis or as a one-time payment as indicated by nearly two thirds of respondents.[39]

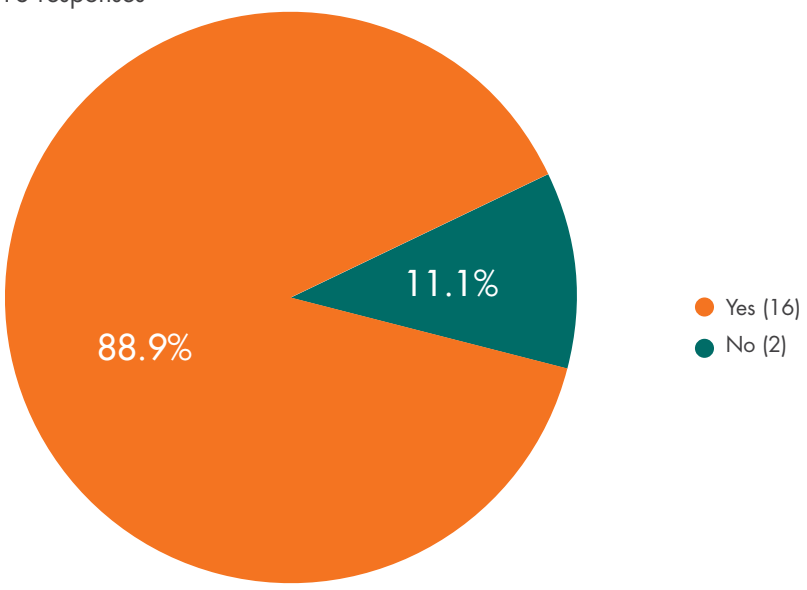
[39] Caribbean Hotel & Tourism Association. 2021. Caribbean Tourism COVID-19 Business Impact and Recovery Survey Results. March 2021.

While all commerce was affected by the pandemic, tourism was arguably the most impacted because of the closure of borders and subsequent shutdowns. The experience of no pay check or a severely reduced one, may at least in the short run, impact the way that people think about the industry. Some establishments did try to cushion the blow in creative ways with one hotel manager for example fund raising to assist employees who had reduced salaries. Another hotel offered vegetable garden packages to laid off workers. A Turks and Caicos hospitality group also assisted laid off workers by promoting their entrepreneurial efforts in the company newsletter. In general, management also took salary cuts. Some countries and establishments also utilised the downtime to upskill employees by providing free training. Jamaica for example offered free online training through the Centre for Hospitality and Tourism Innovation.

The issue of payment is emerging as a concern as the industry reopens fully. Many countries are reporting a crisis as they are unable to find the staff that they need. In Jamaica the labour shortage can be described as acute and the head of the JHTA explained the shortage as occurring because workers had started their own businesses, migrated or moved to better paying jobs in the business processing sector. Thus far the Jamaican hotel sector has focused primarily on increasing supply and has not publicly addressed the issue of wages even though the factors given for departure from the sector can be seen as primarily economic. With a scarcity of labour, wages would normally be expected to rise but based on interviews and focus groups it does not appear to be a major consideration for employers. For example, when the issue of wages was raised specifically with a former head of a hotel and tourism association the issue of high energy costs was raised as a factor that prevented raising wages. When asked about their response to the new customer expectations coming out of the COVID-19 pandemic only 8% indicated that they would pay for new skills acquired. These views may be shifting however because when countries were asked if there was a need to rethink compensation benefits, the majority said that there was.

Is there a need to rethink compensation benefits in the tourism sector in your country?

18 responses



Source: Impact of COVID-19 on Labour Availability Survey - Question 12.

Figure 14: Perceptions of Compensation Benefits in Tourism Sectors

Some countries noted that the government needed to review the minimum wage. Two other issues related to pay were raised - the issue of seasonality because it caused hardship in low season when employees were laid off and the issue of pension payments.

2.5.2.2 Benefits and Intangible Pay

Benefits are an important part of pay and as discussed earlier, only a few of the websites in the sampled establishments described their benefits for potential applicants. Millennials and Generation Z individuals are interested in benefits such as flexibility, opportunities to

grow and opportunities to contribute to society and there is little evidence that these are being offered by establishments. A Canadian study[40] revealed that almost 50% of students surveyed said that they were unlikely to accept a full-time job that matched their skills but not their values and this is a warning sign for Caribbean employers who fail to promote their values and contributions to society.

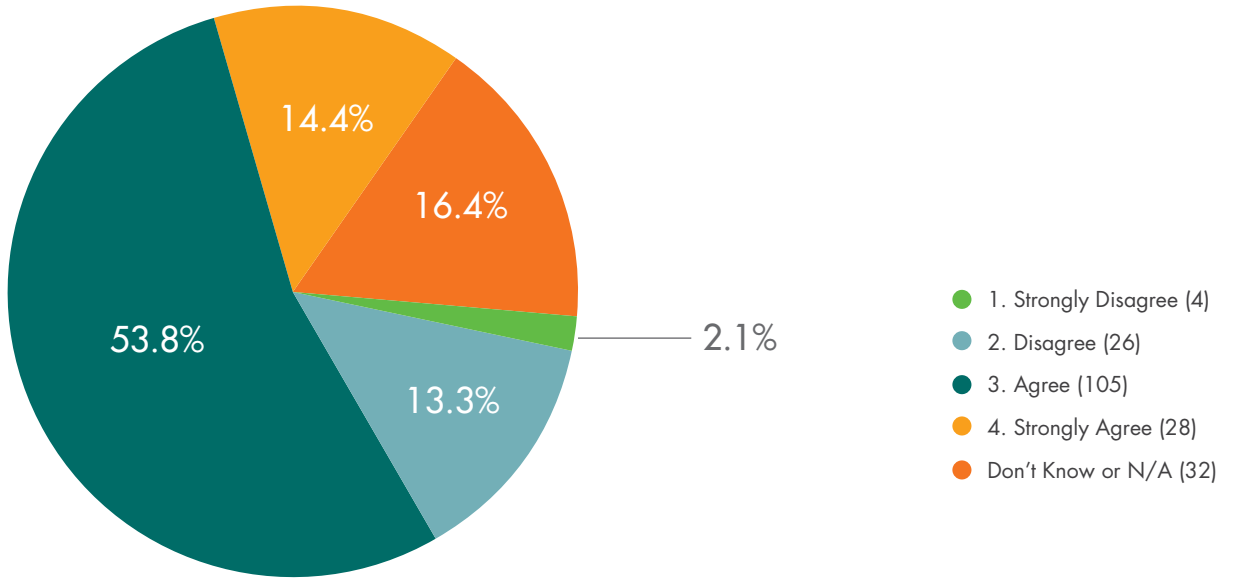
It is also important to consider the conditions of work as these form part of the overall compensation package. At the time of writing the United Kingdom is piloting a four-day work week in what is being described as the world's biggest trial of the new working patterns.[41] One hotel chain in the TCI has indicated that they are experimenting with a five-day work week (down from a six-day work week) as a way of increasing job satisfaction as workers return to work. These initiatives point the way forward for employers who wish to make their job appear more attractive.

The hospitality industry generally operates on a six-day work week which is already out of step with the five-day work week that obtains in most other sectors. Additionally, it is apparent that the pandemic has shifted expectations about work-life balance and impacted the willingness of workers to return to work.

Most student respondents (68%) agreed that the physical working conditions were generally good in hospitality and tourism.

Physical working conditions are generally good in the tourism and hospitality industry

195 responses



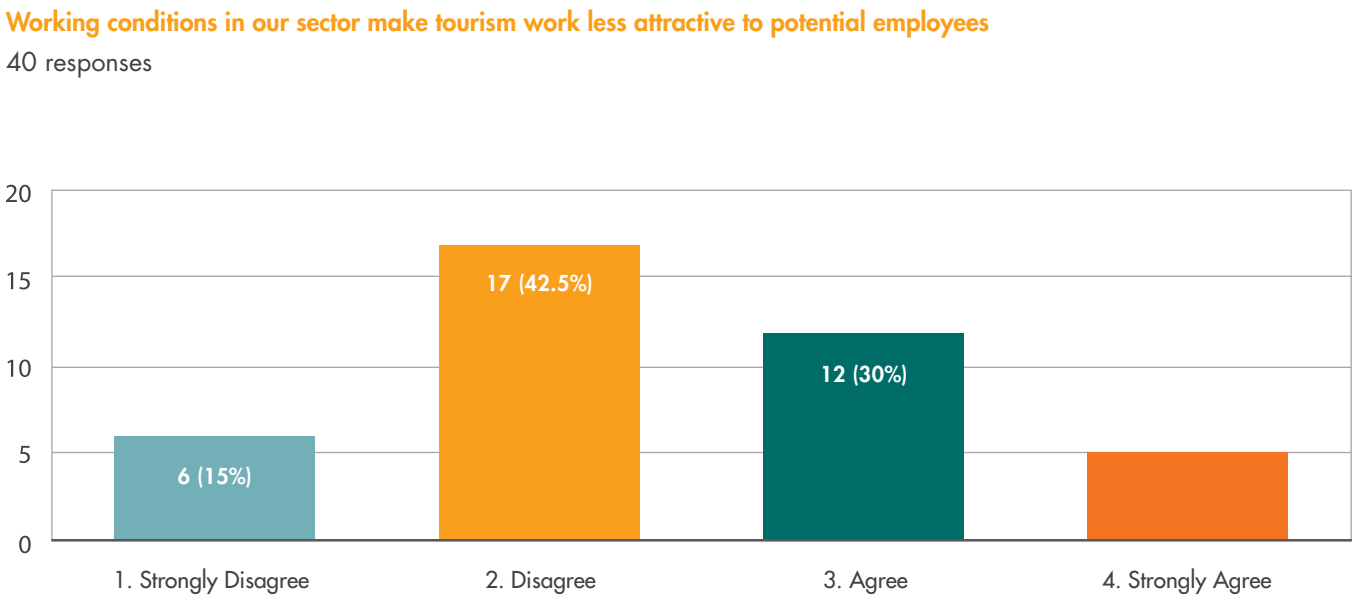
Source: School and College Graduating Class - Question 17.

Figure 15: Perceptions of Physical Working Conditions in Tourism and Hospitality

[40] University of Waterloo, 2019. Are you ready to manage the workplace of the future.
[41] Kollewe, J. 2022¬. Thousands of UK Workers begin world's biggest trial of four day week. Guardian. 6 June.

Their views were closely aligned with those of HR managers with 68% disagreeing that working conditions in the sector made tourism less attractive to potential employees.

on the growth, competitiveness and future-readiness of economies and businesses worldwide."[42] Globally women earn 68% of what men earn for the same work. According



Source: Employers / HR Managers /Corporate Leaders Survey - Question 6.

Figure 16: Perceptions of Working Conditions in Tourism and Hospitality for Potential Employees

This represents an opportunity that employers can build upon by highlighting the working conditions of the sector.

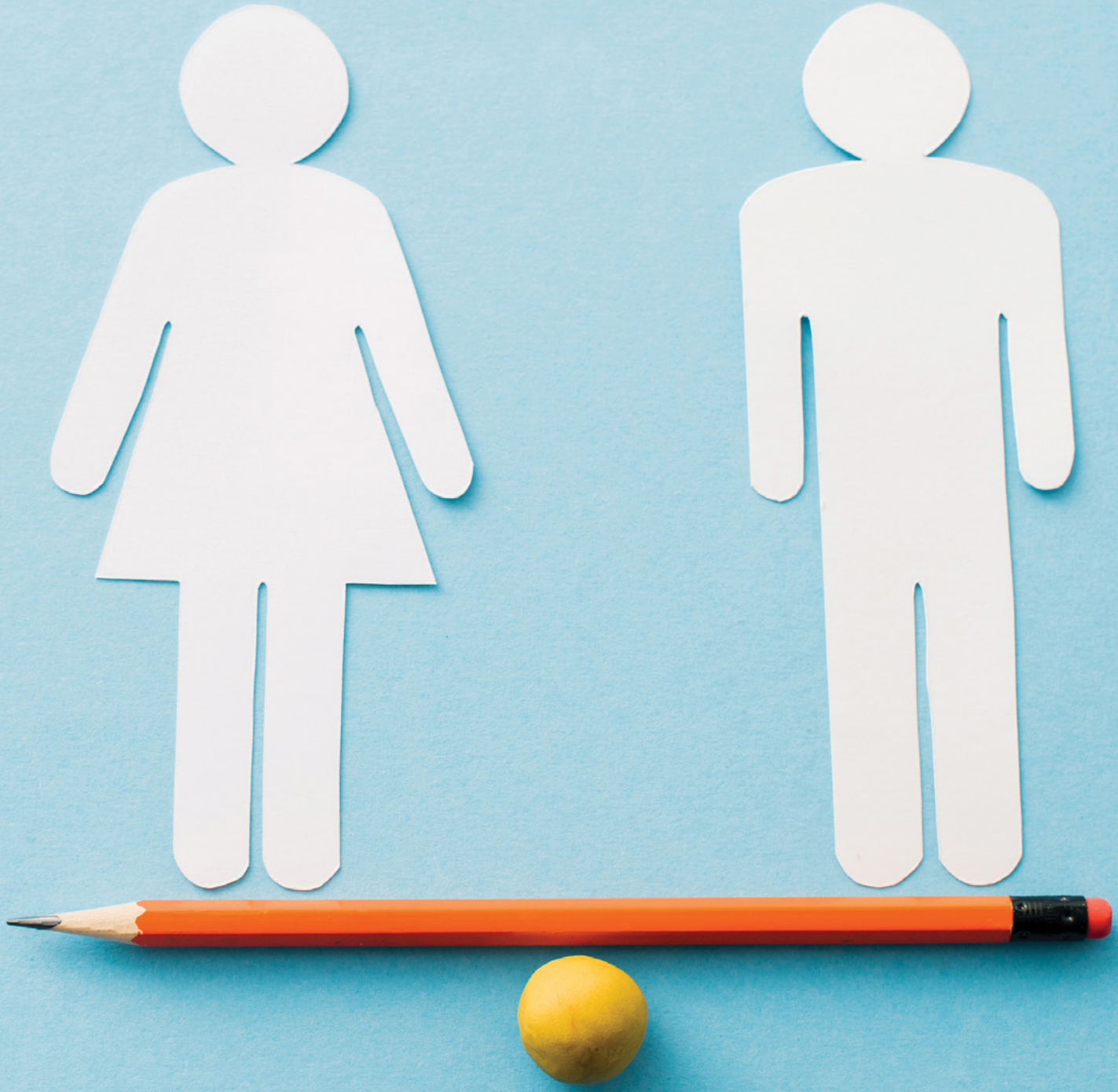
Webinar attendees recommended that establishments consider putting incentives in place to encourage employees.

2.5.2.3 Gender and Pay

The issue of gender equity in pay was a specific focus of this study. According to the World Economic Forum (WEF) "Gender parity has a fundamental bearing on whether or not economies and societies thrive. Developing and deploying one-half of the world's available talent has a huge bearing

to the WEF report Latin America and the Caribbean performed strongly in the period. It is noteworthy that in the same period progress in North America stalled. In response to the statement *"male and female employees doing the same job in the industry are paid equally"*, only 40% agreed or strongly agreed. However, 52% disagreed or strongly disagreed with the statement that "women working in the industry are not likely to be promoted to senior positions". These responses indicate a few possibilities. Indeed, females often occupy positions such as housekeeping that are lower paid and that may not attract tips. Another possibility is that there are structural inequities that make it difficult for women to

[42] World Economic Forum. Global Gender Gap Report 2020.



advance to positions with greater earning capacity. A final possibility is that operators are not adhering to the legal requirement to pay males and females equally.

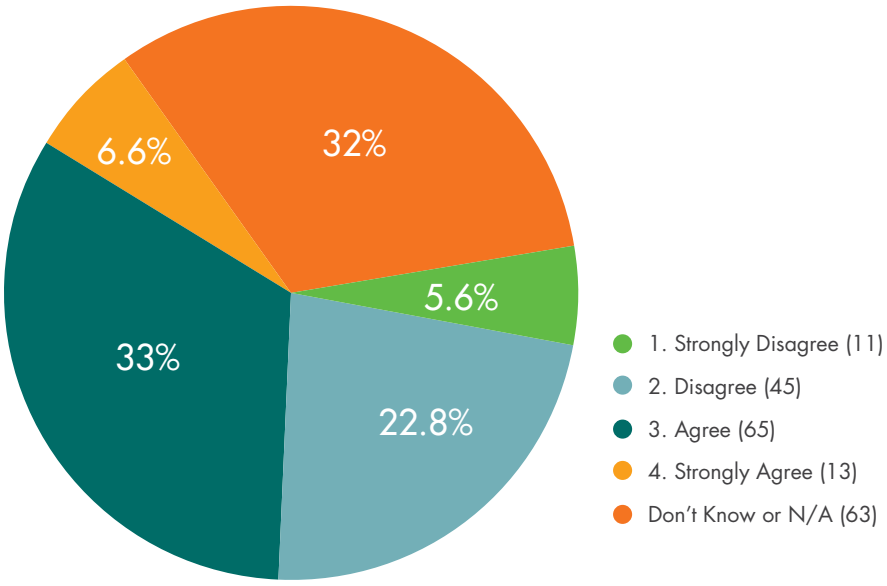
Focus group participants also noted that 'at the money crunching and decision-making levels women were absent.'

Focus group participants noted that women were prized for their attention to detail and were therefore valued in housekeeping. They observed that attention to detail is not only valuable in housekeeping but is valuable in many different positions. This failure to adequately recognise the value of this particular skill may relegate females to lower paying roles while simultaneously depriving establishments of skills that would be beneficial in other positions. In any event this perception is an area of concern that needs to be urgently addressed.

In terms of remedy, Global Citizen[43] recommends the following actions:

1. Put in place laws that enforce pay equity
2. Get companies to voluntarily commit to pay equity
3. Encourage companies to commit to pay transparency
4. Recruit and promote women to leadership roles as this allows women to influence corporate culture and decision-making, including directly influencing pay grades and wider equity
5. Mentor and guide women to fields that are more highly paid.

Male and female employees doing the same jobs in the industry are paid equally
197 responses



Source: Employers / HR Managers /Corporate Leaders Survey - Question 23.

Figure 17: Perceptions of Pay Differences Between Male and Female Employees

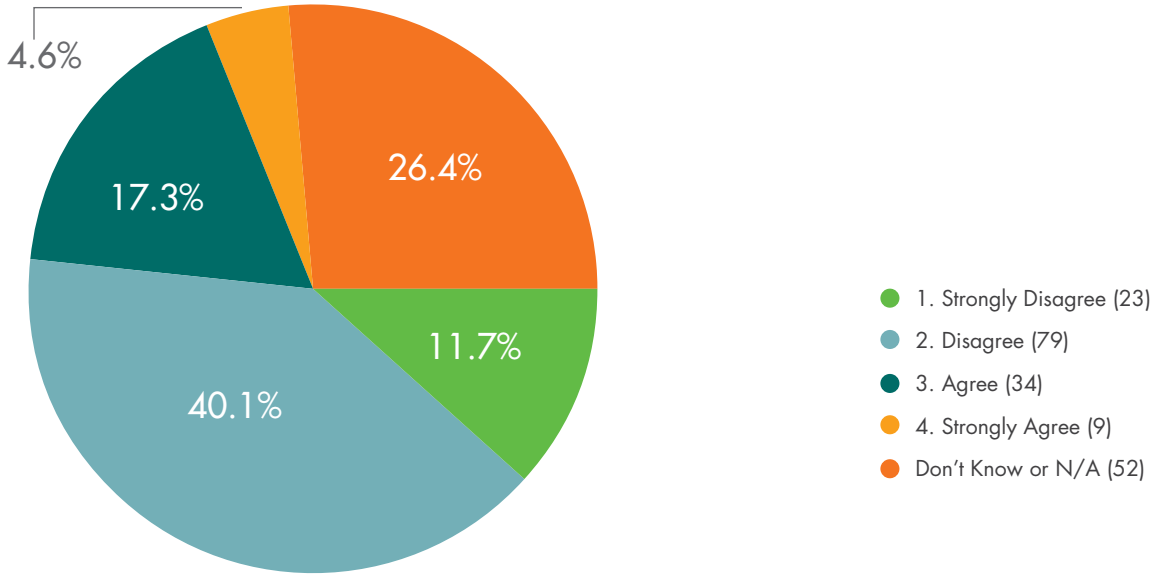
From our survey of school and graduating class, nearly 39.6% of respondents strongly agree or agree that male and females doing the same jobs in the industry are paid the same, while 28.4% strongly disagree or disagree and 32% did not know. This means that there is still a strong perception in in some quarters that there are gender-based pay differences.

From the same survey of school and graduating class, nearly 22.1% of respondents strongly agree or agree that women working in the industry are not likely to be promoted to senior positions, while 51.8% strongly disagree or disagree and 26.4% did not know. Even though most respondents are of the opinion that women are likely to be promoted, there is still over 20% that feel that women are not likely to be promoted.

[43] McCarthy, J. March 11, 2021. What is the Gender Pay Gap and How Do We Close It? Global Citizen.

Women working in the industry are not likely to be promoted to senior positions

197 responses



Source: Employers / HR Managers /Corporate Leaders Survey - Question 41.

Figure 18: Promotion Opportunities for Women

2.5.2.4 Recommendations

1. Tourism continues to be viewed as a low paying industry and this may impact interest from potential employees. Tourism employers should consider doing job evaluations and salary surveys to determine the competitiveness of their jobs with other sectors.

2. Tourism employers should consider enhancing and promoting the benefits of jobs. Potential benefits for hospitality include employees' needs for caregiving, mental health, vacation time, flexibility to care for elderly parents or children, education and a clear career growth path.[44] Employers may also consider reduced rates for tours, meals and rooms, bulk purchasing and in the case of hospitality, employers enabling employees to purchase groceries at a reduced rate

.

3. Tourism employers should also consider highlighting their charitable initiatives and involving employees where possible as this is important particularly to millennial employees.

4. Tourism employers could consider offering relocation benefits.

5. Tourism establishments should stress the opportunities available to women and reinforce equal pay as per labour laws.

2.6 UTILISATION OF HUMAN RESOURCES IN TOURISM, BY SUB-SECTOR

In this chapter there is an evaluation of present utilisation of human capital by each of the eight (8) sub-sectors, which will include identifying any existing problems and needs. While countries have estimates of the number of people employed in tourism, the actual breakdown

[44] Ramsthel, D. 2021. How benefits can help hotels overcome hiring challenges. Hotel Management.

of employees to the sector is hard to find. The ILO notes that the only country that has attempted any break-down of sub-sectors is Belize and even then, that data is limited to socially insured workers (ILO, 2020).[45]

2.6.1 Accommodation

The accommodation sub-sector is the largest employer in every Caribbean economy ranging from a low of 35.5% in Grenada to a high of 61.7% in Cayman, as shown in a study of a select group of Caribbean countries (ILO, 2020).[46] At the same time the ILO report notes that the work in the accommodation sub-sector is relatively stable with temporary and part-time employment not being part of the sub-sector. Accommodation is likely to have a disproportionate share of non-nationals in countries like the Cayman and Turks and Caicos islands.

A study of a select group of countries indicates the extent to which accommodation in the sector actually drives employment.

Country	Employed workers in the accommodation sub-sector as % of all tourism workers
Jamaica	58.3
Grenada	35.5
Cayman	61.7
Bermuda	52.8
Belize	44.6

Table 12: Accommodation as a Percentage of Tourism Employment ILO, 2020

Importantly for this study, most workers in the accommodation sub-sector (60%) tend to be female. This means that women are most at risk in the event of layoffs or closures. A decline in accommodation such as occurred during the recent pandemic would thus adversely affect females.

Accommodation may be subdivided by registration, classification and grading. It may also be subdivided by size and primary market e.g. Leisure vs. Business. Categories include business, leisure and corporate groups. The exact mix will vary by destination, and this has implications for the types of skills and employees required. Master Plans suggest that countries will continue to pursue the leisure market but countries including Dominica, Haiti and Jamaica will actively pursue the conference market. Other countries have indicated an intention to develop eco and community tourism and therefore the demand will be for smaller accommodations. The focus on medical and wellness tourism in many destinations may also mean that accommodations will need employees with specialised training and knowledge.

A review of the plans for the individual destinations in this audit indicates that accommodation is particularly important to the perception of the destination. Barbados in its Tourism Master Plan, for example, notes as a weakness, accom-modation upgrades and concludes that additional accommodation will be required and that the demand is likely to be for all-inclusive, luxury, villa categories and accommodation in the over 100 room categories. There is also a concern about the quality of accommodation with The Bahamas Master Plan, for example, emphasising the importance of encouraging investment in 'high quality, sustainable touristic accommodations.' The TCI also lament being unable to attract a high-end international hotel brand name and notes it as a strategic priority. Jamaica is aggressively expanding not only in the number of rooms available, but into different geographic zones.

[45] ILO . (n.d.). Hotels, catering and Tourism Sector. Retrieved July 24, 2021, from International Labour Organisation.
: https://www.ilo.org/global/industries-and-sectors/hotels-catering-tourism/lang–en/index.htm.
[46] ILO, 2020. Tourism Sector in the English and Dutch Speaking Caribbean: An Overview and the Impact of COVID-19 on Growth and Employment.

Smaller accommodations are much less likely to have structured human resource practices and may lack a dedicated human resources practitioner.

Some countries, particularly smaller and eco-focused destinations have highlighted as priority smaller accommodations. Belize for example has prioritised inland eco-lodges, diving and fishing lodges, beach boutiques and beach resorts in its National Sustainable Master Plan. These smaller accommodations are much less likely to have structured human resource practices and smaller entities may lack a dedicated human resources practitioner. While these smaller entities may lack the standardisation of larger entities, they may however meet the destination's target of providing unique service. There is however an important development as some large accommodation chains have begun to recognise that there is an increasing demand for smaller and more personalised settings according to a chief strategist in Jamaica. The strategist noted a pivot away from the hotel only concept to communities, villas, condominiums, and recreational facilities.[47]

Bed and breakfast accommodations have traditionally been less of a factor in Caribbean destinations than say in Europe and North America. There has however been a change with the advent of sharing platforms such as Airbnb, Vacation Rental by Owner (VRBO) and Booking.com which allow individuals to go directly to the market to offer their accommodation. These short-term home rentals are one of the fastest growing new business models. In 2018 the top destinations for Airbnb were in order the United States Virgin Islands, Puerto Rico, The Cayman Islands, Grenada, Jamaica, Martinique, and Saint Lucia.[48] There are few barriers to entry and almost no minimum standards. These informal accommodations represent an opportunity as they provide diversity in the type of accommodation as well as the price point. They have also become important to those countries that are encouraging longer stays. They do however represent a threat because hosts are untrained and therefore may not offer service at the desired standard. While various governments have signed memorandums of agreement with Airbnb in particular, there is a lag in implementation. There is potential demand for training by hosts who wish to learn how to offer their services at a professional level.

As the pandemic wanes and travel rebounds respondents report a renewed interest in villas and small rentals and a declining interest in large resorts. It is not clear whether this interest will decline but in the short term it represents a training need for villa operators and private chefs.

The number of employees required for accommodation will vary significantly according to the type of accommodation. (A 1993 study indicated that 1.9 employees were employed for every hotel room). Very dated figures from the CTO indicate a ratio of 1.02 employees per room based on 19 Caribbean destinations. Data collected a few years later indicates a much higher ratio. The difference may be because the earlier study was conducted by the CTO which noted a difficulty in collecting accurate data. The latter was conducted by the CHTA which would have an easier time gathering accurate data from its membership. In the later CHTA study, the pattern is clear with hotels with more stars requiring more employees.

[47] Jamaica Gleaner 2021. Resort Chains Weighing More Villa Investments as Preferences Change. November 24
[48] Repeating Islands. 2019. *HOW AIRBNB TOOK OVER THE CARIBBEAN*. Prod. Repeating Islands. October 29.



Accommodation Type	5 stars	4 stars	3 stars	1 or 2 star
All-inclusive resort	3.4	1.3	1.6	0.4
Hotel	4.2	1.3	1.9	0.6
Guest House/B&B	—	—	1.0	1.5
Self-catering villa, apartment or cottage	0.7	0.8	0.6	0.5
Average employee per room	2.8	1.4	1.3	0.7

Table 13: Employment per Room in Different Accommodation Types

The data suggests that it is difficult to capture a complete and accurate picture of tourism employment in the accommodation sector. Not surprisingly, however, the more luxurious the property, the more workers employed. Some of the luxury hotel employers interviewed for this study indicated that coming out of the pandemic they will become even more high end and will offer customised service experiences as a way of differentiating their brands. This has implications for both the quantity of staff and the expectations of quality performance from those staff members. All-inclusive hotels also show a lower number of employees than non-all-inclusive in the 5-star category. This may be accounted for by the extent of self-service in all-inclusive hotels at bars and buffets for example. It is important to note that the protocols required to manage the COVID-19 virus have required hotels to remove self-service and to staff buffets. More employees are also required to sanitise and clean. This of course may be balanced by a reduction in some services such as daily turndowns in rooms.

2.6.2 Adventure Tourism and Recreation

As Caribbean tourism has evolved beyond the sand, sea and sun, the adventure segment has become more important. Discussions with respondents have indicated for example that the pandemic has significantly increased demand for yachting, particularly high-end yachting as it provided a safe way to visit the Region. The increase in domestic tourism during the closure of borders, created opportunities for local entrepreneurs to introduce a captive market to water sports and off the beaten track experiences such as an eight (8) day Discover Jamaica by bike experience.

The exact skills required will vary by the type of activity but generally there are requirements for knowledge of the country, knowledge of the terrain as well as medical and safety training. The Bahamas based Tourism Today site also lists the following requirements:

- Physical ability and experience in the relevant sport or activity is required
- An ability to get along and work well with others is necessary too
- Excellent communication and instruction skills are required, as are organisational and leadership skills. Knowledge of terrain, environment and local area in which the guide is to travel is important
- Customer relations skills and equipment maintenance and repair skills are desired for this position
- Knowledge of safety and emergency procedures.

The Adventure Travel Trade Association (ATTA) notes further that an adventure travel guide must:

- Have a tolerance for adversity and uncertainty
- Possess a strong sense of self-awareness and be able to exercise sound judgment and decision making
- Be highly flexible and have effective communication skills (sometimes involving multiple languages)
- Be able to create memorable experiences that resonate with each guest individually even in a large group setting.

Once again, the sharing economy is changing the contours of a sector. Companies such as Tours by Locals and Airbnb experiences facilitate the involvement of non-professionals in offering tours. According to the UNWTO, the trend has been toward disintermediation where the middleman is eliminated as the consumer goes directly to the supplier.[49] As the report notes, this is likely to happen when the traveller can access trusted consumer reviews and information online to support the decision making. This means that operators must be skilled at not only operating the tours, but in the logistics of collecting payment and marketing them.

Adventure tourism typically involves greater risks than other types of tourism therefore there is a need for specialised training in safety and first aid. While this may be readily available in the larger entities, it may be less available in the smaller operations and this gap may need to be filled at the national level. Indeed, the UNWTO report notes that destinations around the world are working to provide professional education to support local people in participating in this economy. This training will not only be in the safe conduct of tours, but in how to avoid or minimise negative impacts on biodiversity. Certification to international standards will be important in this segment and again tourism entities may need to advise, inform, and facilitate the achievement of this certification.

Tour operators of all sizes in this sector will need to have a firm grasp of risk management.

Operators may need to be encouraged to join associations that can support their efforts to be world class operators. Examples of these associations include the International Rafting Federation and the International Mountaineering and Climbing Federation. Finally, tour operators of all sizes in this sector will need to have a firm grasp of risk management.

2.6.3 Attractions

There will be a need for specialised training in how to develop and market communities.

Attractions will require tour guiding skills and, depending on the type of attraction, specialised skills in operating equipment and safety training. Countries have indicated a focus on attractions that are community based and related to the unique culture of the country. In this instance there will be a need for specialised training in how to develop and market communities. The lines between adventure tourism and recreation and attractions may be blurred, therefore the requirements are likely to be the same as those discussed above. Additionally, to the extent that attractions are natural resources and heritage sites, it will be important for operators to know how to preserve the environment and to accurately and authentically tell the story of the location.

The focus on community-based attractions means that there will be an inclusion of individuals and groups who may not be formally trained. There are efforts through government and private agencies to train and regulate these groups. It was noted in a recent webinar held in

[49] UNWTO Global Report on Adventure Tourism. AM Reports: Volume 9. 2014.

Jamaica however that there is a significant challenge in getting communities to understand the importance of collaborating in order to create an effective tourism product.[50] While the webinar focused on Jamaica, it is likely that this is a problem that other countries will face as they seek to expand their tourism products in communities. Compete Caribbean is currently engaged in supporting community tourism through a community tourism toolkit and other resources and it will supplement existing entities that provide training in this area. While there has been an upsurge of interest in offering community tourism experiences, some providers complain about not receiving adequate and appropriate support from the government. In particular, they are frustrated at the level of bureaucracy involved in adhering to government protocols as well as the lack of consultation with government entities.

2.6.4 Events and Conferences

Some governments have built dedicated conference centres. Additionally, many hotels also have space to accommodate conferences and events. As visitors seek more unusual and off the beaten track experiences, events and conferences may take place in outdoor settings as well. Management Staff for these facilities will need to be flexible and multifaceted to cater to the needs of different groups. They will need to be able to respond to special requests and preferences and be well networked in order to develop unique packages and responses.

As larger companies such as TUI enter the Caribbean space it is becoming increasingly important that local and regional companies develop their capacity to operate according to international standards in order to compete.

Many conferences and events will depend on casual staff who are paid only for the specific event. As this staff represents the business they will need to be trained to the required standard. Event planners may also face the challenge of availability and will need to develop creative HR strategies to be able to obtain the required talent when needed. In other countries this means looking for retired individuals or people who only want temporary work.

Destination Management Companies are increasingly playing a key role in mediating between event planners and local suppliers. Many of these are international brands such as Amstar and TUI but there are many regional companies that have emerged to offer these services. Sun Tours for example offers car rentals, conference services, tours, weddings and related services in Barbados, Saint Lucia and Antigua. They serve as the local eyes and ears and can help to create unique experiences for their clients. This is a growth area and conversations with operators indicate that the field is one that is wide open and an area that needs to be focused on by tertiary organisations.

2.6.5 Food and Beverage

Employment in this sub-sector is very varied. It includes traditional frontline positions such as bartenders, servers and sommeliers as well as an entire range of support positions such as chefs, storekeepers and kitchen cleaners. There are also important jobs in creating, collaborating, marketing and distributing the products.

The food and beverage sub-sector may be thought of in the following two categories:

1. Food and beverage as sustenance
2. Food and beverage as an activity or experience.

Food and beverage as sustenance refers to the food and beverage that visitors must consume as part of their stay.

[50] MSBM, 2021. Rural Tourism Conference: Developing Jamaica's Tourism Product through Rural Tourism, November 24.

Demand will increase for culinary staff who can be creative and who can cook a range of cuisines.

Many of these meals are taken at the place of accommodation and in the case of all-inclusive hotels, almost every meal and drink is consumed on site. Increasingly, accommodations are utilising food and beverage as a source of competitive advantage. Many resorts, for example, advertise the number and variety of restaurants and bars. These often include ethnic and specialty restaurants, and this has implications for the required skillset of staff. Culinary tourism is a growing niche market and there is a deliberate attempt to introduce local produce, to utilise farm to table and to cook local dishes in order to create unique and interesting experiences for guests. The demand will therefore be for culinary staff who can be creative and who can cook a range of cuisines. It is important to note that in some cases restaurants feature tableside cooking so culinary staff who would normally be 'back of the house' or behind the scenes, will be out front and will have to display strong interpersonal and interactive skills.

Food and beverage is a dynamic sector and it will be necessary for establishments to be aware of the trends. These include, but of course are not limited to:[51]

- Plant-based foods – one (1) in five (5) global consumers seek plant-based alternatives
- Values and ethics – how companies demonstrate their commitment to their missions and visions
- Homemade
- Transparency – ethical and responsible ingredient sourcing with three (3) in five (5) global consumers being interested in learning more about where their food comes from and how it is made
- Product mashups – three (3) in five (5) consumers are interested in trying new sensory experiences e.g. aromas, tastes, textures, colours, sensations
- Safety - Consumers will be paying attention to product packaging and will be more accepting of single-use and tamper-proof packaging because of concerns about hygiene and contamination.

The above-mentioned trends indicate that it will not only be important to produce tasty meals and drinks, but to do so in a way that satisfies the public that it is safe and sustainably prepared. St. Kitts' Belle Mont Farms for example, describes itself as being committed to sourcing as much as possible from the land, forest and sea that surround the hotel. The hotel also works with community farmers to reduce the use of pesticides and unnecessary chemicals. This is an example of restaurants of the future that need to ensure that they purchase locally and purchase from suppliers who they can verify are following the required protocols. It therefore means that purchasing will become more complex, and that chefs must pay attention to using products that they can trace. This may even involve growing some of their own food as some hotels have started doing. Some hotels such as Anguilla's Cuisin Art Golf Resort and Spa (now purchased by Olympus Ventures),[52] incorporated hydroponic farming. The utilisation of this type of technology indicates that going forward food and beverage entities will be intentional about developing solutions to problems such as drought or poor soil conditions. There is also interest in standalone facilities such as Saint Lucia's new agro-tourism park which is described as including gastronomic adventures with traditional cuisine and options for hiking and camping, water excursions and farm to table tours. This initiative is linked to the country's focus on community tourism as well as its focus on sustainable development indicating once again the need for government entities to work closely together. U-Pick Chaguaramas Farms in Trinidad is another excellent example where much of the food is made with vegetables grown on-site, and the visitor can pick their own produce from the surrounding fields.

[51] Edlong, 2021. Top 7 Food Industry Trends for 2021.
[52] Now relaunched as Aurora Anguilla Golf Resort and Spa.



The term FLOSS has been used to describe this trend of utilising local products:

- Fresh
- Local
- Organic
- Sustainable
- Seasonable.

Food and Beverage also incorporates the various festivals and food related events as well as farm and farm to table tours that are becoming popular around the Region. American visitors dominate the Region and 60% of them have indicated an interest in culinary activities. Moreover, Compete Caribbean[53] notes the following four community-based activities in the Caribbean as based on high Caribbean benefits and high US interests: local tourism, food and beverage tour, traditional cuisine and farm to table. While the emphasis is on the food, it is an opportunity to showcase the heritage, the people and the landscape. Culinary, gastronomy or food tourism as it is variously described is noted in several Master Plans and other documents. Barbados in 2018 declared a year of culinary experiences for example, and many of the websites of the various countries feature food festivals and events.

These activities require trained individuals who can guide tourists as well as upsell merchandise on sale, etc.

Factory tours are also becoming increasingly popular. Chocolate factory tours, rum tours and coffee tours take visitors on a behind the scenes tour of factory facilities and farms. These tours are excellent examples of ways in

[53] Compete Caribbean. 2019. Diversification of Caribbean Tourism Experiences.

which there is a blurring between the various sectors of the economy. They represent an important way to increase tourist spend and to add value to the tourist experience. They also increase the demand for trained individuals who can not only guide visitors through the factory or farm, but also upsell the merchandise on sale. Some of these tours include hands on experiences in blending, cooking and making drinks and require individuals who are not only skilled in these activities but who are personable and interesting presenters.

Harvey[54] notes several success factors for food tourism criteria including leadership, sufficient market intelligence, partnership, and community-based collaboration. Compete Caribbean notes the following as important considerations for the US market:

- Focus on safety and hygiene as part of the success
- Certification to show that standards have been met
- Combining wellness with high interest community-based activities.

The data provided by Compete Caribbean suggests that visitors will pay premium prices for authentic, well organised, interesting, and informative community-based food and beverage-based experiences. Food, moreover, has the potential to draw visitors outside of their hotels and to spend more in the local economy.[55]

The informal sector has always been an inextricable part of tourism as visitors can readily stop at any rum shop, fruit stall or market. The advent of Airbnb experiences has made it easier for individuals to highlight their offerings and to partner and package those of others for sale directly to the market. The breadth and scope of food and beverage experiences indicates that it will be especially important to incorporate the general population in the training in basic food and beverage service and sanitation.

Demand will increase for procurement officers with the capacity to work with farmers and food manufacturers.

One of the most vexing issues in food and beverage is the use of local rather than imported produce. Some governments have taken this on frontally, with Jamaica for example, sponsoring a report to study the issue and developing a programme that promotes linkages between the industry and local farmers. Some establishments have also sought to create a value chain that not only utilises products as inputs but promotes local products for sale to visitors. The Sandals chain for example, not only purchases from local farmers but management teams have held workshops with farmers to acquaint them with their standards and requirements.[56] Food and beverage must therefore be discussed in relation to not only the purchase of food, but the relationship with food suppliers. There will therefore be a demand for procurement officers with the capacity to work with farmers and food manufacturers in the same way that companies like Walmart do. In the Walmart model, the purchaser shares important data with suppliers, and they collaborate to develop innovative ways of achieving a win-win situation. As countries attempt to utilise more local produce and to increase the linkages and the multiplier impact of tourism, there is likely to be demand for specialists who can help the various stakeholders to negotiate win-win solutions and who can build the infrastructure that will support their efforts.

2.6.6 Tourism Services

This sub-sector includes National Travel Organisations (NTOs), travel agencies, tour operators, online travel agencies and destination management organisations. Jobs include travel writer, visitor information staff, tourism trainer, researcher, marketing and retail.

[54] Harvey, E. 2012. Food Tourism and Food Festivals: Lessons Learned from the Caribbean.
[55] Caribbean Development Bank. 2017. Tourism Industry Reform: Strategies for Enhanced Economic Impact.
[56] McBain, H. 2007. "Caribbean tourism and agriculture: linking to enhance development and competitiveness." ECLAC, 44.

The reports and plans of the various countries indicate that most countries are seeing tourism in a much broader way. While it is acknowledged as a source of foreign exchange, foreign direct investment and jobs, tourism is increasingly seen as being connected to the rest of the economy. There is therefore a need to pull various parts of the economy into the tourism net. As such the core activities of NTOs are coordination, legislation, promotion, research and providing tourist information. Further, many of the activities noted in the Master Plans will fall to these organisations. As the Master Plans indicate, much of the work requires getting better data, analysing it effectively and utilising it to achieve the stated goals of the plan. A 2018 CARIFORUM report noted that information and research are the lifeblood of the industry but more has to be done in this regard to support marketing efforts. The CARIFORUM report also notes the importance of upgrading the quality of personnel who engage and negotiate with investors highlighting the need for better hospitality, social and negotiation skills. Finally, there is an implementation gap with many of the plans and a 2020 report on the sector notes that there is an urgent need for action in moving towards sustainability for example.

Upgrading the quality of personnel who engage and negotiate with investors is important.

This sub-sector also includes educational and training institutions. Many of these institutions are government financed but the number of private sector entities offering specialised training for the sector is increasing. In Saint Lucia it was noted that there were agencies that provide on island training services for cruise ships. The latter training may reduce the poaching of experienced employees. The Jamaica Hotel and Tourism Association (JHTA) is on record as asking the government to intervene to limit the poaching of local employees. The association suggested that cruise ships could provide scholarships or support to existing training institutions.

2.6.7 Transportation

The transportation sub-sector receives little mention in any of the strategic plans or visions. This may be because it is a stable sub-sector. At the same time, it is a vital link in the tourist's visit that can add or diminish value. Moreover, as countries expand beyond sand, sea and sun, this sub-sector will become more important. For example, while transport may be thought of as just the backdrop of the vacation, party cruises with music and food are offered in many of the islands and there is even an annual reggae cruise – a partnership with Royal Caribbean. Ferries and pleasure cruising also fall under this sub-sector and safety is of paramount importance. Ferries are used by the local population as a regular means of transportation, but they are also utilised by visitors therefore there is need for some sensitisation of operators to ensure that they meet the expectations of visitors. Pleasure cruising and boating is targeted in some of the Master Plans as a growth area and there will be a demand for trained pilots, crew, and guides if they are to be successfully integrated into tourism.

Airlift is critical to the Region and ensuring that there is adequate airlift from the source markets is an important function, usually taken at the national level. Ports of entry create a challenge since agents must perform a security as well as a welcoming function. Careful attention is usually paid to training immigration and customs agents to perform this dual function.

Careful attention should be paid to training immigration and customs agents to perform the dual function of security agents and tourism ambassadors.

Land transportation is often managed by cooperative unions of taxi drivers and these individuals form an important part of the tourist experience. As a result of their important function, many countries are training these drivers to ensure that they are knowledgeable about their

country and in how to meet guest expectations. Ridesharing is gradually entering the Region and companies like Uber represent a cheaper alternative to the formal transportation sector. Ridesharing however means that almost any citizen with transport can participate, and destinations will need to develop creative ways of managing this large group of individuals who are only partially in the industry. Rental agencies too are evolving, and they must not only provide cars but support them with navigation instruments and useful advice and information.

Tours are an important activity undertaken by the transportation sub-sector and as visitors to the country exhibit more interest in learning about the destination, demand is likely to grow. Indications are, however, that visitors are interested in seeing more than the traditional sites and attractions and will require tours that involve more adventure and off the beaten track experiences.

Rail transportation is a minor part of transportation in the Region, but it is present in St. Kitts and Barbados, and it is also being actively considered in Jamaica. Once again, safety is of critical importance.

The public transportation system of the destination may be used by visitors, particularly millennials and adventure tourists who want to travel independently. It will be important to sensitise transportation employees to respond to the needs of visitors for information and guidance. Based on the Master Plans, little attention has been paid to enhancing this part of the sector, but a well-equipped transportation system leaves a positive image and encourages return visits.

The Caribbean does not own or operate any cruise ships of its own but individual countries need to organise to take advantage of the thousands of visitors who come on a single ship. As the Caribbean expands the number of ports to accommodate this popular form of travel, strategists need to create interesting experiences and attractions to accommodate cruisers. This has become more imperative as cruise ships develop more attractions onboard and these may compete with the onshore attractions.

The Caribbean supplies thousands of workers for cruise ships. The employment of locals for work on cruise ships has sometimes been disruptive because individuals receiving job offers often need to take them up almost immediately. While this has often been seen as a threat to the accommodation sub-sector it also represents an opportunity to train individuals specifically for work and to benefit later from their experience in working internationally. This is the approach taken by a company in St. Maarten, which announced its intention to promote the employment of locals on cruise ships.[57] The Jamaica Hotel and Tourism Association has also floated the idea of having cruise lines provide financial assistance for training and developing workers. At the time of writing, Royal Caribbean has stepped up its recruitment efforts in Barbados, Jamaica and Trinidad and Tobago and is working with governments to stage job fairs.

2.6.8 Travel Trade

The travel trade sub-sector includes travel agents, wholesalers, and destination marketing organisations. These entities receive little attention in the plans although they play an invaluable support role. While it has become easier for individuals to make their own travel arrangements, travel agents received a boost during the pandemic when it became challenging for travellers to understand and navigate the diverse protocols and requirements. This represents an opportunity that the trade can build on by reconfiguring and reimagining their role as one that adds value to the visitor experience and not just makes bookings. Millennial travellers for example are more interested in travel personalisation and companies can no longer fit customers into the traditional marketing mould but must instead focus on customer intent.[58] The travel trade employees must therefore evolve from passively waiting for the customer to make

[57] Port St. Maarten, 2015. Port St. Maarten to pursue employment opportunities onboard cruise ship (sic) for Sint Maarteners.
[58] Saha, T. July 10 2019. AI is Reimagining Travel Personalisation. Retrieved from https://towardsdatascience.com/ai-is-reimagining-travel-personalisation-c72685faa378 on November 29, 2021.

contact to a role where they build a range of interesting experiences and opportunities to fit different personas which they could suggest to clients who want something different. This suggests that the trade requires individuals who are proactive and responsive.

The travel trade sub-sector requires individuals who are proactive and responsive and not individuals who passively wait for customers to make contact.

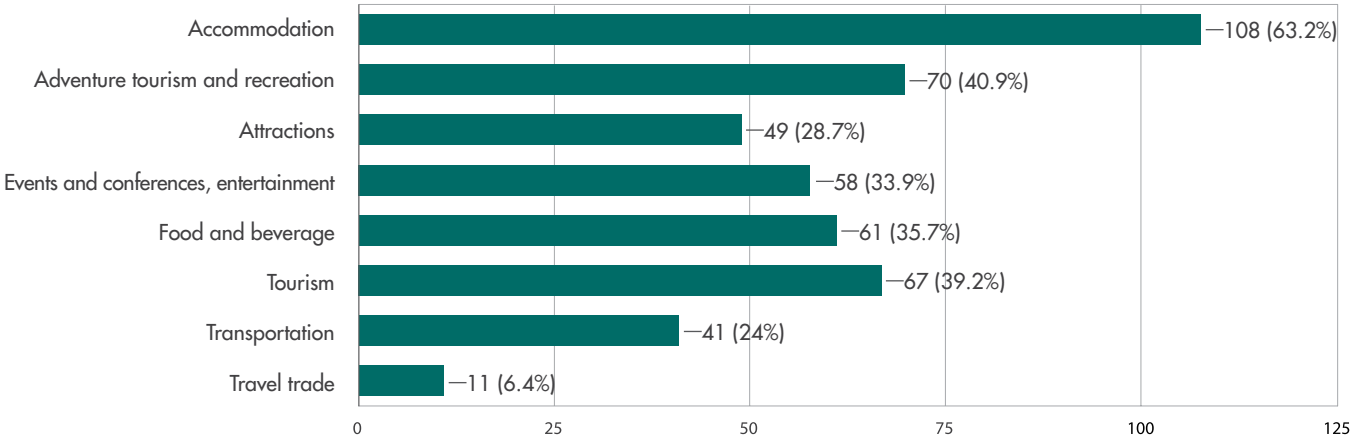
There are also changes in destination marketing organisations at the national level. While the emphasis has been on the volume of visitors, the Master Plans suggest a shift. Many countries are for example, targeting high end or longer stay visitors. Countries are also recognising the importance of consultation and community buy-in for plans. Travel Weekly reported this shift in numerous destinations and quotes one country representative as explaining that *"We got caught up in the race for bigger numbers. We realised over time that the true metric for tourism is the economic and social impact on the community: job development, economic impact, neighbourhood impact. If you don't bring locals with you when you're invigorating or building a destination, you're missing an important part of the equation."*[59] This shift is also exemplified in the CTO's redefinition of 3Ss of sand, sea and sun which was very visitor focused to a more destination focused set of 3Ss – **Social inclusion, Sustainability and Smart destinations and businesses**. Members of the travel trade sub-sector who promote and sell the destinations will be required to develop inclusive partnerships at the global, regional, national and local levels, built upon and values.[60] They will also need to be able to work in more than one sub-sector as discussed in the following section.

2.6.9 Diversification Across Tourism Sub-Sectors

It should be noted that from the Establishment Survey, it was observed that 55% of establishments operated in more than one sub-sector. The graph below shows how many of the sample of 171 operated in different sub-sectors.

Which of the tourism sub-sectors is your establishment associated with?

171 responses



Source: Establishment Survey - Question 11.

Table 14: Associated Sub-Sectors for Tourism Establishments in Survey

[59] Jainchill, J. 2019, July 17. From Marketing to Managing, Travel Weekly. Retrieved from https://www.travelweekly.com/Travel-News/Government/destination-marketing-organisations-From-marketing-to-managing on November 29, 2021.
[60] CTO, September 27, 2021. Joint Communique for Caribbean World Tourism Day Virtual Conference, September 27, 2021. The Future of Caribbean Tourism – Redefining the 3S's.

As expected, the graph above shows that Accommodation is the most common sub-sector as it relates to establishments followed by Adventure Tourism and Recreation, and Tourism Services. However, it is clear that establishments diversify their activities across tourism sub-sectors.

2.6.10 Entrepreneurship

Entrepreneurship is discussed here as a cross-cutting issue impacting all sectors. The informal sector is significant in tourism, and this is made up of individuals operating small businesses. Millennials and Generation Z individuals are particularly noted for their passion for creating and for working autonomously and entrepreneurship creates an important outlet. Half of the students surveyed indicated an intention to open a small business serving tourism and hospitality. Below is a sample drawn from the more than 80 responses to the question about the type of business. The sample of responses indicate a desire to promote the country and culture as well as to provide jobs and exposure for others. As one of the comments indicates this desire for entrepreneurship is a response to the uncertainty caused by the pandemic.

- I plan to open a restaurant that can cater for all people with different diets
- I would like to create a business that promotes local entrepreneurs
- Tourism, providing hospitality to both local and non-local tourists and advertising the local cuisine of Belize to tourists
- Through Bed and breakfast/guest house/tours, I want to show off my beautiful country to the foreigners. I know this dream of mine won't happen anytime soon but it will once I work hard and save to build my empire
- My country of birth (Dominica) is one of the most fertile lands in the Caribbean. I plan to planting crops to sell quality, affordable organic fruits and vegetables to the Caribbean hotels!!!!!!
- Because of the pandemic most people that were working in the tourism lost their jobs and were never called back to work although the tourism industry is picking up. It's better to start your own business and be a local entrepreneur. I would like to start raising and exporting butterflies, and at the same time use it to attract visitors
- I'm planning on opening a restaurant that offers typical Haitian dishes
- There are many sectors in the tourism and hospitality industry and if I were given the chance, I would explore them all. I am currently studying culinary arts with the hopes of starting something big. Running a kitchen sure; but I see it more than just that, I further see myself passing down my knowledge to the young and aspiring children who wants to enter the field. Being able to host foundations and have competitions to widen the knowledge and broadcast these types of individuals are in my dreams and hopefully one day I'll be able to make that happen
- I would like to become a local hospitality supplier incorporating quality products used in the industry around the world, working with local farmers/producers while also sub-contracting certified vocational students catering to the tourism industry to other restaurants, hotels and events
- The business I would like to start is a restaurant and bar where I can promote my country's local dishes for cultural tourism
- I am planning to start an eco-friendly resort. My country is yet to see an eco-lodge/ accommodation and seeing that adventure tourism and sustainability are on the increase, the market will be available. Seeing that my country has all the necessary resources especially, our lush vegetation, soil, natural attractions and other natural resources, the leakage rate will be greatly decreased. My philosophy: "Think Sustainability, Think Luxury"
- I would like to open factories (juice, fruit preserves, soaps, etc.). I will provide the country as well as the Tourism and Hospitality Sector with my products i.e. I will merge the Agricultural and Tourism Sectors together

Table 15: Sample Student Responses



It was also noted that many laid off individuals used the downtime of the pandemic to start their own businesses. Some HR managers indicated that former employees are choosing to retain those businesses rather than returning to their previous employment. One HR manager revealed that her hotel company had chosen to support the entrepreneurial efforts by promoting them in the company newsletter. She also indicated that her company was piloting a shorter work week. These two efforts would facilitate entrepreneurial activities while still retaining employee loyalty and may represent a way in which hospitality firms can respond to 'the great resignation'.

2.6.11 Recommendations

1. Training needs to be offered for the sub-sectors beyond accommodation and food and beverage.

2. Food and beverage training will need to expand beyond preparation to incorporate the newer forms of food and beverage experiences such as farm to table and cooking classes.

3. Conference and destination management training will need to be strengthened.

4. Training in tourism negotiation, planning, forecasting will be required to support the changes in tourism.

5. Retention strategies need to be developed in response to the aggressive recruitment of cruise ship companies.

6. Countries may consider training individuals specifically for employment on cruise ships to avoid brain drain and too much stress on the local accommodation sector.

7. Entrepreneurship training will need to be strengthened.

8. Entrepreneurship needs to be better supported by public and private sector entities and concerted effort needs to be made to bring feasible ideas to fruition and move them from the informal to the the formal sector where they can get support.

9. Tourism establishments should consider ways in which they can support entrepreneurial activities of staff.

In addition to the technical skills required, there is general training needed in Information and Communication Technology (ICT) to support all of the sub-sectors of Tourism.

There are significant changes in all sub-sectors of tourism brought about by changes in the needs and preferences of both internal and external stakeholders. The policy documents of the various countries also indicate diversification beyond the major sub-sectors of accommodation and food and beverage. There is therefore demand for more trained personnel in all these areas. In addition to the technical skills required, there is general training needed in IT to support all of the areas. The workplace is increasingly the province of so-called 'digital natives' who are comfortable using IT but in a competitive marketplace it is critical that users be able to leverage IT to differentiate, promote and facilitate commerce. This topic of IT will be discussed in more details throughout the report because it is also a cross cutting issue.

2.7 TOURISM SECTOR ESTABLISHMENT AND EMPLOYEE PROFILES

The General Establishment Survey included responses from 173 establishments with respondents from all of the eight (8) tourism sub-sectors and most of the 18 project surveyed countries. The questions were designed to target smaller establishments (with five or fewer employees) and larger establishments (with more than five employees) separately.

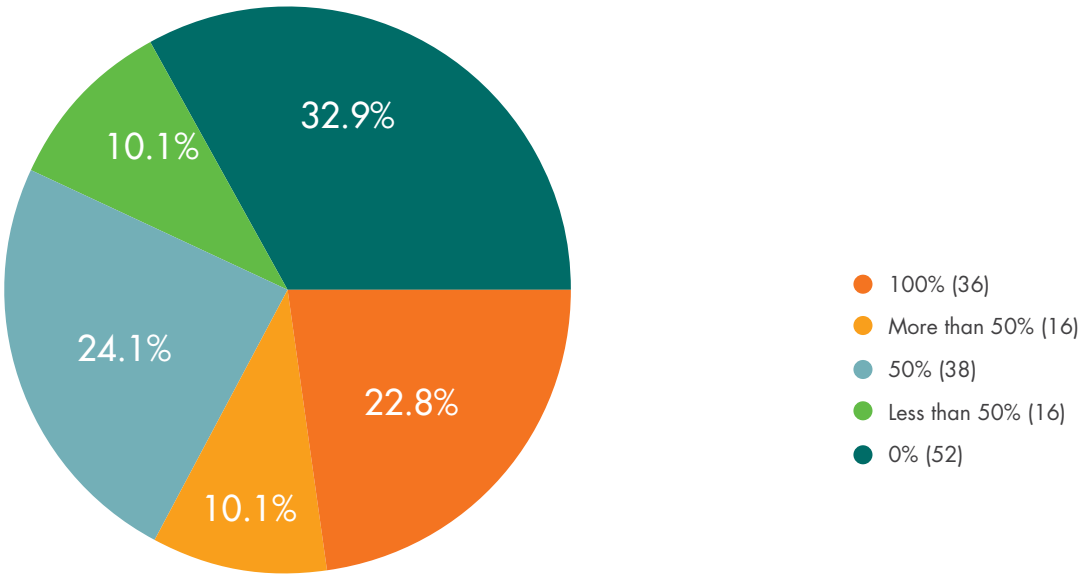
In all there were 95 small and 78 large establishments. A profile of these establishments and their employees is provided in this section with a focus on factors such as gender, employee type and wages.

2.7.1 Ownership by Gender

The establishments were asked what percentage of their owners were female to get an understanding of the gender difference of ownership in tourism establishments. This gives some indication of gender ownership in tourism establishments across the Region. The chart and data below clearly indicate that females feature strongly in the ownership of tourism establishments. It should be noted however that 67% of the respondents were females. The following pie chart illustrates this:

What percentage of your owners are female?

158 responses



Source: Establishment Survey - Question 9b.

Figure 19: Female Ownership

- 52 establishments (32.9%) had no female owners
- 16 establishments (10.1%) had less than 50% female owners
- 38 establishments (24.1%) had 50% female owners
- 16 establishments (10.1%) had more than 50% female owners
- 36 establishments (22.8%) had 100% female owners.

2.7.2 Employee Breakdown in Small Establishments

The survey results of the 95 establishments with five (5) of fewer employees showed a decline in the number of employees in establishments in 2020 at the height of lockdowns. The numbers increased by the end of 2021 to surpass their original 2019 levels as tourism locations opened up across the project surveyed countries and the world. This is illustrated in the table below:

Total Employees 2021, 2020 and 2019 (5 or fewer Employees)

Total Employees 2021 (Sept 31st)	Total Employees 2020 (Dec 31st)	Total Employees 2019 (Dec 31st)
224	79	135

Question 9b.

Table 16: Number of Employees in Small Establishments

Breakdown of types of employees in small establishments (95 establishments)

The following was gleaned from the sample of 95 smaller establishments for the 2021 period:

- The majority (75%) of establishments had owners or partners employed in them
- 28% employed family members
- 59% had employees (including those on paid leave)
- 10% hire apprentices.

This shows the high involvement of owners, partners and family members in the operations of small tourism establishments.

It was also apparent from the survey results that most employees are female across the employment categories for small establishments, particularly supervisors (91% female) and internal service professionals (85% female). This is shown in the table below:

Gender Breakdown Across Different Employment Categories in Small Establishments

Employee Category	Number	Female %	Explanation
Managers (2021)	74 (60 establishments)	**60%**	60 establishments hired managers with 44 having female managers. Of the 74 managers hired across these establishments, 45 (60%) were female
Female Managers	45 (44 establishments)		
Supervisors (2021)	23 (20 establishments)	**91%**	20 establishments hired supervisors. 91% of these were female
Female Supervisors	21 (20 establishments)		

Employee Category	Number	Female %	Explanation
Frontline Service Professionals (2021)	73 (42 establishments)	**63%**	42 establishments hired frontline service professionals with 30 hiring females in this category. 73 were hired across these establishments and 46 (63%) of these were females
Female Frontline Service Professionals	46 (30 establishments)		
Internal Service Professionals (2021)	47 (27 establishments)	**85%**	27 establishments hired internal service professionals with 19 hiring females in this category. In total there were 47 employees with 40 (85%) of these being female
Female Internal Service Professionals	40 (19 establishments)		

Table 17: Employee Breakdown by Category in Small Establishments

2.7.3 Employee Breakdown in Large Establishments

Based on the responses of the 78 establishments with more than five (5) employees, there was a reduction in employment numbers between 2020 and 2021. This is illustrated in the table below:

Total Employees 2021 and 2020 (Large Establishments)

Total Employees 2021 (Sept 31st)	Total Employees 2020 (Dec 31st)
2835	3525

Table 18: Number of Employees in Large Establishments

Breakdown of types of employees in large establishments (78 establishments)

- 52 of the 78 establishments stated they had owners/ partners. In total there were 86 partners/owners, 42 (48%) of which were female
- 19 establishments hired family members. Of the 59 family members, 22 (37%) were female
- In 2021, the total number of employees across the large establishments was 2835. 1650 (58%) of these employees were female
- 13 establishments hired a total of 54 apprentices. 40 (75%) of these were female
- 10 establishments hired a total of 30 employees classified as 'other'. 27 of these were female and included casual labour and domestic staff. The males in this category were parking attendants, casual labour, and lawn and pool service providers.

Gender Breakdown Across Different Employment Categories in Large Establishments

Employee Category	Number	Female %	Explanation
Managers (2021)	378 (67 establishments)	**53%**	67 establishments had managers including 65 with female managers. There were 378 managers hired overall, 53% of which were female
Female Managers	201 (65 establishments)		
Supervisors (2021)	300 (59 establishments)	**58%**	59 establishments had supervisors including 52 with female supervisors. There were 300 across these establishments, 58% of which were female
Female Supervisors	174 (52 establishments)		
Frontline Service Professionals (2021)	1388 (66 establishments)	**59%**	66 establishments had Frontline Service Professionals with 63 having female Frontline Service Professionals. Overall, there were 1,388 of these workers. 59% of these were female
Female Frontline Service Professionals	815 (63 establishments)		
Internal Service Professionals (2021)	1204 (56 establishments)	**73%**	56 establishments stated that they hired Internal Service Professionals including 54 with female Internal Service Professionals. There were 1,204 of these workers across these establishments, 73% of which were female
Female Internal Service Professionals	875 (54 establishments)		

Table 19: Employee Breakdown by Category in Large Establishments

Females also seem to be the dominant gender in large establishments with the majority of employees being female across all employment categories. This is prominent among internal service professionals in roles such as maintenance, food and beverage preparation, housekeeping, cooks and laundry attendants.



2.7.4 Average Monthly Wages

To get an idea of average monthly wages (excluding gratuity) across different employment categories, establishments were asked to give an estimate of what they paid full-time and part-time employees for the period July 1st, 2020 – July 1st, 2021 in the CTO Establishment Survey. The results showed differences between wages paid by small and large establishments and these are broken down and discussed below.

2.7.4.1 Monthly Wages in Small Establishments

Most of the small establishments in the survey were locally owned (88%) with 45% being Sole Proprietorships and 33% Private Limited Companies. The other 22% were a mixture of Non-Profit Organisations, Partnerships and Publicly Owned organizations. Across all types of employees, 44% of respondents paid less than US$500 a month, followed by 20% who paid an average of between US$501-1000 a month and 17% who paid between US$1001-2000. 24% of small establishments paid their upper-level management employees US$1001-2000 per month. With respect to other employment categories, the following was observed:

- 29% paid supervisors US$501-1000 each month
- 18% paid those in professional/specialist roles less than US$500 a month
- 35% paid clerical support staff less than US$500 a month
- 47% paid service and sales workers less than US$500 a month
- 50% paid those in elementary occupations less than US$500 a month

The only categories where some establishments paid over US$2000 a month were upper-level management and supervisors. More details can be found in the table below which shows the typical salary levels for different categories of employees in establishments with 5 or fewer employees.

Average Monthly Wage: **USD ($)** EMPLOYMENT CATEGORY	<$500	$501-$1,000	$1,001-$2,000	$2,001-$3,000	$3,001-$5,000	$5,001-$7,000	$7,001-$10,000	>$10,000	N/A	Number of respondents
All types of employees	44%	20%	17%	0%	0%	0%	0%	0%	15%	**66**
Upper-level Management	20%	18%	24%	6%	12%	0%	0%	2%	22%	**51**
Supervisors (e.g. house-keeping, food and beverage	29%	26%	3%	8%	0%	0%	3%	0%	32%	**38**
Professional and specialists (e.g. executive chef, senior accountant, event manager)	18%	7%	13%	0%	0%	0%	0%	0%	27%	**33**
Clerical support staff (e.g. junior accountant, reservationists)	35%	13%	6%	0%	0%	0%	0%	0%	45%	**31**

Average Monthly Wage: USD ($) / EMPLOYMENT CATEGORY	<$500	$501-$1,000	$1,001-$2,000	$2,001-$3,000	$3,001-$5,000	$5,001-$7,000	$7,001-$10,000	>$10,000	N/A	Number of respondents
Service and sales workers (e.g. receptionist, concierge, bell man	47%	6%	11%	0%	0%	0%	0%	0%	36%	**36**
Elementary occupations (e.g. driver, room attendant, gardener, pool attendant	50%	15%	3%	0%	0%	0%	0%	0%	33%	**40**

Source: Establishment Survey.

Table 20: Average Monthly Wages Across Categories in Small Establishments (Excluding Gratuity - in USD)

2.7.4.2 Monthly Wages in Large Establishments

Most of the large establishments were also locally owned (66%), while 14% were foreign owned, 9% were government owned, 8% were a mixture of local and foreign ownership and 3% were regionally owned. A high percentage were also registered as Private Limited Companies (41%), while 26% were government or statutory bodies, 10% were sole proprietorships, 8% were partnerships and the other 15% were non-profit or publicly listed companies. Across all types of employees, 29% of respondents paid an average of between US$501-1000 a month, followed by 24% who paid US$1001-2000 and 16% who paid between US$2001-3000.

20% of upper-level management employees were paid an average of US$1001-2000 every month, followed by 16% who paid US$2001-3000 and US$5001-7000 to their upper-level management employees. With respect to other employment categories, the following was observed:

- 31% paid supervisors US$501-1000 each month and 22% paid US$1001-2000
- 21% paid those in professional/specialist roles US$2001-3000 and a further 14% paid US$3001-5000 a month
- 33% paid clerical support staff US$501-1000 and 21% paid US$1001-2000 a month
- 32% paid service and sales workers US$501-1000 and 24% paid US$1001-2000 a month
- 36% paid those in elementary occupations US$501-1000, 22% paid US$1001-2000 and 20% paid less than $500 a month

Across all categories there were some establishments that paid over US$2000 a month. More details can be found in the table below, which shows the typical salary levels for different categories of employees in establishments with more than 5 employees.

Average Monthly Wage: USD ($) / EMPLOYMENT CATEGORY	<$500	$501-$1,000	$1,001-$2,000	$2,001-$3,000	$3,001-$5,000	$5,001-$7,000	$7,001-$10,000	>$10,000	N/A	Number of respondents
All types of employees	10%	29%	24%	16%	8%	2%	2%	10%	6%	**40**
Upper-level Management	3%	8%	20%	16%	13%	16%	11%	5%	8%	**64**
Supervisors (e.g. house-keeping, food and beverage	7%	31%	22%	13%	13%	2%	2%	2%	9%	**55**
Professional and specialists (e.g. executive chef, senior accountant, event manager)	5%	5%	5%	21%	14%	11%	5%	4%	21%	**56**
Clerical support staff (e.g. junior accountant, reservationists)	11%	33%	21%	18%	2%	2%	0%	2%	12%	**57**
Service and sales workers (e.g. receptionist, concierge, bell man	12%	32%	24%	8%	2%	2%	0%	2%	19%	**59**
Elementary occupations (e.g. driver, room attendant, gardener, pool attendant	22%	36%	20%	5%	2%	0%	0%	2%	13%	**55**

Source: Establishment Survey.

Table 21: Average Monthly Wages in Large Establishments (Excluding Gratuity - in USD)

It is clear from the above findings that for all categories of employees, wages tend to be higher in larger establishments than in their smaller counterparts.

2.7.5 Sub-Sector Involvement Across Establishments

Many of the establishments across the project surveyed countries participate in more than one tourism sub-sector. Only 73 of the 173 respondents were involved in only 1 of the 8 subsectors, with accommodation being the dominant one, while 101 were involved in a combination. From this we can see that establishments across the Region are usually involved in more than one tourism sub-sector.

This demonstrates the variety of establishments interviewed in the establishment survey and that perspectives were sought from a wide cross-section of the Caribbean tourism industry. The table below outlines the involvement of the 173 establishments surveyed in these sub-sectors.



Tourism Subsector	Accommo-dation	Adventure Tourism and Recreation	Attractions	Events and Conferences, Entertainment	Food and Beverage	Tourism Services	Transpor-tation	Travel Trade	Total
Total involved in each sub-sector	109	70	49	38	61	69	41	11	448
%	24%	16%	11%	8%	14%	15%	9%	2%	100%
Number in only one sub-sector	37	12	1	5	3	10	4	0	73
%	52%	16%	1%	7%	4%	14%	6%	0%	100%
Number in more than one sub-sector	72	58	48	33	58	59	37	11	376
%	19%	15%	13%	9%	15%	16%	10%	3%	100%

Source: Establishment Survey.

Table 22: Establishment Involvement across Sub-Sectors

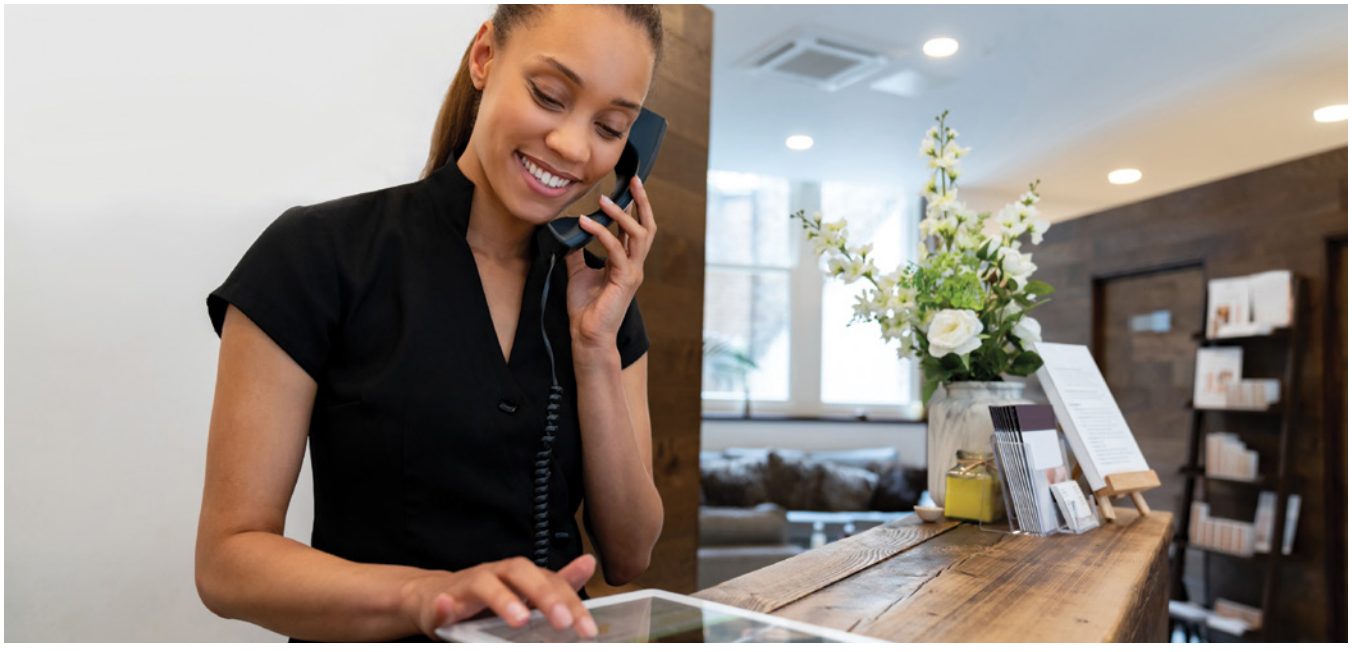
The information in this chapter was extracted from data collected from the CTO General Establishment Survey which was dispatched to establishments across all the project surveyed countries. These establishments varied in size (i.e., number of employees) and sub-sector. The analysed data showed that a large percentage of establishments operated in more than one sub-sector e.g. Accommodation and Food & Beverage or Accommodation and Adventure Tourism. The analysed data also showed the following:

- Gender – the tourism sector is dominated by females, being the majority across all employee categories (managers, supervisors, frontline service professionals and internal service professionals) in both small and large establishments, but especially in small establishments. However, males dominate in terms of ownership with 77% of establishments having male founders/owners (33% with 100% male ownership) and 67% having female ownership (29% with 100% female ownership)

- Size – just over half of the establishments (55%) were classed as small (5 or fewer employees) and 45% were large (more than 5 employees). A higher percentage of small establishments had owners/partners and family members than large establishments, while a higher percentage of large establishments hired apprentices

- Salary – Wages tend to be higher in large establishments than their smaller counterparts. Almost half of small establishments were locally-owned Sole Proprietorships with many paying staff across employment categories under US$1000 a month. In contrast, almost half of the large establishments were Private Limited Companies (PLCs) with many paying staff under US$2000 a month. Those in upper-level management and professional/specialist roles were generally paid higher in large establishments with some earning as much as US$7000 a month

- Sub-Sectors – Most establishments are involved in more than one of the eight subsectors (58%). 42% are focused on only one of the sub-sectors.



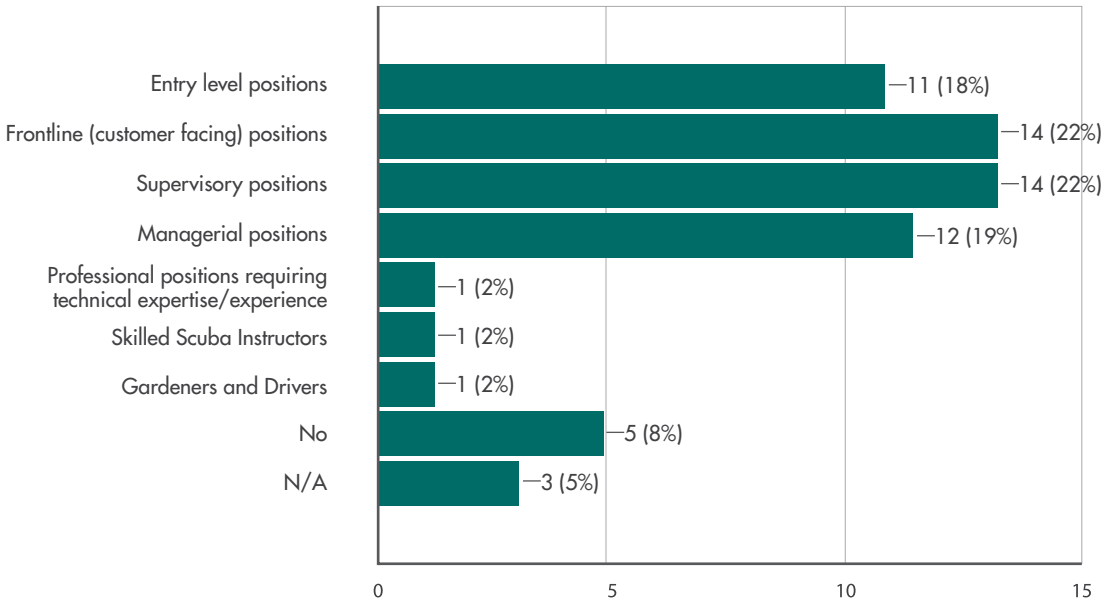
2.8 IDENTIFICATION OF KNOWLEDGE, SKILLS AND QUALIFICATIONS OF THE CURRENT WORKFORCE

2.8.1 Knowledge and Skills of Current Workforce

Pre-pandemic, it was difficult to find qualified people to fill

38 responses

Pre-pandemic HR managers reported that they faced the biggest challenges in supervisory and frontline positions.



**People could give more than 1 response.*

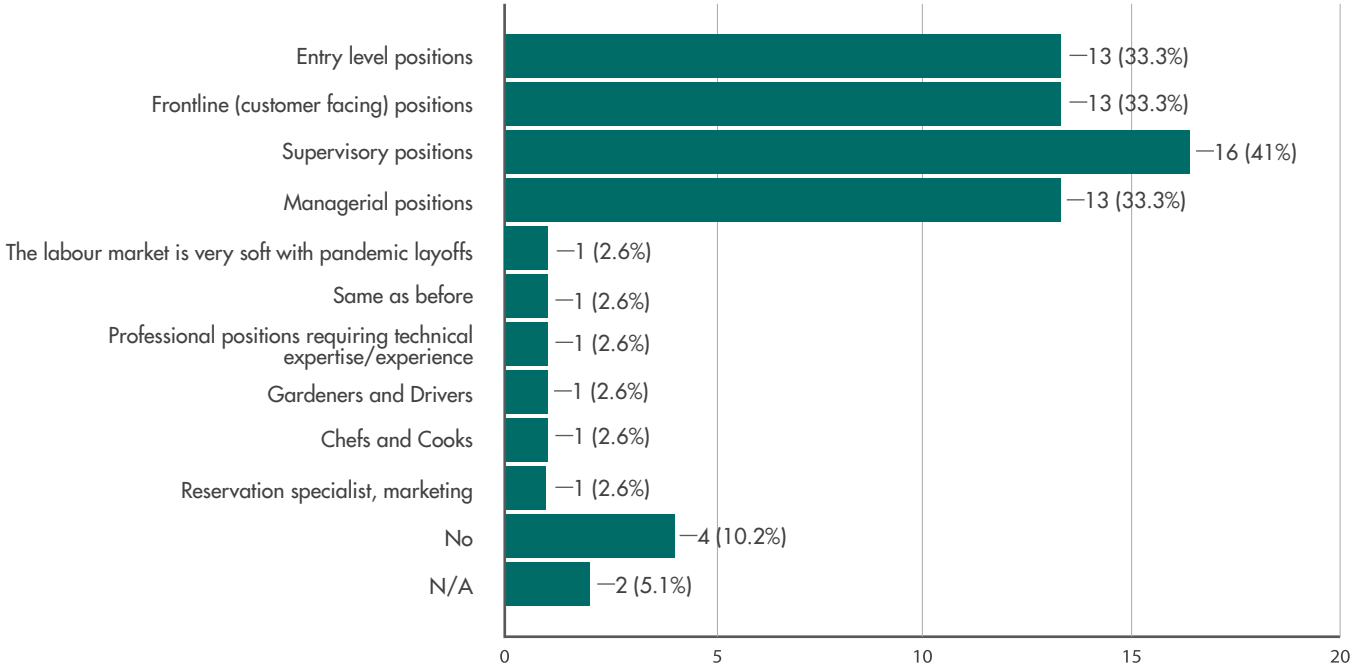
Source: Employers / HR Managers /Corporate Leaders Survey - Question 1.

Figure 20: Finding Qualified Staff (Pre-Pandemic)

Interestingly there was a shift in the shortage that they anticipated post-pandemic with supervisory positions continuing to be a concern followed closely by frontline, entry level and managerial positions. In other words, HR managers were indicating that they anticipated challenges in filling most positions.

Post-pandemic, I anticipate that it will be difficult to find qualified people to fill

39 responses

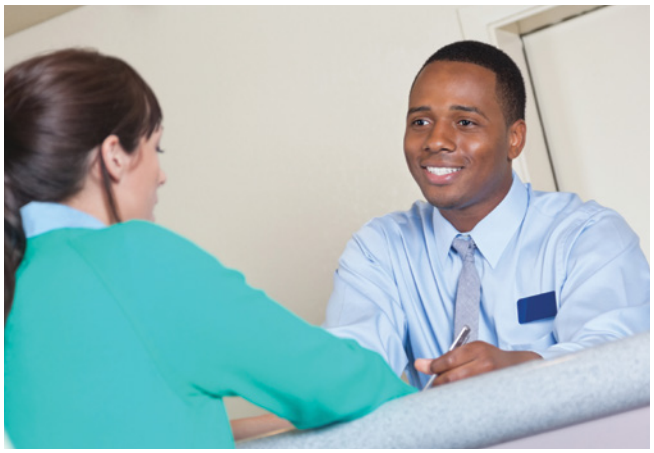


Respondents could give more than 1 response therefore does not add to 100%.

Source: Employers / HR Managers /Corporate Leaders Survey - Question 2.

Figure 21: Finding Qualified Staff (Anticipation Post-Pandemic)

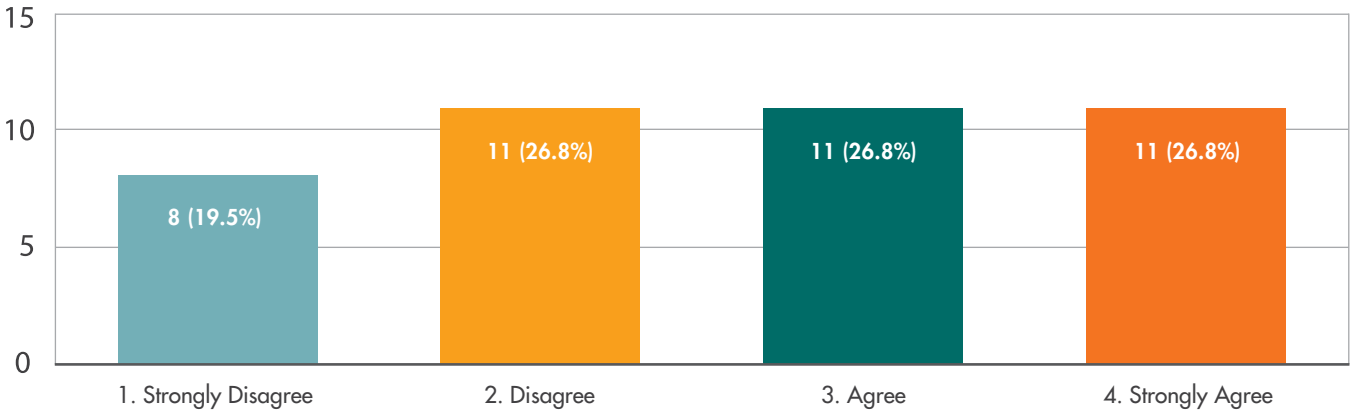
Nearly half of the HR managers indicated that they found it difficult to recruit supervisors and managers from the local market. Also many respondents in the interviews and webinars expressed concerns about the hospitality attitude and soft skills of job applicants. It was noted that amongst respondents to the Employers/HR Managers/ HR Managers/Corporate Leaders Survey that little difference was observed between the soft skills of job seekers with a first degree and secondary school leavers without certification. This indicates that soft skills are not necessarily taught in higher education.



A slight majority of respondents (53%) were in agreement that non-nationals were perceived to have a better work ethic and attitude than local workers.

Non-nationals are perceived to have a better work ethic and attitude than local workers

41 responses

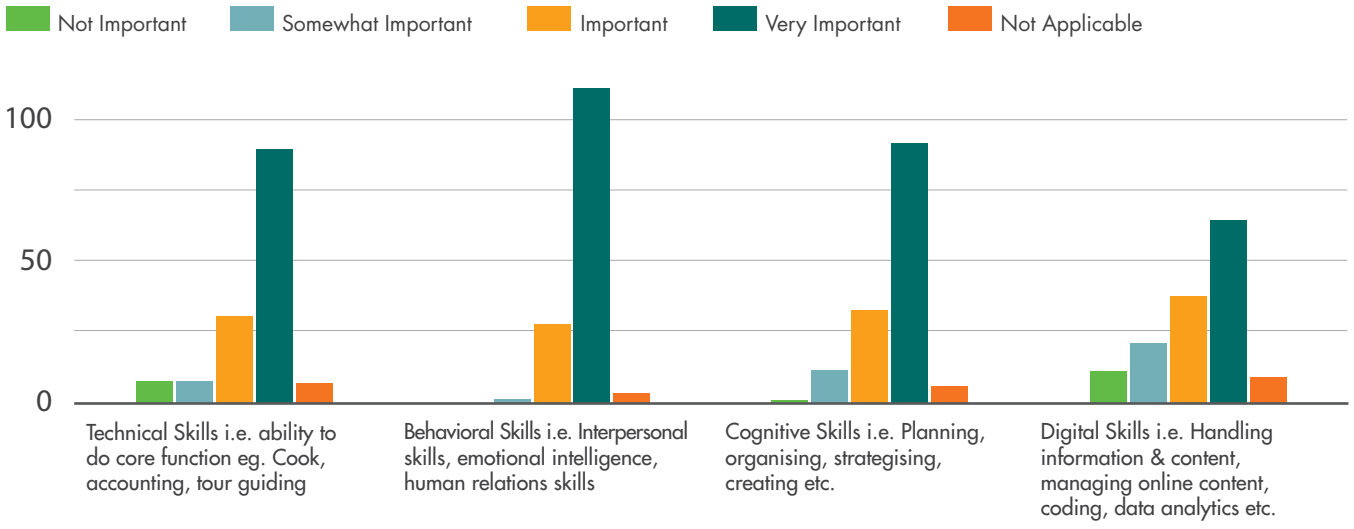


Source: Employers / HR Managers /Corporate Leaders Survey - Question 16.

Figure 22: Work Ethic in Non-Nationals vs Local Workers

The following questions and responses relate to questions asked of establishments managers and owners. The most important skills identified by establishments were behavioural skills, followed by cognitive and technical skills. Digital skills were identified as significantly less important.

How important are the following skills to your establishment's growth and development?



Source: Establishment Survey - Question 36.

Figure 23: Perception of Importance of Certain Skills in Tourism Establishments



Important Skills at Different Levels of the Organisations

Based on findings from the Establishment Survey and shown in the following table, literacy, communication, emotional intelligence, customer service skills and work ethic were identified as being most required at all levels. Computer skills were seen as most required at the level of managers followed by supervisors and front-line professionals. This would suggest that the use of digital devices has not yet penetrated significantly to internal and front-line professionals.

Special care and attention will need to be paid to older workers who are more likely to have less familiarity with technology.

This is likely to change however as visitors may continue to be more interested in touchless or minimum touch interactions. The following table provides a summary of responses to the question:

At which level of your organisation are the following skills/ attitudes most required? [61]

173 responses

Skill	All	Manager	Supervisor	Front line professional	Internal service professional
Literacy	110 (3)[62]	17 (6)	8 (6)	11 (7)	8 (3)
Numeracy	89 (7)	28 (3)	12 (4)	14 (4)	9 (2)
Communication skills	115 (2)	18 (5)	6 (7)	13 (5)	7 (4)
Computer skills	54 (9)	60 (1)	28 (2)	29 (1)	14 (1)
Interpersonal skills	106 (4)	22 (4)	8 (6)	16 (3)	6 (5)
Problem solving skills	96 (6)	31 (2)	16 (3)	14 (4)	7 (4)
Decision making skills	66 (8)	60 (1)	31 (1)	22 (2)	6 (5)
Adaptability skills	104 (5)	18 (5)	12(4)	12 (6)	5 (6)
Customer Service	116 (1)	17 (6)	9 (5)	12 (6)	8 (3)

Source: Establishment Survey - Question 37.

Table 23: Skill/Attitude Requirements at Different Levels of Organisations

[61] This question was included in the Establishment Survey.
[62] Numbers in brackets indicate ranking of importance of having the different skillsets at the various employment levels across tourism establishments.

As indicated in the above table, strong customer service, communication skills and literacy were the most important skills and attitudes that establishments required. Computer skills were seen as least important. It should be noted that skills requirements of supervisors were multifaceted and may explain why the supervisory level positions were highlighted as amongst the most difficult to fill in a previously cited OAS study.

The table below shows the findings registered by participants inthe Establishment Survey when asked to indicate at which level employees were proficient in or exhibited skills such as numeracy, communication, computer skills, problem solving, emotional intelligence, decision making and customer service. The table clearly shows that management in these establishments need to operate at a high level across all the skills identified.

Skill requirements for supervisors were found to be multifaceted.

Which of your employees have proficiency or a high degree of skill & expertise in the following:

173 responses

Skill	Manager	Supervisor	Front line professional	Internal service professional
Numeracy and quantitative skills	40 (3)	6(1)	2 (4)	3 (3)
Communication skills	24 (10)	6 (1)	5 (1)	2 (4)
Computer skills	41 (2)	6 (1)	3 (3)	3 (3)
Interpersonal skills	26 (9)	3 (4)	4 (2)	4 (2)
Problem solving skills	36 (5)	6 (1)	2 (4)	2 (4)
Decision making skills	48 (1)	5 (2)	2 (4)	1 (5)
Adaptability skills	26 (7)	3 (4)	4 (2)	1 (5)
Strong work ethic	25 (8)	3 (4)	5 (1)	2 (4)
Emotional intelligence	30 (6)	6 (1)	3 (3)	1 (5)
Customer service skills	22 (11)	6 (1)	4 (2)	1 (5)
Technical skills	30 (6)	4 (3)	3 (3)	6 (1)
General business skills	38 (4)	5 (2)	1 (5)	0

Table 24: Proficiency/Skills at Different Employee Levels in Establishments

2.8.2 Workforce Development Deficiencies, Needs and Opportunities

Deficiencies

Discussions with HR managers and employers indicated that a major deficiency was in the technical areas such as culinary and engineering skills. Filling the gap is quite challenging despite initiatives to train local chefs in countries including Antigua and Barbuda, The Bahamas, Jamaica and Trinidad and Tobago. One respondent also indicated that all-inclusive hotels were facing a major problem since the food and beverage curriculum was geared towards EP hotels. As previously mentioned, some respondents noted a lack of event and conference planners. Some respondents expressed a concern with the hospitality attitude of job entrants and many expressed that it was something innate to job holders and not something that could be taught.

A major deficiency identified was in the technical areas such as culinary and engineering skills.

As the number of yachters increases, there is an increased demand for specialists in areas such as engineering and dry docking. Respondents noted that within the government there was a need for training in project management and proposal writing. The area of sustainability was also highlighted as an area that needed urgent attention in sensitising individuals to issues such as carrying capacity, and opportunities for intersectoral linkages. It was notable that while it was easy for respondents to identify deficiencies, they had not worked with the institutions to correct these deficiencies. In one instance a high-ranking Jamaican official noted that there was a need for training at the Masters level to develop management and leadership capacities. At the same time the Mona Campus had recently closed its Tourism Masters programme because of low numbers.

Needs

The CTO had commissioned a study to identify training needs and this was submitted in 1999. It has already been referred to in this document but for ease of reference the following table is presented here:

	Managers	Professionals	Skilled/Semi-skilled	Unskilled
Leadership	29.0	4.3	2.9	0.0
Human Resource Management	18.8	7.2	1.4	0.0
Financial/Accounting	14.5	5.8	2.9	0.0
Marketing	17.4	17.4	10.1	0.0
Communication	13.0	11.6	21.7	8.7
Computer Literacy	15.9	11.6	27.5	1.4
Customer Relations	10.1	14.5	40.6	11.6
Foreign Languages	2.9	1.4	2.9	2.9

Source: Training Needs Next 3-5 Years: Quality Consultants, 1999.

Table 25: Training Needs in Tourism



Some important points have arisen from additional studies and surveys that have been conducted in the two decades since this report was published. These are outlined below:

- With the penetration of IT and the ongoing digitisation of so many business processes, computer literacy is less an issue but leveraging IT is an important training need
- Human capital management continues to be an important training need
- Foreign languages are still noted as a training need
- Customer relations and communication are still a concern, but these may be subsumed under the heading of 'soft skills'.

The needs have been identified in various reports and studies. The Caribbean Export Development Agency notes that:

- Human capital development for the sector is primarily focused on the accommodation sector and needs to go beyond this to incorporate spas, boutiques and other non-direct tourism services such as banks, police, customs, etc
- There is a need to focus on HRD in order to create service providing ccritical thinkers, problem solvers and entrepreneurs, rather than just order taking employees, to solve the problems and meet the challenges in their client facing roles
- There is a need to encourage more research and development to create more products focusing on innovation and thinking creatively
- The educational system needs to put more emphasis on bringing tourism into the regular curriculum so that graduates from high schools are already prepared for starting programmes in the Tourism Sector
- The natural attributes of the people of the Region need to be honed and used as a critical tool in offering exceptional service. Education and training can play a pivotal role in this regard
- Value creation needs to be developed by moving beyond just hospitality training to other higher value services such as ICT, finance, and entertainment
- Tourism research and statistics have not been a priority in the statistics divisions which focus more on traditional sectors such as agriculture and manufacturing. Where there are several indicators to measure economic development in these sectors, similar indicators are not usually developed for tourism. The same attention to detail is not given to the Tourism Sector, largely because of a lack of understanding of the importance of the sector and the various pieces of data, e.g. the importance of collecting email addresses to encourage repeat visits. Statistics collection in the Region is more historical in focus and not enough is being done to predict and forecast trends.

While technology, and in particular information technology, is already transforming Caribbean societies, there is a sense in which the Region has only seen the tip of the iceberg. Digital transformation is described as a medium to long term strategy by which tourism companies are distinguishing themselves from those that are not digitising.

The movement towards Smart destinations, one of the new 3Ss in the CTO's re-imagination of tourism, is more than just making people digitally sensitive.

In their report on ICT and tourism, the IADB discusses the Smart City and the transformative nature – "*Due to the intensive technology adoption, destinations will become smart in the future. This is an extrapolation of the smart city concept. A smart city is an innovative consolidated space on the basis of territory and a cutting-edge technology*

infrastructure that combines the concepts of sustainability, knowledge and technological innovation. The added value provided by the concept of smart tourist destination is the consideration of the visitor / tourist at its centre. In this sense, placing the visitor at the centre of developments will facilitate the generation of integrated intelligent systems, improving the integration and interaction with the destination (before, during and after the travel), creating elements that facilitate the interpretation of the environment, streamline decision-making and increase the quality of visitor experience." (IADB, 2014). As the statement indicates, the movement towards Smart destinations, one of the new 3Ss in the CTO's re-imagination of tourism, is more than just making people digitally sensitive.

There is a need for significant re-imagination and re-creation of tourism using the opportunities provided by digital technology. Technology utilised in this way creates opportunities for individuals via the gig economy and the borders of tourism are further stretched as it is possible for individuals to engage in e-commerce and to be a part of the Tourism Sector without having any physical interaction with visitors. This has been accentuated by the pandemic where the economy shifted online and individuals had to learn how to advertise and accept payments online.

The current pandemic has shown the responsiveness of the Caribbean in quickly developing apps and monitoring technologies such as Barbados' "Bim Safe" which is an app designed to simplify and expedite the travel experience to Barbados. The skillsets may therefore exist but not be adequately tapped into. Big data represents a huge opportunity to formulate and implement tourism related policies but a UNWTO report notes that it requires advanced technology and specialised skills as well as strong legal and institutional frameworks. The report suggests that these are often lacking in developing countries and indeed there was little mention of this very important technology in discussions with key stakeholders. There is also little indication of the private-public collaboration that would be an essential part of this strategy.

2.8.3 Strengths, Opportunities, Aspirations and Results (SOAR)

The following table utilises the SOAR methodology which has the advantages of being forward looking and positive. The table is populated with data provided by the reports and from focus groups and interviews. It speaks to general comments from participants of the final webinar[63] which will subsequently be turned into specific recommendations.

Strengths	Opportunities
More educated workforce	Greater utilisation of online training to incorporate workers in small entities and entrepreneurs
Increasing number of Educational and Training Institutions	Expansion of training beyond the hospitality sector
Online learning capacity increased	Greater coordination between training institutions and industry
Corporate universities and structured training programmes in large hotels	Better articulation between training institutions to ensure smooth movement
Some establishments are practicing recycling	Better and more structured internships that add value to interns and institutions
Government policies are in place to promote sustainability e.g. British Virgin Islands Iguana farm and eco tax paid by visitors	Use creative means to expose potential employees to different career paths in tourism. These may for example, include virtual reality and simulations
	Attracting and retaining young people to tourism by showing opportunities for mobility and growth

[63] The final webinar was held May 17, 2022.

Strengths	Opportunities contd.
	Becoming 'greener' by practising more recycling and by retrofitting rooms to be more climate friendly Spreading the message that tourism is everyone's business and connect it to care for the environment Diversifying tourism to include sports, festivals and environmental tourism Using tax incentives to encourage training in tax establishments
Aspirations	**Results**
Transparent career ladders within all institutions Certification for most job positions Accreditation for most job positions Pay for knowledge and skills acquired Utilising online courses to offer training and development opportunities in entities of all sizes Preparation for the digital economy Utilisation of carrying capacity data to make WIFI freely available for visitors and locals	Highly trained workforce and entrepreneurs at all levels Higher retention rates It would be important to determine from our stakeholders what their expectations are

Table 26: SOAR Analysis – Strengths, Opportunities, Aspirations and Results

2.9 CONCLUSION AND LIMITATIONS

The goal of matching supply and demand in tourism is a laudable but difficult one because of the many moving parts in tourism. It is exacerbated by friction within the system. There is, for example, a disconnect and time lag between what the industry requires and what training institutions are providing. There is also some disconnect between the plans at the public sector level and the programme offerings at educational institutions. Entrepreneurship is an important growth area, particularly among the younger generation, but there does not appear to be a lot of attention paid to supporting their efforts by creating opportunities for knowledge transfer. There are gaps between what is required and what is provided but there do not appear to be many efforts to address these gaps by communicating with those who can resolve them.

As tourism becomes more diverse and involves members of small households and communities, there will be a demand for training in a way that is not necessarily currently captured by the traditional educational institutions or in the planning for human capital development.

There is also some disconnect in what employers state as being important and the changes in the sector. For example, digital skill is not highlighted as an important need by employers, but it is the direction envisioned by tourism planners and has become even more urgent in the context of the environment.

There have been significant changes in the needs of visitors, in the needs of the labour force and in the structure of the industry. To effectively manage these changes individual organisations will need to develop strategic human resource initiatives to ensure that they attract and retain productive, skilled and responsive employees. This may lead organisations to revisit their training and development programmes, and their compensation and benefits packages.



3.0

KNOWLEDGE AND SKILLS AUDIT

The Knowledge and Skills Audit **involves a situational analysis** of the tourism human resource development landscape to determine the knowledge, skills, qualifications, and competencies required for the current positions of the tourism workforce. It also aims to determine the extent to which the incumbent workforce is satisfying these requirements and/or recommend how the identified workforce knowledge and skills gaps can be addressed. Given the wide array of CTO countries, the report will not be able to provide great details on each Member State but will aim to give representative examples, given their different sizes and focus."

The chapter presents the specific requirements for the public sector, noting that there is a need for increased coordination between the various arms of government and between the government and the private sector. There is also an increased demand for technical skills in areas including analysis, marketing, promotion and planning. The private sector is extremely complex and diverse, and it is noted that as countries change their strategic direction, the eight sub-sectors will become even more diverse.

3.1 INTRODUCTION AND CONTEXT

This chapter presents an analysis of the knowledge and skills that the countries under review have stated that they will require. It is based on an analysis of the Master Plans and various strategic documents that state the vision and strategic goals of the various countries. The chapter notes the movement away from dependence solely on the natural resources of the traditional 3Ss of **sand, sea and sun**, to an approach that is based on the new 3Ss of **Social inclusion, Sustainability, and Smart destinations and businesses**. This is captured in the strategic plans of many countries and will require an enhancement of the knowledge and skills required, particularly in the public sector which will be the driver of this change.

3.1.1 Context

Tourism is an important socioeconomic activity and has been a leading economic driver of the 21st century service sector in the Caribbean Region. Early visitors came primarily for the sun, sand and sea but Caribbean countries have made a concerted effort to diversify tourism beyond those 3Ss. In September 2021, a virtual conference based on a new set of 3 Ss was held by the CTO to commemorate World Tourism Day. The 3Ss of 'Social Inclusion, Sustainability, and Smart Destinations and Businesses' were identified as three key priorities, which were integral to the Region's recovery strategies and were central to the conference deliberations. The 3Ss indicate an understanding that tourism, as practiced for decades, had certain limitations for hosts as well as guests, and an effort



to reduce those limitations was needed. Social inclusion indicates a desire to accommodate a greater swathe of the populace and ensure that all sectors of society are incorporated. As such, there is a concern about the people with disabilities, women and the youth of the Region. The focus of sustainability is a recognition that tourism must ensure that the natural environment is protected, and that tourism is practised in a way that preserves, celebrates and honours the traditions and practices of local communities. The third new S, Smart destinations, recognises the increasing ascendancy of the internet and of life being conducted virtually.

The 2021 conference captured the sentiments of many of the strategic planning documents and visions of the countries of the Region. The Cayman Islands for example speaks to sustainability and social inclusion in its vision *"to promote a sustainable, inclusive, consistently balanced, and vibrant tourism industry to diversify the Cayman Islands visitor experience, attract new markets, reduce seasonality, celebrate the islands' rich cultural heritage, protect its fragile environmental resources, and spread the benefits of of tourism development broadly and equitably."*

A reset of tourism will necessitate significant changes in the human capital that support the sector.

Grenada highlights social inclusion in its strategic objective of *"encouraging more equitable distribution of the tourism dollar and diversifying the available financial products so that they are more accessible for the development of attractions, accommodation and ancillary services."* Guyana envisions itself as a model of sustainable development and environmental security worldwide and envisions *"bringing out the true voice of the Guyanese – a country and people that are welcoming and proud of their diversity and heritage – and effectively amplifying that to the world."*

The vision statements of these three Caribbean destinations indicate a determination to reset their tourism product. An important precursor to such a reset will be an understanding of the current situation of the human capital in the Region. This report presents the results of studies and analyses done within the Region in an attempt to document the state of tourism human capital.

3.2 THE CHANGING LANDSCAPE

The COVID-19 pandemic represents an unprecedented challenge to tourism as a result of closed borders and new health and hygiene protocols. The World Tourism and Travel Council (WTTC) notes a 18.5% decrease in jobs globally with women, youth and minorities being disproportionately affected.[64] This loss of jobs has been exacerbated in the Caribbean Region because tourism is such a vital industry and indeed it is the world's most tourism dependent region. While the WTTC estimates that lost jobs could return by 2022, there is no clear indication that they will return in exactly the same way. In Barbados, for example, The Welcome Stamp Programme - a remote work programme, has been successful in attracting digital nomads. The model has been copied in other countries of the Region including Anguilla, Antigua and Barbuda, Aruba, The Bahamas, the Cayman Islands and Montserrat. These visitors are unlikely to stay in resorts and will have different requirements. There has also been increased demand for yachting because of the freedom and flexibility it provides travellers. The Bahamas for example, has recently revamped its Marine Association with the goal of raising that awareness levels to enable the sector to achieve its fullest potential. Domestic tourism has surged as locals have sought to satisfy their desire for travel within their own borders, and the WTTC predicts that this will continue to be of interest in the short term. Tourism has perhaps been irrevocably altered.

The COVID-19 pandemic has of course altered the way that people think about safety, particularly when they are away from home, and the WTTC predicts that health

[64] See:WTTC%20Global%20Economic%20Impact%20and%20Trends%202021.pdf.

and safety will remain paramount. The Acting Secretary-General of the CTO suggests that tourism on the other side of the pandemic will be different, with significant integration of tourism and health functions to ensure the health and safety of visitors and locals. This will in turn lead to the need to innovate in order to provide visitors with the security that will make them feel comfortable during travel. There is pent up demand for travel in the wake of COVID-19 and, in the phenomena known as 'revenge travel', destinations can expect a resurgence of visitors. However, these visitors may require more personal services so they can avoid crowds and desire more authentic experiences during their travel. As such, tourism organisations and those who provide services in them will be required to be flexible enough to respond to the changing needs.

3.3 REQUIREMENTS BASED ON MASTER PLANS AND STRATEGIC DOCUMENTS

Available documents related to the plans of the 18 countries were reviewed. All countries are currently adapting their plans to accommodate the fallout from the COVID-19 pandemic and some countries are using this as an opportunity to review them. The table below indicates key features derived from Master Plans and other documents.

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Anguilla Government of Anguilla Sustainable Tourism Master Plan 2010-20 Government of Anguilla Draft Tourism Policy	Vision: ***We are a premier Caribbean destination known for our world class beaches; pristine azure waters; top class resorts and restaurants; relaxed ambience; sense of place, peace and tranquillity in a safe setting among a friendly and hospitable people that take pride in their identity, cultural heritage and environment'.*** ***A tourism product that is responsive to the needs of the consumer whilst at the same time protecting and preserving the fabric that causes it to be–the social, cultural, and ecological environment.*** **Key Strategies:** • Upgrading of service standards • Skills development programme for supervisory and front-line staff • Development of a tourism HRD programme. Government will focus on maximising all available education and training opportunities from a variety of sources to ensure adequate provision of tourism education and hospitality training. Government will ensure that tertiary level training is available. Government will encourage and support all industry-based training • Government will provide the appropriate machinery for skills certification and accreditation of qualifications	• Creative and responsive Human Resources who deliver excellent service and products • Market Researchers • Information Technology Specialists • Data Analysts • Human Resource Specialists • Cultural Interpreters • Hospitality and Tourism Trainers • Craft Trainers • Human Resource Development (HRD) Experts • Accreditation and Certification Specialists • Curriculum Specialists • Accreditation Specialists • Environmental Specialists • Conservation Specialists • Government Planners

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Anguilla contd.	• Undertake pre-opening training programmes to avoid disruptive poaching of existing staff • Government will work with industry to develop career-pathing for Anguillans • Government will ensure that tourism and coastal environment are included in school curriculum • Cultural heritage will be integrated • Government will set up an advisory committee to assist with job analysis in tourism to ensure consistency • Utilising a recognised body for skills accreditation • Developing trainers and training material • Environmental Impact Assessments (EIAs) will be prerequisites to planning approval • Developments will be required to meet planning and building regulations encompassing conservation standards and controls for tourism developments • Government will stimulate and strengthen the intersectoral linkages to the tourism industry	• Organisational Management Specialists
Antigua and Barbuda Government of Antigua and Barbuda Medium-Term Development Strategy 2016-20 Antigua and Barbuda Tourism Authority Website	Vision: ***Antigua and Barbuda to become the premier island destination by delivering distinctive and diverse tourism experiences which will continuously enrich the lives of residents and visitors.*** **Key Strategies:** • Enhance and promote traditional tourism in a sustainable manner • Develop Barbuda as a high-end, low density resort destination • Promote sectoral linkages • Develop standards and regulations for persons involved in tourism • Attract new investments • Build tourism awareness nationally • Revamp aspects of the mature products in need of renewal, upgrading, modernisation and rebranding • Green Tourism	• Creative and responsive Human Resources who deliver excellent service and products • Marketing Experts • Strategic Planners • Branding and Marketing Experts • Quality Specialists • Investment Capital Specialists • Environmental Specialists

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
The Bahamas Vision 2040: National Development Plan of The Bahamas	Vision: ***The Bahamas will have a sustainable Tourism Sector which positively and significantly contributes to economic growth and development; is an engine for stable job creation and a source of entrepreneurial opportunities.*** ***The Bahamas will have a natural environment that supports the long-term sustainable development of the Bahamian economy and way of life for generations.*** **Key Strategies:** • Improve visitor satisfaction, encourage repeat visitors and improve the competitiveness of The Bahamian tourism product by strengthening the basic foundations of the Bahamian Tourism Sector: a service oriented well trained workforce; high quality, modern tourism infrastructure and a clean and beautiful environment • Increase The Bahamas' market share of global tourism through strategic planning, stronger promotions activities and improved access • Ensure that the Tourism Sector provides greater value-added services and linkages with the rest of the economy and that the sector is a source of innovation and entrepreneurship through well-formed tourism clusters • Develop a National Skills Strategy for the hospitality, leisure, travel and Tourism Sector and identify the core competency components for the tourism and hospitality sectors • Develop and deliver hospitality and tourism training programmes aimed at improving tourism and hospitality core competencies in: (insert bullet point) the high school system through practical experiences gained in internships and apprenticeships (insert bullet point) the tertiary system for executive leadership to encourage tourism entrepreneurship • Create standards of practice for local guides and tour companies etc. • Facilitate the use of technology and SMART approaches in all levels of the tourism value chain to improve the visitor experience (i.e., taxi booking applications, Wi-Fi enabled taxis and buses, free Wi-Fi hotspots in all tourist corridors, better internet service provided in hotels, increased acceptance of credit cards, etc.)	• Sustainable Development Planners • HR Development Specialists • Education and Training Specialists • Town Planning Experts • Strategic Planning Experts • Marketing Experts • Strategic Planning Specialists • Education forecasting and planning • Curriculum Specialists • Data Analysts • Entrepreneurship Training • Quality Specialists • Software Development and Application Specialists • Strategic Planners • Heritage and Cultural Interpretation Specialists • Community Development Specialists • Small Business Training, Development and Support Specialists • Health and Wellness Specialists • Promotion and Marketing Specialists • Community Development Specialists • Craft Specialists

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
The Bahamas contd.	• Empower local government in the development and promotion of the local tourism product • Prepare a cluster study of the Bahamian tourism model. Map all functions of the tourism industry to identity and assess the potential linkages to the economy and or related value chains • Create strategies around various tourism experiences including heritage and cultural tourism; health, medical and wellbeing tourism, ecotourism, business tourism, gastronomy-based tourism, youth tourism, yachting, sports, religious tourism • Facilitate equitable community and small business involvement in travel, hospitality, and tourism supported by cooperative agreements or associations • Facilitate the creation of craft villages/days, artisans and local food experiences within hotels and local community venues with an emphasis on micro business • Facilitate and incentivise the creation of backward linkages to agriculture and fisheries • Facilitate and incentivise the creation of authentic Bahamian souvenirs • Strengthen promotion of national festivals for international audiences • Identify and implement innovative solutions to improve value added from tourism	
Barbados Barbados Tourism Master Plan Barbados Draft White Paper	Vision: ***To deliver an unmatched experience that is truly Barbadian, created by warm, welcoming, friendly people, ensuring benefit to the entire nation.*** ***By 2021, the vision is that Barbados will have become a sustainable, competitive, world-class destination with all-year-round tourism, picturesque landscapes, beautiful beaches, pristine waters and protected biodiversity. It will have preserved its heritage, cherished its traditions and proudly showcased them to the world, thus, successfully differentiating its product from the competition. The Barbados Brand will reflect the spirit of the Barbadian people and the memorable and unique experiences they deliver. Barbados would have earned its designation as being an aspirational destination, through the alignment of its price point with the high quality of products and services available on the island and lived up to its reputation of being a friendly, safe and clean destination.***	• Creative and Responsive Human Resources who deliver excellent service and products • Health, Sports, Culinary, Event and Meeting Management • Marketing Specialists • Leadership Development Specialists • Heritage and Cultural Interpreters • Data collection and analysis, Tourism analysts, strategic planners, Tourism researchers • Cultural Preservation Experts • Internal Marketing Specialists

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Barbados contd.	**Key Strategies:** • Priority Niche Markets: Accessible Tourism, Conference Tourism, Culinary Tourism, Diaspora, Domestic Tourism, Health and Wellness Tourism, Silver Tourism, Sports Tourism • Creating an effective leadership and performance management culture • Enhancing education, training and development within a vibrant policy framework • Building an entrepreneurial spirit and maximising ICT. • Defining Barbados as a land of legends with an evolving cultural heritage landscape • Promoting a green economy • Base decisions on comprehensive, accurate, and timely data / information • Enhance the visitor experience via Niche Markets, Built Heritage, Cultural Heritage, Natural Heritage • Change the tourism mindset • Improve financial performance • Modernise accommodation and improve the performance of the sector • Enhance the cruise tourism product and experience • Improve transportation on land and near shore • Assure safety and security of visitors and residents • Effectively market Barbados • Mainstream environmental management	• Environment Specialists • ICT Specialists • Data Analysts • Hospitality Management Specialists • Transportation/Logistics Experts • Communication Specialists • Financial Planners • Infrastructure and HR Specialists • Security Experts
Belize National Sustainable Tourism Master Plan for Belize 2030	Vision: ***Belize by 2030 will be an internationally recognised destination due to its unique, safe and high-added-value vacation experience that leaves those who visit with a longing to return and rediscover.*** ***Belize is an exclusive multicultural sustainable destination in the Central American Caribbean. It is a destination where the authenticity and friendliness of its people, coupled with the uniqueness of an exotic natural environment can be actively experienced within a conserved world.***	• Creative and responsive Human Resources who deliver excellent service and products • Sustainability and Conservation Specialists • Data Analysts • Strategic Planners • Experts in Value Chain Management

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Belize contd.	**Key Strategies:** • Structure the tourism offering into a diversified product portfolio that maximises tourism asset potential that meets the international tourism market demands • Increase visitor satisfaction and confidence in Belize as a tourist destination by enhancing the service quality and by creating spaces of high value • Facilitate stakeholder participation and channelling of benefits to reach long term sustainability and maximum profitability • Be proactive in finding funding solutions through self-funding systems and committed search for investment partners	• Service Management Trainers • Product Development Specialists • Negotiators • Financial and Investment Planners with specialist skills in funding • arrangements • Tourism Planning Experts
British Virgin Islands Recovery to development plan of the Virgin Islands.	Vision: ***Solidifying Virgin Islands' worldwide competitive position in tourism and financial services, diversifying the economy and establishing an enabling environment by creating a unique and memorable experience for visitors with the highest industry service standards, world class accommodation and an exceptional tourism product.*** **Key Strategies:** • Remaining the premier yachting destination • Protecting the environment by encouraging low impact, high yield business • Building a more resilient tourism infrastructure • Product development with emphasis on creating niche markets. Including eco-tourism, medical tourism, agritourism, voluntourism, sports tourism	• Creative and responsive Human Resources who deliver excellent service and products • Strategic Planners • Experts in the Development of Service Standards • Marine/Yachting Skills. • Environmental/Sustainable Management Planners and Trainers • Tourism Planners • Product Development Specialists • Agricultural Specialists • Volunteer Management Specialists • Sports Management Specialists
Cayman Islands Cayman Islands National Tourism Plan 2019-23.	Vision: ***The Cayman Islands will protect our environment, celebrate our cultural heritage, while supporting a vibrant tourism economy that benefits the people of the Cayman Islands.*** **Key Strategies:** • Create or enhance tourism experiences that integrate heritage, arts, culture, and nature and are aligned with the national cultural heritage policy	• Environmental/Sustainable Management Experts • Cultural and Heritage Interpretation and Management Specialists • Policy Development Specialists • Blue Flag Certification Specialists and Trainers

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Cayman Islands contd.	• Enhance interpretation of natural and cultural resources • Develop, Promote and Enforce visitor codes of conduct for wildlife encounters • Revise and relaunch the Cayman Islands Environmental Programme for the Tourism Sector as a new sustainable tourism certification scheme to help businesses understand and apply best practices in sustainable tourism management • Obtain Blue Flag certification for prioritised Cayman beaches • Encourage sustainable design and construction of new tourism developments • Establish sustainable development plans for priority investment areas • Create greater efficiencies in the government and increase responsiveness to eliminate inconsistency and bureaucracy • Retain and expand existing source markets while proactively developing new ones • Implement programmes to attract more visitors in the low and shoulder seasons • Facilitate and attract development of small and micro tourism related businesses, boutique hotels, vacation homes and other non-traditional accommodation services in priority sustainable development areas • Enhance tourism research statistics and information availability • Enhance the governance of cruise tourism and upgrade related facilities and services to better manage the impacts on the environment and stakeholders • Implement a visitor management programme for heavily visited sites and immigration areas • Establish a public/private visitor experience development fund to assist Caymanians • Introduce an entrepreneur payment plan • Position the industry as an attractive career and employment choice for young people and adults	• Sustainable Construction and Design Experts • Strategic Planning, Organisational Management, Re-engineering Specialists • Investment Planning and Small Business Management Specialists • Statistical Analysts and Data Specialists • Plant Management Specialists • Experts in Capacity Management • Financial Planning and Investment Specialists • Community Management Specialists • Beach Management Specialists • Workforce Planning Specialists • Marketing and Promotion Specialists • Curriculum Planning Specialists • Training and Certification Specialists

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Cayman Islands contd.	• Expand and improve the delivery of tourism education to ensure it meets industry needs • Ensure all employees in the tourism industry participate in the PRIDE (Personal Responsibility in Delivering Excellence) training programme • Develop and deliver tour guide training and certification programme • Provide training and professional development opportunities to public sector destination management and marketing staff • Improve intergovernmental tourism coordination and implementation • Decentralise tourism management, and marketing through public-private partnerships at the local destinations, business communities and NGOs to develop new visitor experiences • Upgrade public beaches and organise vendors/concessionaires to offer a world class beach experience • Launch a Vacation Rental concierge programme • Conduct tourism awareness campaigns to communicate the importance of tourism and of delivering "Cayman kind" hospitality • Develop a National Tourism Workforce Plan	
Dominica Commonwealth of Dominica National Tourism Policy 2020	Vision: ***Dominica will pursue sustainable tourism that enriches the lives of all citizens by creating economic, social and cultural opportunities, protecting the natural resources and scenic, heritage and cultural features of the country, nurturing community involvement in tourism at sustainable levels, and by creating career paths for the young people of Dominica.*** **Key Strategies:** • The focus will be on 'low volume, high yield' tourism within the parameters of the island's limited absorptive capacity • Tourism policies, programmes and standards to conform with the principles and directions required of the Tourism Sector arising from 'Green Globe' and/or other certification programmes	• Creative and Responsive Human Resources who deliver excellent service and products that are high yield • Sustainable Tourism Experts • Green Globe Experts • Specialists in Heritage and Culture Discovery and Interpretation • Health and Wellness Specialists • Specialists in Fishing and Bird Watching • Meeting, Conference and Events Specialists • Marketing Specialists

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Dominica contd.	• Primary products: nature; hiking; diving; whale watching; heritage/culture (including the Kalinago Experience); health and wellness; festivals and events; and yachting • Secondary products: sporting events, Soft Adventure/Extreme Sports; Sea and Lake Fishing; Bird Watching; Education Tourism; Meetings and Conferences • Product Opportunities: Beach/Eco Lodges; Residence Tourism; Golf; and General Touring • Ensure that all new developments conform to the image that Dominica wishes to project as Nature Island of the Caribbean by meeting both the Physical Planning Division's (PPD) own eco-tourism guidelines and the eco-tourism performance standards set by 'Green Globe' and other sustainable tourism certification programmes	• Golf Specialists
Grenada Blue Growth Coastal Master Plan: Grenada, April 30, 2016 Grenada Tourism Master Plan 1997 (as cited in CTO Sustainable Report) https://gov.gd/moti/tourism	Vision: ***To be the world's leading tropical geo-tourism destination.*** ***Grenada's Blue Growth Vision: To optimise the coastal, marine and ocean resources to become a world leader and international prototype for blue growth and sustainability. Focus on boutique, eco and medical tourism.*** **Key Strategies:** • Cultural houses to create a vibrant link between visitors and locals • Blue innovations and coral restoration institute will accommodate research and educational exhibits for visitors • Sports rehabilitation and extended care facility and wellness spa hotel • Preservation and promotion of the nation's culture and heritage • Preservation and enhancement of the environment	• Sustainable Tourism Experts • Marine Specialists • Eco Tourism Experts • Medical Tourism Experts • Cultural Experts • Conservation Specialists • Sports Rehabilitation Specialists
Guyana Living Guyana Tourism Strategic Action Plan: 2018-2025 (Draft) Draft National Tourism Policy: Guyana – South America Undiscovered	Vision: ***To be recognised internationally by the year 2025, as a leading sustainable destination.*** ***A Green, Inclusive and Prosperous Guyana that provides a good quality of life for all its citizens based on a sound education and social protection, low-carbon resilient development, green and decent jobs, economic opportunities, individual equality, justice,***	• Sustainable Tourism Experts • Green Tourism Expert • Organisation Development Specialists

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Guyana contd.	***and political empowerment. Guyana serves as a model of sustainable development and environmental security worldwide, demonstrating the transition to a de-carbonised and resource efficient economy that values and integrates the multi-ethnicity of our country and enhances the quality of life for all Guyanese.*** **Key Strategies:** • Increase alignment and strengthen the enabling environment for tourism • Drive tourism related businesses • Develop products based on market demand and Guyana's strengths • Strengthen the approach to training and capacity building • Strengthen data collection and aggregation • Proposed activities: Birding, nature-based ecotourism, adventure and leisure-based tourism, wildlife viewing, community-based tourism, sports fishing, sports tourism	• Product and Marketing Specialists • Education and Training Specialists • IT and Data Specialists • Tourism Statisticians and Researchers • Specialists in Birding and Wildlife • Eco Tourism Experts • Community Tourism Experts
Haiti The Haiti Roadmap: A 2020-2040 Vision Prepared by the NAAHP Working Group – 2018 Haiti Sector Identification Sector Report 3: Tourism https://cfihaiti.com/index.php/en/business-sectors/tourism	Vision: ***Haiti is a vibrant and competitive export-based economy recognised on the world stage for its high competitiveness in four key sectors: Organic Farming and Fishing, Transhipment, Business Process Outsourcing focused on social media management, and Cultural and "Eco" Tourism. The country has grown at more than 7% per annum over the 2020-2040 period resulting in more than a quadrupling of its per capita GDP. The growth is unprecedented and has not been achieved at any other time in the nation's history since its independence. The cluster development concept coupled with the attraction of large multi-national companies, focused on the build-out of the clusters to meet their current and expected production demands, has given rise to a nascent group of entrepreneurial companies throughout the country formed around the clusters. As a result, a multitude of creative financial instruments have been developed allowing for significant foreign direct investments and investments by Haitians living abroad. Additional economic macro indicators are on a positive upward slope resulting in an emergence of new industries and capital flows to the country at a record velocity.***	• Eco Tourism Specialists • Cluster Management Specialists (especially in tourism) • Entrepreneurship Development and Training Specialists • Financing and Grant Writing Specialists • Cultural and Eco Tourism Specialists • Marketing Specialists • Conference/Event Management • Specialists in Golf and Marina Tourism • Organisational Specialists • Branding and Communication Specialists • IT, Data Collection and Analysis

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Haiti contd.	**Key Strategies:** • Expansion of cultural and eco- tourism targeting Haitians living abroad, visitors from African countries and curiosity seekers • Obtaining financing through anchor entities and foundations focused on historical preservation, education and research on indigenous populations • Clusters fuelled by a trained workforce, access to capital and a healthy entrepreneurship community • Accommodation capacity enhanced through local and foreign investment • Construction of a conference hotel • Construction of a marina, golf course and airport on Ile a Vache • Opportunities in development of multi-destination products with neighbouring destinations • Create opportunities for strong local operators willing to partner with foreign investors in green field or brownfield projects • Utilise communication specialists to highlight the safety of Haiti for tourists • Generate actionable data for potential investors	
Jamaica Jamaica Master Plan for Sustainable Development Vision 2030 Jamaica - Final Draft Tourism Sector Plan	Vision: ***To sustain the market position, the product must deliver a quality visitor experience that is unique and distinctive. The need to preserve and develop the country's unique and outstanding heritage assets – natural, cultural, historic and built – must take centre stage in the visitor experience offered.*** ***"An inclusive, world-class, distinctly Jamaican Tourism Sector that is a major contributor to socio-economic and cultural development, with a well-educated, highly skilled and motivated workforce at all levels within a safe, secure and sustainably managed environment."*** **Key Strategies:** • The involvement of communities in the design, development and management of the tourism product • Present Jamaica as a destination that combines sun, sea and sand tourism with a wide variety of adventure, sports and heritage products	• Creative and responsive HR who deliver excellent service and products • Heritage and Cultural Experts • Conservationists • HR Professionals • Sustainable Management • Community Specialists and Planners • Sports Tourism • Data and Market Analysts • Investment Specialists • Resort Managers

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Jamaica contd.	• Diversification of travel markets: emerging market, youth travel market, holistic tourism, eco-tourism and 'going green' • Growth based on a sustainable market position through development of Jamaica's natural, cultural, historic and built heritage, in line with market trends • Enhancing the visitor experience through improving resorts and increasing the types and quality of attractions • Community-based development, strengthening the role of local communities in the tourism industry, to increase local support and enhance sustainability • Making tourism a more inclusive industry, by ensuring that the benefits of tourism are distributed widely throughout the society • Environmental sustainability: the industry must contribute to the preservation of the natural environment	
Montserrat Montserrat Tourism Master Plan, 2015-2025	Vision: ***An exclusive private hideaway – authentic, peaceful, safe, unhurried. Affordable luxury accommodation provided in villas, small to medium sized resorts and guest houses/inns, with culinary excellence available in a variety of eateries. The back-drop is unspoilt nature with a range of things-to-see-and-do.... in the Marine Reserve, yachting, golf, and joining in the fun of the many festivals.*** **Key Strategies:** • Reorganise and strengthen institutional arrangements • Protect and enhance natural environment • Create economic infrastructure • Enhance air and sea access and visitor facilities • Review regulations/incentives to attract investment in accommodation • Enhance monitoring and maintenance of scuba diving sites • Feasibility studies for golf courses • Promotion of current and new festivals	• Culinary Experts • Creative and responsive HR who deliver excellent service and products • Environmental Management Specialists • Marine Specialists • Yachting Specialists • Golf Specialists • Organisational Management Specialists • Infrastructural Support Specialists • Investment Facilitation and Creation • Monitoring and Maintenance Skills • Festival and Event Management Specialists • Website Development and Management Specialists

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Montserrat contd.	• Maintenance of trails and signage • Website restructuring/development • Construction of volcano interpretation centre • Design plan for heritage village, reserve and park	• Interpretive experts for centres, villages and parks
St. Kitts and Nevis St. Kitts Tourism Sector Strategy and Action Plan 2014-2019. St. Kitts and Nevis Sustainable Development Goals (Background Report for 3rd International Report for SIDS)	Vision: ***To be a quality tourism destination that is people-centred, and economically and environmentally sustainable.*** ***Image to be projected: intimate, exclusive, unique, romantic, friendly, uncrowded/unspoiled, safe, healthy, diverse, environmentally friendly, rich heritage to be explored, personalised/ professional service.*** **Key Strategies:** • Strengthen institutional arrangements to increase visitor arrivals and improve quality and sustainable standards to meet international benchmarks • Further develop cruise tourism • Enhance tourism accommodation and encourage real estate development in order to increase room stocks and to improve quality and sustainability standards • To build culture and heritage resources to increase visitor spend • To improve the quality and sustainability standards at sites, attractions and restaurants to meet international benchmarks • To develop the potential of yachting, dive and water sports to attract more visitors and to implement environmental standards	• Creative and responsive Human Resources who deliver excellent service and products • Environmental Management Specialists • Hospitality Management Specialists • Heritage Specialists • Organisational Management Specialists • Standard Setting and Monitoring Specialists • Branding and Promotion Specialists • Investment Planning and Management Specialists • Real Estate Development Experts • Hospitality Management • Cultural and Heritage Management Experts • Yachting and Marine Management
Saint Lucia Tourism Strategy and Action Plan 2020-2030- October 2019 Medium Term Development Strategy 2020-23	Vision: ***Saint Lucia will consistently achieve above average-growth in high value, sustainable tourism.*** **Key Strategies:** • Doubling the total number of arrivals • Tripling the total tourist expenditure • Increasing the total tourism expenditure by 5 times	• Sustainable Experts • Marketing and Promotion Experts • Entrepreneurial Trainers • Specialists in Internal Marketing and Promotion of tourism • Customer Service and Product experts

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Saint Lucia contd.	• Substantially increasing the number of tourism-dependent businesses owned and operated by Saint Lucians • At least 80% of adult citizens satisfied with and supportive of the nature and extent of tourism development • Marine and terrestrial biodiversity and water quality sustained at globally acceptable levels • Satisfaction rating across market segments of 'much better or better' increased	
St. Vincent and The Grenadines St. Vincent and The Grenadines National Economic and Social Development Plan 2013-2025	Vision: ***Stimulating growth in the Tourism Sector to re-engineer economic growth.*** **Key Strategies:** • Increase the awareness of the value of the tourism industry in St. Vincent and the Grenadines • Fashion a comprehensive marketing strategy that capitalises on the diverse characteristics of the multi-island state • Strengthen sectoral linkages with tourism and other sectors of the economy • Increase capacity for tourism and the quality of the tourism plant • Develop a more authentic tourism product that protects the environment and utilises local inputs • Facilitate the development of quality small hotels and ancillary facilities by local entrepreneurs • Encourage viable Foreign Direct Investments (FDIs) • Improve skills base **Strategic Interventions:** • To create a more collaborative public-private sector approach to tourism development, management and marketing • To provide an enabling environment for an integrated approach to tourism development • To create an environment within which greater linkages are established between tourism and other sectors	• Communication Specialists • Marketing Specialists • Strategic Planners • Quality Experts • Community Specialists • Hospitality Specialists • Investment Specialists

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
St. Vincent and The Grenadines contd.	• To create mechanisms that would ensure all tourism development programmes and projects are sustainable • To create a community-based tourism policy • To create a balanced, high quality and competitive tourism product in St. Vincent and the Grenadines • To increase visitor arrival and tourist expenditure in target markets	
Trinidad and Tobago Revised National Tourism Policy 2020-2030 (Draft) July 2020	Vision: ***The Travel and Tourism Sector is a significant contributor to the social and economic resilience, growth and development of Trinidad and Tobago. The sector reflects the innovation, creativity, entrepreneurial spirit, cultural richness, unparalleled beauty, tremendous regional diversity, environmental stewardship and natural hospitality of the people of the twin-island Republic. This is characterised by a deep commitment to adhering to world class standards of excellence that ensures the satisfaction of our international and domestic customers, stakeholders, and other Industry partners.*** ***Trinidad will be positioned as "Trinidad - The Place That's Always in Season."*** **Key Strategies:** • To create an environment within which greater linkages are established between tourism and other sectors • Tourism development will be conducted in a sustainable manner and will transform the visitor economy into one that benefits citizens economically and socially • A collaborative approach will be adopted • A regional approach to tourism place management will be the hallmark • Every community will be given the opportunity to express its distinct natural beauty, power and complexity • Inter-industry linkages will be emphasised • A place brand identity will be developed and implemented for Trinidad's products, services and culture and promoted to a global audience	• Environmental Management Specialists • Specialists in the Development of and Monitoring of International Standards • Sustainable Tourism Experts • Destination Place Management Experts • Community Management Specialists • Cultural and Heritage Experts • Health and Safety Managers • Specialists in the Development of Regulatory and Financial Management Systems • HRD and Educational Development Specialists • Infrastructural Development Specialists

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Trinidad and Tobago contd.	• New emphasis will be placed on health and safety protocols for citizens and visitors alike • Mechanisms will be established to protect the country's natural heritage and cultural resources • A competitive regulatory and financial establishment will be established to enhance and foster investment • A greater commitment to HRD will be adopted while fostering collaboration between educational institutions and the Tourism Sector to rationalise and strengthen training and development programmes • A tourism land use policy will be developed to guide Tourism Sector investment for the public and private sectors. It is proposed that Trinidad's tourism "seasons" be divided into four periods, with each season offering, residents and visitors alike, the opportunity to share memorable experiences of the island's world-class festivals, music, culture, cuisine, sports, and its general joie de vivre during the year	
Turks and Caicos Turks and Caicos Islands Development Strategy 2013-2017	Vision: ***The Turks and Caicos Islands (TCI) tourism industry has the potential to greatly expand the economy if, and as, the community so desires. TCI tourism consists of a diverse set of industries. The overall sector can be broken down into the following categories: (i) the condominium market; (ii) traditional "European Plan" (EP) hotels; (iii) mixed condo/ EP hotels; (iv) time share; (v) the listing of private villas and homes; (vi) a growing number of bed and breakfast hotels; (vii) specialist hotels for divers, weddings, and travellers among other tourists; (vii) the cruise industry of Grand Turk; (viii) the second homes, including for foreigners avoiding northern winters; and (ix) the many ancillary industries such as bars and restaurants, dive shops, taxis and hire car businesses that serve all these visitors to TCI.*** **Key Strategies** The goal of the Ministry in charge of Tourism is to help establish a sound macroeconomic policy framework that supports sustained economic growth over the medium-term. This includes: • To strengthen the domestic value-added tourism • Medical tourism	• Specialists in Marketing and enabling Domestic Tourism • Medical Tourism Experts • Curriculum Development Specialists • Yacht and Diving Specialists

Country and Source	Tourism Imperatives	Derived Demand Implications for HR
Turks and Caicos contd.	• Rationalisation of courses offered by the College in Grand Turk • South Caicos could be developed as a yacht and diving centre	

Table 27: Analysis of Master Plans for CTO Member Countries

There is an inevitable gap between policy and execution and events sometimes overtake the policy. The COVID-19 pandemic certainly accelerated change and resulted in some countries developing new policies and others responding to changes occasioned. Even without the pandemic however, there were changes in the expectations of both visitors and the local population. The following table reflects the changes indicated by respondents as well as publicly available information about changes.

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Anguilla	• With tourism being so badly affected there is interest in creating virtual tours in case another disaster occurs • There is movement away from sole proprietorship to large brands • Visitors are generally interested in local experiences - they want to live as locals • Increased demand for exclusivity and thus demand for fully catered villas • Increased demand for culinary experiences • Demand for people who speak different languages	• Marketed as a COVID-19 free zone built on low volume, high spending visitors. Personalised concierge assisted with the process • Enhanced seaport designed like an airport with restaurants, bars and entertainment • Upgrading and renovation of existing properties to become world class (Aurora targets being one of the top 100 resorts in the world)	• Requirement for more highly trained service employees • Focus on personalised service

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Anguilla contd.	• COVID-19 has brought out the entrepreneur in many persons. For some the new income streams are very beneficial without the hassle of work schedules and there is therefore a reluctance to return to regular work • There is demand for local businesses to find their appropriate presence online		
Antigua and Barbuda	Overall shortage to be addressed particularly regarding: • cooks • chefs • maintenance	• Award winning social media campaign to promote the destination during COVID-19	• With the digital success there is likely to be more demand in this area • There is a need to ramp up training in the areas noted
Bahamas	• HR needs to redefine their role and position themselves as businesses partners. HR also needs to be the culture driver recognising that people want to thrive and be successful. HR also needs to build a training case for training • The pandemic changed people's minds about how they want to be viewed. When they were called back to work some workers were not willing to come back yet and some are realising that "you need me."	• Rejuvenation of the yachting industry – view that yachts were 'self-contained revenue generators that are able to bring in tourist dollars safely." • Government has shifted from fiscal consolidation to "Resilient Bahamas" which is further defined as being built on 'a culture of safety, security, inclusiveness, personal empowerment and evidence-based sustainable development planning throughout all the islands	• Specialised training and development for yachting • Employers need to demand certification

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Bahamas contd.	• Digitalisation has become much more important with the pandemic and many small businesses have moved their business online and have found it to be more cost effective to do business this way • Some businesses have permanently reduced staff • Increased creativity in the way that people do business		• Specialised training and development for yachting • Employers need to demand certification
Barbados	• Luxury tourism is up and there is a robust market for high end villas. There is a shift towards high end because people want a secure and safe environment and private grounds • Medical tourism is a growth area, and two (2) new hotels will be built to focus on cancer treatment. Residences are also being built for rehabilitative care • The welcome stamp programme is doing very well • Cruise tourism is doing very well with up to four (4) cruise ships a day and home porting is creating benefits • There is organic growth of community tourism e.g. Hiking tours are attracting not just locals but also visitors who start making plans even before they land on the island	• Home porting for cruise ships targeting new source markets – Middle East, Africa and Latin America	• The workforce will need to be upskilled. There is already a national training initiative • There will be a need to train additional workers. Discussions have already started

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Barbados contd.	• Extensive training is taking place at the national and organisational leve • Some people may have decided not to go into tourism because of the concerns of working face-to-face • Labour supply negatively impacted by demand from overseas and cruise ships		
Belize	• Increased need for certified bartenders and chefs as well as people who are bilingual		• Language training increased certification training
British Virgin Islands	• Demand for water sports has increased - shortage of marine captains and crew, restaurant chefs and front-line staff • As a result of the pandemic organisations had to be 'Gold Seal Service' certified in order to operate • Increased demand for medical staff, cooks, chefs • Shortage for some positions and concerns about succession planning since a number of current tourism staff are close to retirement age • The private islands attract the better staff	• Changes to the cruising port legislation to give an advantage to British Virgin Islands registered home-based companies owned by Virgin Islanders • Increased focus on the blue economy through training and waived fees	• Government has a 10-year action plan in place • There is a need for tourism education as early as primary school to emphasise the importance of tourism to the economy
Cayman Islands	• Need for personnel in front desk, housekeeping, beach attendants, boating transportation, chefs, bartenders, food and beverage servers		• Training will be needed in the areas indicated

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Cayman Islands contd.	• Upskilling needed in computers, literacy, numeracy, customer service and sales in order to improve longevity and resilience		
Dominica	• Increased training in mental health awareness, hygiene training, customer service, communication, and culinary skills	• Dominica will prioritise tourism, particularly eco-tourism, as it seeks to recover from the pandemic's economic effects	• Training in eco-tourism
Grenada	• Shortage of Food and Beverage staff • Need for training in understanding the needs of the post-COVID-19 traveller • Learning how to adapt to change and understanding that it will be a constant • Refresher training needed in the various fields and job specific enhancement training	• Increased construction of hotels. Task force developed to get students back on the St. Georges Campus	• There will be increased demand for hotel workers
Haiti	• Training needed particularly for the Bar and Restaurant and Reception areas • Training in how to be flexible		
Jamaica	• People are travelling more to learn more about new cultures and there is a big push towards gastronomy, health and wellness and the cultural industries	• Labour shortage has prompted free training	• More support from the tourist board to move and merge the cultural assets that are of interest • Continuous professional development involving partnerships with communities

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Jamaica contd.	• Greater focus on community tourism with clusters being created in different parishes • There is however a concern that community tourism is being treated as a token and that many niches in tourism are not being explored • Greater focus on health and wellness – spas, sports, yoga, medical nutrition, gastronomy • New tourists are going to be highly "tech savvy" – they will be seeking experiences such as augmented reality and looking in the metaverse, etc. • Visitors looking for more environmentally friendly spaces • 'Off the Beaten track' tours being created. Greater interest in 'touch, feel, immerse' from tourists • Opportunities for including indigenous culture e.g. Rastafarian community. This creates opportunities for attracting African Americans and Africans • More domestic visitors to resorts • Cycling has become a greater player with cycling tours being introduced. Some are integrated with other interests e.g. Birdwatching		• Development of ICT skills, increased training in standards and tourism laws • A need to expand Team Jamaica Training programmes to help people to better understand the link between community's behaviour and the success of tourism. Training is needed for entire communities and not just for people at a site or resort • Need for tourism awareness at an earlier age • Greater infrastructural support is needed for communities so that they are safe and clean - an important prerequisite for tourism • Greater collaboration between countries especially at the level of the indigenous population. • Important to diversify the pool of trainers to include people from indigenous communities • There is a need to increase the supply of labour

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Jamaica contd.	• The workforce needs to be more creative and nimbler, therefore the educational system needs a reset. There is a need to create an educational system that is not necessarily about working for someone. Three (3) pillars are envisioned: 1. They should establish a regional training network for the new workforce 2. They should develop a credit arrangement to incentivise knowledge and monetise ideas 3. Need to create a marketing network that can showcase what is being created • There is a need to certify more tourism workers, and this is the role of the Jamaica Centre of Tourism Innovation (JCTI). Employed individuals may be certified so that they can add value and lift the quality of the workforce. These credentials should be 'stackable' which means that they should be able to get global recognition • There is a vision for an associate degree in customer service and hospitality at 6th form		

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Jamaica contd.	• Tourism services have not been recognised as critical, but they are an important support service that brings great revenues directly to suppliers of these services • 'Strategic reform' is needed in the tourism labour markets • Trade unions are becoming irrelevant as workers are becoming their own entrepreneurs and therefore issues such as collective bargaining will no longer be necessary as workers will negotiate for themselves • Individuals are becoming more entrepreneurial - "people are not interested in writing resumes anymore – they are interested in writing their business model." • Labour supply negatively impacted by demand from overseas and cruise ships		
Montserrat	• High migration levels have decreased the tourism workforce • There has been a decline in the arrival numbers because of the loss of the ferry and cruise ships. Businesses have had to reinvent themselves	• Montserrat Remote Worker Stamp - Year long digital nomad • Minimum stay of 2 months and minimum income limit of $70K annually	• Need to increase tourism education in schools so that students understand how tourism can benefit them • Parents also need to be educated about options in tourism

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Montserrat contd.	• A unique problem is that many people in the workforce are only in the country temporarily as they await British Citizenship, so the turnover rate is quite high • The high cost of living means that it is not possible to make a living just from tourism and employers have had to be creative e.g. Job sharing and utilisation in other areas such as land cultivation • Tourism work is seen generally as less stable than other options e.g. Government work. There are also negative perceptions about tourism work e.g. that it is slave labour • The government has offered free training in some areas of tourism and the take up has been good because of the downtime of the pandemic		• There is a disconnect between the community college and the sector and this needs to be addressed • Training in customer care is needed
Nevis	• Increased interest in authentic tourism • Increased interest in sustainable and responsible tourism • Increase in cruise tourism • A deliberate attempt to diversify tourism and these are supported by a newly hired Community Tourism Officer		• Require digital skills to market online potential for virtual tours • Customer service skills • Cultural preservation skills • Flexibility/adaptability in order to be resilient and pivot • Create flexible options for people who only want to work part-time

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Nevis contd.	• Increased visitor arrivals from St. Kitts • Two older hotels have closed • Increased entrepreneurial activity as a result of the pandemic • Increased consultation and collaboration between government and various tourism stakeholders • Sous chefs and culinary positions are the hardest to fill • There is a shortage of labour which could be resolved by offering better salaries and benefits • There is a need for training in experiential tourism to meet increased demand		• Managing risks so that risks may be turned into opportunities • Administration - knowledge of labour laws, processes, etc • Need to retain talent because people are reconsidering the sector • Better communication between academia and industry and options for internships • Fostering entrepreneurship • Require training in soft skills/ work ethic • Need better succession planning – currently some job occupants are unwilling to share knowledge with others
St. Kitts	• Training in resilience and creative thinking is needed • Training is needed in customer service that will help individuals to distinguish St. Kitts from other destinations	Conducted a resident perception of tourism survey that indicated dissatisfaction with community involvement in decision making and a desire for increased focus on activities that improve the lives of locals rather than merely catering to tourist needs	Need for more experts in community mobilisation and engagement
Saint Lucia	• Increased domestic interest in tourism • Increased local participation and entrepreneurship in tourism through Airbnb for example • Increased interest in adventure tourism and hospitality	• Launch of a community tourism programme • Umbrella tourism programme to give greater exposure to smaller accommodations	Need for more IT experts

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Saint Lucia contd.	• Increased consciousness about hygiene and safety • Increased support e.g. Business Development Studios • Development of an agro-tourism park		
St. Vincent and The Grenadines	Shortages in: • housekeeping and • restaurant staff		Need for training in the requisite areas
Trinidad and Tobago	• Two (2) agencies dealing with tourism in Trinidad and Tobago leads to competition between the islands and is a positive development because the tourism product on the two islands is quite distinct • Improvement in the marketing strategy for Tobago • Increase in hiking and naturalists in Trinidad • Local tourism has increased • There has been more blended learning • There have been more virtual tours • Significant investment in digitising the Tourism Sector in Tobago • There has been more diversification in the activities offered	Tourism accommodation upgrade programme Focus on domestic Trinidadian tourism	• Training in the importance of tourism for Tobagonians including for children. Need for tourism to be positioned as a 'high end profession.' • Need training in IT • Need training in social media • Customer service needs to be enhanced especially training in cultural diversity and sensitivity • Tour guide training is needed

Country	Changes as described by focus groups and individuals	Policy changes	Implications for HRD from focus groups and individuals
Turks and Caicos Islands contd.	• COVID-19 has shown that training is important, and training has been taking place in the break using AHLEI programmes • There is a need to redefine hospitality and tourism work and to answer the WIIFME (What's In It For Me?) question. Therefore, it must be clear what the perks in hospitality are • CEO of one of the resort wants to make the resort the 'most Instagrammable resort in the world' so HR needs are constantly evolving • Since the pandemic employees' needs are evolving as well and organisations have to be creative to meet those needs. One hotel is exploring a 5-day work week and the pilot has shown benefits. This is part of the 'thinking outside of the box'. The pandemic created opportunities to appraise the situation and to develop a new culture, mission, vision and values • It is important that all employees demonstrate leadership • Roles that are hard to fill are culinary, spa and food & beverage	Cruise port improvement programme	There needs to be training in leadership and hospitality from an early age and hospitality and tourism must be in the curriculum

Table 28: Policy Changes as a Result Of COVID-19

As the table above indicates there have been some important shifts in the tourism product of the Caribbean and the implications for the human resources of the Region. The most shared shifts are:

1. Increased interest in community tourism, natural assets, culture and heritage

2. Increase in domestic tourism

3. Increase in small suppliers to provide unique/niche services. Increase in the informal 'gig economy.'

4. Increased training in the accommodation sector sometimes accompanied by rebranding.

3.4 CONCLUSIONS

Reports from key stakeholders indicate that tourism is shifting both domestically and internationally. There is a significant interest in community tourism and the pandemic created entrepreneurial activities that may now be mainstreamed. This means that tourism authorities will need to think about tourism differently and create different support mechanisms. In Jamaica it was noted for example that the pool of trainers for a programme needs to include more indigenous people. Jamaica also noted that as tourism moves beyond the resorts it is important to develop the infrastructure and to sensitise communities so that they are ready for this expansion. Almost every country noted the importance of sensitising schoolchildren to the importance and value of tourism. There was also concern about the professionalism of school leavers.

Special care and attention will need to be paid to the shifting interests of the younger workforce. One respondent described school leavers as lacking motivation. It was not clear whether they lacked motivation for the industry or just in general. Indeed, much of the entrepreneurial activity at the height of the pandemic and afterwards is attributed to young people. This would suggest that Caribbean young people, in line with their peers globally, may not be motivated to work for others and if they do, they want to do so on different terms as discussed below.

Research on Generation Z and Millennials suggest that they are motivated by much more than a pay check and it may be that employers need to think differently about how they attract and retain them.

There is a need for career pathing especially because of the widely held belief that locals cannot make it to the top of organisations. The changing expectations of Generation Z and Millennials however suggests that a broader approach may be needed. One idea coming from a Millennial HR manager is to think of employees as taking journeys. It means that organisations may facilitate but not dictate exactly how individuals work within organisations. It also implies the need for flexible career paths and multiple opportunities for learning and growth. Establishments are not just competing with other establishments for talent however - they are competing with the entrepreneurial drive of many in the workforce. One respondent in Jamaica who is involved in business development told us with conviction that "People are not interested in writing resumes anymore. They are interested in writing their business model". Even if they choose to work for an employer they want to do so on different terms. One HR manager noted that they want to be able to thrive and be successful contributors to the workforce.

HR plays a pivotal role in the accommodation sector, but that role varies.

Some HR managers discussed limits on their ability to be creative and responsive to the changing workforce. This was the case for example with expatriates who some HR managers thought were not held accountable for training their successors. There is a clear difference in the way



that HR managers of locally owned and foreign owned hotels experienced their roles. There appeared to be more limits on the autonomy of the foreign owned hotels than the locally owned ones and this manifested itself in the creativity that the latter experienced. In one instance for example a manager of a locally owned hotel had used the pandemic period to totally revamp the organisation's culture and to develop a customised training programme for the hotel. The approach to employees was changed significantly to provide them with ways of earning additional income and expressing their creativity.

In this section of the report, there is an examination of the conditions of tourism employment vis-à-vis labour market information. This would cover private and public sector input as well as surveying of the tourism workforce.

3.5 REQUIREMENTS BASED ON EXISTING REPORTS

Studies by the CDB, Caribbean Export (CARIFORUM Report) and the UNDP indicate several implications for human resource development. These are indicated below:

SWOT	HR Requirement
Strengths: • Unique value proposition (UVP) • Diversity of the product offering • Strong Caribbean brand	Participants will need to be trained to understand the UVP and trained to perform their roles in a way that upholds the UVP. Participants will need to be innovative and continuous learners who adapt well to changes and who are continuously seeking opportunities Identify the attributes of the brand and train personnel in how to bring them to life
Weaknesses: • Seasonality • Weak linkages to the local economies • Human Resources and Training is limited to accommodation and does not incorporate spas, boutiques and other non-direct tourism services such as banks, taxi drivers and customs • Not enough certification of tourism employees • Limited financial resources of the member states • High level of bureaucracy	Participants will need multiple skills and/or income streams so that they will have a source of income in the off-season Innovative solutions will be needed to create reasons for tourists to visit the destination e.g. Saint Lucia Jazz Festival. Tourism linkages may need to be part of the planning process to ensure that tourism generates income for a larger section of the economy e.g. Oistins Fish Fry in Barbados. Training may need to be provided to respond to this weakness Make better use of the resources provided by regional institutions such as CTO and CHTA. Utilise online training It will be important to enhance the skills of the HR practitioners Improve the coordination of resources in the various ministries and government agencies. Implement the plans for better coordination that are already in many national plans Need to strengthen the capacity to quickly collect, analyse and utilise data

SWOT	HR Requirement
Weaknesses contd. : • Lack of development planning • Limited data and information to support marketing and promotion efforts. Data is often out of date and inputted late. Statistical collection is more historical and less emphasis on forecasting • Weak skills in the area of attracting investment. Specific need for negotiating and social skills • Old management thinking especially as it relates to the use of social media • Not customer-centric enough • Inconsistency in marketing efforts • Need for thinkers/entrepreneurs and not just employees • Lack of strategic intent in training interventions	Need to develop and stick to long term marketing plans and to work collaboratively
Opportunities: • Increased regional collaboration especially in terms of investment • Growth of the Shared Economy • Cruise conversion • Medical and educational tourism • Yachting tourism • Use Information Technology more effectively for promotion and marketing • Growing trend towards authentic experiences • Joint marketing opportunities with non-traditional partners such as automobile firms, camera producers, telecommunication companies etc.	It will be important to train leaders and decision makers in cross cultural interactions so that they can work effectively on joint projects People who work in the sharing economy are not generally part of the formal economy, but they do form part of the tourism product and some basic training and sensitisation is therefore necessary. Training in marketing and upselling will be important It will be important to train individuals who can participate in this type of tourism Overall, it will be important to train individuals who can leverage tourism as a tool for economic development, develop economic linkages and inclusion, prepare for tourism of the future, explore opportunities for regional collaboration and organise the Tourism Sector (Fig. 19 – CDB, 2017)[65] Training in data capture and mining as well as web development Provide support and training for small entrepreneurs with authentic products and services

[65] Caribbean Development Bank. (2017). *Tourism Industry Reform: Strategies for Enhanced Economic Impact.* Caribbean Development Bank. Caribbean Development Bank.

SWOT	HR Requirement
Opportunities contd. : • The relationship between the creative industries and the Tourism Sector can be explored • Focus on mega yachts • Educational system can bring tourism into the regular curriculum so that high school graduates are sensitised to tourism careers/training • Service training can enhance the natural attributes of the people in the Region so that service is more interactive and dynamic • Tourism education and training should be more practical and involve more internships • Value creation may take place by moving beyond just hospitality training to other higher value services such as ICT, finance and entertainment. Jamaica's linkage programme was cited by CARIFORUM as an example of an effective structure • Potential synergies within the Region utilising the strengths of one destination to help the weakness of another • Potential learning from other destinations	
Threats • Climate change • Environmental damage • Health Risks • US/Cuba Relations • European War - Ukraine and Russia	Leaders and decision makers will need to be sensitised to the challenges and opportunities of climate change and the appropriate actions. Line employees may need to be trained in green tourism. Parties will need to be sensitised to these risks so that they may be avoided.

Table 29: SWOT Analysis

NGOs and Think Tanks have made specific proposals to develop tourism along more sustainable lines particularly as the world adjusts to the reality of a global pandemic. A 2021 report by the UNDP[66] was blunt in its assessment that tourism value chains are neither inclusive nor sustainable. The report specifically notes the demographic challenge of an aging population, brain drain and a lack of digital talent to facilitate digital transformation. The UNDP report indicates that it will be difficult to achieve the new 3Ss of Social inclusion, Sustainability, and Smart destinations and businesses. There is therefore a need for more focused public sector engagement.

Caribbean Master Plans and Strategies have for the most part been focused on sustainable development for the people of the country, but the details of people development are often lacking. When they are absent it is likely that people will feel ignored. A recent survey conducted by St. Kitts found out for example that three-quarters (77%) of residents desire community involvement in tourism development decisions, but only one-third (32%) feel that their opinion makes a difference.[67] Similar sentiments were heard in focus groups as individuals felt ignored. An approach that is people focused is evident in the Australia Tourism, Travel and Hospitality Workforce Development Strategy 2019, where the goal is that *"People working across tourism, travel and hospitality will be appropriately skilled and able, through the application of their expertise to contribute to the growth and development of a sustainable, productive and profitable tourism, travel and hospitality industry"* (p.7). A review of documentation suggests that while Caribbean policy makers have paid some attention to developing the inputs of skills and abilities, they have paid less attention to the outcomes such as sustainability, productivity, and profitability as is evident in the Australian development strategy. It also suggests that there is a role for technocrats who can build bridges between the Tourism Sector and the residents of the country. As the St. Kitts representative noted, their survey revealed that the authority was not as connected as it needed to be, and that not enough attention was being paid to making residents comfortable. This self-analysis as well as the ability to develop solutions to identified problems will be an important skill going forward.

Gaps in workforce knowledge may occur because individuals are not being trained or are not being trained in sufficient numbers or in the required areas.

Gaps may also occur because of leakage through migration to other companies, industries or to other countries. The Australia Tourism, Travel and Hospitality Workforce Development Strategy notes that while individual firms may suffer from the loss of employees, the industry may benefit from the intra-industry transfer of knowledge. The report notes that the sharing of employees within a community may create a pool of talent from which employers can choose and allows employees to gain exposure to the careers that are available. While it is not stated in the report, it would seem important to have a mechanism to foster this movement and to encourage retention within the sector if not at a particular job. In interviews conducted thus far, it is evident that stakeholders understand the problem but there do not appear to be any concerted efforts to manage it.

3.6 PUBLIC SECTOR

The public sector in tourism is usually dominated by a Ministry of Tourism which increasingly is likely to be paired with another sector. Barbados for example has a Ministry of Tourism and International Transport, Antigua has a Ministry of Tourism and Investment, Belize has a Ministry of Tourism and Diaspora Relations, Trinidad and Tobago has a Ministry of Tourism, Culture and the Arts and Guyana has a Ministry of Tourism, Industry and Commerce. These varied names reflect the new strategic thrust of pairing tourism with other sectors and attempting

[66] UNDP Rethinking Tourism & MSMEs in times of COVID-19: Regional Policy Dialogues: Summary Report. July 2021.
[67] https://www.travelagentcentral.com/destinations/st-kitts-resident-survey-shows-local-desire-community-centric-tourism.

to reduce the blockages that have traditionally limited the multiplier effect. Even in Jamaica which simply has a Ministry of Tourism, there is a deliberate focus on creating linkages with other productive sectors through a Tourism Linkages Network (TLN). Most Master Plans and policy documents recognise that these connections are critical if tourism is to be sustainable and inclusive.

The public sector may play an important role in national human resource development. This is well described by Baum and Szivas[68] in the following way: *"Policy and operational direction for the educational process from pre-school to vocational, higher and lifelong learning provision; facilitating access for the private and public sectors to the quantity and quality of skills required for economic development and growth; encouraging skills enhancement as a tool within economic restructuring, recalibration and inward investment attraction through moves to stimulate a high knowledge and/or skills based economy, and putting in place policies and programs that maximise employment opportunity and minimise unemployment and under employment within the economy, and thus enhance social inclusion"* (p. 785).

3.6.1 Requirements

The knowledge and skills discussed earlier indicate specialist skills in marketing, communication and data analysis for example as well as skills in networking, negotiation, creative thinking and problem solving. The skills listed in the Master Plans and other strategic documents primarily indicate a push towards pairing with other sectors and attempting focus on the former however a 2014 CEDA Skills Report noted high levels of bureaucracy as being a problem (Caribbean Export Development Agency, 2018). The CDB also noted weak linkages as a weakness in their SWOT of the sector (Caribbean Development Bank, 2017). There is therefore a need for countries to develop the skills necessary to create what Jamaica has referred to as 'joined-up government'. In one example out of Dominica, there was a tourist attraction that was under the protection of the National Environment Agency and there was a challenge in getting tourism and the environmental agency to work together. At the same time the public sector may need to reduce its reliance on favouring internal candidates and promoting from within rather than seeking the best available talent even if it comes from outside. In one example of this favouring of internal candidates, an auditor's report noted that a Jamaican tourism agency had several instances in which jobs required Masters degrees and were filled internally by people without that qualification and in one instance even without a first degree. The jobs were not advertised externally.

There is also a requirement for specific sectors to be upgraded in order to meet the shifts in tourism. Marine tourism for example, is spoken to in many of the plans and a 2020 report notes that the Caribbean has signed many agreements that provide a good framework for creating a good programme for responsible use of marine resources. The same report notes however that previous efforts have been quite pedestrian and therefore appropriate policies, legislation, incentives and infrastructure are required (Ventura and Wint, 2020).[69] The same requirements will exist for many of the new directions envisioned in the Master Plans. Particular attention needs to be paid to the overall area of environmental risk management as the Caribbean is the second most hazard prone Region in the world according to a 2014 report by the Caribbean Disaster Emergency Management Agency (CDEMA). It is also a tourism climate change vulnerability hotspot according to a 2008 report done by the UNWTO (as cited in Green, 2020).[70] Again, many of the reports speak to issues of climate change but there are few indications as to how these are being incorporated into educational programmes for tourism and what new jobs will be created to support this imperative. There is also little mention made of the careful record keeping and analysis in this area of hazards and disasters and Green notes this as being a critical component of the disaster management process.

[68] Baum, T., Szivas, E. 2008. HRD in Tourism: A Role for Government? Tourism Management 29(4) 783-794.
[69] Ventura, A.K., Wint, S.M.E. 2020. Building a Framework for an Integrated Caribbean Science, Technology and Innovation System for Socio-economic development.
[70] Green, E. 2020. Multi-Hazard Risk Management Guide for the Caribbean Tourism Sector, CTO.

The public sector in tourism facilitates the private sector in various ways including offering training, promotion, investment opportunities and facilitating access of visitors to the destination. The public sector is driven by national developmental goals while the private sector is for the most part, driven by a profit motive. The ability to create opportunities for investment and development by the private sector that line up with the government's goals for national development requires coordination, negotiation and bargaining between the public and private sector but there is no mention of this in the national plans and documents. It is important to note that lobby groups such as the national Hotel and Tourism Associations, do attempt to create this bridge between the public and private sector but as tourism becomes more diversified, these associations are limited in that they often do not include smaller players and tend to be dominated by the accommodation sector.

The public sector also includes the educational sector.[71] It is important to note that the secondary schools, training agencies, community colleges and universities in the countries provide an important pipeline of skill and knowledge for tourism. The extent to which they are providing relevant, affordable and attractive options will impact not only their ability to serve the needs of tourism employers, but their ability to attract people to the industry. With the current labour shortage, it is important that supply and demand be aligned.

Currently there are trained tourism/ hospitality graduates unable to find employment in the sector and employers unable to find the skills that they need.

The need for training is referred to in several plans both directly and indirectly. Belize for example directly states the intention to develop its training and capacity building institutions to provide diverse courses for operational and management staff so they can satisfy the needs and requirements of the tourism industry by 2030. This would be directly related to its note of the challenge of insufficient tourism services and facilities mainly due to poor training methods, low investment level of local private sector and few international hotel brands. Other countries such as Trinidad and Tobago refer to world class standards of excellence but do not indicate a vehicle by which these will be achieved.

3.7 PRIVATE SECTOR

The private sector in tourism is extremely diverse and by tradition is divided into eight sub-sectors. These sub-sectors in turn, often incorporate a wide range of players. The transport sub-sector for example may include airlines, yachts, ferries, taxis, tour buses and even bicycles. Understanding the challenges and needs of each sub-sector is therefore very difficult. This is exacerbated by the shifting contours of the sector. The sharing economy has for example, meant that accommodation now includes large numbers of private homeowners who may rent out space effectively competing with villas, apartments and hotels.

3.7.1 Requirements

The plans indicate that there is a need for greater training of individuals to meet the changing demands of tourists as well as new trends. Organisations and in particular leaders in the private sector will be required to be flexible in the light of continued uncertainty as the world recovers from the pandemic and contends with supply chain issues and inflation. Individuals trained to contend with health and safety issues are likely to be in demand for the foreseeable future as countries continue to deal with COVID-19 and emergent viruses such as Monkey Pox. As travellers demand more authentic experiences the cultural and creative arts will be a major growth sector. Sustainability management, community tourism and entrepreneurship are also growth areas. As countries attempt to diversify, cultural diversity and language training will be important. These areas are discussed more fully in chapter five which deals with future skills.

[71] As this will be treated within a separate report, it is dealt with very minimally in this report.



3.8 LIMITATIONS AND CONCLUSION

This report highlights the deficiencies as identified by various reports and the strategic documents of various countries, as detailed in Table 27 on page 149 -: Analysis of Master Plans for CTO Member Countries. The report indicates an increasingly granular demand for skills in the public sector, which will drive the transformation of tourism. At present the public sector deficiencies are clearly documented in Master Plans and policy documents but the deficiencies in the private sector are less definitive. They are shown in the section of the table entitled "derived demand" but it must be noted that Master Plans are sometimes a wish list and not an actual plan that will be implemented. Moreover, the current pandemic means that all Master Plans must be revisited and recalibrated.

The pandemic has created unique challenges and opportunities that need to be addressed. There is a quantitative difference in the workforce as some countries report that some former employees are unwilling to return to work. At the same time there is increased demand for labour because of increased travel. There is also a demand for more intense and more customised experiences, and this requires employees to be more creative and responsive. Some employers were proactive and created a retention strategy during the pandemic. In some cases, for example, employers used the period of closure to provide free training for employees. Others used the time to revamp their business strategy which led to the need to revamp the HR strategy. These hotels were able to reopen with their staff intact and in some cases more committed and energised. On the other hand, there were stories of other employers who were struggling to re-engage employees who they had let go during the pandemic.

The difference appears to be between viewing employees as a cost or viewing them as an asset. In an example of the latter perspective one hotelier explained that he had significantly increased his room rates and redefined the role that employees would play in delivering the type of experiences that would justify the increased rates. The same hotelier explained that he paid a lot of attention to wages noting that he wanted to ensure that he provided his employees with a liveable wage. During the pandemic when the hotel was closed, he had contacted repeat guests and asked them to contribute to a fund to assist employees. In other instances, we spoke to hoteliers who were developing and offering training that was not just focused on the job but meant to develop individuals holistically. One example was given of paying housekeepers above market rate as a retention strategy and we were informed that the strategy had paid dividends in terms of productivity and loyalty.

3.8.1 Conclusions

1. Countries have developed goals that are meant to transform their countries. There does not appear however to be much attention given to the process that will be used to achieve this and in particular, how the traditional mechanisms of the public sector will themselves be transformed to achieve the stated goals. A 2021 UNDP report notes, for example, that there is a lack of coordination at the community, national and Regional levels.[72] The CARICOM Human Resource Development (HRD) 2030 Strategy[73] targets the development of the ideal Caribbean person and represents the type of seamless approach that will be required in human capital development. That very important document does not however mention the Region's most important sector.

It will be important to identify the specific knowledge and skills required to drive the change and to map this against existing resources.

[72] UNDP. July 2021. Rethinking Tourism & MSMEs in Times of COVID-19. Future-Tourism in the Eastern Caribbean. Regional Policy Dialogues: Summary Report.
[73] CARICOM . (n.d.). CARICOM Human Resource Development 2030 Strategy: Unlocking Caribbean Human Potential. CARICOM.

2. Interviews, webinars and focus groups conducted have suggested that the training and development needed to support these changes is extremely fragmented and uncoordinated. While some of the plans highlight the need for better training particularly at the tertiary level, there is little attention paid to coordinating and integrating the efforts of these institutions. The rationale for developing these programmes is sometimes unclear and may even be described as ad hoc.

It will be important to coordinate the efforts of all of the training institutions to ensure that they offer programmes that directly support the strategic visions and that the programmes are offered at the required level.

3. The plans indicate a desire to be more socially inclusive but there appears to be very few plans to incorporate more women and differently disabled either in the public or private sector.

It will be important to deliberately cater to the needs of women, youth and the disabled people at the level of training and development and to work towards creating opportunities for them in the workplace.

Despite increasing labour force participation of women, a gender gap of 19.1% remains between women and men in the Caribbean, which is smaller than the 26.7% gap at the global level (ILO, 2018). Women are in a more precarious position as in 2017, the average unemployment rate for women in the Caribbean was 14.7% compared to 8.5% for men. Moreover, because women are heavily represented in the strongly affected economic sectors such as hotels and restaurants, they were more severely impacted by the COVID-19 pandemic (ILO, April 2021). Further, the informal sector which incorporates those who have chosen not to or who are unable to find work in the formal sector, has been affected with more negative intensity than the private sector according to a 2021 ILO report. The same report notes that even in the informal sector women lost jobs at a higher rate than did men.

4. The plans make little reference to the changing needs and preferences of the Millennials and Generation Y. There is, for example, limited reference to preparing trainees to become entrepreneurs and to enhance their digital skills so that they can compete in an increasingly digital world. This is a major concern as the IADB rated the Caribbean as being barely a 5 on a 10-point scale in terms of readiness to operate in the virtual space. The concern about the youth is of particular importance because the ILO[74] notes that this group was more severely affected than other groups. Moreover, the ILO noted that youth will be particularly affected especially in scenarios of a slow, gradual recovery, where those entering the labour market will find limited job offers (ECLAC-ILO, 2020). Additionally, although young people have the potential to participate in technology sectors and activities, the digital divide and the mismatch between the skills demanded and those acquired are important labour barriers for a significant subset of youth. The ILO 2022 report on social trends[75] also notes that during the pandemic the digital divide may have negatively

[74] ILO. (2020). Global Employment Trends for Youth 2020: Technology and the future of jobs. Geneva.
[75] ILO World Employment and Social Outlook: Trends 2022.

impacted economically vulnerable people still in school and this will of course impact the employment pool.

It will be important to identify the preferences and needs of the 'Youth' that are targeted and to develop plans to meet those needs and preferences. It will also be important to identify opportunities where youth have the potential to create value through technology and to create career paths to assist them.

5. There are many references to service excellence and to world class standards but limited discussion of the technical and soft skills that constitute this excellence. There is as such no roadmap for developing these skills in the private or public sector.

It will be important to drill down to what knowledge, skills and attitudes constitute world class and excellence for each destination and to develop a specific plan for developing them.

6. It is widely accepted by tourism stakeholders that jobs in tourism and hospitality are not the first choice by school leavers but there is virtually no attention paid to fixing any negative perceptions and promoting the positive aspects of tourism. Interviews conducted indicated that hospitality jobs, are still viewed as being less prestigious and acceptable than traditional jobs such as law, engineering and other white-collar work. It will also be important to target key influencers in communities such as parents and teachers as we were advised many of these influencers still believe that tourism should be a last resort.

It will be important to recognise that simply creating more training programmes alone will not solve the human resource issues in the Region and that attention must be paid in considering the feelings that potential employees have about working in the industry.

7. Retention is barely addressed in the strategic plans and policy documents yet migration and poaching of talented staff is a reality that affects the willingness of employers to invest in training and development. The Caribbean countries have lost 10-40% of their labour force due to emigration to OECD member countries. The migration rates are particularly striking for the high skilled.

It will be important to recognise that countries and private sector companies will need to develop an understanding of the push and pull factors that are affecting their human resources and to develop specific strategies to retain them.

Many countries have lost more than 70% of their labour force who have more than 12 years of completed schooling: this is amongst the highest emigration rates in the world for The Tourism, Travel and Hospitality industry. The situation has become even more dire as North America and the UK and cruise ship companies are actively



targeting Caribbean workers in an unprecedented way. There is therefore a need for a Workforce Development Strategy. Such a strategy developed for Australia,[76] recognises this as an important issue in their context and has a specific goal: 'people with expertise are retained within the tourism, travel and hospitality industry because they have opportunities to grow and build satisfying careers' (p.13).

[76] Service Skills Australia. Tourism Travel & Hospitality Workforce Development Strategy 2014-19.

4.0

HIGHER EDUCATION AND TRAINING INSTITUTIONS

4.1 INTRODUCTION AND CONTEXT

The CTO conceptualised this HRD Knowledge and Skills Audit of the Region's Tourism Sector as a response to Regional Governments' acceptance that this industry has one of the highest job-creation to investment dollar ratios of any industry option open to the Region. However, because of the Region's low absorptive capacity, caused by its uncompetitive suppliers of goods and services, and the 'low skill', 'low wage' profile of its workforce, the bulk of the investment dollars flow back out of the Region's economies to purchase the needed goods and services, including human resources knowledge and skills. This reality will threaten the promise to Caribbean Governments by the World Travel and Tourism Council, in its Travel and Tourism Economic Impact 2018 report, that world tourism employment is expected to rise by 2.5% per annum to 413.5 million jobs in 2028, thereby making Travel and Tourism the best partner for governments to generate quality employment.

The purpose of this Audit's chapter on the Region's Higher Education and Training Institutions is to reflect the consultants' assessment of their current capacity and effectiveness in meeting the Region's present and future Tourism Workforce needs, and to make recommendations on how to enhance their capacity and effectiveness.

The scope of this regional tourism industry Human Resource Development (HRD) Knowledge and Skills Audit requires an anticipatory forecast of emerging and future skills. Such a forecast is predicated on projected job-creating investment trends and strategies set out as a part of each country's Tourism Industry Master Plan. This forecasting will also incorporate the competencies required to manage the consequences of global warming, climate change and digitisation for the industry. Consideration will also be given to the heightened demand by the Region's tourism guests for a culturally authentic and diverse travel experience as well as the need to manage other post-pandemic eventualities.

This Higher Education and Training chapter has been set within the broad labour market framework of a knowledge and skills Supply and Demand equation. The role of HRD in the process of economic growth is predicated on the understanding that human capital propels economic growth through the internal effects of workers' productivity, creativity and innovation realised through lifelong education and training.

The quality of the labour supplied by the education and training institutions to the labour market determines the quality and productive capability of the national workforce. This in turn has an important bearing on the quantity and quality of the output produced in an economy. Given that labour demand is a derived demand, the quality and type of output produced by firms is constrained by the quality and quantity of available labour in the workforce. Likewise, the future aspirations for the growth, diversity and sophistication of the regional tourism industry, can only be realised through the productive, creative and innovative achievements of the tourism industry's workforce. This would be made possible by the structured and deliberate interventions of the Region's higher education and training institutions working in synergistic partnership with the industry.



4.2 METHODOLOGY AND APPROACH

In assessing the capacity and effectiveness of the Region's Higher Education and Training Institutions, both secondary and primary research methods were used. The primary research methods included:

- one-on-one interviews
- interviews with mixed discipline national focus groups, including education and training officials
- interviews with the institution's Principals and Officers, to garner a deeper quantitative and qualitative understanding of the appropriateness of the institution's programme offerings to meet the knowledge and skill demands of their Local Tourism Industry.

It is worth noting that the Region's Higher Education and Training establishments have traditionally operated from a supply-side philosophy, requiring them to prescribe the curriculum and credentials needed for the Region's socio-economic development. The emergence over the last four decades of the forces of economic liberalisation and market-driven globalisation, has resulted in a more market demand side approach by Higher Education and Training Institutions. Throughout the research process of this consultancy, a "mis-match" between the knowledge and skills supplied by the Education and Training Institutions and the needs of the Tourism Sector was regularly highlighted. Research findings also noted the following:

- reports of truncated career advancement for Caribbean locals
- widely held perceptions of career glass ceilings for locals and
- the preference to recruit the "better qualified and skilled" foreigners to fill the top positions in the sector.

All of these concerns have implications for the capacity and effectiveness of the Region's Higher Education and Training Institutions to enrol and prepare the best local talent. The prospect of a fulfilling career in tourism and hospitality will be the bait to attract future tourism employees.

The findings from both the Establishment Survey and the Survey of the Human Resource Managers and Executives in the Industry have revealed a degree of acceptance of the higher education and training qualifications awarded by local Institutions, and the extent to which these qualifications help to ensure career advancement of Caribbean residents. Most importantly, discussions with focus groups produced useful suggestions as to how meaningful interaction between the Higher Education and Training Institutions and the Tourism Sector could result in the supply and demand of required knowledge and skills being appropriately harmonised.

4.3 PROFILE OF HIGHER EDUCATION AND TRAINING INSTITUTIONS

4.3.1 The Institutional Framework of Caribbean Tourism Higher Education and Training Institutions

Higher Education and Training refers to Post-Secondary Education as well as Technical Vocational Education and Training (TVET) and Certification, including the credentialing of trained and assessed secondary school leavers about to enter the workforce.

The Region's prominent Higher Education and Training Institutions offering Diplomas, Associate Degrees, Bachelors and Masters Degrees in Tourism related disciplines include the following universities:

- The campuses of the regional University of the West Indies and
- Others located in Barbados, the Bahamas, Belize, Guyana, Haiti, Jamaica, and Trinidad and Tobago.

However, the bulk of the Higher Education Training and Certification, whether in the form of Associates Degrees, National Vocational Qualifications (NVQs) or Caribbean Vocational Qualifications (CVQs) are provided by the Region's seventeen (17) Community Colleges and TVET Institutions. The Region also boasts numerous private tourism and hospitality training institutions many of which issue their own certification. The table below shows these institutions.

Country	Type of Course/Programme and Certification Awarded	Type of Higher Education and Training Institution
Bahamas	University of the Bahamas Associates, Bachelors, Masters Degrees University of the West Indies Centre of Hotel and Tourism Management Bachelors, Masters	University University
Barbados, Trinidad and Tobago, Antigua and Barbuda, Jamaica, Open Campus	University of the West Indies (Regional) Bachelors, Masters, PhD	University
Belize	University of Belize Bachelors	University
Belize	Galen University Bachelors	University
Guyana	University of Guyana Bachelors	University
Haiti	University of Quisqueya Bachelors	University
Jamaica	University of Technology Jamaica Bachelors, Masters	University
Barbados	Barbados Community College Hospitality Institute Samuel Jackman Prescod Institute TVET Institute	Community College
Cayman Islands	International College of the Cayman Islands Associates Degrees	College
Dominica	Dominica State College Associates Degrees	Community College
Grenada	T. A. Marryshow Community College Associates Degrees	Community College
Jamaica	Excelsior Community College Knox Community College Montego Bay Community College Moneague College College of Agriculture, Science and Education Associates Degrees	Community College

Country	Type of Course/Programme and Certification Awarded	Type of Higher Education and Training Institution
Anguilla	Anguilla Community College Associates Degrees	Community College
Saint Kitts and Nevis	Clarence Fitzroy Bryant College Associates Degrees	Community College
Saint Vincent and the Grenadines	St. Vincent and the Grenadines Community College Associates Degrees	Community College
Saint Lucia	Sir Arthur Lewis Community College Associates Degrees	Community College
Turks and Caicos	Turks and Caicos Community College Associates Degrees	Community College
Antigua and Barbuda	Antigua and Barbuda Hospitality Training Institute Occupational Certification	TVET Institute
Bahamas	Bahamas Hotel Training College Occupational Certification	TVET Institute
Jamaica	HEART NTA Runaway Bay Training Hotel Occupational Certification Levels 1 to 5	TVET Institute

Table 30: Educational Programmes at Higher Education and Training Institutions across Project Surveyed Countries

The Regional Tourism Sector, long dominated by its accommodations sub-sector, comprised villas, small/medium sized hotels and larger resort properties combined with the jobs and occupations therein, symbolised what the Region's people traditionally understood as being the Tourism Industry. Consequently, education and training institutions and programmes seeking to supply knowledge and skills to the industry are still largely focused on the accommodation/hotel related occupations; including jobs, at all levels, from hotel management, housekeeping, front-office, accounting, food and beverage to plant maintenance.

In recent years the Sandals Resort Chain has operated "Sandals Corporate University, which is an in-house post-secondary education and training institution accredited by a Dutch accreditation body. It offers online and face-to-face courses to staff. In 2021 Sandals announced the launch of the Gordon Butch Stewart School of Hospitality Management to be located in Montego Bay Jamaica. This will be a collaboration between the University of the West Indies and the Florida International University.

At present however, Bachelors Degree programmes in Tourism and Hospitality Management have been offered at University level. Masters level degrees have been offered at the University of the West Indies. The course content reflects the growing diversity and scope of today's industry related jobs and enterprises in the Public, Private and NGO sectors. Examples of such courses are:

- Quality Service and Operations Management
- Research and Quantitative Methods
- Human Resource Management
- Financial and Management Accounting
- Tourism Entrepreneurship and Innovation Management
- Tourism and Hospitality Management
- Tourism and Hospitality Marketing
- Sociology of Tourism
- Decision Making Under Uncertainty
- Events Planning and Management
- Food and Beverage Management
- Sustainable Tourism Management
- Internship
- International Hospitality Business.

The UWI's programme brochure explicitly seeks to attract, "Persons who are either currently working, or are desirous of working in any of the wide variety of work settings that absorb tourism and hospitality management expertise within government ministries, private sector entities, non-governmental organisations, and in educational and training institutions."

At the Community College Associate Degree level, programmes are geared predominantly towards the accommodations sub-sector including:

- Hospitality Studies
- Culinary Arts
- Food and Beverage
- Travel and Tourism
- Hospitality Management
- Events Management.

These 80 to 84 credit hour Associate Degree programmes evolved from the CTO's 1990s Caribbean Tourism Learning System core curriculum which was intended as, "A strategic and coordinated tourism education and training strategy for the Caribbean and to raise the level of professionalism of tourism workers to meet international standards and competitiveness". Its key elements included:

- United core curriculum for different levels of certification at the tertiary level
- Use of occupational standards linked to core curriculum
- Student and industry employee mobility regionally
- Programme articulation to facilitate transfer of credits between institutions.

The programme catalogues assert that Graduates are prepared for employment in management-trainee positions within the industry and are eligible for transfer into the degree programme.

The Region's TVET institutions subscribe to the Caribbean Association of National Training Authorities (CANTA) prescribed Competency-Based Education and Training (CBET) methodology. This is based on industry-determined specification of work performance and describes the knowledge, skills and attitudes required by a worker in the performance of a particular role (occupation) in the workplace at an established standard. These are referred to as Occupational Standards and are used as the basis for:



- Developing training curriculum
- The assessment of attained learning outcomes and competence standards
- The award of the NVQ and CVQ from level 1 entry-level worker to level 5 professional-level worker
- Facilitating the accreditation of programmes and institutions and the articulation to higher levels of certification or to advanced standing towards certification in other areas of study.

Occupational Standards are used for purposes including the following:

- to identify and describe training needs for various occupations in industry
- to conduct labour market analysis and
- as a medium of communication between industry and the education and training system.

The training system unpacks the industry-determined Occupational Standards into Units of Competence consisting of elements, each with performance criteria and range statements. Instructors and assessors in the competency-based education and training system are supported by Evidence Guides as they facilitate learners toward achieving these units of learning outcomes and competencies that ultimately culminate in earning a qualification/certification.

All tourism industry related training programmes in the Region are explicitly titled after the occupation for which the programme prepares learners e.g. Commis Chef, Executive Chef, Front Office, Housekeeping, Food and Beverage, Plant Maintenance etc. This practice makes it very easy for tourism industry employers to decipher the knowledge, skills and attitude, and therefore the appropriate job placement of a CVQ or NVQ certified job applicant.

4.4 EFFICACY OF THE EDUCATION AND TRAINING COURSES IN TOURISM

In this section there is discussion of the Region's Higher Education and Training Institution's quest to satisfy knowledge and skills requirements. Relevant findings from some of the surveys conducted in this audit will also be presented.

4.4.1 Higher Education and Training Institutions Meeting Knowledge and Skills demands.

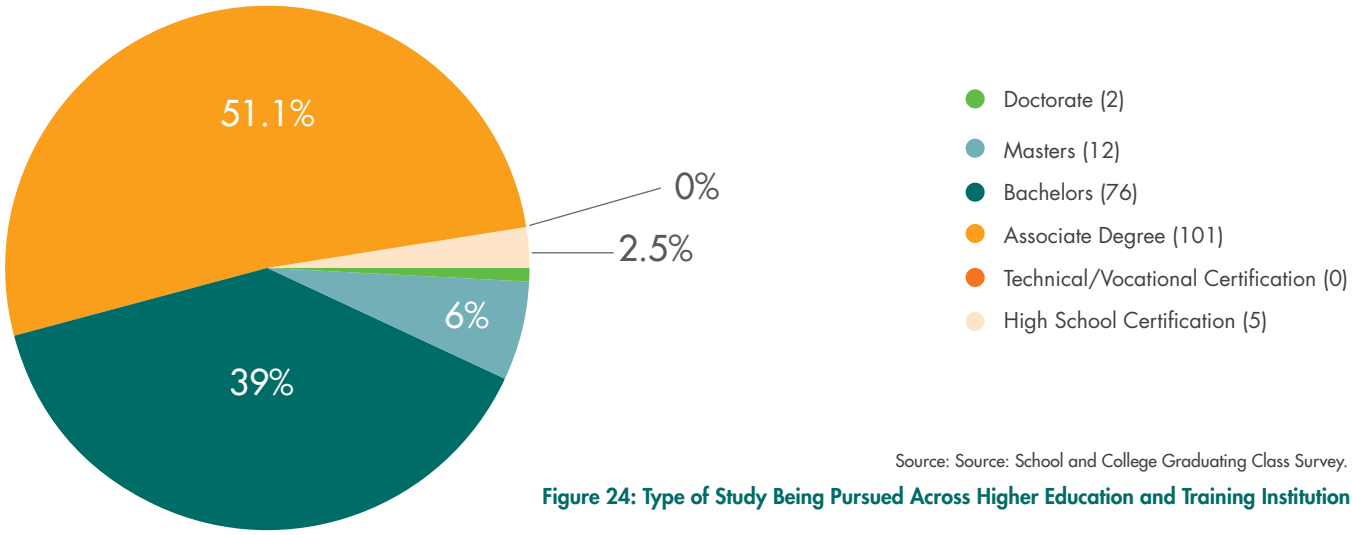
Higher education in Latin America and the Caribbean has 'massified' and is in the process of universalisation.[77] This is evident in the increase in opportunities for education and training in hospitality/tourism in the Region (see earlier discussion). At the time of writing, Barbados and Jamaica were signalling their intention to increase access to training opportunities even further as they grapple with the current labour shortages. An important question is whether the training/education is achieving its purpose of addressing the labour shortages in the Region in general and/or for individual countries.

51.5% of the students in the School and College Graduating Class Survey conducted in this project were pursuing their Associates degree and 38.3% were pursuing their Bachelors degree.

[77] UNESCO. 2019. Higher Education Mobility in Latin America and the Caribbean: Challenges and Opportunities for a renewed convention on the recognition of studies, degrees and diplomas (142).

Type of Study being pursued

196 responses



Source: Source: School and College Graduating Class Survey.

Figure 24: Type of Study Being Pursued Across Higher Education and Training Institution

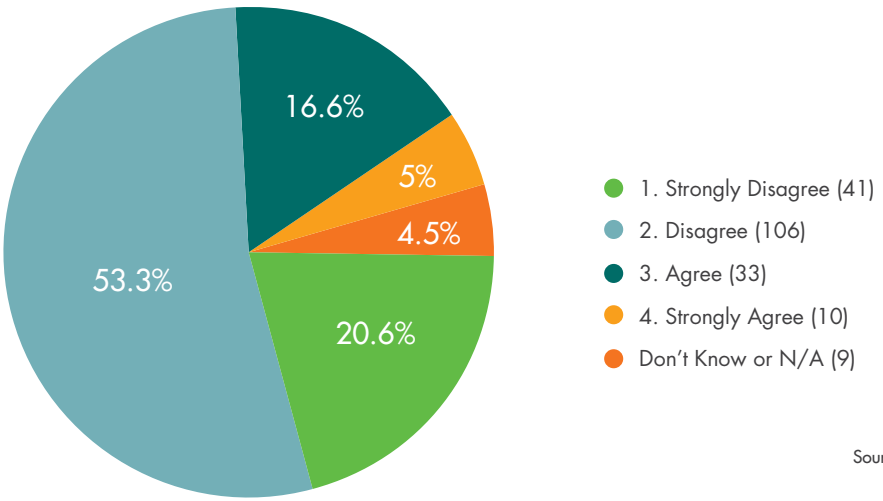
The students surveyed were very positive about the impact of tourism with the following findings:

- 96% agreeing or strongly agreeing that tourism played an economic role in their country
- 94% agreeing or strongly agreeing that they were proud that tourists were coming to their country.

The following charts with explanations show how students feel about various aspects related to jobs in the Tourism Sector.

Jobs in the tourism industry are low-skilled

199 responses



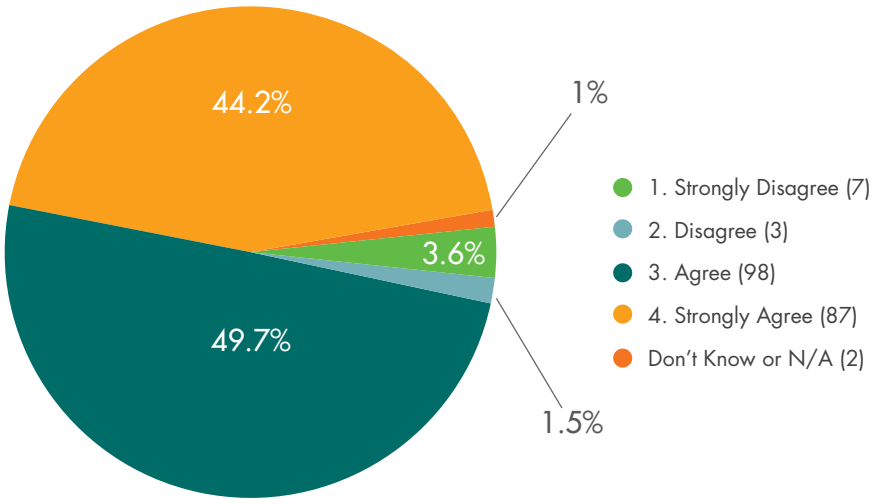
- Students were somewhat less positive about skill levels of jobs, with 25% agreeing that jobs in the industry are low skilled.

Source: School and College Graduating Class Survey. - Question 5.

Figure 25: Skill Level of Jobs in Tourism

I find jobs in the tourism industry interesting

197 responses



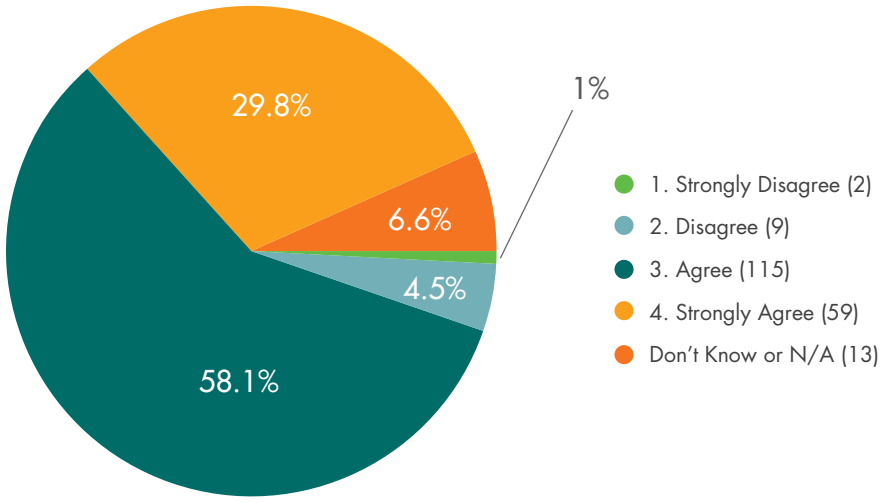
Source: School and College Graduating Class - Question 6.

Figure 26: Interest Level for Jobs in Tourism

- 94% believed the jobs in the tourism industry to be interesting.

People can use their initiative in jobs within the tourism and hospitality industry

198 responses



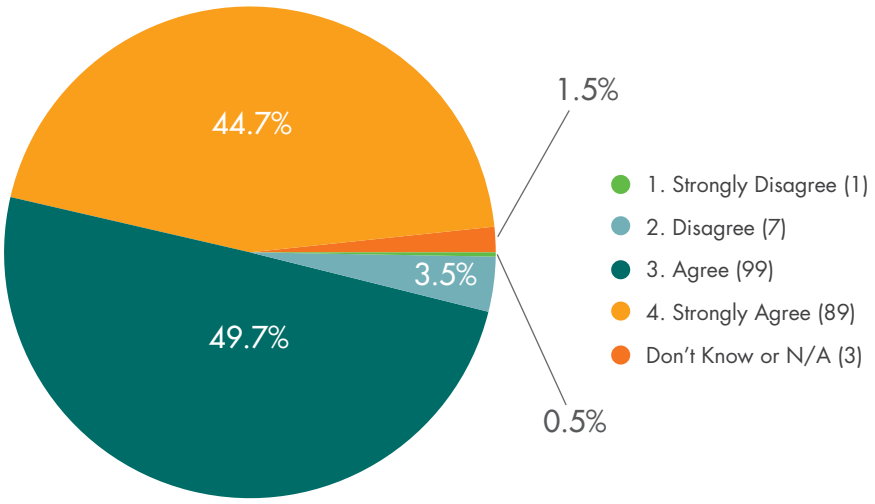
Source: School and College Graduating Class - Question 7.

Figure 27: Use of Initiative in Tourism Jobs

- 88% believed that they could use their initiative in jobs within tourism and hospitality.

Jobs in tourism and hospitality are meaningful

199 responses



**Due to rounding the totals do not always add to exactly 100%.*

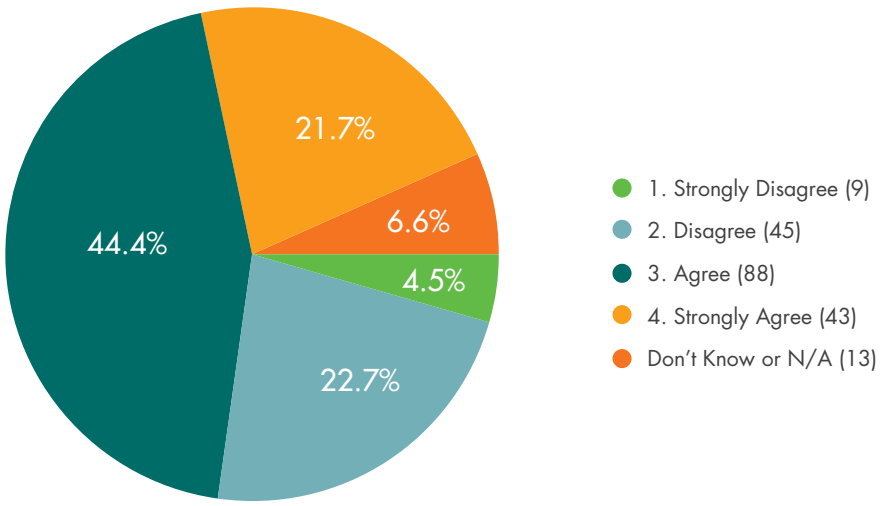
Source: School and College Graduating Class - Question 8

Figure 28: Perceived Meaningfulness of Jobs in Tourism and Hospitality

- 94% believed that jobs in the sector were meaningful.

Working in the tourism and hospitality industry is seen as a respected career choice

198 responses



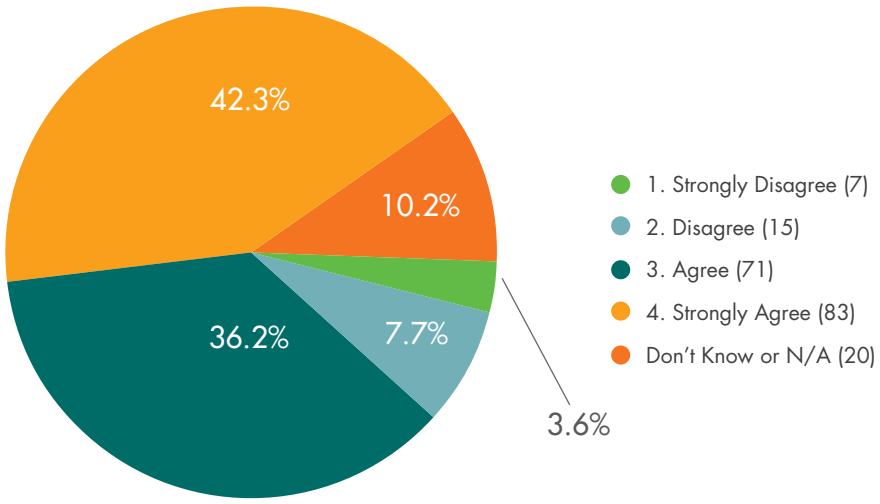
Source: School and College Graduating Class - Question 135.

Figure 29: Perception of Tourism and Hospitality Jobs

- 66% believed that working in the sector was seen as a respected career choice.

I would like to work in the tourism and hospitality industry after graduation

196 responses



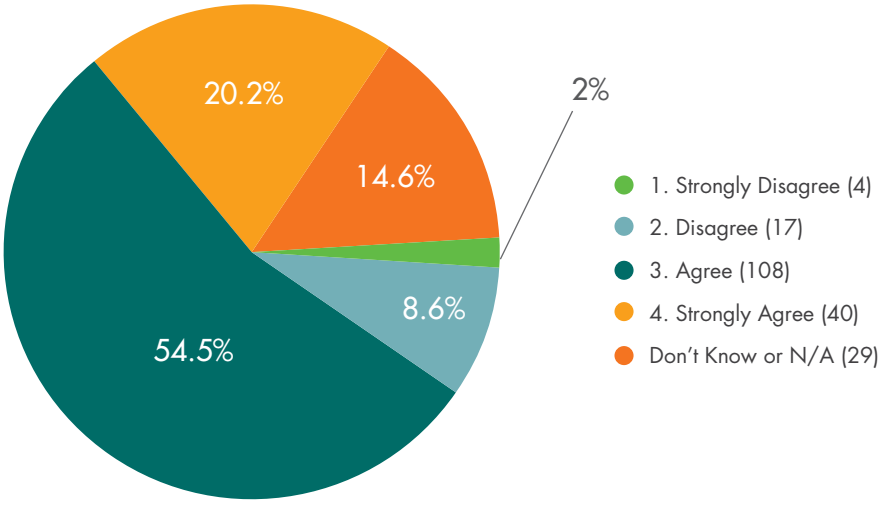
Source: School and College Graduating Class - Question 22.

Figure 30: Desire to Work in Tourism and Hospitality After Graduation

- 78% agreed or strongly agreed that they would like to work in hospitality and tourism after graduation.

Young persons that I know feel proud to work in the tourism and hospitality industry

198 responses



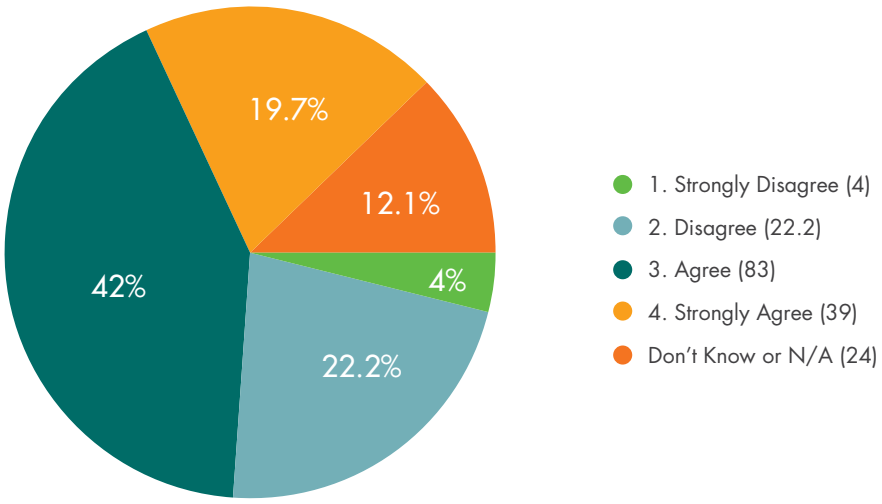
Source: School and College Graduating Class - Question 25.

Figure 31: Young Persons Perceptions of Work in Tourism and Hospitality

- 75% agreed or strongly agreed that young persons that they knew were proud to work in hospitality and tourism.

Jobs in tourism and hospitality are stressful

198 responses



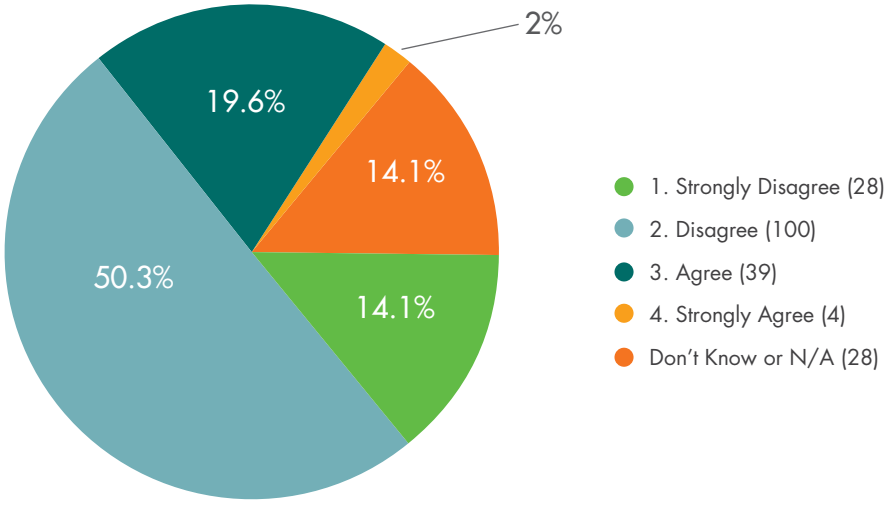
Source: School and College Graduating Class - Question 9.

Figure 32: Perceptions of Stress Levels in Tourism and Hospitality Jobs

- 61.6% agreed that jobs in the sector were stressful.

Working in the tourism and hospitality industry has a negative impact on family life

199 responses.



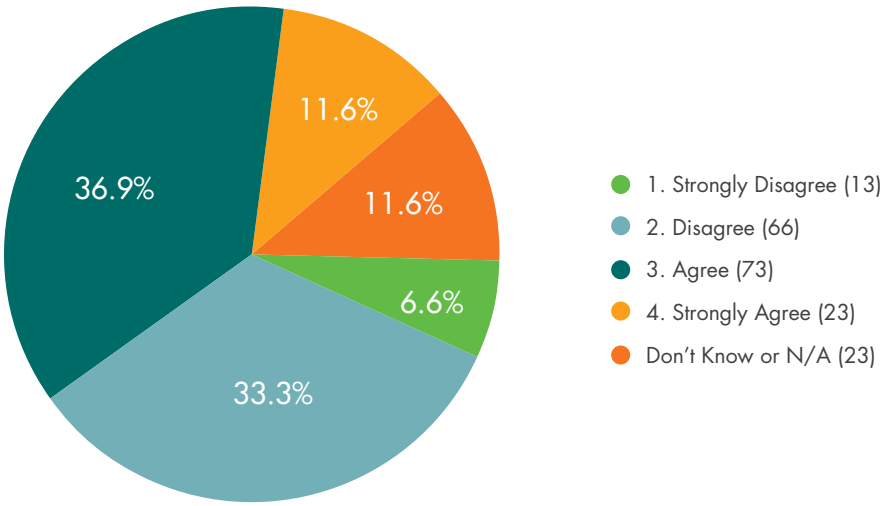
Source: School and College Graduating Class - Question 11.

Figure 33: Perceptions of the Impact of Jobs in Tourism and Hospitality on Family Life

- 22% agreed that working in tourism and hospitality has a negative impact on family life.

Working hours in the tourism and hospitality industry negatively affect regular life

198 responses



Source: School and College Graduating Class - Question 12.

Figure 34: Perceptions of Impact of Jobs in Tourism and Hospitality on Regular Life

- Nearly 50% of respondents did believe however, that working hours in hospitality and tourism negatively affect regular life.



Students' sentiments towards tourism and hospitality and the jobs were mixed. These findings provide a good foundation on which employers can build.

Perspectives of Employers / HR Managers / Corporate Leaders

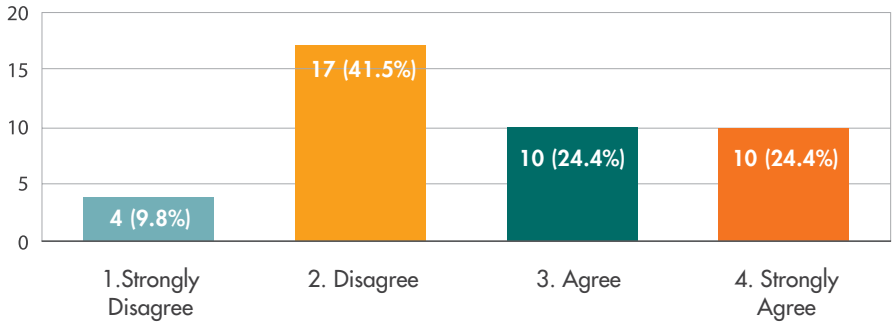
The following graphs and charts summarise the perspectives of Employers and HR Managers on the tourism labour market:

- 30% disagreed or strongly disagreed that tourism work was viewed in a positive light in their country
- Tourism work in the opinion of these HR professionals is viewed more positively than negatively but the industry still has a difficulty in attracting the brightest and the best.

The following two graphs depict what is described above:

Our sector of tourism attracts the brightest and the best human resource talent

41 responses



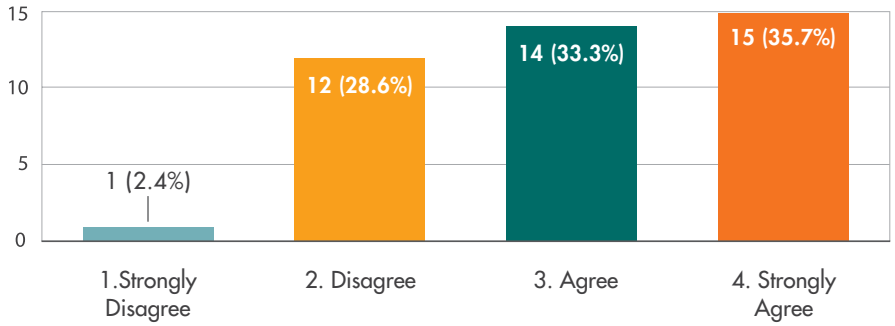
Source: Employers / HR Managers /Corporate Leaders Survey - Question 4.

Figure 35: Perceptions of Attracting the Brightest and Best Talent to Tourism Sector

- Just over 50% of Employers/HR Managers or Corporate Leaders did not agree that tourism attracts the brightest and best HR talent.

Tourism work is viewed in a positive light in my country

42 responses



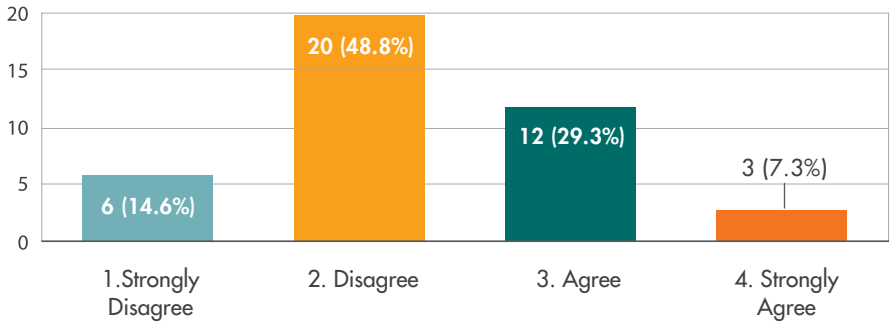
Source: Employers / HR Managers /Corporate Leaders Survey - Question 5.

Figure 36: Perceptions of Tourism in Project Surveyed Countries

- Over 69% of Employers/HR Managers agreed or strongly agreed that tourism work is viewed in a positive light in their country.

Certified job seekers from technical and vocational schools are well prepared for work

41 responses



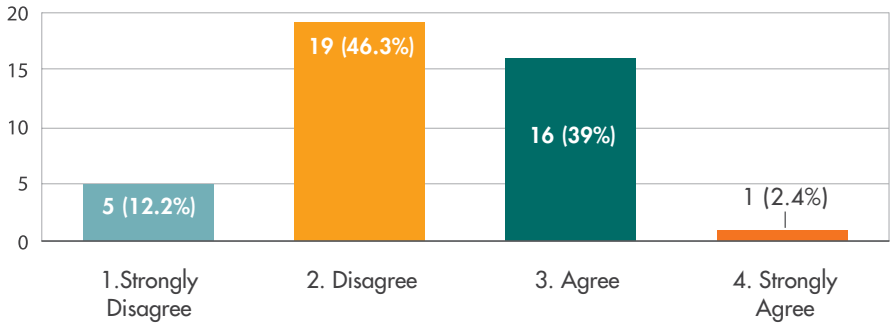
Source: Employers / HR Managers /Corporate Leaders Survey - Question 9.

Figure 37: Job Seekers from Technical and Vocational Schools Preparedness for Work

- Only 37% of Employers/HR Managers agreed or strongly agreed that certified job seekers from technical and vocational schools are well prepared for work.

Job seekers with a degree are generally well prepared for work

41 responses



Source: Employers / HR Managers /Corporate Leaders Survey - Question 104.

Figure 38: Job Seekers with a Degrees Preparedness for Work

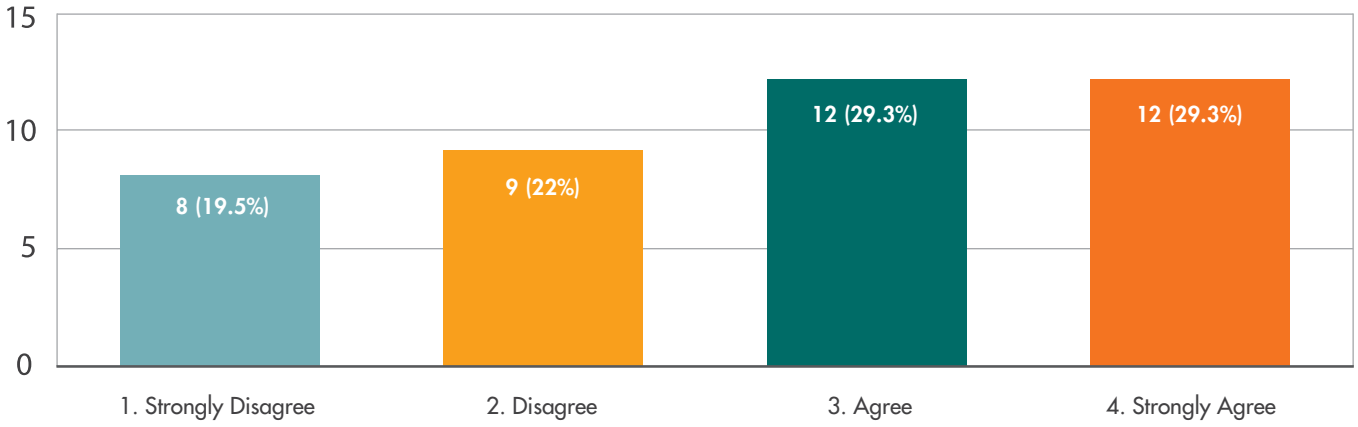
- Only 41% of Employers/HR Managers agreed or strongly agreed that job seekers with a degree are well prepared for work.

The above discussion suggests that having a degree did not make a major difference in terms of preparedness for work compared to certified job seekers from technical and vocational schools.

The graph below shows that despite the fact that some of the degree programmes were designated as 'management' programmes, 59% of Employers/HR Managers reported having difficulties recruiting for management positions from the local labour market. This may reflect the challenge that educational institutions face in balancing technical and soft skills. In an interview with an educator, the view was expressed that there was a need for soft skills that would help to develop the caring, loving and interested people needed in hospitality. The educator lamented however, that the number of credits did not allow for additional courses in soft skills.

We find it difficult to recruit for management positions from the local labour market

41 responses



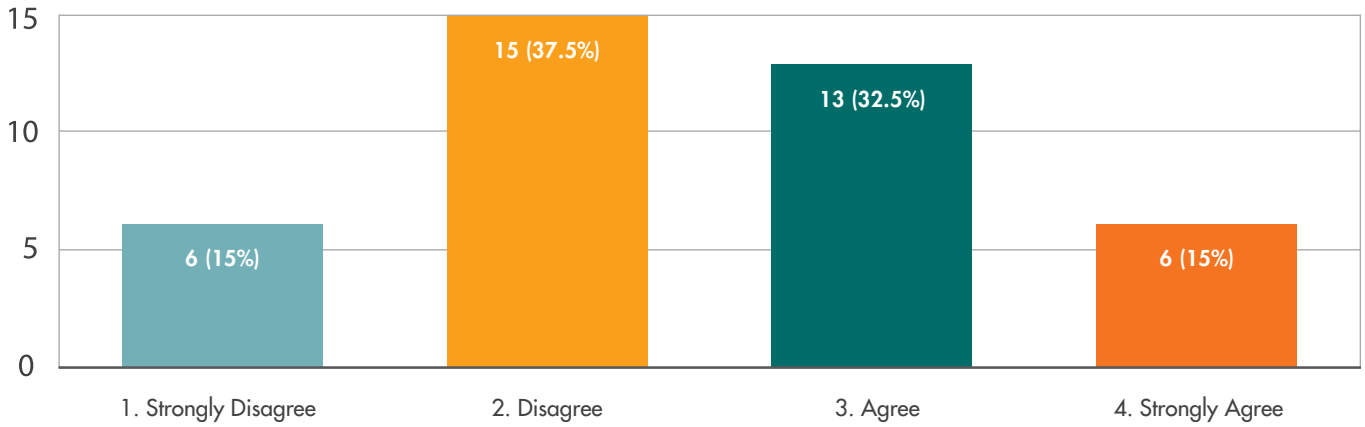
Source: Employers / HR Managers /Corporate Leaders Survey - Question 12.

Figure 39: Ease of Recruiting Managers from the Local Market

As shown in the graph below, the situation was slightly better for the supervisory level in terms of recruiting from the local labour market but still 48% of Employers/HR Managers agreed or strongly agreed that they found it difficult to recruit for supervisory positions from the labour market.

We find it difficult to recruit for SUPERVISORY positions from the local labour market

40 responses



Source: Employers / HR Managers /Corporate Leaders Survey - Question 13.

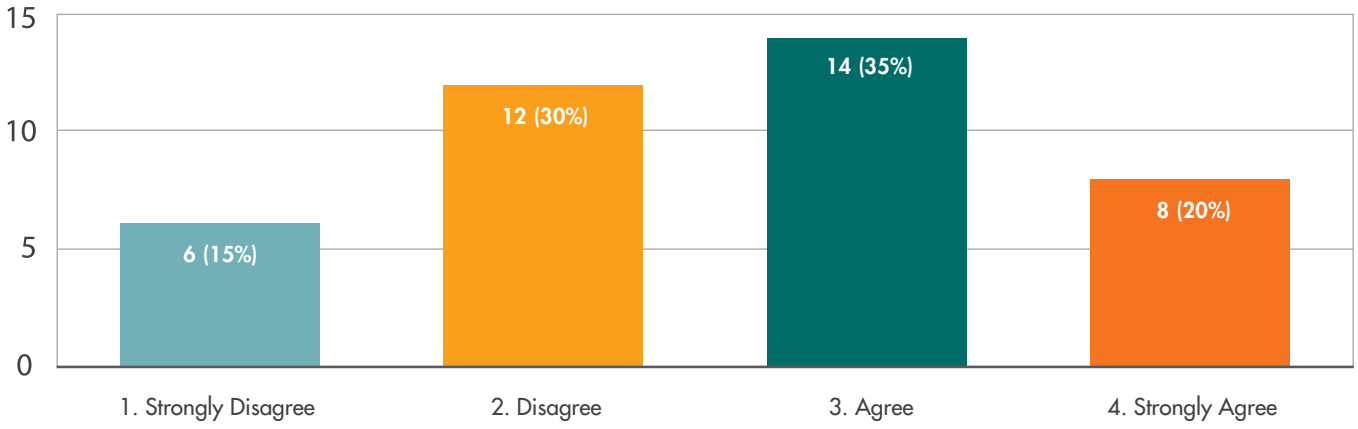
Figure 40: Ease of Recruiting Supervisors from the Local Market

As indicated in the following two graphs

- Educational and Training Institutions added only marginal value in the area of soft skills as 59% of Employers/HR Managers agreed or strongly agreed that first time job seekers with a degree had the soft skills to do the job
- When asked the same question about school leavers without certification, 55% agreed or strongly agreed that they had the soft skills to do the job.

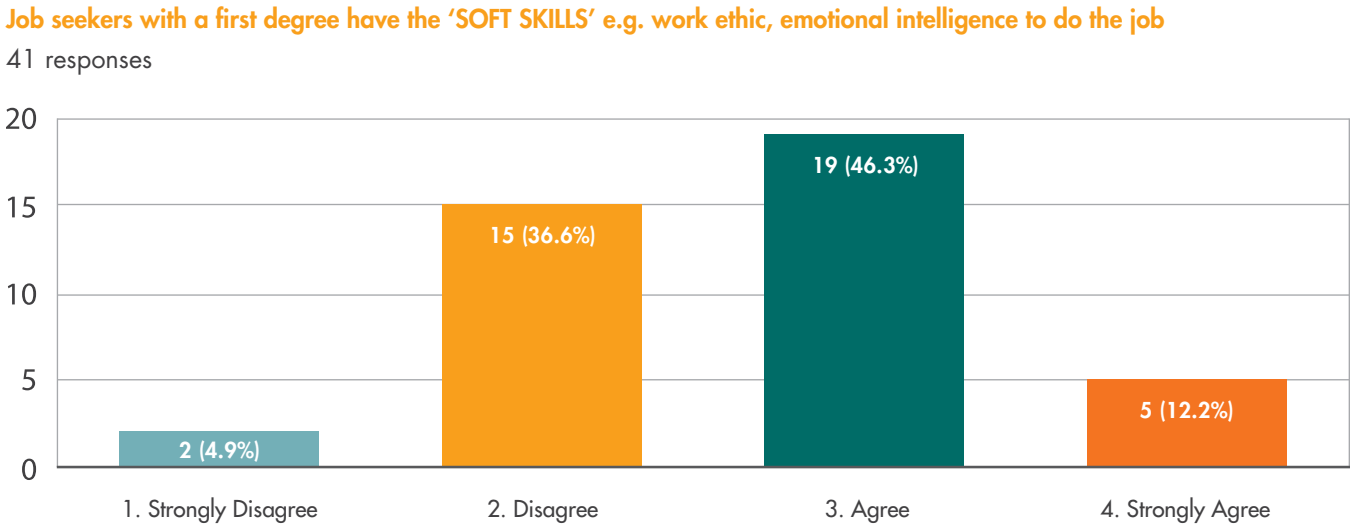
Secondary school leavers without certification have the 'SOFT SKILLS' e.g. work ethic, emotional intelligence to do the job

40 resonses



Source: Employers / HR Managers /Corporate Leaders Survey - Question 18.

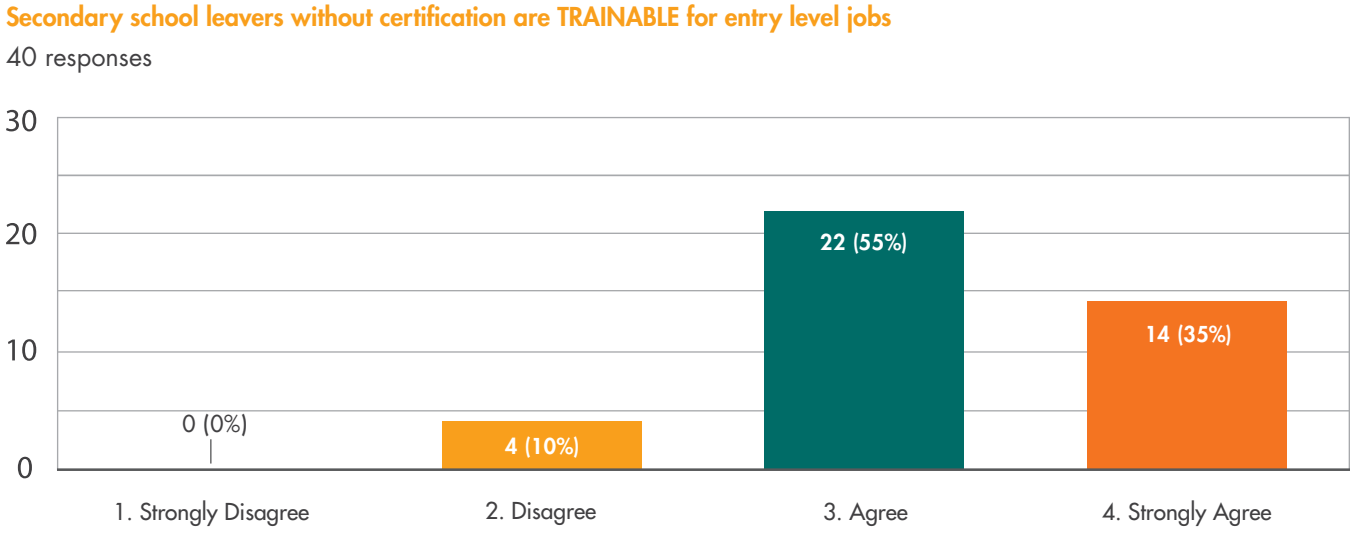
Figure 41: Presence of Soft Skills in Uncertified Secondary School Leavers



Source: Employers / HR Managers /Corporate Leaders Survey - Question 20.

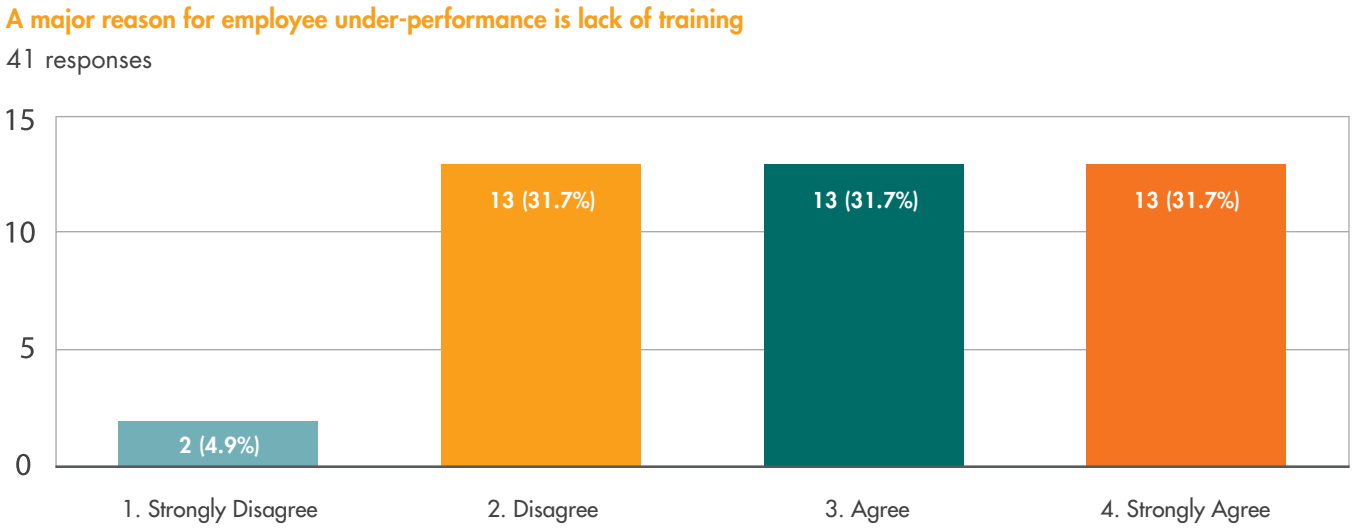
Figure 42: Presence of Soft Skills in Job Seekers with a First Degree

As reflected in the following graphs, 90% of Employers/ HR Managers agreed or strongly agreed that secondary school leavers without certification are trainable for entry level jobs. The challenge however is the extent to which their organisations have the capacity to offer the requisite training. In fact, 63% of the same respondents agreed or strongly agreed that a major reason for employee under-performance is lack of training, which suggests that the required training is not taking place.



Source: Employers / HR Managers /Corporate Leaders Survey - Question 17.

Figure 43: Trainability of Uncertified Secondary School Leavers for Entry Level Jobs

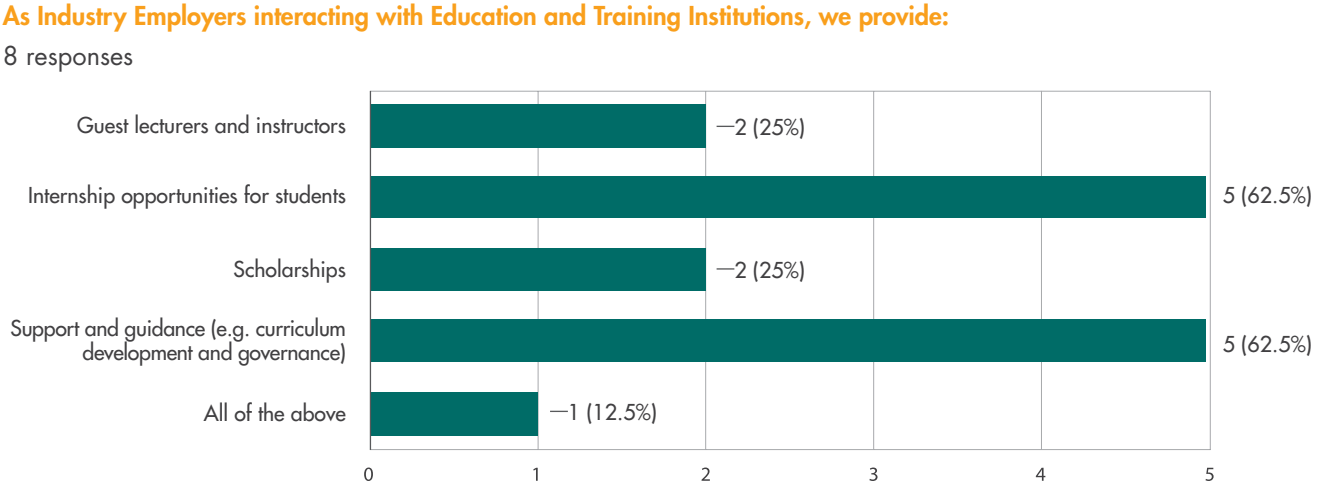


Source: Employers / HR Managers /Corporate Leaders Survey - Question 22.

Figure 44: Lack of Training and Underperformance

As has been noted elsewhere in this report, interviewees and focus group participants expressed dissatisfaction with the graduates of training institutions. Specifically, they expressed dissatisfaction with the currency and relevance of the training provided. It was therefore somewhat surprising to note that Employers/HR respondents indicated significant contact with the training institutions. As shown in the charts below.

- Of the eight (8) Employers/HR Managers that responded five (5) indicated providing support and guidance to training institutions. Two (2) said that they provided guest lecturers and instructors
- Of the nine (9) Employers/HR Managers that responded six (6) said they used training institutions to provide on-the-job training. Five (5) used them to provide company supported professional training and certification. Four (4) used them to provide certification of staff.

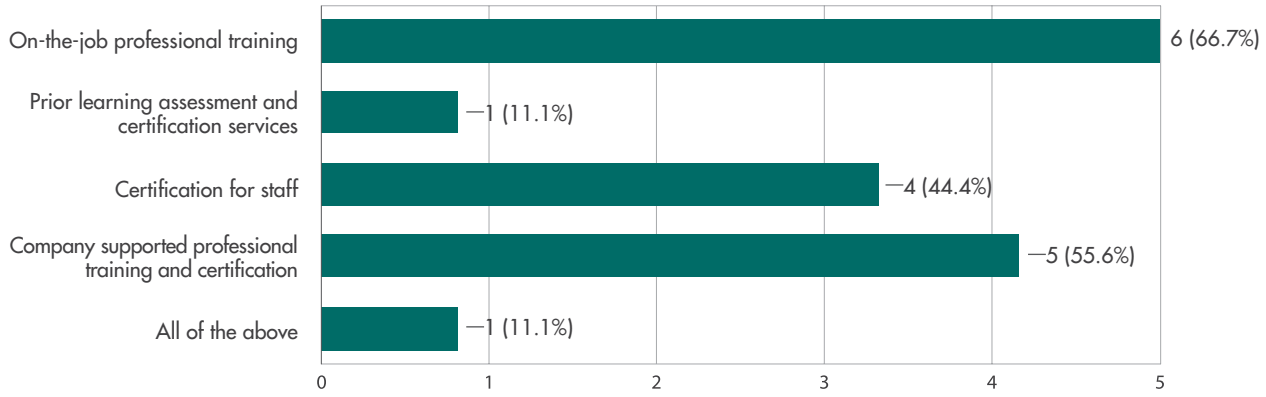


Source: Employers / HR Managers /Corporate Leaders Survey - Question 25.

Figure 45: Training Offered by Industry Employers (In Conjunction with Training Institutions)

As Industry Employers we engage the services of our local Education and Training Institutions to provide for us:

9 responses



Source: Employers / HR Managers /Corporate Leaders Survey - Question 26.

Figure 46: Educational and Training Services Engaged by Industry Employers

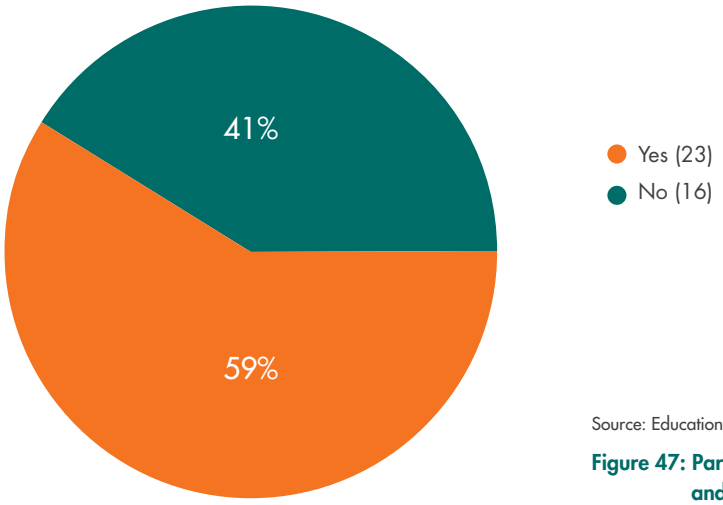
Given the low response rate shown in the above graphs, it suggests that there is scope for more interaction between employers/HR Managers and training institutions. However, based on those responding, there appears to be opportunities for influencing what is taught but this may not be fully leveraged.

Based on findings from the Educational and Training Institutions Survey as shown in the following three pie charts, training institutions perceive that they work quite closely with tourism establishments.

- 59% of Educational and Training Institution respondents agreed that they worked closely with tourism establishments to find out their needs and
- 45% organised job/career fairs to match graduates with potential jobs
- 82% agreed that they worked closely with tourism establishments to place trained and certified graduates.

We work closely with tourism establishments to find out their needs

39 responses

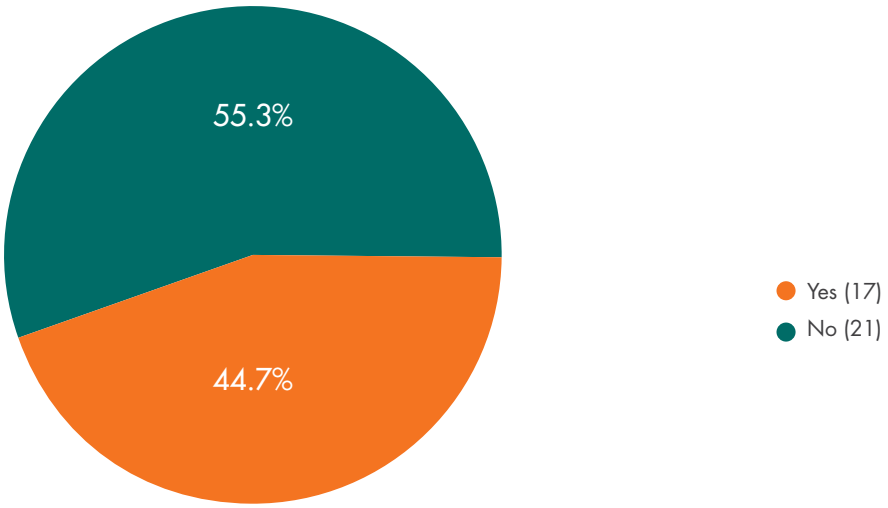


Source: Educational and Training Institutions Survey - Question 6.

Figure 47: Partnerships between Educational/Training Institutions and Tourism Establishments

We organise job/career fairs to match students and jobs

38 responses

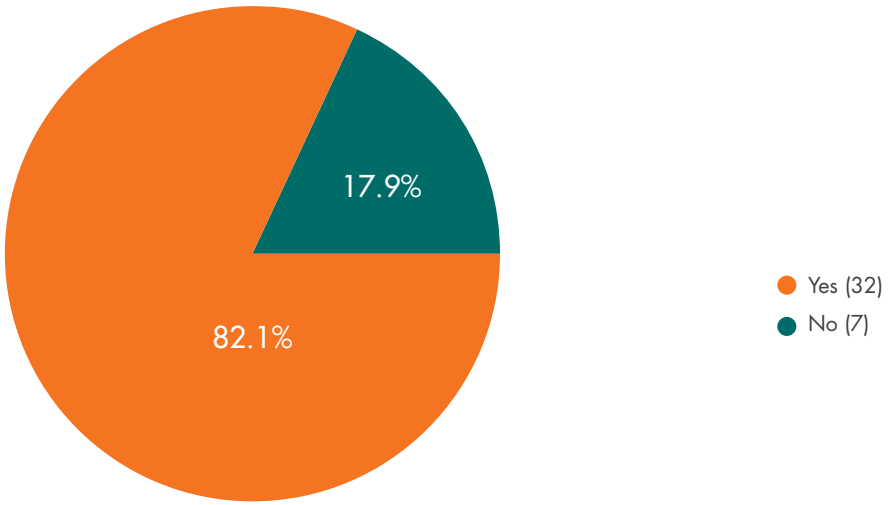


Source: Educational and Training Institutions Survey - Question 7.

Figure 48: Educational and Training Institutions Job/Career Fairs

We work closely with tourism establishments to place our trained and certified graduates

39 responses



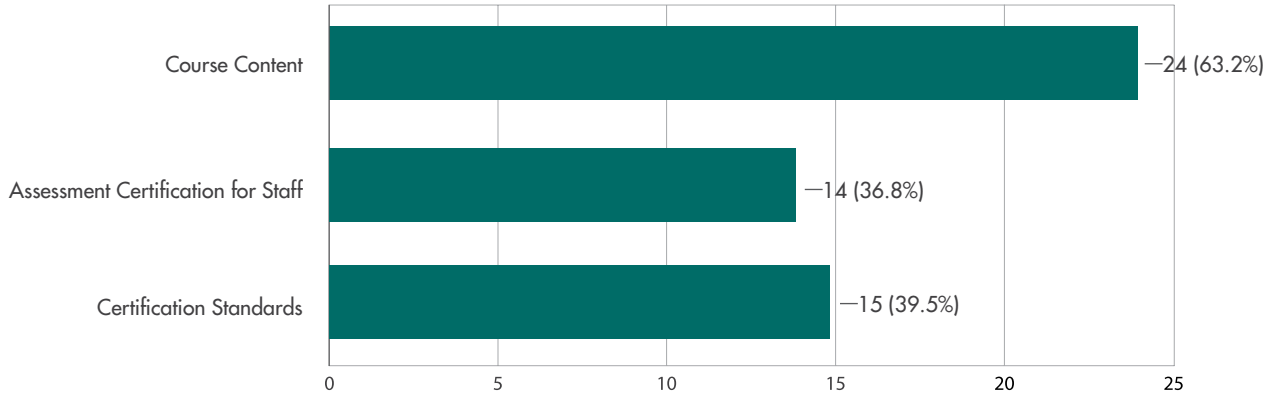
Source: Educational and Training Institutions Survey - Question 5

Figure 49: Educational and Training Institutions Partnering with Tourism Establishments to Place Students

As shown in the bar chart below, 63% of Educational and Training Institutions respondents indicated that they consulted with members of the Tourism Sector on course content and 40% stated that they consulted with members of the sector on certification standards.

We consult with shareholders/members of the tourism industry before determining the following tourism related issues:

38 responses



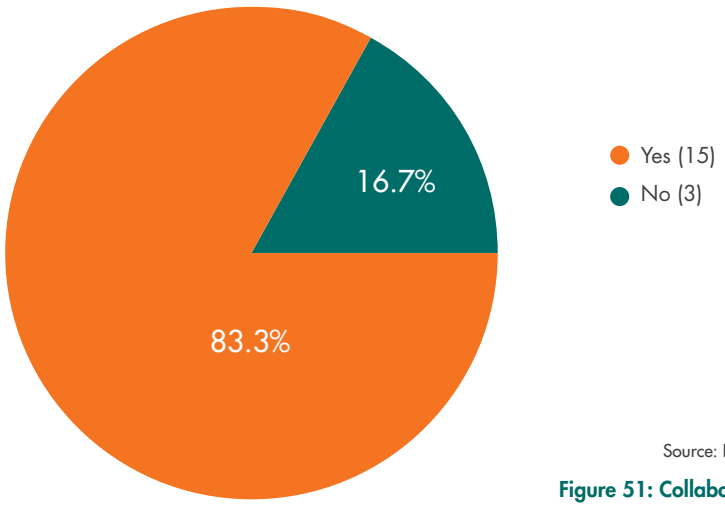
Source: Educational and Training Institutions Survey - Question 3.

Figure 50: Rate of Consultations with Tourism Stakeholders

Based on findings from the Impact of COVID-19 on Labour Availability Survey, it appears that as the pandemic has subsided the Tourism Sector and Educational/Training Institutions have begun to work more closely to address the issue of labour shortages. As indicated in the pie chart below, most countries reported that they are working with community colleges and other organisations to offer classes.

Do Education and Training Institutions in your country work closely together to ensure that the tourism industry is supplied with the required set of skills and knowledge?

18 responses



Source: Impact of COVID-19 on Labour Availability Survey - Question 9.

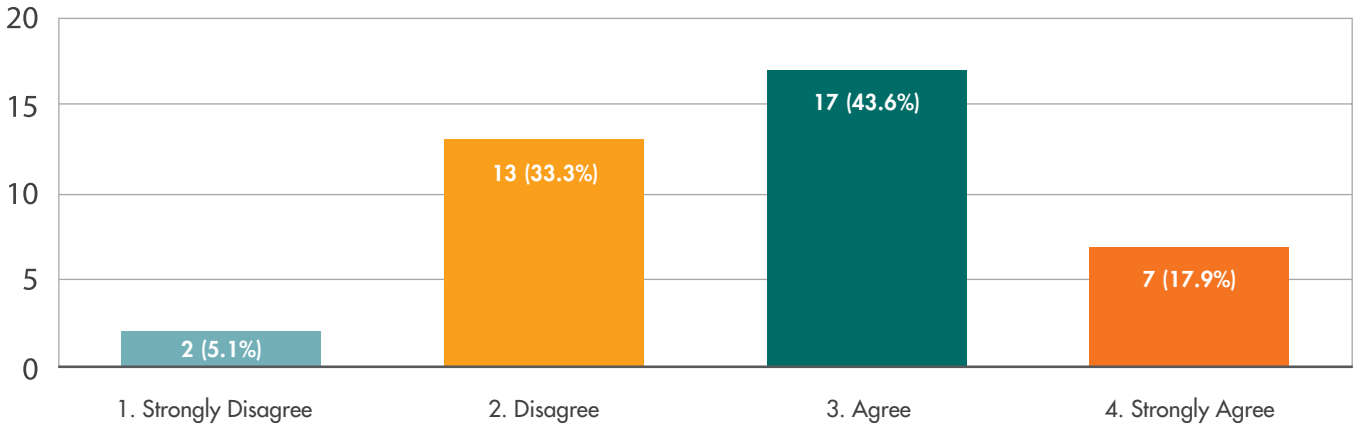
Figure 51: Collaboration Among Educational and Training Institutions

Countries indicated however, that relationships could be improved and perhaps this comment from a survey respondent to a question about the relationship between tourism and academia, sums it up best: *"Local tertiary body as well as national training institutions have partnered in an attempt to support this relationship building effort, however, they cannot do this alone. Industry must make a consistent and concerted effort to proactively inform education and training institutions of their labour knowledge and skill needs."* It is this proactive response mechanism that has been lacking and this does need to be addressed to avoid outdated programmes.

Internship placements are an important way of providing exposure and job experience for students but 38% of Education and Training Institutions disagreed or strongly disagreed that they found it easy to find work experience and internship placements for students.

It is easy to find work experience and internship placements for our students within the tourism and hospitality industry

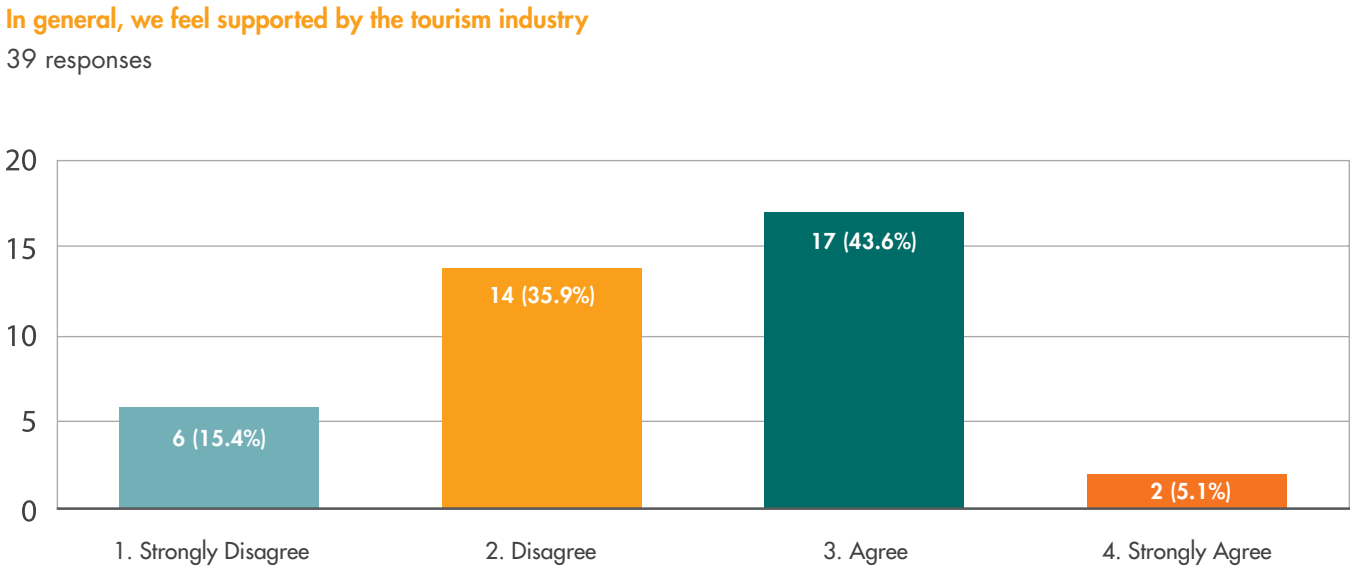
39 responses



Source: Educational and Training Institutions Survey - Question 8.

Figure 52: Ease of Finding Work Experience and Internships for Students

The graph below shows that there is room for improvement however, as less than 50% of Educational and Training Institutions respondents expressed agreement or strong agreement with the statement "In general we feel supported by the tourism industry."



Source: Educational and Training Institutions Survey - Question 4.

Figure 53: Educational and Training Institutions Perceptions of Support from the Tourism Industry

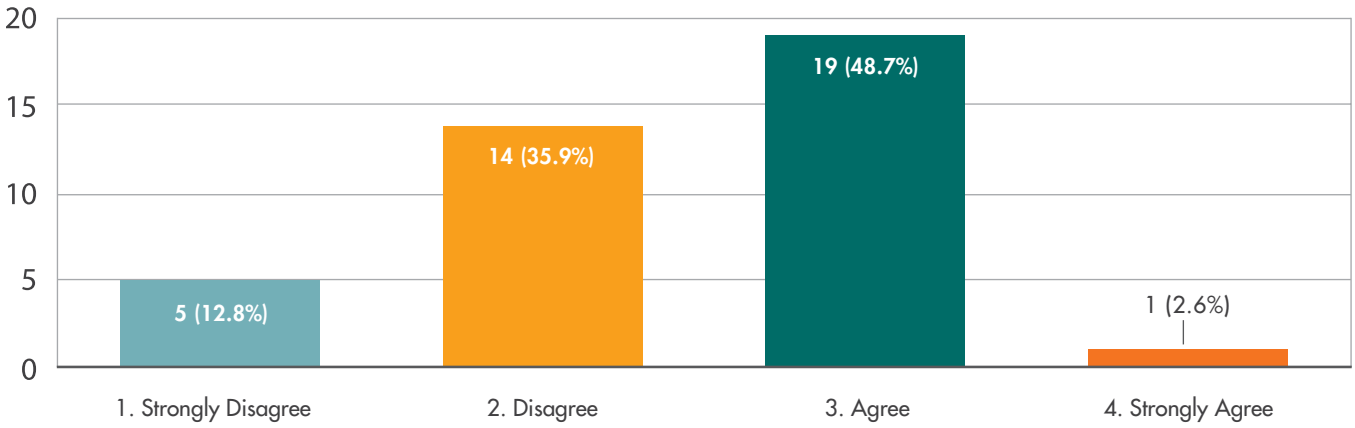
In response to the question "How important would you see internships in your country?", there was uniform agreement that they were important, and the following reasons were given:

- Would provide another perspective on tourism to students and employees
- Would help with the shortage of workers
- Would expose participants to the various career paths
- Would help to improve skills
- Would provide students with the opportunity to practice skills learned in school
- Would provide the opportunity to cultivate talent in the area
- Would bridge the skills gap
- Would give the opportunity to improve leadership skills, grow professionally, become professional and agile.

An important indicator of satisfaction with the output of the educational and training institutions is the hiring of graduates. In that regard only about half of the respondents to the Educational and Training Institutions survey agreed or strongly agreed that most of their graduates found jobs quickly.

Most of our graduates find job positions quickly

39 responses



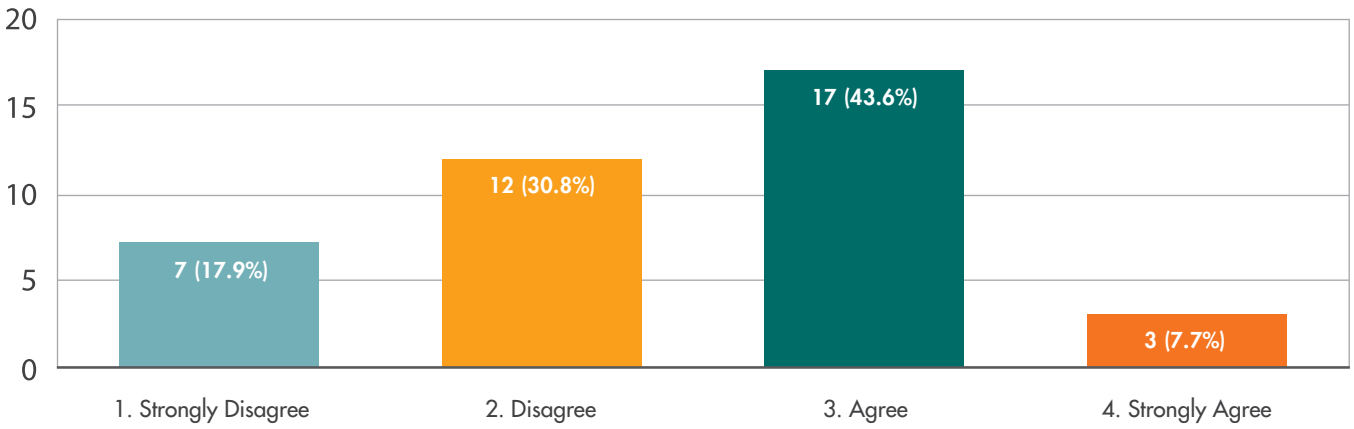
Source: Educational and Training Institutions Survey - Question 1.

Figure 54: Speed of Graduates Finding Jobs

Interestingly, only half of the respondents agreed or strongly agreed that graduates were able to get jobs for which they were trained. This suggests that tourism and hospitality graduates may be finding jobs in other sectors, and this is in line with the negative comments received in focus groups about the graduates of hospitality and tourism training institutions.

Most of our graduates get the jobs for which they were trained

39 responses



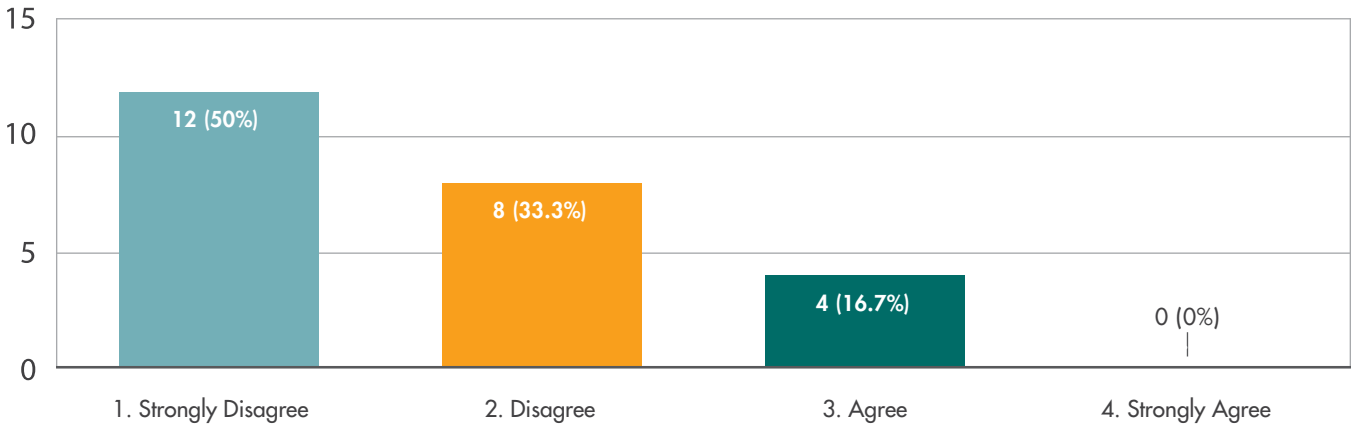
Source: Educational and Training Institutions Survey - Question 2.

Figure 55: Ease of Graduates Filling Positions they are Trained for

Most Educational and Training Institutions are at least partially government funded however, as shown in the graph below, only 17% of respondents indicated that the funding was adequate.

The support from government is adequate for our operations

24 responses



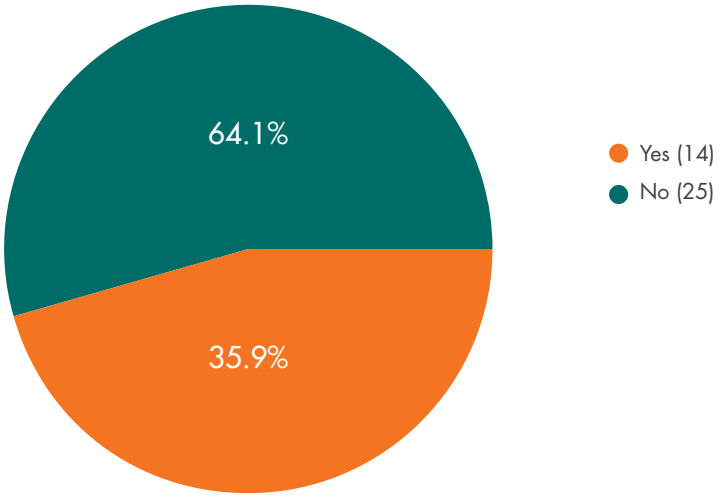
Source: Educational and Training Institutions Survey - Question 15b.

Figure 56: Adequacy of Government Support in Educational and Training Institutions

Other resources are available including training resources from the CTO but only 36% of respondents indicated that they were aware of these resources and only 27% indicated that they utilised these resources.

We are AWARE of the resources available through the Caribbean Tourism Organization

39 response.

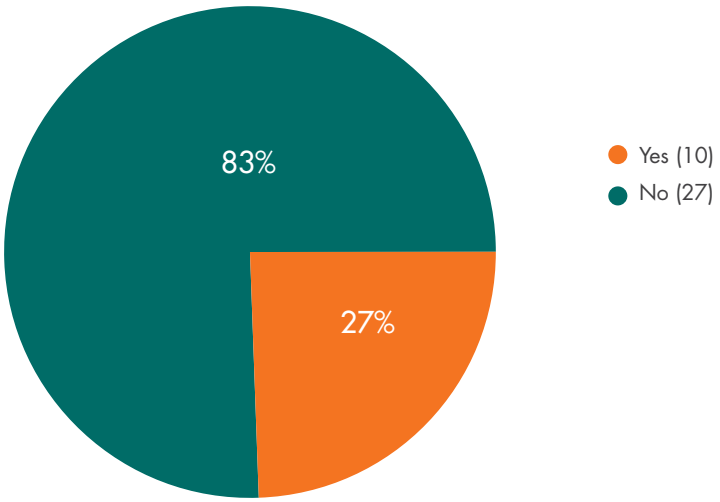


Source: Educational and Training Institutions Survey - Question 16.

Figure 57: Awareness of Resources Available Through the CTO

We utilise the resources/training available through the Caribbean Tourism Organization

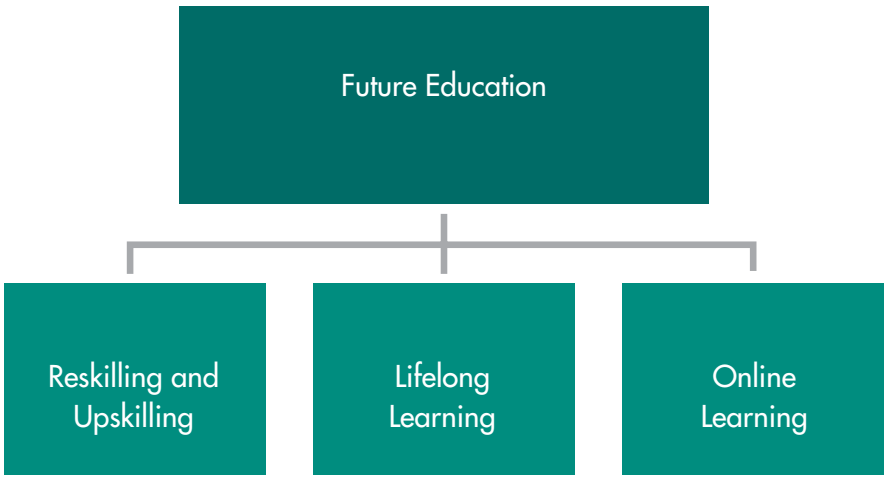
37 responses



Source: Educational and Training Institutions Survey - Question 17a.

Figure 58: Utilisation of Resources and Training Available through the CTO

Tourism education and training will need to evolve as the industry resumes in the wake of COVID-19. As pointed out in other reports, some industry players want more 'on demand' training that provides required relevant training quickly and efficiently. This represents an opportunity for Educational and Training Institutions, provided that they can respond effectively to meet the needs identified below.



Source: Euromonitor International.[78]

Figure 59: Future Education Needs

[78] Euromonitor International, Future of Work and Education, April, 2022.

Reskilling and upskilling may be provided for the existing labour force. For example, digitisation of work processes, enhanced health and safety protocols, climate resilience, will clearly be a way of life going forward and everyone from management to entry level staff will need specific training from professionals. As tourist demands shift, tourism staff will need to be aware of what these demands are and how they can adapt to meet them. There will be a need for specific job related and management/supervisory training to accommodate movement within organisations. Finally, it will be important for institutions to move outside of the traditional face-to-face mode to the more flexible mode of online training offered in both asynchronous and synchronous modes.

4.5 CONCLUSIONS

Information gathered indicates that the perennial mis-match between the knowledge and skills demanded by the Tourism Sector and that supplied by the Region's Higher Education and Training Institutions still persists. Traditionally, the developmental philosophy and role of Higher Education and Training has been to determine and prescribe the curriculum and the credentials they perceive as required for regional/national socio-economic development. This took place with little or no consultative reference to the requirements of industry and the labour market. The appropriate philosophy should be one which cultivates a permanent synergistic partnership between industry at all levels of employment, and the national tertiary education and training institutions. The traditionally perceived dichotomy between a person's earned qualifications (credentials) and competence (know-how) to create value and solve problems needs to be re-evaluated. The Tourism Sector should advocate and enact in partnership with National Post-Secondary Education and Training Institutions, a new reality where qualifications actually indicate the holder's ability to apply knowledge to create value and solve problems.

Forecasting skills for the future should reflect the emerging skills and respond to emerging demands such as digitisation of work processes and resilience to climate change. Such future skills forecasts are also critical in enabling the Region's Higher Education and Training Institutions to pre-emptively plan, educate and provide training for the needed HR knowledge and skills to meet future needs.

Major indications from the research suggest that most Tourism/Hospitality employers across the Region do not require or ask for occupational certification or credentials as a condition for employment. There are also indications that holders of Tourism related Associates and Bachelors Degrees are not placed in positions or compensated commensurate with their training and certification. These indications have been further interrogated and validated through secondary research. This situation serves to undermine the perceived utility value and attractiveness of pursuing higher education, training and certification to enter a career in tourism in the eyes of young Caribbean people. This in turn has negative implications for deepening the professionalisation of the sector and ultimately for creativity, productivity, performance and profits.

4.6 RECOMMENDATIONS

- In the context of the prevailing Caribbean Market economy, Educational and Training institutions must re-orient their governance and operating structures based on market principles. These Educational and Training Institutions are the suppliers of education, training and certification services, which should always be aligned with the knowledge and skill demands of the labour market, employment and entrepreneurship.

- In the context of the prevailing Caribbean Market economy, Tourism Sector employers and entrepreneurs must re-position and deepen their relationship with the education and training provider institutions. These institutions are important suppliers that can establish and sustain the global competitiveness and profitability of the Tourism Sector through the value adding input of educated, trained and certified employees, entrepreneurs and related services.

- Tourism Sector employers and entrepreneurs should be actively represented on the boards, and the curriculum development, assessment and certification committees of all regional education and training institutions. This is likely to ensure the continued relevance and currency of the education, training and certification services supplied.

- The education and training system at all levels should be actively represented on the national Tourism Industry boards and councils to be consulted, to receive and coordinate the education and training system's strategic response to the expressed current and future skills and knowledge needs of the Tourism Sector.

- The tourism industry should engage the national Educational and Training Institutions to facilitate and/or provide in-service upgrading education, training and certification services to the Tourism Sector workforce, and where possible extended to informal sector workers and entrepreneurs in the Tourism Sector.

- The education and training system, working in collaboration with the Government Department responsible for the issuance and monitoring of work permits, and the tourism entity requesting the permits, should share responsibility for structuring and overseeing' the training and development of the designated understudy assigned to the respective work permit holder. Such a measure would add transparency to the work permit arrangements in some countries and open further opportunities for locals to advance beyond the perceived glass ceiling.

- As a matter of long-term self-interest, the Tourism Sector should advocate and support efforts across the Region to transform the existing early childhood, primary and secondary education system, which is currently only capable of educating and certifying 30% of the secondary school leaving cohort as high school graduates (CSEC). For the current and future viability of the regional economy, 90% of the workforce should possess at a minimum secondary education certification, serving as a platform to absorb higher education and training and lifelong learning.

- Tourism Sector related agencies and bodies such as the CTO, CHTA etc. that provide support for tourism education and training, should extend and target their communication to ensure that all the Region's Educational and Training Institutions are at least aware of what is available to support their efforts.

- Job and career fairs, internships and other forms of apprenticeship (on-the-job) type training modalities, are a low hanging fruit that create a way in which employers and the workplace, and the potential workers and workforce can be exposed to one another. They provide employers with the opportunity to identify and earmark budding talent for future employment. It would be in the strategic HRD interest of national Educational and Training Institutions and the Tourism Sector to institutionalise such mechanisms.

- Tourism is viewed in a positive light by tourism students and this positive sentiment may be further leveraged by increasing and varying the types of contact between the Tourism Sector and students.

- National Educational and Training Institutions should work closely with Tourism/Hospitality stakeholders, (who in our surveys have identified difficulty in sourcing supervisory and middle-management talen), to devise appropriate in-service supervisory and management training responses.

5.0

FUTURE KNOWLEDGE AND SKILLS NEEDS ASSESSMENT

5.1 INTRODUCTION AND CONTEXT

This chapter examines future skills and knowledge needs in the Global Tourism Sector but relates findings to the Caribbean Region where necessary. There is no doubt that the knowledge and skills that the people that work in the Tourism Sector possess is critical in supporting the Global Industry. The quality of knowledge and skills is a major determining factor in where visitors choose to travel.

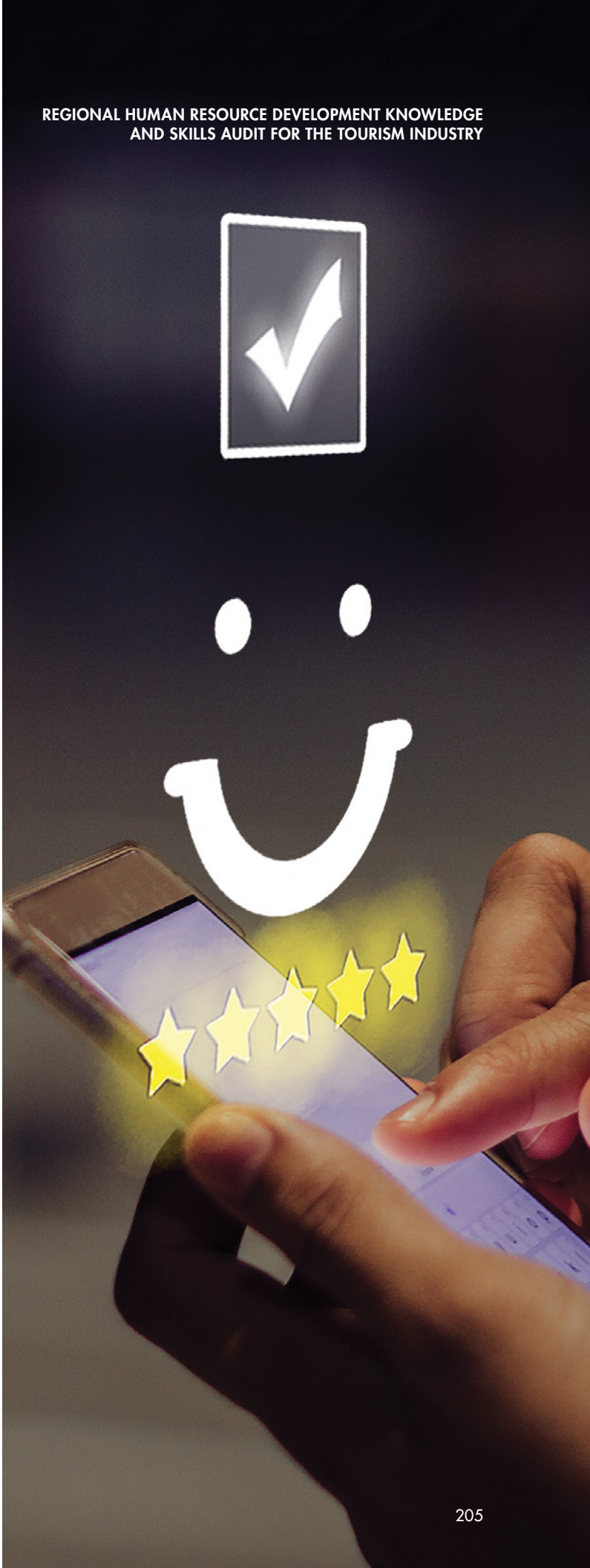
One bad experience with a person in country/destination/property can influence the choice of:

- Where a conference for thousands of people is held
- How many people attend a festival
- Where a family spends their annual vacation
- Which airline a major sporting team chooses to fly to a destination
- Which port a cruise liner chooses to call at, etc.

Not only may one bad experience affect the present and future behaviour of those who are impacted directly, but it will have a multiplier effect by influencing the behaviour of those who learn about it on social media sites such as Trip Advisor and other channels through which information flows instantaneously around the world. The internet makes very few experiences remote because information about those experiences can be transmitted easily and rapidly. Furthermore, if a country/destination/property has numerous inadequately trained staff who are providing bad experiences to visitors/travellers on a regular basis, the multiplier effect can be exponential. The converse is true if tourism employees are constantly giving visitors positive experiences and exceeding the visitors' expectations. In such cases positive tourism flows will be experienced by a destination/property.

5.2 METHODOLOGY AND APPROACH

Based on the Terms of Reference, the Future Knowledge and skills Needs Assessment Report is intended to provide an assessment of the skills, qualifications and knowledge, which will be essential for meeting training and development needs for future tourism workforce planning. In this report, a comprehensive competency framework will be developed that identifies the collection of



competencies and essential skills, for the Tourism Sector. Issues such as gender awareness will be examined.

Methodology

Documents by the World Travel and Tourism Council (WTTC), the CTO and the ILO amongst others will be used to outline factors that will determine the future of tourism and hence the future knowledge and skills needs. Human resource related needs are a derived demand based on what is happening in the sector rather than a demand for human resources in and of themselves. It is therefore very important to predict as best as possible, not only what is happening now, but what is likely to happen in the future so that the quantity and quality of human resources in the sector are aligned with the needs of the sector. In addressing this important issue, this report will carry out the following:

- Examine megatrends shaping the future of tourism – from a macro perspective, these trends will be major determinants of the future skills and knowledge needs of the sector
- Assess the future of tourism jobs, skills and work-force development – this will be based on the trends identified above
- Identify possible approaches towards meeting training and development needs for future tourism workforce planning – this will involve looking at the nexus between operators in the industry and the Educational and Training Institutions; and
- Develop a skills and competency framework for the Tourism Sector.

The report also uses information from Tourism Masterplans and tourism strategies to identify future skills and knowledge needs.

Approach

In carrying out these future knowledge and skills needs assessments, there will be an examination of future needs in the Tourism Sector bearing in mind the eight (8) sub-sectors of tourism which are shown in the below diagram. The report will also draw upon the analysis and conclusions reached in the other deliverables of this project, namely the Skills Supply and Demand in the Tourism Industry Report, Knowledge and skills Audit Report, and the Tourism Higher Education and Training Institutions Report.



The report attempts throughout to make the connection between the megatrends and paradigm shifts in the Tourism Sector and the future demand for knowledge and skills in the sector. Once these knowledge and skills requirements are identified, the report moves on to recommending minimum qualifications and training that will be required to effectively provide these skills and knowledge. The report then moves on to look at a possible Competency Based Education and Training (CBET) Framework that should be considered for the Project surveyed countries in the Caribbean Tourism Sector.

Some key issues to be addressed will be:

- What needs and wants are tourists and travellers who drive the sector, going to demand in the future?

- What sets of knowledge and skills will be required at all levels to satisfy these needs and wants?

- Where will these skills be obtained from? Should they be developed locally in Educational and Training Institutions or in the industry itself? Should they be developed in other industries or taken from other countries?

- How is technology impacting the demands of tourists and travellers and what role will it play in satisfying the needs and wants?

- What are some of the concerns and constraints that the sector faces that may create challenges in satisfying the knowledge and skills needs?

- How should the Educational and Training Institutions collaborate with the industry in order to best satisfy the knowledge and skills needs of the sector?

5.3 TOURISM FUTURE OUTLOOK

5.3.1 Megatrends Shaping the Future of Tourism

A megatrend is not a short-term fad, but rather a trend with longevity, one representing a fundamental shift in behaviour that is defining consumer markets. According to the OECD Tourism Trends and Policies 2018[79] which analysed tourism performance and policy trends across 49 OECD countries and partner economies, "the future of tourism will be impacted by large-scale social, economic, political, environmental and technological changes, bringing new and often unseen challenges, threats and opportunities. These "megatrends" are slow to form but, once they have taken root, exercise a profound and lasting influence on human activities, processes and perceptions, including those associated with tourism. The following four megatrends are likely to have significant impacts and relevance for tourism:

1. Evolving visitor demand
2. Sustainable tourism growth
3. Enabling technologies
4. Travel mobility.

The findings of a report produced by the **World Travel and Tourism Council (WTTC)** and **Bloomberg Media Group (2021)[80] states that:**

"As global forces converge to create unprecedented change across all industries, the future of travel and tourism will be shaped by those companies and destinations which provide unique and meaningful experiences, harness the power of networks, provide a personal service to sustainability-minded consumers, and are led by trustworthy and responsible leadership."

This perspective shows how companies and destinations need to respond to the megatrends shaping the future of tourism.

According to the above-mentioned study, the following megatrends are likely to have significant impacts and relevance for tourism:

i) Evolving visitor demand – for example:

- Consumers are increasingly moving beyond experiences as social currency to seeking shared experiences to deliver meaning, self-improvement and stronger connections

- "**Millennials** and **Generation Z** have little loyalty to employers or brands and are more likely to rely on personal networks than experts." ("Global travel 'megatrends' outlined in new report by WTTC")

[79] OECD Tourism Trends and Policies 2018, https://www.thinktur.org/media/TENDENCIAS.pdf.
[80] **World, Transformed: Megatrends and their implications for Travel & Tourism** produced by the **World Travel & Tourism Council (WTTC)** and **Bloomberg Media Group (2021)**.

- Consumers have increased **health and safety** focus especially since COVID-19. Some persons will not go to a destination or a property if they cannot get some assurance about standards as they relate to health and safety

- **Health tourism is becoming more important**

- Consumers value technology but are uncomfortable with over-automation, which seeks to replace customer interaction with intelligent bots as well as invade their privacy. ("Global Megatrends are Shaping New ... - Bloomberg Media")

- Travel and tourism companies will succeed by responding to the rise of ethical consumption trends and protecting the very destinations they promote (WTTC).

ii) Increasing competition from other destinations – destinations are competing for tourists and travellers. Businesses will need to utilise their brand values to guide their innovation and prioritise transparency with their consumers in order to keep attracting them. As an example, the approach used by Sandals and other properties of socialising new employees deeply in their values needs to be observed, given that these properties enjoy a very high repeat rate in terms of repeat business.

iii) Sustainable tourism growth - Sustainable business practices and aligning brand stories to sustainable solutions may become the core of a robust growth strategy for the travel and Tourism Sector. Safeguarding destinations, environmental leadership and community health will therefore be integral to the customer experience. There has been growing awareness around climate, environmental and social issues, from sustainable destination development to waste management, climate neutrality, inclusivity, and mental wellbeing across the world. It is generally felt that the Tourism Sector must respond with the same urgency and vigour to the climate crisis as it has to COVID-19, not only on ethical grounds, but also because the travellers of tomorrow will demand it.

iv) Focusing on the impact on people, WTTC also launched guidelines on key social issues such as diversity and inclusion and mental health, which have had a particular salience during the COVID-19 pandemic. The private and public sectors in CTO member states will need to pass on this knowledge to employees so they are aware and can be sensitive to these issues when dealing with tourists and travellers. Employers will also need to be aware that these factors will impact their workforce and must therefore make the necessary changes and accommodations.

The WTTC has been repeatedly calling for public-private collaboration in the coordinated response, ensuring all measures put the traveller at the heart of their actions. These include a seamless traveller journey with enhanced health, safety and security standards enabled through technology, such as the use of digital health passes, implementing health and hygiene protocols, as well as ongoing support packages for the Tourism Sector. WTTC's Safe and Seamless Traveller Journey (SSTJ) programme evolved to include initiatives such as COVID-19 testing, digital health passes for travel and risk-based frameworks for safe international mobility.

v) An article from Australasian Leisure Management (October 2021) suggests that 'Virtual Tourism' and 'Space Tourism' cannot be ignored as new trends. The article notes that based on an analysis of the Social Media Analytics (SMA) Platform, which identifies and tracks the emerging trends, pain areas, new fields of innovation among discussions of Twitter influencers and Redditors, has revealed 'Virtual Tourism' as the most popular type of tourism, followed by 'Space Tourism' in 2021. The top five types of tourism discussed were:


COVID - 19 GREEN CERTIFICATE
This is to certify that the holder of this certificate has been successfully vaccinated against
Coronavirus COVID - 19
in accordance with international health guidelines.
INTERNATIONAL CERTIFICATE OF VACCINATION OR PROPHYLAXIS
Coronavirus COVID - 19

- Virtual Tourism
- Space Tourism
- Adventure Tourism
- Food Tourism
- Wine Tourism.

5.3.2 The Impact of COVID-19 On the Future of Tourism

According to the WTTC (WTTC Global Economic Impact and Trends 2021)

"From a demand perspective, COVID-19 is transforming traveller inclinations and behaviours toward the familiar, predictable, trusted, and even low risk. Domestic and regional vacations, extensive research and planning, and the outdoors will reign in **the short-term**, with tourism businesses and destinations already adapting accordingly. Proactive communication will be key to spur demand. Though the longevity of these shifts is still unknown, the Travel and Tourism Sector has a unique opportunity to rethink and refresh prevailing business models, in partnership with local communities."

Many would agree that although COVID-19 is seen as a temporary turbulence it will lead to paradigm shifts because people will not necessarily revert to pre-COVID-19 methods of doing things once the pandemic has passed. Indeed, the emergence of Monkey Pox and the re-emergence of Polio in some spaces means that the state of high alert for travel will become a fixture. The tourism industry, which has been adversely affected more than most other industries, is likely to see a paradigm shift in the future.

Health and Safety are paramount in this new era. Personal experiences, the fear of changing entry regulations, concerns for physical distancing and having flexible cancellation policies will guide consumer behaviour in the short to mid-term. According to the WTTC, more than 55% of North American leisure travellers said that reassurance that the property is "doing extra sanitising" would be the most likely factor to persuade them to book a future vacation. The WTTC is encouraging the sector not to compete on health and hygiene, but rather align and elevate the whole sector to make tourism and travel easier for millions of travellers.

COVID-19 and Digital Solutions

COVID-19 has resulted in innovation and the integration of new technologies in the Travel and Tourism Sector. Stay-at-home orders and digital consumption are on the rise, with consumers now expecting contactless technologies, among others, as a basic prerequisite for a safe and seamless travel experience. Cybersecurity is also becoming more important, particularly as remote work becomes the norm and as identities are digitised. ("The Future of The Travel Agency Business After COVID-19 ...") COVID-19 has forced less developed countries to adopt to a greater extent the mature technologies that have been around for many years, such as the Internet, personal computers and smart-phones. This should have contributed to the narrowing of the so-called "digital divide" between more developed and less developed countries as well as between rural and urban communities within a country, as well as between workers of different socioeconomic levels.

COVID-19 and Training and Skills Needs

The new remote learning format brought about by COVID-19 led to the need to train teachers to become remote trainers and tutors. Some institutions activated their teacher training schools with online training courses. In the medium to long term, new job demands are focussing more on a specific ability and skill than on a degree. Skills needs are now concentrated on more specific capabilities, programming skills, design skills and product specification skills rather than on traditional academic degrees. For example, the growth of e-commerce resulting from COVID-19 has

generated demand for programming skills, data analytics, machine learning and use of georeferencing software. This trend will be very important in the Tourism Sector.

Vocational and Training Institutes that carry out training for the Tourism Sector have also responded to the pandemic and have made progress in occupational health and safety through the offering of courses in biosafety protocols and standards as well as the use of online training.

COVID-19 and Teleworking

Around the globe, due to COVID-19, teleworking has changed to the extent that in many cases the following is now the norm:

- Teleworking is no longer a voluntary agreement between the parties but is now a binding arrangement imposed by circumstances
- Teleworking during the pandemic is fulltime, whereas previously it was generally a part-time or occasional arrangement
- Teleworking was initially thought to be a short-term solution, the health crisis in many countries required this arrangement to become more long-term and of uncertain duration
- Teleworking allowed for the acquisition of the equipment, services and materials necessary to work from home making some workers more productive.

Due to cost savings for enterprises and the greater flexibility and savings on time and travel by workers, it is likely that teleworking will continue being part of the way of working for a considerable share of workers after COVID-19. This will have important implications for the Tourism Sector, where teleworking will not be possible because the physical presence of many workers is at the heart of service delivery. Some tourism jobs can be performed remotely so there will be some flexibility in such cases. The risk for the Tourism Sector is that with an increasing appetite for teleworking generally, it may lose workers to industries or jobs that can be performed remotely.

Impact of COVID-19 on Restaurants and Food

COVID-19 has dramatically affected this sub-sector overall given the restrictions on movement, curfews, etc. However, a study by ECLAC 2020 found that "In the context of the pandemic, the online presence of retail companies increased 431% between June 2019 and June 2020. The increase in the case of restaurants and food delivery services was 331%, and in business services, 311%. This suggests that the Food and Beverage sub-sector has made some adjustments in order to survive. These **forced new trends are not likely to disappear** after the presence of COVID-19 is no longer an issue.

Conclusion

It is very important that Caribbean destinations explore the multi-dimensional implications of these megatrends and paradigm shifts due to COVID-19 to inform policy and shape the future of tourism in the Region over the next 20 years.

These megatrends will impact the choices made by consumers, influence the strategic decisions made by Caribbean tourism players, and determine some of the knowledge and skills needs of the future.

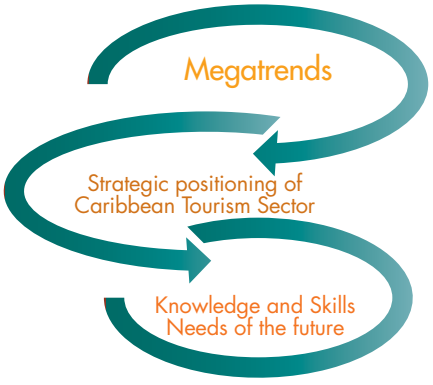


Figure 60: Megatrends and Future Needs in the Tourism Sector

5.4 FUTURE OF TOURISM JOBS, SKILLS AND WORKFORCE DEVELOPMENT

Overall, the future of Tourism Sector Job Descriptions and Job Functions may not change drastically because most of the functions being performed currently will still be required in the future as the focus should still be on meeting or exceeding visitor satisfaction. However, some major changes in the knowledge and skills required will be essential to keep up with the megatrends and paradigm shifts that shape the future of tourism and travel. Existing job descriptions will need to be augmented to reflect factors such as:

- Changes in the use of technology
- Understanding developments and trends in sustainability (social, economic and environmental)
- Understanding developments and trends in health and safety protocols
- Understanding client needs along the inter-generational continuum[81]
- Managing in times of crisis.

New jobs will have to be created in areas such as:

- Customer and Industry Analytics
- Market Intelligence
- Health and Safety Protocols Management and Supervision
- Space and Virtual Tourism.

Training courses will need to be enhanced to reflect the megatrends and paradigm shifts.

5.4.1 Trends In Tourism

In 2016, the ILO identified tourism as "a major engine for job creation and a driving force for economic growth and development";[82] this position was supported by WTTC statistics that showed that tourism directly created over 107 million jobs (3.6% of total employment representing 3% of total GDP) and supported (directly and indirectly) a total of 284 million jobs, equivalent to one in 11 jobs in the world. By 2026, these figures are expected to increase to 136 and 370 million jobs respectively representing one in nine of all jobs worldwide.[83]

According to the WTTC,[84] in 2019, Travel and Tourism was one of the world's largest sectors, accounting for 10.4% of global GDP (USD 9.2 trillion), 10.6% of all jobs (334 million), and was responsible for creating 1 in 4 of all new jobs across the world. Moreover, international visitor spending amounted to USD 1.7 trillion in 2019 (6.8% of total exports, 27.4% of global services exports).

In 2021, the WTTC reported[85] that "As a result of COVID-19 and the ongoing restrictions to international mobility, the Travel and Tourism Sector suffered losses of almost USD 4.5 trillion, with its global contribution to GDP declining by 49.1% compared to 2019 to reach only USD 4.7 trillion in 2020; relative to a 3.7% GDP decline of the global economy. Domestic visitor spending decreased by 45%, whilst international visitor spending fell by an unprecedented 69.4%. In 2020, 62 million jobs were lost, leaving just 272 million employed across the sector globally."

[81] Inter-generational continuum goes from Baby Boomers to Generation Alpha. For example Google has found that the latest generations, generation Z and generation Alpha, prefe communication via images and voice control over typing and texting.
[82] "Sustainable tourism: A driving force of job creation, economic growth and development", https://www.ilo.org/global/about-the-ilo/newsroom/news/WCMS_480824/lang-en/index.htm.
[83] https://caribbeanhotelandtourism.com/wp-content/uploads/data_center/global/WTTC-WorldEconomicReport2015.pdf.
[84] Travel and Tourism Economic Impact 2019 - https://wttc.org/Research/Economic-Impact.
[85] Travel and Tourism Economic Impact 2021.
https://wttc.org/Portals/0/Documents/Reports/2021/Global%20Economic%20Impact%20and%20Trends%202021.pdf.

The ILO in 2016 stated that "Tourism is a major contributor to employment creation particularly for women, youth, migrant workers"



The above data show very well how global tourism was performing prior to COVID-19 and how drastically the sector has been affected by COVID-19. Conducting this study has come at an interesting time because there is still uncertainty about when the impact of COVID-19 will end and whether the industry will return to its previous growth trajectory. The WTTC research shows that if international mobility and travel is resumed by June this year, the 62 million jobs lost in 2020 could return before the end of 2022, therefore powering global economic recovery.[86]

The ILO in 2016 stated that "Tourism is a major contributor to employment creation particularly for women, youth, migrant workers, rural communities and indigenous peoples and has numerous linkages with other sectors. The ILO[87] reports that in 2019 women and young people were over represented in hotel and restaurant sectors. Informal jobs in tourism also outweighed informality in other areas of employment. As a consequence, tourism can lead to the reduction of poverty and to the promotion of socio-economic development and decent work. However, if tourism does not respect local cultures and is uncontrolled, unsustainable, or not socially accountable, it can also have a negative impact on local communities, their heritage and environment, exacerbating inequalities."[88] These factors will be brought to bear on the analysis that follows on the future knowledge and skills needs for the global Tourism Sector.

In an ILO publication, Skills and the Future of Work Strategies for inclusive growth in Asia and the Pacific (2018)[89] the authors emphasise the importance of the demand side of skills utilisation "Improving skills utilisation requires skills to be considered from the demand-side perspective because the traditional (supply-driven) skills policy is limited in terms of its ability to link skills to business operations.

[86] See: WTTC%20Global%20Economic%20Impact%20and%20Trends%202021.pdf.
[87] https://www.ilo.org/caribbean/newsroom/WCMS_809331/lang–en/index.htm.
[88] https://www.ilo.org/global/about-the-ilo/newsroom/news/WCMS_480824/lang–en/index.htm.
[89] https://www.ilo.org/wcmsp5/groups/public/@asia/@ro-bangkok/@sro-bangkok/documents/publication/wcms_650239.pdf.

This recognition also means that policymaking needs to broaden the scope of existing skills policy and explore new territories, such as sector-based policies, enterprise support for new business models and supporting (career-based) skills deepening and jobs with quality."

Beyond the current imperatives for utilisation of technology, a Compete Caribbean report notes several technology trends that must be taken into account:

- New mobile technologies
- Internet of things
- Cloud Computing
- Cross platform and network technologies
- New materials (grapheme, etc.)
- Big data technologies
- Mobility and tracking technologies
- New smart devices (glasses, watches)
- New social media tools
- New sensors (NFC, RFID) (Compete Caribbean, 2014).

The report specifically notes the need for ICT driven innovation to take place within clusters and makes the following recommendations:

- Tourism Small and Medium Enterprises (SMEs) need to collaborate, engage and find a common purpose
- Tourism SMEs are to be empowered via further access to education and professionalisation
- Tourism SMEs further education needs to seek broadening their absorptive capacities
- Policy frameworks fostering SME cooperation, education and professionalisation are to be in place.
- Innovation Structures with a focus on tourism are needed and umbrella formulas, such as regional/national innovation systems are advisable
- Tourism SMEs and Innovation Structures are to exchange information, transfer knowledge and collaborate; policy frameworks fostering this exchange are recommended
- Local Tourism SMEs are to be connected and interact with the regional/national level and with other economic sectors, seeking synergies and engagement (pp.33 -34).[90]

5.4.2 Future Knowledge and Skills Needs Derived From Tourism Master Plans

Most CTO/CDB member states have Tourism Master Plans and/or some Tourism Strategy that outline where the country wishes to go in terms of tourism in the upcoming decade or so. It is sometimes argued that, even though these Master Plans and Strategies are well intentioned, they are not driven by data from those operating in the sector or are not based on realities faced by those in the sector.[91] They are also typically driven by supply rather than demand based on market analysis which profiles the type of visitors the country desires matched up against what the country has the capacity to provide or will have the capacity to provide if the necessary infrastructure and support measures are put in place. Some Master Plans end up with low implementation rates because they were too optimistic or all players were not equipped or aware of the role they were supposed to play in making the Plan a success.

[90] https://www.competecaribbean.org/wp-content/uploads/2015/04/Improving-Competitiveness-in-the-Caribbean-Tourism-Sector-Through-ICT-Based-Innovations_September_v4_docx.pdf.
[91] This point was made by tourism operators during interviews and focus groups sessions held to collect data for this project.

It can be seen from the above analysis of Master Plans that future knowledge requirements vary to some extent across Member States, however knowledge on travel facilitation and health and hygiene protocols are prevalent (see Chapter 2).

With respect to future skills needs, the two main ones identified are:

- Training, reskilling, and upskilling schemes aimed at equipping individuals with new and improved skills to operate in the Travel and Tourism Sector including aspects addressing sustainability, and

- Enhanced digital literacy to acquire in-demand and emerging skills across several sectors enabling workforce future readiness, whilst also attracting new investment.

While the Master Plans and related documents indicated the thinking of policymakers and stakeholders, there is a time lag between creation and implementation of these plans. When stakeholders were asked to indicate their list of knowledge and skills required for the future, it is not surprising that their list might have some differences as shown below.

Based on the responses, customer service and communication skills are dominant. Language skills and technology are also mentioned by a few of the countries as being important skills. A subsequent question asked respondents how important they viewed language skills to be and all viewed them as being important. Most needs are not complicated and since most countries responded that they worked closely with training institutions these areas may be addressed in the short term. Additionally, there are opportunities through online learning that can make this training accessible to organisations of every size.

In addition to the above, it must be emphasised that effective marketing is one of the key success factors to the long-term sustainability of tourism in the Caribbean. It is therefore imperative going forward that the skills are available to execute in areas including the following:

- Tourism Market Intelligence and Analytics

- Social Media and Digital Tourism Marketing and Public Relations

- Aligning Marketing Efforts

- Tourism Product Development, Enhancement, Rejuvenation, and Diversification

- Cultural Heritage Development as a Tourism Product; and

- Product Quality Assurance.

Traditionally the Caribbean has attracted visitors interested in the 3Ss of sand, sea and sun. Increasingly however, Caribbean destinations have sought to broaden the appeal of their destinations in order to reduce the seasonal impacts of tourism and to differentiate their warm weather destinations from other warm weather destinations. Mature destinations have also attempted to reinvent themselves in order to continue to be appealing. Tourism Master Plans, strategic documents and vision statements of destinations indicate their intentions to diversify tourism offerings. This was discussed in detail in the Knowledge and Skills Audit of Chapter 3.

Focus groups and interviews with stakeholders in the different countries were used to gather data about the types of changes to the tourism product and ultimately therefore the type of changes required of the people engaged in tourism delivery. There is an inevitable lag between when tourism policy documents are written and when they are enacted. In some cases, the policies may actually never be implemented and in the case of a "black swan" event like the pandemic, events may overtake the plans.

5.5 FUTURE DEMAND FOR TOURISM HUMAN RESOURCES

According to the ILO '*The confluence of various macro-economic trends is creating uncertainty around whether the drop in working hours, employment and labour force participation is temporary, or whether the pandemic is expediting more structural labour market exits or labour-saving transformations – each of those requiring different courses of action. The pandemic is deepening various forms of inequality, from exacerbating gender inequity to widening the digital divide. Changes in the composition of employment relationships – such as reliance on informal self-employment to earn a living, the rise in remote work, and various trends with regard to temporary work – all risk impairing the quality of working conditions'* (ILO, World Employment and Social Outlook Trends 2022:13).

There is evidence for example that as a cost saving measure some hotels may attempt to retain some of the protocols adopted during the pandemic. Housekeeping may be on demand and room check-in and room service orders may be done via app post-pandemic. Demand for labour may therefore decline. At the same time some hoteliers indicated that they had reconfigured their operations and were moving to a model that required offering even more service in exchange for higher room rates. What is clear however is that the future will be digital and those individuals who are not skilled in this regard will find it difficult to find employment.

The demand is also likely to differ between countries. In Jamaica for example, many hotels had adopted a model of contract work which meant that they could be more flexible in employment. Without permanent employment prospects it is likely that these employees would use their flexibility to respond to work in other sectors and outside of the Region.

It is also unclear how deeply technology, and in particular information technology will be utilised within the organisation. As Miralles[92] notes in her discussion of tourism and technology, organisations can choose to utilise technology to do tiny mechanical tasks without added value or to provide products and services in a more agile way. She suggests that each company should identify what aspects can be improved with technology but notes that companies must take into consideration the abilities of their staff. The latter point is very important given that employers frequently mentioned their dissatisfaction with the equipment and technical resources of educational institutions. This suggests that employees may be entering the workplace without the requisite training and knowledge (see Chapter 4 on education and training). The audit also did not reveal any emphasis at the national or sectoral level designed to train current employers in how best to utilise technology in their workplaces. Zuboff[93] makes the interesting distinction between automating and informating. In the former case the number of employees utilised in the organisation may decrease. If for example hotels continue to utilise apps then guests may use the apps to let themselves into their rooms, order meals, make restaurant reservations and check out, then the employees required to perform these tasks will be eliminated. If the technology is used to "informate" this means it creates more information and provides more insights that can lead to significant improvement in the production and delivery of services. In this instance more employment may be created but it will be in the strategic planning and design segment of the organisation.

5.6 MEETING FUTURE TRAINING AND DEVELOPMENT NEEDS

In examining how to meet training and development needs for future workforce planning, this chapter attempts to use a predominantly demand side approach to address the issue. As mentioned earlier in Chapter 4, the ILO emphasises the demand side approach to knowledge and skills delivery

[92] Miralles, P. 2021. Digital Transformation in Tourism. Compete Caribbean. https://www.competecaribbean.org/digital-transformation-in-tourism/
[93] Zuboff, Shoshana. In the age of the smart machine: The future of work and power. Basic Books, Inc., 1988.

as opposed to the more commonly used supply side approach.[94] The main proposition is based on the fact that **whatever the visitor wants is what the establishment/destination should aim to deliver or exceed** in each sub-sector or with respect to technology or with respect to sustainability, etc. The destination/establishment should factor this into their strategic planning and decision making in a very significant manner. The supply side cannot be ignored because if the destination/attraction does not have certain natural or human resources this may be a major constraint in and of itself.

From the perspective of an economic analysis, future knowledge and skills needs in the Tourism Sector are a derived demand determined by factors including:

1. The wages paid to employees in the Tourism Sector
2. The income and financial position of tourists and travellers
3. The tastes and preferences of tourists and travellers
4. The age of tourists and travellers
5. Price, availability and quality of substitutes
6. Price, availability and quality of complements
7. Seasonality
8. Population/number of consumers.

Each of the above factors will be discussed briefly below. The megatrends and paradigm shifts discussed earlier are subsumed under one or more of the above categories and will therefore be accounted for in the discussion. The discussion of these drivers of demand will then be used to determine the future skills needs.

1. **The wages paid to employees in the Tourism Sector** – the lower the wages, other things equal, the higher will be the demand for skills. However, it should be noted that the higher the skills and the knowledge, the greater will be the wage demanded.

2. **The income and financial position of tourists and travellers** – the higher the income level of tourists and travellers, the more they will demand tourism and travel services and the more they will be prepared to pay for higher quality services – more highly trained employees will be required to provide services to higher income consumers. This can create a dilemma for tourism and travel service providers because if they do not provide the quality of service required, they will not be able to attract or retain the consumer. At the same time these more highly trained employees are highly mobile to competitors as well as to other sectors of the economy e.g. financial service.

3. **The tastes and preferences of tourists and travellers** – the tastes and preferences of tourists and travellers are very important in determining the tourism services they demand. For example, some tourists desire sand, sea and sun while others demand attractions, adventure, community interaction, etc. It is therefore important to have skills and knowledge appropriate for each type of demand. It should be noted that the tastes and preferences are heavily influenced by marketing and promotional strategies. Direct marketing to destination managers, travel agents and tour operators can be very effective. It is very important for destinations as well as individual establishments to build a strong brand. However, once a brand is created and developed, it is important to have the appropriate skills and knowledge to preserve it otherwise the brand

[94] Skills and the Future of Work Strategies for inclusive growth in Asia and the Pacific - https://www.ilo.org/wcmsp5/groups/public/—asia/—ro-bangkok/—sro-bangkok/documents/publication/wcms_650239.pdf.

will be damaged. As an example, the Sandals, Atlantis and Ritz-Carlton chains have a documented low tolerance for anything that may adversely affect their brands. As a result, both have very high return rates amongst their guests. The hotel companies mentioned above have managed the challenges of recruiting trained staff by setting up their own training facilities. In other countries, such as Anguilla and the Turks and Caicos Islands, most establishments carry out their own in-house training in order to mitigate risks associated with too few appropriately trained employees. Companies have also recognised the importance of soft skills and many hire based largely on attitude and then train to build capacity

Another important area in terms of tastes and preferences is **the area of sustainability**, which includes environmental, social and economic issues.

According to the CSTPDF, the twelve (12) values and guiding principles convey the CTO's current requirements for sustainable development to 2030 and are aligned to the broader international development agenda purported by United Nations World Tourism Organization (UNWTO). In this context, the CSTPDF recognises the need for all policies and development initiatives to address and mainstream climate change, disaster resiliency, gender equity considerations and public-private partnerships. The values and principles continue to further define sustainable tourism, its interaction with communities and the environment, and the underlying importance of social inclusion with a process which includes engaging local community participation. Most importantly, the values and principles stress that sustainable tourism guidelines and management practices are applicable to all forms of tourism, across all tourism sub-sectors and market segments, in all types of destinations in the Caribbean

The CTO is taking a leading position on the above issues including gender equity, inclusiveness, child labour, human rights, etc., which are very important to some visitors who will make a statement by visiting a destination only if some or all of the sustainability factors are in place. It is therefore important that destinations understand the profile of the type of visitors they wish to attract in order to:

- Avoid wasting marketing spend if these sustainable factors are not in place
- Identify which of the sustainability factors are most important to each type of visitor
- Become compliant with the sustainability requirements
- Ensure that the employees have the skills and knowledge to understand the sustainability issues and address visitors appropriately before or when questions are asked.

Apart from meeting the United Nations Sustainability Development Goals (SDGs), these sustainability factors are becoming increasingly important on an individual basis to visitors from all over the world. It is therefore important that destinations and properties become compliant with the trends related to sustainability as well as develop the **knowledge and skills** required to demonstrate this compliance.

4. **The age of tourists and travellers** – Millennials and Gen Y have different needs and behaviours compared to Gen X and Baby Boomers. While **Millennials** and **Generation Z** have little loyalty to employers or brands and are more likely to rely on personal networks than experts, Baby Boomers and Gen X may have more brand loyalty. These are important factors to consider when marketing or providing services. It will be important to train employees to know the different needs and preferences of the different generations and address them appropriately in order to avoid customer dissatisfaction

However, it is interesting to note that a recent study published in the Harvard Business Review suggests that in the workplace, generational differences may not be as great as stereotypes would suggest.[95] This is very important to all sectors, including tourism, from a skills, knowledge and attitude perspective

5. **Price, availability and quality of substitutes** i.e. price and quality in other destinations or within a destination – the price and quality of similar tourism options in other destinations or within a given destination will affect the demand for tourism and travel services and therefore the future knowledge and skills needs. It is therefore important for destinations to benchmark prices in other destinations in order to be competitive for the tourist traveller who base their decision on price rather than other factors such as brand and reputation. Similarly, each destination should monitor wages (i.e. price of labour) in other destinations in order to prevent losing their employees. In addition, it will be important for destinations or establishments to have knowledge and skills in marketing and analytics to generate the vital information, develop the brand, and design and execute the appropriate marketing strategies.

6. **Price, availability and quality of complements** – if a tourist or traveller wishes to visit a destination or property, their decision will be influenced not only by prices and quality of the destination but also by the price of complements such as transportation, food and beverage, etc. In fact, the other sub-sectors of tourism are often complements of each other. For example, a visitor may wish to visit the Caribbean but the cost of travelling to the Caribbean may be so expensive that they choose another destination that is less desirable. In such a case, a destination or a property will need to try to work on high value packages that

It is therefore important for destinations to benchmark prices in other destinations in order to be competitive for the tourist traveller who base their decision on price rather than other factors such as brand and reputation.



[95] "Generational Differences At Work Are Small. Thinking They're Big Affects Our Behavior by Eden King, Lisa Finkelstein, Courtney Thomas and Abby Corrington, August 2019.

will induce a visitor to still visit because they perceive that they will derive additional value for the additional expenditure. However, the destination or property will have to ensure that it has the skill and knowledge endowments to **satisfy or exceed the expectations of the visitor** when they arrive and during their stay. It is therefore important that a destination or property understands the profile of its visitors before they arrive. This will require knowledge and skills in market research and data analysis/analytics, in addition to the particular knowledge and skills required to satisfy the visitor

7. **Seasonality** – seasonality affects the demand for tourism and travel thereby affecting the demand for knowledge and skills at some times of the year relative to other times of the year. However, the employee has to be equipped with the skills and knowledge so that whenever they are called upon, they can perform at a level to satisfy the visitor. Visitors do not care whether it is a temporary worker brought on just for the peak season, they expect a certain level of service regardless. A destination or establishment needs to ensure that seasonal workers are appropriately trained so they can execute adequately.

   It should be noted that seasonal workers face certain disadvantages that employers need to be sensitive towards. For example, they may need multiple occupations to support themselves throughout the year; they may have unpredictable shifts and in turn have difficulty in balancing personal life and work; and if they fall in the category of "informal" they may face limited social security coverage, contract stability and irregular payment of wages.

8. **Population/Number of Consumers** – the future demand for knowledge and skills is also determined by the size of the population of potential visitors.

   As shown in data presented earlier, the rapid growth of the Tourism Sector prior to COVID-19 resulted in rapid growth in employment in the sector as well as shortages in certain skills and knowledge. The converse has been true since COVID-19. When the Tourism Sector recovers from COVID-19, employers with capacity to expand, will have to ensure that they not only have the appropriate quantity of employees but that each worker has the appropriate level of knowledge and skills.

The above factors play a role in the future skills and knowledge needs assessment at the establishment level, at the destination level and the Tourism Sector level. It is therefore important that destinations and properties develop analytical models and draw on market intelligence that allows them to understand the needs of visitors, develop the knowledge and skills of employees, market accordingly, exceed the expectations of visitors, and generate repeat visitors who will also tell others.

It should be noted that the above analysis takes a demand side approach to the need for knowledge and skills in that the factors that determine the demand for tourism services are ultimately the drivers of the required knowledge and skills. This approach is different to what often happens in many countries where the focus is on the supply side wherein policy makers and Educational and Training Institutions make the decisions about what knowledge and skills should be imparted to those being trained. This leads to the perennial complaint from industry that **new employees coming from training institutions are unprepared for the workforce**.

The following section develops a framework that uses the variables discussed above as well as other factors to develop a profile of visitors. The framework is based on identifying what the most demanding or discriminating visitor wants, in other words for each variable or criterion in the framework (e.g. Technology dependence or usage), the visitor is given an orientation rating of high, medium or low. A visitor that has a high orientation rating prefers to use or interface with technology throughout the tourism

value chain e.g. from booking a trip - checking in – internet available in the room and throughout the location - ordering room service - checking out – paying the bill - booking an Uber to the airport - to rating the trip, etc. A low technology orientation would be indicative of a visitor that prefers face-to-face interactions on all of the above steps. The training, knowledge and skills required by employees in order to deal with each type of visitor may vary significantly. Therefore, it is important for a destination or an establishment to know and understand the respective profiles of their visitors in order to match their requirements. It can be assumed that if the visitor's requirements are not matched, they will not visit in the first place or they may not return because their satisfaction level would have been below their expectations.

The framework basically suggests the following:

1. Establishments and destinations should understand the profile of visitors – this can be done by reading Trip Advisor or other online rating services; reading or listening to other market intelligence reports; and/or conducting their own customer satisfaction/ exit surveys. This amounts to Knowing Your Customer or KYC as it is referred to in the financial service industry.

2. Establishments and destinations should understand their own profile – this can be done by assessing each element of their product/service and comparing it to the "strongest orientation" in order to ensure that they match up to the requirements of their targeted visitors. The **Hospitality Assured** instrument available through the CTO may be utilised for this purpose. They can then conduct a Gap analysis on their product/service offerings to determine how close they are to being able to satisfy customers with high orientation in different factors.

3. Based on the findings from 1 and 2 above, the establishment or destination can determine their marketing and service strategies. It is possible that an establishment/destination may identify that it has Gaps in certain factors however it is prepared to settle for this but promote highly those areas where they do not have a Gap. For example, a hotel may know that its room quality and its food and beverage, etc. do not match up to the "high-orientation" standards but they have excellent internet connection 24/7, which is better than even the top hotels. In such a case the hotel would emphasise this positive Gap or competitive advantage in its marketing and promotional activities and thereby still attract visitors.

4. Based on 1, 2 and 3 above, the establishment/ destination would be able to determine and develop the knowledge and skills (and number of employees) required for each factor and train and develop employees accordingly.

5. Based on the information above, the employer can choose whether to conduct in-house training or utilise training institutions or a combination of both. The framework also makes recommendations with respect to the **minimum level** of qualifications and training required to meet the needs of high-orientation visitors in each category.

The minimum level of qualifications is set quite low in the framework to align with the realities of the Caribbean where insufficient persons are graduating with five CXC/ CSEC passes including English and Mathematics, which could be considered as achieving a basic complete high school education. If the minimum level was set at five CXC/ CSEC passes, the Tourism Sector in the Caribbean would struggle even more than it currently does to find enough qualified persons to employ.

This is a major constraint faced by Caribbean Tourism industry which originates from the education system. Employers in the sector are often forced to train their workers more than would be expected and even then, the low

level of education is an obstacle to knowledge and skills development. This typically manifests itself in low wages and the various challenges faced by the industry. However, it is noted that at the same time some employers are not demanding experience from employees because they wish to avoid paying the higher wages commensurate with such experience.

5.7 FRAMEWORK FOR DETERMINING FUTURE KNOWLEDGE AND SKILLS NEEDS

Taking into consideration that different visitors have different profiles in terms of their orientation and what is highly important to them when they travel, it is important that the tourism workers with whom they interface have the knowledge and skills to provide the required level of service. The Table below aims to indicate the minimum qualifications and the recommended level of training required by Tourism Sector workers in order that they are equipped with the required knowledge and skills to address visitors with different profiles. However, it should be noted that there are many workers who may not have been formally trained or educated but meet the qualifications and experience requirement. In such cases they may have been trained by their establishment or in a previous job and are therefore very competent to address the specialised needs of the visitor. For example, if visitors have high Income Level Orientation, they would desire high quality products and services (and price would not be a major consideration) e.g. a wealthy celebrity like LeBron James. In such a case (as shown in the first example in the table) it would be recommended that the workers have the following minimum qualifications and recommended training.

- CXC English and CXC Mathematics or 3-years relevant working experience in the industry dealing with High income orientation visitor
- A Customer Service Course/ Customer Success Specialist programme designed to examine the profile of this type of visitor with appropriate role plays.

For the above example, the recommended training provider would be appropriate professional In-house training and/ or customised training at an external training institution that has been briefed by industry (private and public sector) on the specific content and preferred structure of the course.

It should be noted that with the global focus on visitor experience, tourism workers at all levels should be made conscious (through training) of their role as authentic hosts to the visitors.

The framework below shows that the training profile of the tourism employees should be developed to match the profile of the particular type of visitors with whom they interface. After the framework outlined below, the next section links the different profiles of tourism employees as well as the profiles of future knowledge and skills identified in the previous section with the following two established Competency Frameworks:

- The CARICOM Qualification Framework and
- The Singapore Workforce Skills Qualification (WSQ).[96]

The CARICOM Qualification Framework is selected because it was developed based on international best practices as well as its relevance to the Caribbean. The Singapore Workforce Skills Qualification was selected because it is a very well-structured international benchmark that is comprehensive in its coverage, has a strong tourism component, and can easily be customised for the Caribbean context.

[96] "https://www.ssg.gov.sg/wsq.html.

Framework for Determining Future Knowledge and Skills Needs Based on Characteristics of Different Visitor Profiles and Capacity of the Destination or Establishment

Visitor Profile Orientation Factors		Descriptor for High Orientation in Each Visitor Profile Factor	Recommended Minimum Qualifications	Recommended Initial Orientation and Training	Training Provider
1.	Income Level Orientation	High Income Orientation - visitor is not price sensitive but desires high quality products and high-quality service	CXC English CXC Mathematics or CVQ Level 1 or 3-years relevant working experience in the industry dealing with High income orientation visitor	A Customer Service Course or Customer Success Specialist programme designed to respond appropriately to different profiles of this type of visitor using methods such as role plays, job share and cross-training which indicate how the employee should treat and respond to the visitor in different situations/scenarios	In-house training and/ or customised training at an external training institution that has been briefed by industry (private and public sector) on the specific content and preferred structure of the course and desired learning outcomes
2.	Price Sensitivity Orientation	High Price Sensitivity Orientation – visitor is very price sensitive	CXC English CXC Mathematics CXC Principles of Business or CVQ Level 1 or 2-years in the industry dealing with reservations or interfacing with price sensitive visitors	As above	As above
3.	Technology Orientation	High Technology Orientation	CXC English CXC Mathematics CXC IT or CVQ Level 1 or 2-years in the industry dealing with technology or interfacing with visitors through the use of technology	A Customer Service Course/ Customer Success Specialist programme designed to address the require-ments of this type of visitor with methods such as role plays, job share and cross-training indicating how the employee should treat and respond to the visitor. **The course should also offer training in the use of certain key software programmes and applications and how to use online payment systems**	In-house training and customised training at an external training institution that has been briefed by industry (private and public sector) on the specific content and preferred structure of the course **based on the patterns of technology used by visitors**

Visitor Profile Orientation Factors		Descriptor for High Orientation in Each Visitor Profile Factor	Recommended Minimum Qualifications	Recommended Initial Orientation and Training	Training Provider
4.	Level of Service Quality Orientation	High Level of Service Quality Orientation – visitor always wants high quality service and is very sensitive	CXC English CXC Mathematics/ CXC Principles of Business or CVQ Level 1 or 2-years in the industry dealing with customer service or interfacing with service quality sensitive visitors	A Customer Service Course/Customer Success Specialist programme designed to examine the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the **employee should treat and respond to the visitor in all aspects of the customer** experience	As in 1 and 2 above
5.	Destination Orientation	High Destination Orientation – visitor has a high preference for a particular destination and will prioritise it over other destinations	CXC English CXC Geography/ Social Studies/ Caribbean History or CVQ Level 1 or 2-years in the industry dealing with destination related issues or interfacing with this type of visitor	A Customer Service Course with destination-specific elements designed to examine the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the employee should treat and respond to the **visitor in all likely scenarios.**[97]	As above
6.	Sand, Sea, Sun Orientation	High Sand, Sea, Sun Orientation – visitor wants sunny weather and a nice beach	CXC English CXC Geography/ Social Studies or CVQ Level 1 or 2-years in the industry dealing with this type of tourism related issues or interfacing with this type of visitor	A Customer Service Course with **Sand, Sea Sun-specific contents** designed to examine the profile of this type of visitor and using role plays to indicate how the employee should treat and respond to the visitor in all likely scenarios. It should include environmental protection and safety	As above
7.	Community Tourism Orientation	High Community Tourism Oriented – visitor has a strong	CXC English CXC Geography/ Social Studies/	A customer service course **with Community Tourism-specific contents**	In-house training or an organisation like Countrystyle Community

[97] Some islands e.g. Jamaica and The Bahamas already have the Team Jamaica and Bahama Host programmes that are mandatory for all tourism contact employees. Countries could develop versions of these and enhance them along the lines suggested.

Visitor Profile Orientation Factors		Descriptor for High Orientation in Each Visitor Profile Factor	Recommended Minimum Qualifications	Recommended Initial Orientation and Training	Training Provider
7.	Contd.	preference for integrating with local communities and heritage during their visit	Caribbean History Or CVQ Level 1 Or 2-years in the industry dealing with this type of tourism related issue or interfacing with this type of visitor	designed to examine the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the employee should treat and respond to the visitor in all likely scenarios	Tourism Network and Villages as Businesses which are very experienced in offering such courses
8.	Accommoda-tion/ Brand Orientation	High Accommodation Orientation – visitor has a strong preference for a particular brand (e.g. Sandals) or a particular property (e.g. Atlantis, Paradise Island)	CXC English CXC Geography/Social Studies/ Caribbean History or CVQ Level 1 or 2-years in the industry dealing in a relevant area of Accommodation or interfacing with this type of visitor	A Customer Service Course with the **property-specific elements** designed to examine the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the employee should treat and respond to the visitor in all likely scenarios	As in 1 above
9.	Adventure Tourism and Recreation Orientation	High Adventure and Recreation Orientation – visitor wants to be highly involved in sports, hikes, horseback riding, etc.	CXC English CXC Geography/ Social Studies/ Caribbean History or CVQ Level 1 or 2-years in the industry dealing in a relevant area of Adventure Tourism and Recreation or interfacing with this type of visitor	A Customer Service Course with the **Adventure Tourism and Recreation -specific elements** designed to examine the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the employee should treat and respond to the visitor in all likely scenarios. Safety issues related to the sector should form a major part of the training	As above
10.	Attractions Orientation	High Attractions Orientation – visitor wants to be highly	CXC English CXC Geography/ Social Studies/	A Customer Service Course with the **Attractions -specific**	As above

Visitor Profile Orientation Factors		Descriptor for High Orientation in Each Visitor Profile Factor	Recommended Minimum Qualifications	Recommended Initial Orientation and Training	Training Provider
10.	Contd.	involved in visiting attractions e.g. waterfalls, heritage sites	Caribbean History or CVQ Level 1 or 2-years in the industry dealing in a relevant area of Attractions or interfacing with this type of visitor	**elements** designed to examine the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the employee should treat and respond to the visitor in all likely scenarios. **Special emphasis should also be placed on environmental practices as these are important to host countries and to visitors**	
11.	Events and Conference Orientation	High Events and Conference Orientation - visitor wants to participate mainly in festivals, carnivals, tradeshows, meetings	CXC English CXC Geography/Social Studies/ Caribbean History or CVQ Level 1 or 2-years in the industry dealing in a relevant area of Events and Conferences or interfacing with this type of visitor	A Customer Service Course with the **Events and Conference-specific elements** designed to examine the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the employee should treat and respond to the visitor in all likely scenarios	As above
12.	Food and Beverage Orientation	High Food and beverage Orientation – visitor wants to participate highly in gastronomically related activities such as restaurants, bars, food and beverage festivals, etc.	CXC English CXC Geography/ Social Studies/ Caribbean History/ Home Economics or CVQ Level 1 or 2-years in the industry dealing in a relevant area of Food and Beverage or interfacing with this type of visitor	A Customer Service Course with **Food and Beverage e.g. mixology and sommelier training -specific elements** designed to examine the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the employee should treat and respond to the visitor in all likely scenarios	As above
13.	Tourism Services Orientation	High Tourism Services Orientation – visitor is highly involved in the industry from a Government Ministry	Degree/Diploma/ Associated Degree/ CAPE in tourism related subject or Economics or Caribbean Studies	A high-level Customer Service Course with the **Tourism Services -specific elements** designed to examine	As above

Visitor Profile Orientation Factors		Descriptor for High Orientation in Each Visitor Profile Factor	Recommended Minimum Qualifications	Recommended Initial Orientation and Training	Training Provider
13.	Contd.	(official), Hotel and Tourism Association, Training or Consultancy perspective	or CVQ Level 1 or 3-years in the industry dealing in a relevant area of tourism services or interfacing with this type of visitor	the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the employee should treat and respond to the visitor in all likely scenarios	
14.	Trans-portation Orientation	High Transportation Orientation – visitor is highly interested in modes of transporta-tion because they wish to move around by themselves or in groups during their visit	CXC English CXC Geography/ Social Studies/ Caribbean History/ Economics or CVQ Level 1 or 2-years in the industry dealing in a relevant area of Transportation or interfacing with this type of visitor	A Customer Service Course with **Transportation - specific elements** designed to examine the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the employee should treat and respond to the visitor in all likely scenarios	As above
15.	Travel Trade Orientation	High Travel Trade orientation –visitor is highly engaged with travel agents, tour companies, destination marketing organisations, etc.	Degree/Diploma/ Associated Degree/ CAPE in tourism related subject or Economics or Caribbean Studies or CVQ Level 1 or 3-years in the industry dealing in a relevant area of tourism services or interfacing with this type of visitor	A high-level Customer Service Course with the **Travel Trade - specific elements** designed to examine the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the employee should treat and respond to the visitor in all likely scenarios	As above
16.	Sustainable Development Orientation	High Sustainable Development orientation – visitor is highly sensitive with a destination or property's compliance with sustainability. Some of the features are outlined below	Degree/Diploma/ Associated Degree/ CAPE in tourism related subject or Economics or Caribbean Studies or CVQ Level 1 or 3-years in the industry dealing in a relevant area of Sustainability or interfacing with this type of visitor	A high-level Customer Service Course with **Sustainability - specific elements** designed to examine the profile of this type of visitor and using methods such as role plays, job share and cross-training to indicate how the employee should treat and respond to the visitor in all likely scenarios	In-house training and customised training at an external training institution that has been briefed by industry (private and public sector) on the specific content and preferred structure of the course

Visitor Profile Orientation Factors	Descriptor for High Orientation in Each Visitor Profile Factor	Recommended Minimum Qualifications	Recommended Initial Orientation and Training	Training Provider
a) Gender Equity		As above	As above	As above
b) Human Rights		As above	As above	As above
c) Environ-mental awareness ecotourism		As above	As above	As above
d) Optimal use of natural resources		As above	As above	As above
e) Socio-cultural and Heritage Conserva-tion		As above	As above	As above

Table 31: Framework for Determining Future Knowledge and Skills Needs

Apart from the future skills and knowledge needs identified above, employees should be encouraged to participate in self-directed online courses or programmes to keep them up-to-date on the latest developments in their areas of expertise.

5.8 EMPLOYMENT AND WORKFORCE CHALLENGES FACED BY THE TOURISM SECTOR

The challenges that tourism faces in terms of employment, workforce or Human Resource Management have been well documented and include inter alia:

- Challenging working conditions
- Dirty and difficult work
- Low pay
- Lack of gender and minority opportunity
- Precarious, seasonal employment
- Low status of work
- Absence of clear career structures; and
- High labour turnover.

[98] Sustainability and the Tourism and Hospitality Workforce: A Thematic Analysis (2016) by Tom Baum, Catherine Cheung, Haiyan Kong, Anna Kralj, Shelagh Mooney, Hai Nguyen Thi Thanh, Sridar Ramachandran, Marinela Dropulié Ružic and May Ling Siow.

Even though these challenges have been addressed at the policy level, there seems to be little change in reality. A study by Tom Baum et al in 2016[98] on a variety of countries not including the Caribbean, suggests that many of the challenges represent practice that is not sustainable, including as examples:

- Short-termism as a result of irregular demand and deficient business planning
- The misperception that skills are not required for many lower-level hospitality jobs, thus denying workers their professional identity
- Widespread employment of labour, at all skills levels, that is not from the community or even country where the operations are located, denying opportunity to the local labour market
- Wide-term perception of employees as a cost and not as an asset to the business
- Poor working conditions and relatively poor pay, acting as a disincentive to either join or remain in the industry
- Dominance of small businesses (both in the formal and informal sectors) that limit career progression opportunities
- Limited engagement with diversity issues, meaning women and minorities do not have opportunities for progression; and
- Human rights' abuses through extensive use of child labour and working conditions that deny family rights.

5.9 FUTURE KNOWLEDGE AND SKILLS REQUIREMENTS IN THE CARIBBEAN

The information contained in this section is obtained from Focus Group discussions with representatives from 10 of the project surveyed countries. Responses are noted in the table below.

Future Knowledge and Skills Requirements Based on Consultations

Training and knowledge of industry best practices
• Hire persons with the appropriate hospitality attitude and basic education and training requirements and expose them to good/best practice
Entrepreneurial Training and skills development
• Entrepreneurial Training to ensure that entrepreneurs in the Tourism Sector maintain standards and maintain the "entrepreneurial momentum" ignited by the pandemic
• Training to develop knowledge and skills in Business Development
• Branding – use graphic t-shirts to inspire persons
Continuous Training and Skills development in Technology
• Virtual communication skills need to be developed to offer more to existing markets and to reach new markets. In some countries this was significantly developed during the pandemic
• Knowledge and skills in the development of Virtual Tours

Continuous Training and Skills development in Technology contd.
• Apps to facilitate online check-in and other services
• Technological adoption – Anguilla to become silicon valley of the Caribbean
• Need to find a way to allow local businesses to find their appropriate online presence e.g. Local Media/TV business had to go completely digital (using cloud). There are challenges with taxi and tour operators who do not even have an email address and so they cannot be accessed
• Smaller properties may have to be brought up to speed with the use of the technology
• Need for coders and persons who could fix hardware
Continuous life-long training
• Deliberate development of local Human capital and allow people to see possibility of upward mobility in tourism
• Youth need to see a career path to the highest levels. This will eliminate the complaint that foreigners are taking all top positions
• Cross training for workers so they can perform more than a single task – this may assist in addressing labour shortages
Specialist Skills and Knowledge
• Knowledge and skills in Strategy for nation building (National Development Plan – 10 years)
• Need more education and training for people in specialist areas e.g. Head Chefs, Cooks, IT, Technicians for high-tech equipment, Pilots and Teachers
• Knowledge and skills in water sports – there is a strong demand for water sports amongst locals and visitors so local skills need to be augmented to satisfy this increased demand in the marine sector
• Skills in **ICT, best practices, database management, standards, tourism laws, survey information** from other countries – these are critical for greater engagement
• Training in **servicing yachts and yachties** – these are often high-income persons with high expenditure who stay for long periods and wish to live like members of the local community
• Tour guide training programme is critical – people need to understand timing and etiquette
• Need for electrical, plumbing and skills in trades – does not exist locally – so currently it is imported - needs to be developed at home
• **Maintenance and repair** people are needed for engines, etc.
• Knowledge and skills development in basic **photography** in an era where the traveller wants to take a photo at every step of the experienc
• Knowledge and skills in **signage** - Destination signage, directional signs for roads, signage for new accommodation properties and other new businesses such as restaurants
• Enhancing the brand by adding wellness to nature
• Medical training including First Aid and CPR
• Knowledge in Health Compliance
• Investors (especially foreigners) need to be focused more on developing soft skills and training of staff – they should not just focus on their bottom line. Staff needs to be trained in how to deal with a diverse set of visitors
• Knowledge and skills in how to make the visitors experience multi-sensorial
• Training to develop knowledge and skills of Bed and Breakfast (B&B) – especially in light of migration of workers overseas

Specialist Knowledge and Skills contd.

- Negotiation Skills – How to negotiate on country's behalf (e.g. with respect to FDI)
- Enhanced knowledge and skills of Immigration and Customs employees to address increased flow of visitors due to increased number of flights e.g. direct access from Miami
- Niche market knowledge and skills – destination weddings, honeymoons, etc.
- Knowledge and training in Food Security and Sovereignty
- Training to develop knowledge and skills in planting and growing of food crops
- Knowledge and skills in open air transportation e.g. golf cart rentals
- Tourism related knowledge and skills for parents – education for parents so they can educate their children
- Tourism Education for Children – e.g. The Little Chef Programme in Turks and Caicos Islands
- Children must understand the importance of the tourist to their island (economy)

Communication, Language and Evaluation skills

- Communication skills are a staple requirement and evaluation of results is necessary for sustainability
- Need knowledge and skills to address visitors from non-traditional markets such as Dubai, Africa, etc.
- Language skills – employees need to be able to interact with persons in their own language. This represents value addition to the product
- Need knowledge and skills to address local visitors especially in the light of more staycations from locals as well as visits from the diaspora
- Sign language and the knowledge and skills necessary to cater to persons with disabilities
- Knowledge and exposure to other Caribbean folk forms (e.g. other dance forms) to create a package which also embraces other Caribbean countries thereby tapping into the rich Caribbean culture
- Knowledge and skills in translating how the community's behaviour is linked to the success of tourism
- Cultural sensitivity and diversity – important that stakeholders realise that they have to welcome everyone
- Religious sensitivity
- Need training in Community Tourism e.g. Sustainability, Heritage Hikes and local trails e.g. Waitukubuli National Trail in Dominica; Local Foods, Entertainment, Local Music and Culture. The demand for these services is rising. In Saint Lucia there is need for general community tourism training
- Bird watching is quite popular
- Cycling is becoming more popular so need persons that can handle cycling tours
- Training in tourism product development for policy makers and private sector e.g. more creative initiatives like "remote work" programme
- Training in locally based production and being creative with local resources for example bread fruit leaves, different fruit etc. and understanding the benefits of our local herbs, produce and crops
- Training in local community assets such as Heritage sites, rivers, churches, etc.
- Training in how to protect the environment in the community e.g. do not chop down trees

Communication, Language and Evaluation skills contd.
• Adding healthy alternatives to the brand and collaborating more with businesses aligned to the brand
• There is a greater focus on health and wellness – people want to visit Sulphur springs, yoga, etc.
Management Training and Skills
• Management skills on how to cope during a crisis such as a pandemic especially in a depressed society with rising mental health challenges
• Team building skills to ensure that everyone is pulling in the same direction and aligned to the organisational goals
• **Business Continuity Planning** – such as Insurance and risk planning tools e.g. how to protect your business in light of business disruption
Management Training and Skills
• Management skills need to be enhanced to **motivate** and improve the commitment of employees who are insufficiently engaged to help solve organisational problems etc.
• Staff are of the view that there is insufficient **management support**
• **Training for creatives/artistes** so they understand the true value/worth of their services/talents
• Some persons in the sector (such as entertainers) do not think that they are paid adequately for their services. Some decline the low offers or, if they accept, they may provide the product/service at a sub-standard level or lower quality
• **Interpersonal skills, decision making skills, emotional intelligence, time management**, personal self-awareness, etc.
• **Continuous Professional Development (CPD)** involving partnerships with communities. There is need for information sharing and pooling of information
• Knowledge and skills in 'blended' approaches to tourism training
Tourism Marketing
• Increased knowledge and skills in **creative marketing and product development**. For example, British Virgin Islands has a Deputy Director of Marketing and opened a New York office
• **Internal customer marketing** – promoting tourism as an area to pursue as a career
• **Social media marketing**
Certification and Awards
• Greater demand for Culinary experiences for example Grenada received Culinary Awards from the World Food Travel Association
• 'Gold Seal Service' certification – in British Virgin Islands over 3,000 persons were trained before they could open up to guests safely
• Transport Industry had to be Gold Seal certified for cruise ship passengers e.g. screens in buses et.
• Cruise Certification put in place for health and safety
• Turks and Caicos Islands Assured Programme – Certification of businesses (COVID-19 protocol adherence) across all of the tourism sub-sectors
• Need to find ways to certify experienced local people

Table 32: Future Knowledge and Skills Requirements

It should be noted from the above that in most cases the future knowledge and skills are not "new", however what is required is an enhancement and deepening of existing skills and available knowledge. In general, the megatrends and other changes that are likely to take place in the Tourism Sector revolve around employees understanding and better knowing:

- Customers and their needs
- The job - including customer service aspects, health and safety aspects, as well as any technical aspects.
- Establishment including the brand and facilities
- Community including assets and health and safety matters
- Country including some basic history, geography and important aspects of the society and the economy
- Industry/sector including the megatrends such as sustainability, health, hygiene and safety, as well as the origins, tastes and preferences of tourists and travellers.

5.10 ROLE OF GOVERNMENT

Studies reveal that the potential roles of government in the HRD domain are broad and diverse.

The roles usually ascribed to Government include the following:

- Setting policy and the operational direction for the education process from pre-school to vocational, higher and lifelong learning provision
- Facilitating access for the private and public sectors to the quantity and quality of skills required for economic development and growth



- Encouraging skills enhancement as a tool within economic restructuring

- Recalibration and inward investment attraction through moves to stimulate a high skills and/or knowledge-based economy, and putting in place policies and programmes that maximise employment opportunity and minimise unemployment and under-employment within the economy and, thus, enhance social inclusion.

It is also very important for Governments to be proactive in this period to facilitate optimal responses to the rapidly changing global and regional economic, social, environmental, and information-driven landscape. An example of the required proactivity was displayed by the move by Barbados and other countries that implemented Remote Work Programmes in order to take advantage of a niche opportunity. Regional Governments need to be proactive in other areas such as putting in place legislation for Airbnb and UBER.

Several Governments have recognised that they require organisational transformation and are in the process of such transformation. In order to optimise the benefits of this transformation Governments need to train or recruit organisational specialists.

5.11 DEVELOPING A SKILLS AND COMPETENCY FRAMEWORK FOR THETOURISM SECTOR

In terms of a competency-based framework for the Tourism Sector, to avoid reinventing the wheel, the CARICOM Qualifications Framework should be considered. Not only is the framework well developed and sanctioned by CANTA and CARICOM, holders of two CVQs at Level 2 can obtain a CARICOM Skills National Certificate allowing them to move and work in other CARICOM member states. The Singapore Workforce Skills Qualifications is also considered an international benchmark that could be adapted by the Caribbean Tourism Sector. It is comprehensive and well-structured and outlined below.

5.11.1 The CARICOM Qualifications Framework

The various levels of the CARICOM Qualifications Framework are outlined in the following table.

CCARICOM Qualifications Framework	Level Summary Descriptors	CVQ Level
Doctoral Level	**Level 10:** Achievement at this level recognises the ability to generate new ideas/knowledge and understanding and expand on an area of knowledge and professional practice It demonstrates the ability to address complex issues through initiating and designing research, development and strategic activities It reflects a profound understanding of complex theoretical and methodological principles and analysis to bring about change in the profession and/or workplace. It indicates an ability to exercise autonomy, judgement and leadership in taking/sharing responsibility in the development of an area of work or study or in influencing substantial change in a profession, organisation or society	CVQ 8
Masters Level	**Level 9:** Achievement at this level recognise the ability to apply knowledge and understanding to real life situations. It reflects the responsibility for planning and developing courses of action that impact organisational change within the working environment It reflects broad autonomy and judgement. It also reflects an understanding of the relevant theoretical and methodological area of study or work	CVQ 7

CARICOM Qualifications Framework	Level Summary Descriptors	CVQ Level
Post Graduate Level	**Level 8:** Achievement at this level recognise the ability to take responsibility to refine, integrate and apply advanced knowledge and skills to solve complex problems with limited data; initiate and develop courses of action for change and improvement utilising applicable theories; continue to advance knowledge and understanding and develop new skills to a high level	CVQ 6
Bachelors Level	**Level 7:** Achievement at this level recognises the application of relevant knowledge, methods and skills for the workplace and for further learning; planning, assessing, developing courses of action in response to a broad range of situations; exercising judgment and autonomy; communicating to varied audiences; reflecting understanding of different perspectives and schools of thoughts and the reasoning behind them	CVQ 5
Associate Degree Level	**Level 6:** Achievement at this level recognises the ability to identify, select and use relevant and appropriate knowledge, skills and technology to complete tasks and procedures and to address problems that are complex and non-routine. Within these parameters, it includes the ability to demonstrate leadership, to engage in teamwork and apply critical thinking skills, and to exercise autonomy and judgment while appreciating different perspectives and approaches in an area of study or work	CVQ 4
Diploma	**Level 5:** Achievement at this level recognises the ability to identify, select and use relevant and appropriate knowledge, skills and technology to complete tasks and procedures and address problems with a measure of complexity with autonomy and judgment. Within these parameters, it includes the ability to demonstrate leadership, teamwork and critical thinking skills	CVQ 3
Advanced Certificate	**Level 4:** Achievement at this level recognises the ability to select and use relevant knowledge, ideas, skills and procedures to complete well-defined tasks in a range of contexts, some of which are complex and non-routine. It includes the ability to communicate ideas and information, using appropriate communication tools and representation. It also includes taking responsibility for completing tasks and procedures and involves some level of autonomy, teamwork and guidance	CVQ 2
Certificate 3	**Level 3:** Achievement at this level recognises the ability to use relevant knowledge, skills and procedures, to complete basic and routine tasks with direct supervision and support. It includes the ability to communicate simple information using appropriate communication tools. Collaboration with others, through work groups or teams, may often be a requirement	CVQ 1
Certificate 2	**Level 2:** Achievement at this level recognises the ability to use skills, knowledge and understanding to carry out structured tasks and activities with appropriate support and guidance when required	N.A.
Certificate 1	**Level 1:** Achievement at this level recognises the ability to use elementary skills, knowledge and understanding to carry out simple tasks and activities with support and close guidance	N.A.

Table 33: CARICOM Qualifications Framework

The Caribbean Vocational Qualification (CVQ) is based on a competency-based approach to training, assessment and certification. Candidates are expected to demonstrate competence in attaining occupational standards **developed by practitioners, industry experts and employers**. As mentioned above, these standards when approved by CARICOM allow for easy movement across the Region. Currently, CVQs are planned to reflect a Qualification Framework of five levels as shown and explained in the above table.

Given that the CVQ system follows the Competency Based Education and Training (CBET) approach, which bases learning on the individual's ability to carry out well defined activities, it is considered an Effective, Efficient, Relevant method of delivery for mastery of skills and assessment in TVET. It measures skills and performance/competencies.

The steps for establishing a CBET Framework could involve partnering with an approved NTA in the Region to offer the programme. HEART/NTA, Jamaica has Occupational Standards for numerous occupational areas in tourism including Community Tourism, Tour Guiding, Food Preparation to the level of Chef, Front Office Operations, Food and Beverage, and Housekeeping.

Guidelines to Employer Using CARICOM Qualifications Framework

Step 1: Define the roles and functions that you wish the worker to perform

Step 2: Refer to the Qualifications Framework to find the descriptor that best fits the roles and functions defined in Step 1

Step 3: That descriptor selected in Step 2 corresponds to a CVQ level ranging from Level 1 for Entry Level worker to Level 3 for Supervisory Level worker; Level 5 for Managerial Level; and onwards.

Figure 61: Guidelines for using CARICOM Qualifications Framework

5.11.2 The Singapore Workforce Skills Qualifications Framework - Comparison and Reference for Caribbean Tourism Employers

Since 2007 Singapore has developed and used what they refer to as the Singapore Workforce Skills Qualification Framework (WSQ Framework).[99] The Framework consists of the following seven (7) Levels arranged in ascending order of qualification:

- **Level 1** Certificate
- **Level 2** Higher Certificate
- **Level 3** Advanced Certificate
- **Level 4** Diploma
- **Level 5** Specialist Diploma
- **Level 6** Graduate Certificate
- **Level 7** Graduate Diploma.

The Qualifications awarded at each level corresponds to specific levels of knowledge and skills required for specific Occupational/Job Ranks, specified by Industry Employers.

The Tourism Industry in Singapore has five (5) designated sub-sectors, these are:

1. Hotel and Accommodation Services
2. Attractions
3. Meetings Events Conferences Exhibitions (MICE)
4. Spa Services
5. Casino Gaming.

[99] The Singapore Workforce Skills Qualification Framework (WSQ Framework) https://www.skillsfuture.gov.sg/skills-framework/tourism.

The WSQ develops skills and competencies in two dimensions: **Technical** and **Generic**.

- **Technical skills and competencies** comprise occupation, job-specific skills and competencies that an individual needs to perform various job tasks
- **Generic skills and competencies** refer to employability and transferable skills and competencies that are applicable across job roles. They help every individual adapt to a new job and bring relevant skills across different jobs.

Each Tourism Sub-Sector has its range of training programmes consisting of both Technical and Generic skills and competencies from Level 1 Certificate to Level 7 Graduate Diploma. For example, to earn a Level 1 Certificate required by employers as an entry-level worker in the Hotel Accommodation Services Sub-Sector, the prospective employee must have completed **seven (7) competency modules** comprising **three (3) core units**, plus any **four (4) electives** to attain at least 11 credits.

The Core Modules include:

- Work Safety, Providing Safety and Security for Guests (12 hours)
- Interacting with Guests (16 hours)

The Electives consist of modules in:

- Food Service
- Front Office/Guest Services
- Housekeeping Operations
- Risk Management
- Sales and Marketing
- Site and Equipment Management
- Service Excellence.

The training programmes developed under Singapore's WSQ System are based on skills and competencies validated by employers, unions, and professional bodies. This process ensures existing and emerging skills and competencies that are in demand are used to inform training and development under WSQ.

The training is accessible through a network of WSQ Accredited Training Provider institutions and programmes, which provide the quality assurance, reliability and integrity of the qualifications awarded.

Singapore is a best practice example for the Caribbean to follow, forging deep collaboration between employers, worker representatives, education and training institutions and providers for the further development of the CARICOM Qualifications Framework and the validation of the CARICOM Vocational Qualifications (CVQ) awards.

Examples of the application of Singapore's WSQ System to Tourism Sector occupations such as Event Management and Operations; Attractions Management and Operations; Venue Management and Operations; Travel Management and Operations; MICE Operations; Tour and Travel Services Operations can be found at: https://www.skillsfuture.gov.sg/skills-framework/tourism.

5.11.3 Education and Training to Understand Sustainability

With respect to sustainability education and training, Baum et al (2016),[100] hospitality sustainability education should be delivered in a more comprehensive way. The focus should go beyond a single dimension of sustainability,

[100] Ibid.

Singapore is a best practice example for the Caribbean to follow, forging deep collaboration between educational and training institutions, employers and worker representatives.



i.e., protecting the environment. Instead, it should consider realistic business contexts, in order to effectively apply sustainability concepts to operations, finance and socio-cultural management. The benefits to society and the national economy of effective hospitality and tourism sustainability education include:

- increasing employment
- the preservation of cultural and natural resources and
- the positive economic impact of increasing access to outside resources that benefit a community.

It is important to find out how sustainability concepts and practices can be embedded in teaching and research in hospitality higher education. The following are a few recommendations as to its implementation:

- Continuous professional development training for teachers in primary, secondary and higher education so that they are exposed to new knowledge and best practices in the sector e.g. familiarise them with the Singapore Workforce Skills Qualification Framework (WSQ Framework) as well as the new focus on sustainability.
- Use of experiential learning; e.g. organising field trips for tourism students studying eco-tourism to examine and study sustainability issues
- Use social media for sustainability learning; e.g. Facebook has been used to engage students in sustainability and tourism
- Promote group discussions, problem-based learning, service learning, critical thinking through case studies and collaborative learning
- Further research on the use of technology in sustainable education for the hospitality industry; e.g. power management systems and green procurement programmes for hotel chains, waste reduction and recycling for the restaurant industry, etc.

5.12 CONCLUSION

Megatrends Driving Change In The Tourism Sector

In light of the above scenarios, it is critical that all persons who interface with visitors are trained and equipped with the appropriate knowledge and skills in how to provide only positive experiences to visitors and their internal customers/colleagues.

In addressing this matter of future skills and needs, the report starts off by looking at megatrends that are driving the needs of tourists and travellers and the choices they make about where to visit and how much they spend. The megatrends examined include:

- Evolving consumer demand including the focus on health and safety
- The increased role being played by technology across the tourism value chain
- Increasing competition from other destinations
- The increased focus by visitors on sustainable tourism growth including environmental protection and socio-economic issues like human rights protection.
- The impact of COVID-19 and resulting paradigm shifts.

Future Jobs, Knowledge and Skills Emerging From Masterplans and Strategies

Having examined megatrends, the report moves on to looking at the future of jobs based on these trends in tourism growth and based on future plans laid out in the

Tourism Masterplans and strategies of certain Caribbean countries. With respect to future skills needs, the two main ones identified are:

- Training, reskilling, and upskilling schemes aimed at equipping individuals with new and improved skills to operate in the Travel and Tourism Sector including aspects addressing sustainability, and health and hygiene, which have become dominant concerns in the Tourism Sector

- Enhanced digital literacy to acquire in-demand and emerging skills across several sectors enabling workforce future readiness, whilst also attracting new investment.

In terms of future knowledge several needs were iidentified. However, knowledge on travel facilitation and health and hygiene protocols amongst others were identified in several member states.

In addition to the above, it was emphasised that effective marketing will be a key success factor to the long-term sustainability of tourism in the Caribbean. It is therefore imperative going forward that the skills are available to execute in this area.

Meeting Training and Development Needs

In this chapter, a demand side approach was used to identify knowledge and skills needs based on key factors influencing the demand for labour, which is a derived demand. The factors examined included:

1. The wages paid to employees in the Tourism Sector

2. The income and financial position of tourists and travellers

3. The tastes and preferences of tourists and travellers.

4. The age of tourists and travellers

5. Price, availability and quality of substitutes

6. Price, availability and quality of complements

7. Seasonality

8. Population/number of consumers.

A link was made between each of the above factors and the future knowledge and skills requirements. Given that this approach is based on the behaviour of visitors and the necessary responses of tourism businesses, which includes in-house training and/or institutional training, there should be a greater impetus for industry (e.g. hotels) and training institutions to collaborate in offering training that is more targeted to the needs of industry and by extension to the needs of visitors.

In this chapter, a simple framework is developed based on the demand factors. The framework makes the causal link between the profile and orientation of visitors (based on the various demand factors and the eight (8) sub-sectors) and the minimum qualifications and skills required to satisfy tourists with different profiles. The framework is enhanced to allow countries/destinations/ establishments to develop their own profile and match this against the profile of visitors in order to determine if there is a gap between what they have to offer compared to what visitors need or want.

This chapter ends with a discussion on the methodology to be used for projecting the human resource needs of the Tourism Sector.

Skills and Competency Framework for the Tourism Sector

The final chapter of the report looked at the Caribbean Vocational Qualification (CVQ), which utilises a competency-based approach to training, assessment and certification. Candidates are expected to demonstrate competence in attaining occupational standards **developed by practitioners, industry experts and employers.** Not only is the frame-work well developed with several Occupational Standards

in place for tourism, it is also sanctioned by CANTA and CARICOM. It should be noted that holders of two CVQs at Level 2 can obtain a CARICOM Skills National Certificate allowing them to move and work in other CARICOM member states.

This report has used different approaches to highlight the determinants of the demand for future knowledge and skills needs in the Tourism Sector. Both the trends emerging from the Tourism Master Plans and Strategies indicate that training in technology related skills and knowledge is very important in order to remain competitive in the current and future market environment.

If sustainable tourism is viewed as important and a megatrend in tourism, then it will be important that employees in the Tourism Sector be included in the sustainability equation. This implies that tourism employment should be consistent with the 17 United Nations SDGs. The United Nations SDGs that relate to tourism and tourism employment are the following:

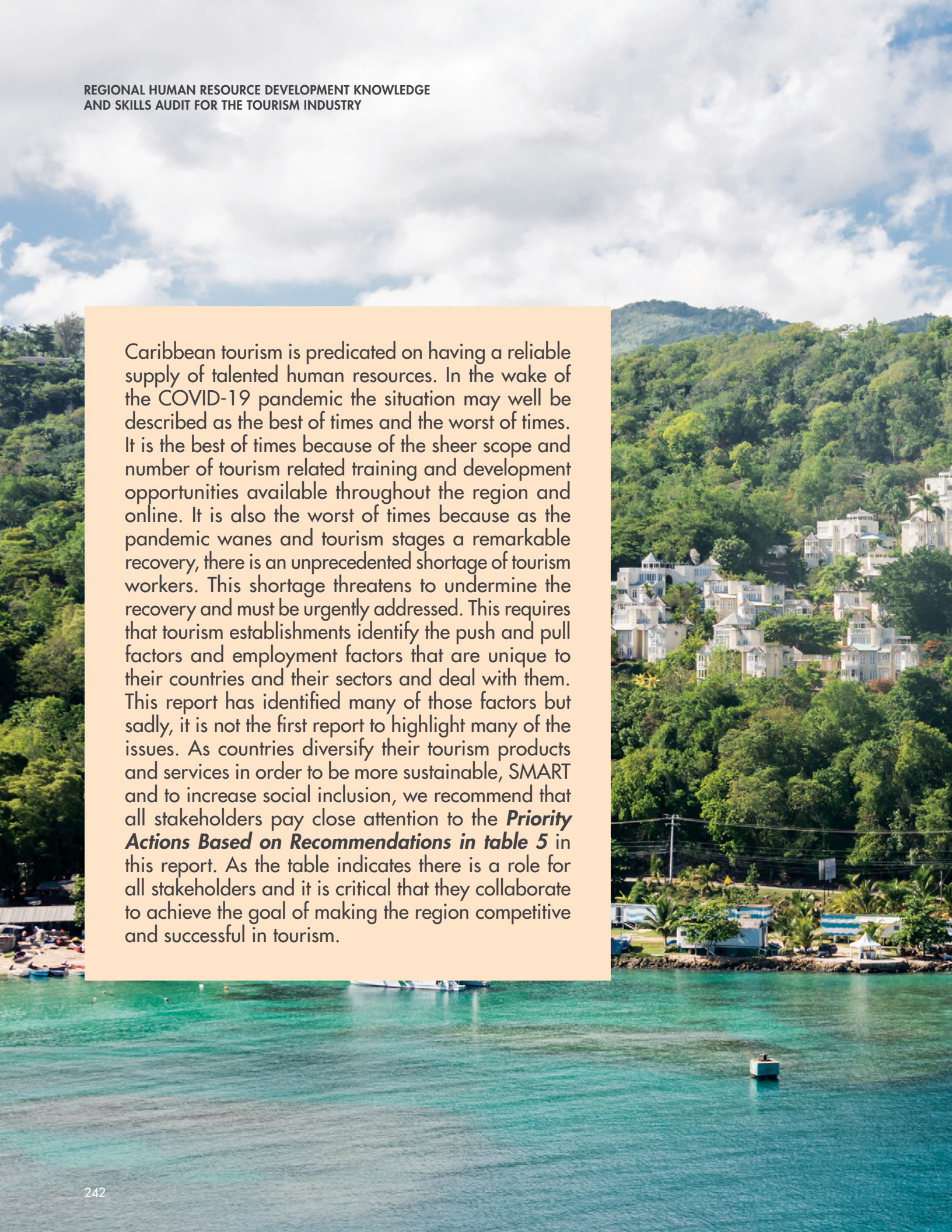
- **Goal 1:** to end poverty in all its forms and everywhere
- **Goal 3:** to ensure healthy lives and well-being for all at all ages
- **Goal 4:** to ensure inclusive and equitable quality education and promote lifelong learning opportunities for all
- **Goal 5:** to achieve gender equality and empower all women and girls
- **Goal 8:** to promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work
- **Goal 10:** to reduce inequality within and among countries
- **Goal 16:** to promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels.

The previously mentioned study by Tom Baum et al in 2016[101] found that for New Zealand, which is often identified as a country with examples of best practice, several of the SDGs goals were unmet for employees in the Tourism Sector. The following areas of concern relating to the Tourism Sector were identified: tourism workers were paid less than many other sectors, women were paid less than men, employee turnover was high, long working hours, low investment in qualifications and few opportunities to develop skills, workers often have temporary contracts, lack of unionisation opportunities, cheap foreign or indigenous labour was used, child labour may still exist especially in smaller rural properties or homestays, etc.

One of the conclusions of the study by Baum et al. (2016) is that the ultimate consequence of the failure to provide decent work has possibly resulted in the labour shortages negatively affecting New Zealand's image as a quality tourist destination. Tourism employers, when surveyed about the potential reasons for the lack of skilled workers, believed a general lack of knowledge about career paths available in the sector was a contributory factor.

In order for tourism employment to be sustainable in the future, it is important that the above goals in the SDG are met.

[101] Ibid.



Caribbean tourism is predicated on having a reliable supply of talented human resources. In the wake of the COVID-19 pandemic the situation may well be described as the best of times and the worst of times. It is the best of times because of the sheer scope and number of tourism related training and development opportunities available throughout the region and online. It is also the worst of times because as the pandemic wanes and tourism stages a remarkable recovery, there is an unprecedented shortage of tourism workers. This shortage threatens to undermine the recovery and must be urgently addressed. This requires that tourism establishments identify the push and pull factors and employment factors that are unique to their countries and their sectors and deal with them. This report has identified many of those factors but sadly, it is not the first report to highlight many of the issues. As countries diversify their tourism products and services in order to be more sustainable, SMART and to increase social inclusion, we recommend that all stakeholders pay close attention to the ***Priority Actions Based on Recommendations in table 5*** in this report. As the table indicates there is a role for all stakeholders and it is critical that they collaborate to achieve the goal of making the region competitive and successful in tourism.



APPENDICES

APPENDIX 1:

DATA COLLECTION INSTRUMENTS

1. Caribbean Tourism Organization (CTO) General Establishment Survey Instrument (for Large Establishments) **246**

2. Caribbean Tourism Organization (CTO) General Establishment Survey Instrument (for Small Establishments) **263**

3. Employers / HR Managers / Corporate Leaders Survey Instrument **284**

4. School and College Graduating Class Survey Instrument **290**

5. Tourism Employees Survey Instrument **297**

6. Educational and Training Institutions **303**

7. Unions and Associations **308**

8. Impact of COVID-19 on Labour Availability **313**

Caribbean Tourism Organization (CTO) General Establishment Survey Instrument





Thank you for agreeing to be a part of this important Regional Human Resources Development (HRD) Knowledge and Skills Audit for the Tourism Industry, which is commissioned by the Caribbean Tourism Organization (CTO) and funded by the Caribbean Development Bank (CDB).

The information collected by this survey is strictly confidential and will only be used for statistical purposes. Your establishment's name will not be mentioned nor will any of your information be provided to the Government, any third party or financial institution.

It may take up to 60 minutes to complete this survey and it requires some level of commitment and preparation. Your participation will, however, ensure that we have a thorough understanding of human resources in tourism in the Region and will inform policy and strategy development; and consequently, benefitting all those directly or indirectly involved in any tourism related activity. We would, therefore, appreciate if you would dedicate some time to answer all the questions. The following information should be readily available to you during this survey:

• Your establishment's employment history
• Types of workers you have hired
• Future hiring plans
• Problems you have faced in hiring
• Your views on the Tourism Sector.

This survey was designed by A-Z Information Jamaica Limited (A-Z), which was selected to carry out this project by the CTO, based on an internationally competitive procurement process.

* Required

Email * _____

Your survey responses will be emailed to you once you press submit at the end of the form. This will allow you to edit or complete this survey in your own time by using the link emailed to the address you provided above. If you need to pause, please skip to the end of the questionnaire and press submit to register your progress.

Caribbean Tourism Organization (CTO) General Establishment Survey

Section 1: Your Establishment

1. Your Name:
2. Name of Establishment:

3a. Is your establishment registered?

- ☐ Yes
- ☐ No

3b. How is your establishment registered?
Please specify 'Other'.

- Sole Proprietorship
- Partnership
- Private Limited Company
- Publicly Listed Company
- Government
- Co-operative
- Non-profit
- Community Based
- Other:

4. Which of the following best describes the ownership of this establishment:

- Locally owned (TC)
- Local/Regionally owned
- Local/Foreign owned
- Regional (Caribbean)
- Foreign (US-owned)
- Foreign (UK-owned)
- Foreign (Canadian-owned)
- Foreign (EU-owned)
- Other:

5a. What country does your establishment operate in?
Please specify 'Other'.

- Anguilla
- Antigua and Barbuda
- Bahamas
- Barbados
- Belize
- British Virgin Islands
- Cayman Islands
- Curaçao
- Dominica
- Grenada
- Guyana
- Haiti
- Jamaica
- Martinique
- Montserrat
- Puerto Rico
- St. Eustatius
- St. Kitts and Nevis
- Saint Lucia
- St. Maarten
- Saint Martin
- St. Vincent and the Grenadines
- Trinidad and Tobago
- Turks and Caicos Islands
- Other:

5b. What country are you based in?

6. What role best describes your position in the establishment:
Please specify 'Other'.

- Owner
- CEO

- Managing Director
- Director
- General Manager
- Human Resource Manager
- Other:

7. Please use the spaces below to list the 3 most important Product/Services provided by your establishment.
7a. Product/Service 1:
7b. Product/Service 2:
7c. Product/Service 3:

8. Please list the approximate share of revenue from each Product/Service listed in Question 8a-c in the spaces below:
Please enter percentages below

	Name of Product or Service	*Share of Revenue (%)*
8a.		
8b.		
8c		

9a. How many owners does your establishment have?
9b. What percentage of your owners are female?
- 100%
- More than 50%
- 50%
- Less than 50%
- 0%

10. How does your establishment benefit from the tourism industry?
- Directly
- Indirectly
- Not at all

11. Which of the tourism sub-sectors is your establishment associated with?
Please tick all that apply.
- Accommodation
- Adventure tourism and recreation
- Attractions
- Events and conferences, entertainment
- Food and beverage
- Tourism services
- Transportation
- Travel trade

12. Is your establishment a part of the Hospitality Assured Caribbean Programme?
- Yes
- No

Section 2: TOTAL EMPLOYMENT
Please note that this TOTAL includes all employees, owners, partners, participating family members and apprentices receiving remuneration in the form of pay, profit or family gain from the establishment in cash or in kind, for at least one hour during the last week of August, 2021.

*Note that persons with a formal attachment to the job, even when on temporary layoff for less than four weeks, should be included among the total number of employees.

13. How many people were employed at this establishment as of September 1st, 2021?

14.Please provide in the spaces below the total number of people employed as of September 1st, 2021, based on the following categories:
14a. Owners/Partners:
14b. Participating family members:
Excluding Owners and Partners described above
14c. Employees (including persons on paid leave):
Excluding persons described above (i.e. owners and partners and participating family members) please indicate the number of the following:
14d. Apprentices:
14e. Other:

15. Please provide in the spaces below the total number of FEMALES employed as of September 1st, 2021, based on the following categories:
15a. Owners/Partners:
15b. Participating family members:
15c. Employees (including persons on paid leave):
15d. Apprentices:
15e. Other (please specify below):

16. How many people were employed at this establishment on December 31st, 2020?

17. Please provide the total number of people employed as of December 31st, 2020, based on the following categories:
17a. Owners/Partners:
17b. Participating family members:
17c. Employees (including persons on paid leave):
17d. Apprentices:
17e. Other:

18a. How many people were employed at this establishment as of December 31st, 2019?
18b. How many of these employees were female?

19. Please provide, in the spaces below, the number of people employed as “MANAGERS” for the given time periods:
Managers have portfolio operational responsibilities including strategy formulation, policy and overall results. E.g. General Manager, Chief Engineer, Tour Director, Human Resources etc.
19a. Number of Managers (September 2021):
19b. Number of Female Managers (September 2021):
19c. Number of Managers (December 2020):
19d. Number of Female Managers (December 2020):
19e. Number of Managers (December 2019):
19f. Number of Female Managers (December 2019):

20. Please provide, in the spaces below, the number of people employed as “SUPERVISORS" for the given time periods
Supervisors are responsible for team leadership and performance; and report to a manager.
20a. Number of Supervisors (September 2021):
20b. Number of Female Supervisors (September 2021):
20c. Number of Supervisors (December 2020):
20d. Number of Female Supervisors (December 2020):
20e. Number of Supervisors (December 2019):
20f. Number of Female Supervisors (December 2019):

21. Please provide, in the spaces below, the number of people employed as "FRONT-LINE SERVICE PROFESSIONALS" for the given time periods
E.g. Room attendants, waiters, tennis coaches, tour guides, receptionists, drivers etc.
21a. Number of Front-line Service Professionals (September 2021):
21b. Number of Female Front-line Service Professionals (September 2021):

21c. Number of Front-line Service Professionals (December 2020):
21d. Number of Female Front-line Service Professionals (December 2020):
21e. Number of Front-line Service Professionals (December 2019):
21f. Number of Female Front-line Service Professionals (December 2019):

22. Please provide, in the spaces below, the number of people employed as "INTERNAL SERVICE PROFESSIONALS" for the given time periods.
E.g. Maintenance, food and beverage preparation, store keeper, cooks, laundry attendants, gardeners, accountants etc.
22a. Number of Internal Service Professionals (September 2021):
22b. Number of Internal Service Professionals (September 2021):
22c. Number of Internal Service Professionals (December 2020):
22d. Number of Female Internal Service Professionals (December 2020):
22e. Number of Internal Service Professionals (December 2019):
22f. Number of Female Internal Service Professionals (December 2019):

23. What was the average monthly wage in USD (EXCLUDING GRATUITY) for employees within the following categories for the period July 1st, 2020 – July 1st, 2021?

All types of employees	<$500	$501-1,000	$1,001-2,000	$2,001-3,000	$3,001-5,000	$5,001-7,000	$7,001-10,000	>$10,000	N/A
Upper level Management									
Supervisors (e.g. housekeeping, food and beverage)									
Professional and specialists (e.g executive chef, senior accountant, event manager)									
Clerical support staff (e.g. junior accountant, reservationists)									
Service and sales workers (e.g. receptionist, concierge, bell man)									
Elementary occupations (e.g. driver, room attendant, gardener, pool attendant)									

24. In your current workforce, how many employees come from the following areas/regions?
Please enter the number in the spaces provided below.
23a. Home Country:
23b. Eastern Caribbean countries
23c. Other Caribbean countries:
23d. North America:
23e: Europe:
23f. Other:
Please specify 'Other' and number of employees that come from the 'Other' background.

Section 3: NEW HIRES

25a. In the last 3 years, has your company filled any vacant full-time or part-time positions?

- ☐ Yes
- ☐ No (skip to Q 32a)

25b. How many of the vacancies in the last 3 years were filled by nationals/locals?
25c. How many of the vacancies in the last 3 years were filled by foreigners (non-nationals)?

26. Please list, in the spaces provided below, the approximate number of workers hired for the following time periods.
(sub-divided into total hires and female hires)
26a. Since January 2021 (total workers):
26b. Since January 2021 (female):
26c. January to December 2020 (total workers):
26d. January to December 2020 (female):
26e. January to December 2019 (total workers):
26f. January to December 2019 (female):

27a. Were any vacancies filled by foreigners (non-nationals) in the last 3 years?

- ☐ Yes (Please continue to 27b)
- ☐ No

27b. How many of the vacancies in the last 3 years were filled by foreigners (non-nationals)?
27c. Please rate how much each of these factors contributed to the hiring of non-nationals/foreigners:

All types of employees	Did not contribute	Marginally contributed	Neutral	Contributed fairly significantly	Contributed significantly
Skills not available locally					
More cost effective to recruit workers from abroad					
High turnover amongst locals					
Foreign workers are more productive than local					
Smaller pool of qualified applicants					
Better Return on Investment					
Lack of skills/certification and experience of local persons					
Lower foreign staff turnover					
Foreign workers have better work ethic/attitude than local workers					
Positive Government Legislation/ Work Permit Policies					
Other					

27d. Please specify other (from 27a):

Did you hire any first-time job-seekers in the last 3 years?
A first-time job seeker is someone who is seeking a job for the first time.
Yes (Continue to next question)
No (go to question 32a)

28. Please specify, in the spaces below, the number of first-time jobseekers hired over the last 3 years.
Enter zero if none were hired.
28a. Year 2021: _____
28b. Year 2020: _____
28c. Year 2019: _____

29. Please give details of the numbers of first-time job seekers described in 28a-c (i.e. hired within the last 3 years) within the following categories.
If none came from the category please enter '0'
29a. First-time job seekers with no high school certification: _____
29b. First-time job seekers with high school certification: _____
29c. First-time job seekers coming from technical and vocational school: _____
29d. First-time job seekers with a first degree: _____
29e. First-time job seekers with a second degree: _____
29f. Foreign (non-national) job seekers: _____

30. How well were each of these groups prepared for work?

	Competently prepared	Adequately prepared	Prepared	Poorly prepared	Very poorly prepared	N/A
First-time job seekers with no high school certification						
First-time job seekers with high school certification						
First-time job seekers coming from technical and vocational school						
First-time job seekers with first degree						
First-time job seekers with second degree						
Foreign (non-national) job seekers						

31a. In which of the following areas were the newly hired lacking? (You can select all relevant fields for each group)

	First-time jobseekers with no high school certification	First-time jobseekers with high school certification	First-time jobseekers coming from technical and vocational school	First-time jobseekers with first degree	First-time jobseekers with second degree	Foreign Job seekers
Required skills or competencies (e.g. technical or job specific skills, IT skills, problem solving skills, team working skills)						
Literacy/numeracy skills						
Ability to use own initiative						
Soft Skills						

Working world/life experience or maturity (including general knowledge)						
Work ethic (e.g. punctuality, manners, deportment)						
Other						

31b. Please specify 'Other' from 31a, if applicable: _____

Section 4: SEPARATIONS

This section investigates the separation of workers from the establishment. 'Separation' includes layoffs, termination, redundancies, furloughs, etc.

32a. Have you had any separations from your establishment since January 2021?

- ☐ Yes
- ☐ No (skip to 36)

This section investigates the separation of workers from the establishment. 'Separation' includes layoffs, termination, furloughs, etc.

About separations from your establishment since January 2021.

32b. How many persons left *since January 2021*? _____

32c. How many persons who left were female? (*Since January 2021)* _____

Please indicate, in the spaces below, the number of persons who left under each category.

33a. Upper Management (Managers): _____

33b. Middle Management (Supervisors): _____

33c. Front-line professionals _____

33d. Internal service professionals:

Please give top 3 reasons for separations for each category, in the spaces provided below:

34a. Managers:

Please tick top 3 and explain 'Other'.

- ☐ Not specified
- ☐ Persons fired/terminated (Initiated by management)
- ☐ Persons quitting
- ☐ Expired work permit
- ☐ Poor performance
- ☐ Unsuccessful after probation period
- ☐ Redundancy
- ☐ Retirement
- ☐ Death
- ☐ Business slowed down
- ☐ Re-organisation of business
- ☐ Other…

34b. Supervisors:

Please tick top 3 and explain 'Other'.

- ☐ Not specified
- ☐ Persons fired/terminated (Initiated by management)
- ☐ Persons quitting
- ☐ Expired work permit
- ☐ Poor performance
- ☐ Unsuccessful after probation period
- ☐ Redundancy

- Retirement
- Death
- Business slowed down
- Re-organisation of business
- Other…

34c. Front-line professionals:
Please tick top 3 and explain 'Other'.

- Not specified
- Persons fired/terminated (Initiated by management)
- Persons quitting
- Expired work permit
- Poor performance
- Unsuccessful after probation period
- Redundancy
- Retirement
- Death
- Business slowed down
- Re-organisation of business
- Other…

34d. Internal Service Professionals:
Please tick top 3 and explain 'Other'.

- Not specified
- Persons fired/terminated (Initiated by management)
- Persons quitting
- Expired work permit
- Poor performance
- Unsuccessful after probation period
- Redundancy
- Retirement
- Death
- Business slowed down
- Re-organisation of business
- Other…

Section 4: SEPARATIONS
Did you have any separations in 2019 or 2020?

- Yes (continue to next question)
- No (Go to question 36)

Please list, in the spaces provided below, the approximate number of workers laid-off during the following time periods *(divided into total layoffs and layoffs of female workers)*
35a. January to December 2020 (total workers): _____
35b. January to December 2020 (female): _____
35c. January to December 2019 (total workers): _____
35d. January 2019 to December 2019 (female): _____
35e. Please list up to 5 occupations which account for the most layoffs:
1. _____
2. _____
3. _____
4. _____
5. _____

Section 5: SKILLS AND COMPETENCIES OF PERSONS EMPLOYED IN YOUR ORGANIZATION

36. How important are the following skills to your establishment's growth and development?

	Not Important	Somewhat Important	Important	Very Important	Not Applicable
Technical Skills i.e. ability to do core function eg. Cook, accounting, tour guiding					
Behavioral Skills i.e. Interpersonal skills, emotional intelligence, human relations skills					
Cognitive Skills i.e. Planning, organizing, strategizing, creating etc.					
Digital Skills i.e. handling information and content, managing online content, coding, data analytics etc.					

37. At which LEVEL OF YOUR ORGANIZATION ARE the following SKILLS/ ATTITUDES most required?

	ALL	Managers	Supervisors	Frontline Professionals	Internal Service Professionals	n/a
Literacy						
Numeracy						
Communication skills						
Computer skills						
Interpersonal skills						
Problem solving skills						
Decision making skills						
Adaptability skills						
Strong work ethic						
Emotional Intelligence						
Customer service						
Technical skills						

General business skills						

38. What PERCENTAGE (%) OF YOUR MANAGEMENT TEAM have proficiency or a high degree of skill and expertise in the following:

	0%	1-20%	21-40%	41-60%	61-80%	80-99%	100%
Numeracy and qualitative skills							
Communication skills							
Computer skills							
Interpersonal skills							
Problem solving skills							
Decision making skills							
Adaptability skills							
Strong work ethic							
Emotional intelligence							
Customer service skills							
Technical skills							
General business skills							

39. What PERCENTAGE (%) OF YOUR SUPERVISORS have proficiency in the following SKILLS:

	0%	1-20%	21-40%	41-60%	61-80%	80-99%	100%
Numeracy and qualitative skills							
Communication skills							
Computer skills							
Interpersonal skills							
Problem solving skills							
Decision making skills							
Adaptability skills							
Strong work ethic							
Emotional intelligence							
Customer service skills							
Technical skills							
General business skills							

40. What PERCENTAGE (%) OF YOUR FRONT-LINE PROFESSIONALS have proficiency in the following SKILLS:

	0%	1-20%	21-40%	41-60%	61-80%	80-99%	100%
Numeracy and qualitative skills							
Communication skills							
Computer skills							
Interpersonal skills							
Problem solving skills							
Decision making skills							
Adaptability skills							
Strong work ethic							
Emotional intelligence							
Customer service skills							
Technical skills							
General business skills							

41. What PERCENTAGE (%) OF YOUR INTERNAL SERVICE PROFESSIONALS have proficiency in the following SKILLS:

	0%	1-20%	21-40%	41-60%	61-80%	80-99%	100%
Numeracy and qualitative skills							

Communication skills							
Computer skills							
Interpersonal skills							
Problem solving skills							
Decision making skills							
Adaptability skills							
Strong work ethic							
Emotional intelligence							
Customer service skills							
Technical skills							
General business skills							

42. What is being done to overcome human resource challenges in your establishment?
Tick as many as apply.

- ☐ Increased hiring
- ☐ Further training has been provided
- ☐ Pay for new skills acquired
- ☐ Work practice has been changed
- ☐ Lobby government
- ☐ No special actions/measures have been taken
- ☐ Other:

43a. Please indicate the number of persons within your establishment who are certified in the following areas:
These are other technical skills in addition to the skill sets required for the job.

	0	1-2	3-5	6-10	Over 10
Accounting					
Plumbing					
Carpentry					
Mechanic					
Construction					
Computer					
Catering					
Food preparation					
Driving					
Customer service					
Music					
Electrical					
Other					

43b. If applicable, please elaborate on 'Other' from 43a.

44. How many of your FOREIGN workers (non-nationals) are certified to international standards in the following employee categories?
44a. Management: _____
44b. Supervisors: _____
44c. Front-line Professionals: _____
44d. Internal Service Professionals: _____

45. How many of your LOCAL workers (nationals) are certified to international standards in the following employee categories:
e.g. AHLEI (American Hotel and Lodging Educational Institute), City and Guilds etc.
45a. Management: _____
45b. Supervisors: _____

45c. Front-line Professionals: _____
45d. Internal Service Professionals: _____

Section 6: SKILLS GAPS AND WORKFORCE TRAINING

46. Which of the following factors contribute to your employees' inability to do their job to a satisfactory level? Tick as many as apply.
Please specify 'Other'.

- ☐ The introduction of new products and services by the establishment
- ☐ The introduction of new working practices
- ☐ The introduction of new technology e.g. new software for point-of-sale terminals
- ☐ They are new to the role
- ☐ They have not received the appropriate training
- ☐ Their training is currently only partially completed
- ☐ Training has not been effective
- ☐ Staff lack motivation
- ☐ Other: _____

47. Across the different categories of occupations where employees under-performed, which of the following skills need to be improved, if any? (*Tick all that apply)*

	Managers	Supervisors	Front-line Professionals	Internal Service Professionals
Literacy				
Numeracy				
IT literacy / using IT				
Advanced IT application / development				
Oral communication				
Written communication				
Public speaking /instructing / training				
Customer handling				
Team working				
Taking initiative				
Knowledge of a foreign language				
Solving complex tasks / problems				
Planning and organizing				
Management responsibilities /taking a lead				
Adapting to new equipment / materials				
Learning new ideas, methods, concepts				
Manual dexterity				

Clerical / administrative tasks				
Pro-environmental tasks (e.g. resource efficiency, saving energy or water, limiting pollution/waste, recycling, restoring Environmental quality etc.)				
None of the above				

48. In which areas has your establishment financed internal or external training?

- N/A
- Customer Service Training
- Induction Training
- Tourism Awareness Training
- Occupational Health and Safety
- Literacy / Numeracy
- Foreign Language
- IT Training
- Management and Administration (including human resource management and quality management)
- Training in new technology / new product or service
- Environmental Protection
- Accounting and Finance

49. What difficulties, if any, did your establishment experience in organizing training? Please select the main reasons below.

- N/A
- Poor Information on available courses
- Lack of information on courses
- Low quality of courses offered
- Lack of specialized trainers
- Low quality of trainers
- Other:

50. In which areas of training did your establishment experience unavailability of courses/trainers? Please select the TOP 5 areas from the list below:
Please use 'Other' to list any additional courses/trainers.

- None
- Customer Service Training
- Induction Training
- Tourism Awareness Training
- Occupational Health and Safety
- Literacy / Numeracy
- Foreign Language
- IT Training
- Management and Administration (including human resource management and quality management)
- Training in new technology / new product or service
- Environmental Protection
- Accounting and Finance

- Other:

51. In which fields of training did your company experience low quality of courses/trainers on offer? Please tick all that apply. Use the 'Other' option to include additional fields of training with low quality courses/trainers.

- None
- Customer Service Training
- Induction Training
- Tourism Awareness Training
- Occupational Health and Safety
- Literacy / Numeracy
- Foreign Language
- IT Training
- Management and Administration (including human resource management and quality management)
- Training in new technology / new product or service
- Environmental Protection
- Accounting and Finance
- Other:

52. Which of the following occur in your establishment:
Please tick all that apply and specify 'Other'.

- Offering spaces for high school interns
- Offering spaces for college interns
- Encouraging employees to mentor high school and/or college on company time
- Establishment members do guest lectures in schools and/or colleges
- Establishment members teach in schools and/or colleges
- Members of the establishment sit on high school and/or college boards or advisory councils
- Outreach to 'at risk youth'
- None of the above
- Other:

53. How often is training provided for the following?

	Monthly	Quarterly	Bi-annually	Annually	As Needed	Never
Managers						
Supervisors						
Front-line Professionals						
Internal Service Professionals						
New Recruits						

54. Please answer YES or NO to the following training related questions.

	Yes	No
Employees receive certification for training offered internally		
There is a specified course of training for each job function		
Employees are paid for skills acquired		
There is a training fund for employees to do training externally e.g. University, short courses etc		

55. Please use this space to elaborate on any of the above responses if needed: _____

Section 7: FUTURE HIRING

56. Are there any plans for your establishment to recruit new hires in the next 12 months?

- ☐ Yes (continue to question 57)
- ☐ No (continue to question 58a)

57. In which occupations do you foresee the highest number of new hires over the next 12 months? Please indicate up to five occupations and the expected number of positions to be filled.

57a. Occupation 1: _____
57b. Occupation 2: _____
57c. Occupation 3: _____
57d. Occupation 4: _____
57e. Occupation 5: _____

Section 8: WORK PERMITS

58a. Please indicate below, the major challenges experienced in obtaining Work Permits (W.P.).

	No challenge	Slight challenge	Quite a challenge	Major challenge	N/A
Period for the processing of W.P. documents					
Process is too bureaucratic/complicated					
Lack of a standardized application process					
Political interference					
Lack of an employer-centered evaluation process					
Other					

58b. Please specify 'Other' from 58a. _____

59. How many work permits were applied for over the last 3 years for the following categories?

59a. Top Level Management: _____
59b. Middle Level Management: _____
59c: Professional and Specialist: _____
59d. Clerical Support Staff: _____
59e. Sales and Service Workers: _____
59f. Front-line Occupations: _____

60. What is the average length of time taken to have work permits issued for your foreign workers (Non-Nationals)?

- ☐ Under 1 year
- ☐ 1 to 2 years
- ☐ 2 to 3 years
- ☐ 3 to 4 years
- ☐ More than 5 years
- ☐ N/A

61a. Does your establishment plan to apply for additional work permits over the next two years?

- ☐ Yes (go to question 61b)
- ☐ No (go to question 62)

61b. Approximately how many work permits do you expect to apply for over the next two years?

62a. Does your firm take advantage of free movement of labour within the Caribbean Region under the Caribbean Single Market and Economy (CSME) arrangement?
Under the CSME, the free movement of persons across the Region entails the removal of work permits for the University Graduates, Media Workers, Sports Persons, Musicians, Artists, Managers, Supervisors and other service providers.

- Yes (go to question 63)
- No (go to question 62b)

62b. Why don't you utilize the free movement of labour arrangement?

Section 9: COMPANY 'S BUSINESS STRATEGY

63. As a result of the COVID-19 pandemic, does your establishment plan to introduce new products, services, technologies or expand/switch to new markets? Please comment.
_____

64. Linked to these plans, does your establishment plan to apply any of the following measures to address newly emerging tasks?

- Training of available staff
- Internal re-organization to better use available staff and competences
- Recruitment of new staff
- Reduction of staff
- Retraining of staff
- Reassignment/relocation of staff
- Other measures (Specify)

Caribbean Tourism Organization (CTO) General Establishment Survey Instrument





Thank you for agreeing to be a part of this important Regional Human Resources Development (HRD) Knowledge and Skills Audit for the Tourism Industry, which is commissioned by the Caribbean Tourism Organization (CTO) and funded by the Caribbean Development Bank (CDB).

The information collected by this survey is strictly confidential and will only be used for statistical purposes. Your establishment's name will not be mentioned nor will any of your information be provided to the Government, any third party or financial institution.

It may take up to 60 minutes to complete this survey and it requires some level of commitment and preparation. Your participation will, however, ensure that we have a thorough understanding of human resources in tourism in the Region and will inform policy and strategy development; and consequently benefitting all those directly or indirectly involved in any tourism related activity. We would, therefore, appreciate if you would dedicate some time to answer all the questions. The following information should be readily available to you during this survey:

• Your establishment's employment history
• Types of workers you have hired
• Future hiring plans
• Problems you have faced in hiring
• Your views on the Tourism Sector.

This survey was designed by A-Z Information Jamaica Limited (A-Z), which was selected to carry out this project by the CTO, based on an internationally competitive procurement process.

* Required

Email * _____
Your survey responses will be emailed to you once you press submit at the end of the form. This will allow you to edit or complete this survey in your own time by using the link emailed to the address you provided above. If you need to pause, please skip to the end of the questionnaire and press submit to register your progress.

Caribbean Tourism Organization (CTO) General Establishment Survey

Section 1: Your Establishment
1. Your Name:
2. Name of Establishment:
3a. Is your establishment registered?
- ☐ Yes
- ☐ No

3b. How is your establishment registered?
Please specify 'Other'.
- ☐ Sole Proprietorship

- Partnership
- Private Limited Company
- Publicly Listed Company
- Government
- Co-operative
- Non-profit
- Community Based
- Other:

4. Which of the following best describes the ownership of this establishment:
- Locally owned (TC)
- Local/Regionally owned
- Local/Foreign owned
- Regional (Caribbean)
- Foreign (US-owned)
- Foreign (UK-owned)
- Foreign (Canadian-owned)
- Foreign (EU-owned)
- Other:

5a. What country does your establishment operate in?
Please specify 'Other'.
- Anguilla
- Antigua and Barbuda
- Bahamas
- Barbados
- Belize
- British Virgin Islands
- Cayman Islands
- Curaçao
- Dominica
- Grenada
- Guyana
- Haiti
- Jamaica
- Martinique
- Montserrat
- Puerto Rico
- St. Eustatius
- St. Kitts and Nevis
- Saint Lucia
- St. Maarten
- Saint Martin
- St. Vincent and the Grenadines
- Trinidad and Tobago
- Turks and Caicos Islands
- Other: _____

5b. What country are you based in? _____

6. What role best describes your position in the establishment:
Please specify 'Other'.
- Owner
- CEO
- Managing Director
- Director

- General Manager
- Human Resource Manager
- Other:

7. Please use the spaces below to list the 3 most important Product/Services provided by your establishment.
7a. Product/Service 1: _____
7b. Product/Service 2: _____
7c. Product/Service 3: _____

8. Please list the approximate share of revenue from each Product/Service listed in Question 8a-c in the spaces below:
Please enter percentages below

	Name of Product or Service	*Share of Revenue (%)*
8a.		
8b.		
8c		

9a. How many owners does your establishment have? _____
9b. What percentage of your owners are female?
- 100%
- More than 50%
- 50%
- Less than 50%
- 0%

10. How does your establishment benefit from the tourism industry?
- Directly
- Indirectly
- Not at all

11. Which of the tourism sub-sectors is your establishment associated with?
Please tick all that apply.
- Accommodation
- Adventure tourism and recreation
- Attractions
- Events and conferences, entertainment
- Food and beverage
- Tourism services
- Transportation
- Travel trade

12. Is your establishment a part of the Hospitality Assured Caribbean Programme?
- Yes
- No

Section 2: TOTAL EMPLOYMENT
Please note that this TOTAL includes all employees, owners, partners, participating family members and apprentices receiving remuneration in the form of pay, profit or family gain from the establishment in cash or in kind, for at least one hour during the last week of August, 2021.

*Note that persons with a formal attachment to the job, even when on temporary layoff for less than four weeks, should be included among the total number of employees.

.

13b. How many people were employed at this establishment as of September 1st, 2021?

- 1
- 2
- 3
- 4
- 5

13c.Please outline the number of employees based on the following categories.

	0	1	2	3	4	5
Owners/Partners						
Participating family members:						
Employees (including persons on paid leave):						
Apprentices:						
Other						

13d.Please specify 'Other': _____

13e. Please outline your female employees based on the following categories

	0	1	2	3	4	5
Owners/Partners						
Participating family members:						
Employees (including persons on paid leave):						
Apprentices:						
Other						

13f. Please specify 'Other': _____

Definition of positions

- *Managers have portfolio operational responsibilities including strategy formulation, policy and overall results. E.g. General Manager, Chief Engineer, Tour Director, Human Resources etc.*

- *Supervisors are responsible for team leadership and performance; and report to a manager.*

- *Front-line Service Professionals serve external customers e.g. room attendants, waiters, tennis coaches, tour guides, receptionists, drivers etc.*

- *Internal Service Professionals support front-line service professionals and customers but are not front-facing e.g. maintenance, food and beverage preparation, store keeper, cooks, laundry attendants, gardeners, accountants etc.*

13g. Please outline the number of employees in your establishment filling the above positions as of September 1st, 2021.

	0	1	2	3	4	5
Managers						
Supervisors						

Front-line Service Professionals						
Internal Service Professionals						

13h. Please outline the number of female employees in your establishment filling the above positions as of September 1st, 2021.

	0	1	2	3	4	5
Managers						
Supervisors						
Front-line Service Professionals						
Internal Service Professionals						

	0	1	2	3	4	5
Home Country:						
Eastern Caribbean countries						
Other Caribbean countries:						
North America:						
Europe:						
Other:						

13j. Please specify 'Other':

14a. Was your employee breakdown the same in 2020?

- Yes (skip to question 15a)
- No → section repeated for 2020 (Continue to 14b)

14b. How many people were employed at this establishment as of September 1st, 2020?

- 1
- 2
- 3
- 4
- 5
- Other:_____

14c. Please outline the number of employees based on the following categories in 2020

	0	1	2	3	4	5
Owners/Partners						
Participating family members:						
Employees (including persons on paid leave):						
Apprentices:						
Other						

14d. Please specify 'Other'

14e. Please outline your female employees in 2020 based on the following categories:

	0	1	2	3	4	5
Owners/Partners						
Participating family members:						
Employees (including persons on paid leave):						
Apprentices:						
Other						

14f. Please specify 'Other'

14g. Please outline the number of employees in your establishment filling the above positions in 2020.

	0	1	2	3	4	5
Managers						
Supervisors						
Front-line Service Professionals						
Internal Service Professionals						

14h. Please outline the number of female employees in your establishment filling the above positions in 2020.

	0	1	2	3	4	5
Managers						
Supervisors						
Front-line Service Professionals						
Internal Service Professionals						

15a.Was your employee breakdown the same in 2019?

- Yes (skip to question 23)
- No (go to question 15b)

15b. How many people were employed at this establishment as of September 1st, 2019?

- 1
- 2
- 3
- 4
- 5
- Other

15c. Please outline the number of employees based on the following categories in 2019.

	0	1	2	3	4	5
Owners/Partners						

Participating family members:						
Employees (including persons on paid leave):						
Apprentices:						
Other						

15d. Please specify 'Other'

15e. Please outline your female employees based on the following categories in 2019.

	0	1	2	3	4	5
Owners/Partners						
Participating family members:						
Employees (including persons on paid leave):						
Apprentices:						
Other						

15f. Please specify 'Other'

15g. Please outline the number of employees in your establishment filling the following positions in 2019.

	0	1	2	3	4	5
Managers						
Supervisors						
Front-line Service Professionals						
Internal Service Professionals						

15h. Please outline the number of female employees in your establishment filling the above positions in 2019.

	0	1	2	3	4	5
Managers						
Supervisors						
Front-line Service Professionals						
Internal Service Professionals						

After Question 23, please continue to question 24

Section 2: TOTAL EMPLOYMENT

23. What was the average monthly wage in USD (EXCLUDING GRATUITY) for employees within the following categories for the period July 1st, 2020 – July 1st, 2021?

All types of employees	<$500	$501-1,000	$1,001-2,000	$2,001-3,000	$3,001-5,000	$5,001-7,000	$7,001-10,000	>$10,000	N/A
Upper level Management									
Supervisors (e.g. housekeeping, food and beverage)									
Professional and specialists (e.g executive chef, senior accountant, event manager)									
Clerical support staff (e.g. junior accountant, reservationists)									
Service and sales workers (e.g. receptionist, concierge, bell man)									
Elementary occupations (e.g. driver, room attendant, gardener, pool attendant)									

Section 3: NEW HIRES

25a. In the last 3 years, has your company filled any vacant full-time or part-time positions?

- ☐ Yes
- ☐ No (skip to Q 32a)

25b. How many of the vacancies in the last 3 years were filled by nationals/locals?
25c. How many of the vacancies in the last 3 years were filled by foreigners (non-nationals)?

26. Please list, in the spaces provided below, the approximate number of workers hired for the following time periods.
(sub-divided into total hires and female hires)
26a. Since January 2021 (total workers):
26b. Since January 2021 (female):
26c. January to December 2020 (total workers):
26d. January to December 2020 (female):
26e. January to December 2019 (total workers):
26f. January to December 2019 (female):

Section 3: NEW HIRES

27a. Were any vacancies filled by foreigners (non-nationals) in the last 3 years?

- ☐ Yes (Please continue to 27b)
- ☐ No

27b. How many of the vacancies in the last 3 years were filled by foreigners (non-nationals)?

27c. Please rate how much each of these factors contributed to the hiring of non-nationals/foreigners:

All types of employees	N/A	Did not contribute	Marginally contributed	Neutral	Contributed fairly significantly	Contributed significantly
Skills not available locally						
More cost effective to recruit workers from abroad						
High turnover amongst locals						
Foreign workers are more productive than local						
Smaller pool of qualified applicants						
Better Return on Investment						
Lack of skills/certification and experience of local persons						
Lower foreign staff turnover						
Foreign workers have better work ethic/attitude than local workers						
Positive Government Legislation/ Work Permit Policies						
Other						

27d. Please specify other (from 27c):

28. Did you hire any first-time job-seekers in the last 3 years?
A first-time job seeker is someone who is seeking a job for the first time.
Yes (Continue to next question)
No (go to question 32a)

28. Please specify, in the spaces below, the number of first-time jobseekers hired over the last 3 years.
Enter zero if none were hired.
28a. Year 2021: _____
28b. Year 2020: _____
28c. Year 2019: _____

29. Please give details of the numbers of first-time job seekers described in 28a-c (i.e., hired within the last 3 years) within the following categories.
If none came from the category please enter '0'
29a. First-time job seekers with no high school certification: _____
29b. First-time job seekers with high school certification: _____
29c. First-time job seekers coming from technical and vocational school: _____
29d. First-time job seekers with a first degree: _____
29e. First-time job seekers with a second degree: _____
29f. Foreign (non-national) job seekers: _____

30. How well were each of these groups prepared for work?

	Competently prepared	Adequately prepared	Prepared	Poorly prepared	Very poorly prepared	N/A
First-time job seekers with no high school certification						
First-time job seekers with high school certification						
First-time job seekers coming from technical and vocational school						
First-time job seekers with first degree						
First-time job seekers with second degree						
Foreign (non-national) job seekers						

31a. In which of the following areas were the newly hired lacking? (You can select all relevant fields for each group)

	First-time jobseekers with no high school certification	First-time jobseekers with high school certification	First-time jobseekers coming from technical and vocational school	First-time jobseekers with first degree	First-time jobseekers with second degree	Foreign Job seekers
N/A						
Required skills or competencies (e.g. technical or job specific skills, IT skills, problem solving skills, team working skills)						
Literacy/numeracy skills						
Ability to use own initiative						
Soft Skills						
Working world/life experience or maturity (including general knowledge)						
Work ethic (e.g. punctuality, manners, deportment)						
Other						

31b. Please specify 'Other' from 31a, if applicable:

Section 4: SEPARATIONS

This section investigates the separation of workers from the establishment. 'Separation' includes layoffs, termination, redundancies, furloughs, etc.

32a. Have you had any separations from your establishment since January 2019?

- □ Yes (5 or less employees)
- □ No (skips to 36)

32b. How many persons left over the last 3 years (2019-2021)?

	0	1	2	3	4	5
2021						
2020						
2019						

32c. How many females left over the last 3 years (2019-2021)?

	0	1	2	3	4	5
2021						
2020						
2019						

33. In which of the following categories did you experience separations?

	Managers	Supervisors	Frontline Professionals	Internal Service Professionals
2021	□	□	□	□
2020	□	□	□	□
2019	□	□	□	□

34. Please give top 3 reasons for separations for each category, in the spaces provided below: Pick up to 3 reasons per category.

	Managers	Supervisors	Frontline Professionals	Internal Service Professionals
Not specified	□	□	□	□
Persons fired/terminated (Initiated by management)	□	□	□	□
Persons quitting	□	□	□	□
Expired work permit	□	□	□	□
Poor performance	□	□	□	□
Unsuccessful after probation period	□	□	□	□
Redundancy	□	□	□	□

Retirement	□	□	□	□
Death	□	□	□	□
Business slowed down	□	□	□	□
Re-organisation of business	□	□	□	□
Other…	□	□	□	□

35e. Please list the occupations which account for the most layoffs: _____

Section 5: SKILLS AND COMPETENCIES OF PERSONS EMPLOYED IN YOUR ORGANIZATION

36. How important are the following skills to your establishment's growth and development?

	Not Important	Somewhat Important	Important	Very Important	Not Applicable
Technical Skills i.e. ability to do core function eg. Cook, accounting, tour guiding					
Behavioral Skills i.e. Interpersonal skills, emotional intelligence, human relations skills					
Cognitive Skills i.e. Planning, organizing, strategizing, creating etc.					
Digital Skills i.e. handling information and content, managing online content, coding, data analytics etc.					

37. At which LEVEL OF YOUR ORGANIZATION ARE the following SKILLS/ ATTITUDES most required?

	ALL	Managers	Supervisors	Frontline Professionals	Internal Service Professionals	N/A
Literacy						
Numeracy						
Communication skills						
Computer skills						
Interpersonal skills						
Problem solving skills						

45c. Front-line Professionals: _____
45d. Internal Service Professionals: _____

Section 6: SKILLS GAPS AND WORKFORCE TRAINING

46. Which of the following factors contribute to your employees' inability to do their job to a satisfactory level? Tick as many as apply.
Please specify 'Other'.

- ☐ The introduction of new products and services by the establishment
- ☐ The introduction of new working practices
- ☐ The introduction of new technology e.g. new software for point-of-sale terminals
- ☐ They are new to the role
- ☐ They have not received the appropriate training
- ☐ Their training is currently only partially completed
- ☐ Training has not been effective
- ☐ Staff lack motivation
- ☐ Other: _____

47. Across the different categories of occupations where employees under-performed, which of the following skills need to be improved, if any? (*Tick all that apply)*

	Managers	Supervisors	Front-line Professionals	Internal Service Professionals
Literacy				
Numeracy				
IT literacy / using IT				
Advanced IT application / development				
Oral communication				
Written communication				
Public speaking /instructing / training				
Customer handling				
Team working				
Taking initiative				
Knowledge of a foreign language				
Solving complex tasks / problems				
Planning and organizing				
Management responsibilities /taking a lead				
Adapting to new equipment / materials				
Learning new ideas, methods, concepts				
Manual dexterity				

- ☐ No special actions/measures have been taken
- ☐ Other:

43a. Please indicate the number of persons within your establishment who are certified in the following areas:
These are other technical skills in addition to the skill sets required for the job.

	0	1	2	3	4	5
Accounting						
Plumbing						
Carpentry						
Mechanic						
Construction						
Computer						
Catering						
Food preparation						
Driving						
Customer service						
Music						
Electrical						
Other						

43b. If applicable, please elaborate on 'Other' from 43a.
44. How many of your FOREIGN workers (non-nationals) are certified to international standards in the following employee categories?

	0 OR N/A	1	2	3	4	5
Managers						
Supervisors						
Front-line Professionals						
Internal Service Professionals						

45. How many of your LOCAL workers (nationals) are certified to international standards in the following employee categories?

	0 OR N/A	1	2	3	4	5
Managers						
Supervisors						
Front-line Professionals						
Internal Service Professionals						

Section 6: SKILLS GAPS AND WORKFORCE TRAINING

46. Which of the following factors contribute to your employees' inability to do their job to a satisfactory level? Tick as many as apply.
Please specify 'Other'.

- ☐ The introduction of new products and services by the establishment
- ☐ The introduction of new working practices
- ☐ The introduction of new technology e.g. new software for point-of-sale terminals
- ☐ They are new to the role
- ☐ They have not received the appropriate training

- Other:

51. In which fields of training did your company experience low quality of courses/trainers on offer? Please tick all that apply. Use the 'Other' option to include additional fields of training with low quality courses/trainers.

- None
- Customer Service Training
- Induction Training
- Tourism Awareness Training
- Occupational Health and Safety
- Literacy / Numeracy
- Foreign Language
- IT Training
- Management and Administration (including human resource management and quality management)
- Training in new technology / new product or service
- Environmental Protection
- Accounting and Finance
- Other:

52. Which of the following occur in your establishment:
Please tick all that apply and specify 'Other'.

- Offering spaces for high school interns
- Offering spaces for college interns
- Encouraging employees to mentor high school and/or college on company time
- Establishment members do guest lectures in schools and/or colleges
- Establishment members teach in schools and/or colleges
- Members of the establishment sit on high school and/or college boards or advisory councils
- Outreach to 'at risk youth'
- None of the above
- Other:

53. How often is training provided for the following?

	Monthly	Quarterly	Bi-annually	Annually	As Needed	Never
Managers						
Supervisors						
Front-line Professionals						
Internal Service Professionals						
New Recruits						

54. Please answer YES or NO to the following training related questions.

	Yes	No
Employees receive certification for training offered internally		
There is a specified course of training for each job function		
Employees are paid for skills acquired		
There is a training fund for employees to do training externally e.g. University, short courses etc		

48. In which areas has your establishment financed internal or external training?

- N/A
- Customer Service Training
- Induction Training
- Tourism Awareness Training
- Occupational Health and Safety
- Literacy / Numeracy
- Foreign Language
- IT Training
- Management and Administration (including human resource management and quality management)
- Training in new technology / new product or service
- Environmental Protection
- Accounting and Finance

49. What difficulties, if any, did your establishment experience in organizing training? Please select the main reasons below.

- N/A
- Poor Information on available courses
- Lack of information on courses
- Low quality of courses offered
- Lack of specialized trainers
- Low quality of trainers
- Other:

50. In which areas of training did your establishment experience unavailability of courses/trainers? Please select the TOP 5 areas from the list below:
Please use 'Other' to list any additional courses/trainers.

- None
- Customer Service Training
- Induction Training
- Tourism Awareness Training
- Occupational Health and Safety
- Literacy / Numeracy
- Foreign Language
- IT Training
- Management and Administration (including human resource management and quality management)
- Training in new technology / new product or service
- Environmental Protection
- Accounting and Finance
- Other:

51. In which fields of training did your company experience low quality of courses/trainers on offer? Please tick all that apply. Use the 'Other' option to include additional fields of training with low quality courses/trainers.

- None
- Customer Service Training
- Induction Training
- Tourism Awareness Training
- Occupational Health and Safety
- Literacy / Numeracy

- ☐ Foreign Language
- ☐ IT Training
- ☐ Management and Administration (including human resource management and quality management)
- ☐ Training in new technology / new product or service
- ☐ Environmental Protection
- ☐ Accounting and Finance
- ☐ Other:

52. Which of the following occur in your establishment:
Please tick all that apply and specify 'Other'.

- ☐ Offering spaces for high school interns
- ☐ Offering spaces for college interns
- ☐ Encouraging employees to mentor high school and/or college on company time
- ☐ Establishment members do guest lectures in schools and/or colleges
- ☐ Establishment members teach in schools and/or colleges
- ☐ Members of the establishment sit on high school and/or college boards or advisory councils
- ☐ Outreach to 'at risk youth'
- ☐ None of the above
- ☐ Other:

53. How often is training provided for the following?

	Monthly	Quarterly	Bi-annually	Annually	As Needed	Never
Managers						
Supervisors						
Front-line Professionals						
Internal Service Professionals						
New Recruits						

54. Please answer YES or NO to the following training related questions.

	Yes	No
Employees receive certification for training offered internally		
There is a specified course of training for each job function		
Employees are paid for skills acquired		
There is a training fund for employees to do training externally e.g. University, short courses etc		

55. Please use this space to elaborate on any of the above responses if needed.

Section 7: FUTURE HIRING

56. Are there any plans for your establishment to recruit new hires in the next 12 months?

- ☐ Yes (continue to question 57)
- ☐ No (continue to question 58a)

57. In which occupations do you foresee the highest number of new hires over the next 12 months?
Please indicate up to five occupations and the expected number of positions to be filled.
57a. Occupation 1: _____

57b. Occupation 2: _____
57c. Occupation 3: _____
57d. Occupation 4: _____
57e. Occupation 5: _____

Section 8: WORK PERMITS

58a. Please indicate below, the major challenges experienced in obtaining Work Permits (W.P.).

	No challenge	Slight challenge	Quite a challenge	Major challenge	N/A
Period for the processing of W.P. documents					
Process is too bureaucratic/complicated					
Lack of a standardized application process					
Political interference					
Lack of an employer-centered evaluation process					
Other					

58b. Please specify 'Other' from 58a. _____

59. How many work permits were applied for over the last 3 years for the following categories?

59a. Top Level Management:
59b. Middle Level Management:
59c: Professional and Specialist:
59d. Clerical Support Staff:
59e. Sales and Service Workers:
59f. Front-line Occupations:

60. What is the average length of time taken to have work permits issued for your foreign workers (Non-Nationals)?

- Under 1 year
- 1 to 2 years
- 2 to 3 years
- 3 to 4 years
- More than 5 years
- N/A

61a. Does your establishment plan to apply for additional work permits over the next two years?

- Yes (go to question 61b)
- No (go to question 62)

61b. Approximately how many work permits do you expect to apply for over the next two years?

62a. Does your firm take advantage of free movement of labour within the Caribbean Region under the Caribbean Single Market and Economy (CSME) arrangement?
Under the CSME, the free movement of persons across the Region entails the removal of work permits for the University Graduates, Media Workers, Sports Persons, Musicians, Artists, Managers, Supervisors and other service providers.

- Yes (go to question 63)
- No (go to question 62b)

62b. Why don't you utilize the free movement of labour arrangement?

Section 11: COMPANY 'S BUSINESS STRATEGY

63. As a result of the COVID-19 pandemic, does your establishment plan to introduce new products, services, technologies or expand/switch to new markets? Please comment.
_____

64. Linked to these plans, does your establishment plan to apply any of the following measures to address newly emerging tasks?

- ☐ Training of available staff
- ☐ Internal re-organization to better use available staff and competences
- ☐ Recruitment of new staff
- ☐ Reduction of staff
- ☐ Retraining of staff
- ☐ Reassignment/relocation of staff
- ☐ Other measures (Specify): _____

- Accounting and Finance
- Other:

51. In which fields of training did your company experience low quality of courses/trainers on offer? Please tick all that apply. Use the 'Other' option to include additional fields of training with low quality courses/trainers.

- None
- Customer Service Training
- Induction Training
- Tourism Awareness Training
- Occupational Health and Safety
- Literacy / Numeracy
- Foreign Language
- IT Training
- Management and Administration (including human resource management and quality management)
- Training in new technology / new product or service
- Environmental Protection
- Accounting and Finance
- Other:

52. Which of the following occur in your establishment:
Please tick all that apply and specify 'Other'.

- Offering spaces for high school interns
- Offering spaces for college interns
- Encouraging employees to mentor high school and/or college on company time
- Establishment members do guest lectures in schools and/or colleges
- Establishment members teach in schools and/or colleges
- Members of the establishment sit on high school and/or college boards or advisory councils
- Outreach to 'at risk youth'
- None of the above
- Other:

	Monthly	Quarterly	Bi-annually	Annually	As Needed	Never
Managers						
Supervisors						
Front-line Professionals						
Internal Service Professionals						
New Recruits						

54. Please answer YES or NO to the following training related questions.

	Yes	No
Employees receive certification for training offered internally		
There is a specified course of training for each job function		
Employees are paid for skills acquired		
There is a training fund for employees to do training externally e.g. University, short courses etc		

55. Please use this space to elaborate on any of the above responses if needed.

Section 7: FUTURE HIRING
56. Are there any plans for your establishment to recruit new hires in the next 12 months?
Yes (continue to question 57)
No (continue to question 58a)

Section 7: FUTURE HIRING
57. In which occupations do you foresee the highest number of new hires over the next 12 months? Please indicate up to five occupations and the expected number of positions to be filled.
57a. Occupation 1:
57b. Occupation 2:
57c. Occupation 3:
57d. Occupation 4:
57e. Occupation 5:
After section 28
Section 29 of 33
Section 9: WORK PERMITS
58a. Please indicate below, the major challenges experienced in obtaining Work Permits (W.P.).

	No challenge	Slight challenge	Quite a challenge	Major challenge	N/A
Period for the processing of W.P. documents					
Process is too bureaucratic/complicated					
Lack of a standardized application process					
Political interference					
Lack of an employer-centered evaluation process					
Other					

58b. Please specify 'Other' from 58a.
59. How many work permits were applied for over the last 3 years for the following categories?
59a. Top Level Management:
59b. Middle Level Management:
59c: Professional and Specialist:
59d. Clerical Support Staff:
59e. Sales and Service Workers:
59f. Front-line Occupations:

60. What is the average length of time taken to have work permits issued for your foreign workers (Non-Nationals)?
- Under 1 year
- 1 to 2 years
- 2 to 3 years
- 3 to 4 years
- More than 5 years
- N/A

61a. Does your establishment plan to apply for additional work permits over the next two years?
- Yes (go to question 61)
- No (go to question 62)

Section 9: WORK PERMITS

Employers / HR Managers / Corporate Leaders Survey Instrument





The Caribbean Tourism Organization (CTO) is conducting a REGIONAL HUMAN RESOURCES DEVELOPMENT KNOWLEDGE and SKILLS AUDIT for the Tourism and Hospitality Industry.

The audit is being implemented by the Caribbean Tourism Organization (CTO) with funding from the Caribbean Development Bank, to better understand how human resource development can be optimally leveraged to support the growth, development, innovation and competitiveness of the Caribbean Tourism Sector. You may find additional information at https://www.onecaribbean.org/our-work/human-resource-development/regional-hr-development-knowledge-skills-audit/

Given that you are important stakeholders in the tourism industry, your perspectives are important and will help to shape the future of human resource management in the sector. We are therefore asking you to take five minutes to respond to the following statements which require responses to multiple choice responses.

Please note that the information that you provide here will be treated as confidential and you will remain anonymous.

A-Z Information Jamaica Limited was selected to carry out this project based on an internationally competitive procurement process.

Thank you very much for your participation.

Your Country:

- Anguilla
- Antigua and Barbuda
- The Bahamas
- Barbados
- Belize
- British Virgin Islands
- Cayman Islands
- Dominica

- ☐ Grenada
- ☐ Guyana
- ☐ Haiti
- ☐ Jamaica
- ☐ Montserrat
- ☐ St Kitts and Nevis
- ☐ St. Lucia
- ☐ St Vincent and the Grenadines
- ☐ Trinidad and Tobago
- ☐ Turks and Caicos Islands
- ☐ Curacao
- ☐ Martinique
- ☐ Puerto Rico
- ☐ St. Eustatius
- ☐ St. Maarten
- ☐ Saint Martin
    - Other: _____

Definitions of the 8 Sub-Sectors in Tourism

ACCOMMODATION:

Includes traditional and non-traditional accommodation facilities such as:

• Mega resorts and large, medium and small hotels

• Non-hotel accommodation e.g. villas, lodges, guest houses, bed and breakfasts, campsites, hostels, home and room rentals.

ADVENTURE TOURISM AND RECREATION:

Tours and recreational activities including:

• Eco-tourism/nature-based activities, agro-tourism

• Hard and soft adventure sports and activities (land and marine based).

ATTRACTIONS:

Natural or man-made attractions/ Local sites and facilities including:

• Native/cultural sites, heritage/historical sites, parks and community-based tourism initiatives

• Museums, galleries, interpretive centres, spa/health and wellness facilities, casinos, cabarets, nightclubs, amusement/recreational parks, performances, shopping facilities etc.

EVENTS AND CONFERENCES:

Meetings, Incentives, Conferences and Exhibitions (MICE MARKET) e.g.:

• Special events, incentive travel, festivals, cultural events, sporting events, symposia, trade shows/fairs, conventions, hallmark and niche market events

FOOD AND BEVERAGE:

Food and beverage facilities/service providers:

• Bars, restaurants, coffee chops, fast food operations

• Catering establishments, specialty culinary shops,

• Local farms, food tours and culinary experiences.

TOURISM SERVICES:

Tourism Support Services such as:

• National Tourism Organizations (NTOs), tourism information and research services, travel trade media, professional associations, consultants, tourism educators

• Local, regional and international tourism development organizations

• Hospitality and Tourism Trade Associations

TRANSPORTATION:

Land, air and water-based transportation including:

• Cruise lines, buses, motor vehicles, recreational vehicles, certified air carriers

TRAVEL TRADE:

Travel trade intermediaries such as:

• Travel agents, tour operators, reservation/booking services, advertising agencies, destination marketing and management organizations, international tourism suppliers and retail operations.

Tourism Sub-sector/s worked in:

- ☐ N/A
- ☐ Accommodation
- ☐ Adventure Tourism and Recreation
- ☐ Attractions
- ☐ Events and Conferences
- ☐ Food and Beverage
- ☐ Tourism Services
- ☐ Transportation
- ☐ Travel Trade

Position/Job Title:

- ☐ Senior Management
- ☐ Management
- ☐ Other: _____

Name of Establishment: _____

How long has your establishment been in business?

- ☐ Less than 1 year
- ☐ 1-5 years
- ☐ 6-10 years
- ☐ More than 10 years

How many employees work in your establishment? _____

What percentage of your employees are women? _____

1. Pre-pandemic, it was difficult to find qualified people to fill:

Please check all that apply and if 'Other', please specify.

- ☐ entry level positions
- ☐ frontline (customer facing) positions
- ☐ supervisory positions
- ☐ managerial positions
- ☐ Other: _____

2. Post-pandemic, I anticipate that it will be difficult to find qualified people to fill:

Please check all that apply and if 'Other', please specify.

- ☐ entry level positions
- ☐ frontline (customer facing) positions
- ☐ supervisory positions
- ☐ managerial positions

Other: _____

Please state how much you agree with the following statements or issues using the following scale: 1 = Strongly Disagree 2 = Disagree 3 = Agree 4 = Strongly Agree

3. Existing employment legislation makes it difficult to get the people that we need in our establishment.

Strongly Disagree 1 2 3 4 Strongly Agree

4. Our sector of tourism attracts the brightest and the best human resource talent.

Strongly Disagree 1 2 3 4 Strongly Agree

5. Tourism work is viewed in a positive light in my country.

Strongly Disagree 1 2 3 4 Strongly Agree

6. Working conditions in our sector make tourism work less attractive to potential employees.

Strongly Disagree 1 2 3 4 Strongly Agree

7. Compensation packages in our sector make tourism work less attractive to potential employees. i.e. base pay, tips/gratuity, benefits (e.g. pension, health insurance)

Strongly Disagree 1 2 3 4 Strongly Agree

8. Unions and Employee Associations are viewed favourably in this establishment.

Strongly Disagree 1 2 3 4 Strongly Agree

9. Certified Job seekers from technical and vocational schools are well prepared for work.

Strongly Disagree 1 2 3 4 Strongly Agree

10. Job seekers with a degree are generally well prepared for work.
Strongly Disagree 1 2 3 4 Strongly Agree

11. We are able to retain those employees who we want to keep.
Strongly Disagree 1 2 3 4 Strongly Agree

12. We find it difficult to recruit for MANAGEMENT positions from the local labour market.
Strongly Disagree 1 2 3 4 Strongly Agree

13. We find it difficult to recruit for SUPERVISORY positions from the local labour market.
Strongly Disagree 1 2 3 4 Strongly Agree

14. It is more cost effective to recruit workers from outside of the country.
Strongly Disagree 1 2 3 4 Strongly Agree

15. Non-nationals are perceived to be more productive than local workers.
Strongly Disagree 1 2 3 4 Strongly Agree

16. Non-nationals are perceived to have a better work ethic and attitude than local workers.
Strongly Disagree 1 2 3 4 Strongly Agree

17. Secondary school leavers without certification are TRAINABLE for entry level jobs.
Strongly Disagree 1 2 3 4 Strongly Agree

18. Secondary school leavers without certification have the 'SOFT SKILLS' e.g. work ethic, emotional intelligence to do the job.
Strongly Disagree 1 2 3 4 Strongly Agree

19. First time job seekers with a degree have the TECHNICAL or JOB SPECIFIC SKILLS to perform effectively.
Strongly Disagree 1 2 3 4 Strongly Agree

20. Job seekers with a first degree have the 'SOFT SKILLS' e.g. work ethic, emotional intelligence to do the job.
Strongly Disagree 1 2 3 4 Strongly Agree

21. Most employees in our establishment perform below the desired level
Strongly Disagree 1 2 3 4 Strongly Agree

22. A major reason for employee under-performance is lack of training.

Strongly Disagree 1 2 3 4 Strongly Agree

23. A major reason for employee under-performance is lack of motivation.

Strongly Disagree 1 2 3 4 Strongly Agree

24. As Industry Employers, we regularly are consulted by Education and Training Institutions regarding the specific industry knowledge and skills to be reflected in their course curriculum, assessment and certification standards.

- Yes
- No

25. As Industry Employers interacting with education and training institutions, we provide:
Please check all that apply and if 'Other' please specify

- Guest lecturers and instructors
- Internship opportunities for students
- Scholarships
- Support and guidance (e.g. curriculum development and governance)
- Other: _____

26. As Industry Employers WE ENGAGE the services of our local Education and Training Institutions to provide for us:
If 'Other' please specify

- on-the-job professional training
- prior learning assessment and certification services
- certification for staff
- company supported professional training and certification
- Other: _____

27. As Industry Employers WE WOULD LIKE the local Education and Training Institutions to provide for us:
If 'Other' please specify

- on-the-job professional training
- prior learning assessment and certification services
- certification for staff
- company supported professional training and certification
- Other: _____

School and College Graduating Class Survey Instrument





The Caribbean Tourism Organization (CTO) is conducting a REGIONAL HUMAN RESOURCES DEVELOPMENT KNOWLEDGE and SKILLS AUDIT for the Tourism and Hospitality Industry.

The audit is being implemented by the CTO with funding from the Caribbean Development Bank (CDB), to better understand how human resource development can be optimally leveraged to support the growth, development, innovation and competitiveness of the Caribbean Tourism Sector. You may find additional information at https://www.onecaribbean.org/our-work/human-resource-development/regional-hr-development-knowledge-skills-audit/

As tourism and hospitality students or graduates, your perspectives are important and will help to shape the future of human resource management in the sector. We are therefore asking you to take five minutes to respond to the following statements which require responses to multiple choice responses.

Please note that the information that you provide here will be treated as confidential and you will remain anonymous.

A-Z Information Jamaica Limited was selected to carry out this project based on an internationally competitive procurement process.

Thank you very much for your participation.

Name of School/Institution: _____

What country is your School/Institution based in?

- ☐ Anguilla
- ☐ Antigua and Barbuda
- ☐ The Bahamas
- ☐ Barbados
- ☐ Belize
- ☐ British Virgin Islands
- ☐ Cayman Islands
- ☐ Dominica
- ☐ Grenada

- ☐ Guyana
- ☐ Haiti
- ☐ Jamaica
- ☐ Montserrat
- ☐ St Kitts and Nevis
- ☐ St. Lucia
- ☐ St Vincent and the Grenadines
- ☐ Trinidad and Tobago
- ☐ Turks and Caicos Islands
- ☐ Curacao
- ☐ Martinique
- ☐ Puerto Rico
- ☐ St. Eustatius
- ☐ St. Maarten
- ☐ Saint Martin
- ☐ Other: _____

Definitions of the 8 Sub-Sectors in Tourism

ACCOMMODATION:

Includes traditional and non-traditional accommodation facilities such as:

• Mega resorts and large, medium and small hotels

• Non-hotel accommodation e.g. villas, lodges, guest houses, bed and breakfasts, campsites, hostels, home and room rentals.

ADVENTURE TOURISM AND RECREATION:

Tours and recreational activities including:

• Eco-tourism/nature-based activities, agro-tourism

• Hard and soft adventure sports and activities (land and marine based).

ATTRACTIONS:

Natural or man-made attractions/ Local sites and facilities including:

• Native/cultural sites, heritage/historical sites, parks and community-based tourism initiatives

• Museums, galleries, interpretive centres, spa/health and wellness facilities, casinos, cabarets, nightclubs, amusement/recreational parks, performances, shopping facilities etc.

EVENTS AND CONFERENCES:

Meetings, Incentives, Conferences and Exhibitions (MICE MARKET) e.g.:

• Special events, incentive travel, festivals, cultural events, sporting events, symposia, trade shows/fairs, conventions, hallmark and niche market events

FOOD AND BEVERAGE:

Food and beverage facilities/service providers:

• Bars, restaurants, coffee chops, fast food operations

• Catering establishments, specialty culinary shops,

• Local farms, food tours and culinary experiences.

TOURISM SERVICES:

Tourism Support Services such as:

• National Tourism Organizations (NTOs), tourism information and research services, travel trade media, professional associations, consultants, tourism educators

• Local, regional and international tourism development organizations

• Hospitality and Tourism Trade Associations

TRANSPORTATION:

Land, air and water-based transportation including:

• Cruise lines, buses, motor vehicles, recreational vehicles, certified air carriers

TRAVEL TRADE:

Travel trade intermediaries such as:

• Travel agents, tour operators, reservation/booking services, advertising agencies, destination marketing and management organizations, international tourism suppliers and retail operations.

Tourism Sub-Sector/s of Interest:

Please check all that apply.

- ☐ N/A
- ☐ Accommodation
- ☐ Adventure Tourism and Recreation
- ☐ Attractions
- ☐ Events and Conferences
- ☐ Food and Beverage
- ☐ Tourism Services
- ☐ Transportation
- ☐ Travel Trade

What country do you reside in? _____

Gender:

- ☐ Male
- ☐ Female
- ☐ Prefer not to say

Age Group:

- ☐ Under 21
- ☐ 21-30
- ☐ 31-40
- ☐ 41-55
- ☐ 56-67
- ☐ Over 67

Type of Study being pursued:

If 'Other', please specify

- □ Doctorate
- □ Masters
- □ Bachelors
- □ Associate Degree
- □ Technical/Vocational Certification
- □ High School Certification
- □ Other: _____

Are you a Current Student or a Graduate?

- □ Current Student
- □ Graduate

Please state how much you agree with the following statements or issues using the following scale: 1 = Strongly Disagree 2 = Disagree 3 = Agree 4 = Strongly Agree

1. The tourism and hospitality industry is the most important industry in my country's economy.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

□ Don't Know or N/A

2. Tourism helps my country grow.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

□ Don't Know or N/A

3. Tourism plays an important economic role in my country.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

□ Don't Know or N/A

4. I am proud that tourists are coming to my country.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

□ Don't Know or N/A

5. Jobs in the tourism industry are low-skilled.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

□ Don't Know or N/A

6. I find jobs in the tourism industry interesting.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

□ Don't Know or N/A

7. People can use their initiative in jobs within the tourism and hospitality industry.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

□ Don't Know or N/A

8. Jobs in tourism and hospitality are meaningful.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

□ Don't Know or N/A

9. Jobs in tourism and hospitality are stressful.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

10. I would like the opportunity to use foreign language skills whilst working in the tourism and hospitality industry.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

11. Working in the tourism and hospitality industry has a negative impact on family life.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

12. Working hours in the tourism and hospitality industry negatively affect regular life.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

13. Working in the tourism and hospitality industry is seen as a respected career choice.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

14. Many people in my country believe that tourism and hospitality graduates will end up in low status jobs.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

15. People have long careers in the tourism and hospitality industry.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

16. Tourism work is seasonal work.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

17. Physical working conditions are generally good in the tourism and hospitality industry.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

18. I think the pay is low for most jobs in tourism and hospitality when compared to other industries in my country.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

19. The best paying jobs in tourism and hospitality are occupied by men.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

20. I think that the pay for most tourism and hospitality jobs is not sufficient to lead a satisfactory life.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

21. Given the hours and workload, I think the pay is low in the tourism and hospitality industry.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

22. I would like to work in the tourism and hospitality industry after graduation.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

23. Male and female employees doing the same jobs in the industry are paid equally.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

24. Women working in the industry are not likely to be promoted to senior positions.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

25. Young persons that I know feel proud to work in the tourism and hospitality industry.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

26. Promotion opportunities are limited for local people working within the tourism and hospitality industry.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

27. To acquire a job in the tourism and hospitality industry, you must have an occupational certification (CVQ, City and Guilds, a specialized Degree) as proof of your competence.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

28. There are adequate educational and training institutions in my country for persons to gain the qualifications required to work in the tourism and hospitality industry.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree
□ Don't Know or N/A

29. The tourism and hospitality industry is where persons without education and training certification can easily:
Please check all that apply and specify 'Other' if applicable

- □ acquire a job
- □ move up the career ladder
- □ advance their expertise
- □ earn additional qualifications
- □ practice speaking foreign languages
- □ meet people from other cultures and nationalities
- □ Other: _____

30. The tourism and hospitality industry requires a wide variety of knowledge and skills.

- □ Yes
- □ No

31. Do you have plans to start a business that serves the tourism and hospitality industry?

- ☐ Yes
- ☐ No

If 'Yes' →

32. Please tell us more about the business you are planning to start:
e.g. sector, services offered.

Tourism Employees Survey Instrument





The Caribbean Tourism Organization (CTO) is conducting a REGIONAL HUMAN RESOURCES DEVELOPMENT KNOWLEDGE and SKILLS AUDIT for the Tourism and Hospitality Industry.

The audit is being implemented by the CTO with funding from the Caribbean Development Bank (CDB), to better understand how human resource development can be optimally leveraged to support the growth, development, innovation and competitiveness of the Caribbean Tourism Sector. You may find additional information at https://www.onecaribbean.org/our-work/human-resource-development/regional-hr-development-knowledge-skills-audit/

As a tourism employee your perspectives are important and will help to shape the future of human resource management in the sector. We are therefore asking you to take five minutes to respond to the following statements which require responses to multiple choice responses.

Please note that the information that you provide here will be treated as confidential and you will remain anonymous.

A-Z Information Jamaica Limited was selected carry out this project based on an internationally competitive procurement process.

Thank you very much for your participation.

Your Country:

- ☐ Anguilla
- ☐ Antigua and Barbuda
- ☐ The Bahamas
- ☐ Barbados
- ☐ Belize
- ☐ British Virgin Islands
- ☐ Cayman Islands
- ☐ Dominica

- ☐ Grenada
- ☐ Guyana
- ☐ Haiti
- ☐ Jamaica
- ☐ Montserrat
- ☐ St Kitts and Nevis
- ☐ St. Lucia
- ☐ St Vincent and the Grenadines
- ☐ Trinidad and Tobago
- ☐ Turks and Caicos Islands
- ☐ Curacao
- ☐ Martinique
- ☐ Puerto Rico
- ☐ St. Eustatius
- ☐ St. Maarten
- ☐ Saint Martin

Other: _____

Position/Job Title: _____

Name of Organization: _____

Definitions of the 8 Sub-Sectors in Tourism.

ACCOMMODATION:

Includes traditional and non-traditional accommodation facilities such as:

• Mega resorts and large, medium and small hotels

• Non-hotel accommodation e.g., villas, lodges, guest houses, bed and breakfasts, campsites, hostels, home and room rentals.

ADVENTURE TOURISM AND RECREATION:

Tours and recreational activities including:

• Eco-tourism/nature-based activities, agro-tourism

• Hard and soft adventure sports and activities (land and marine based).

ATTRACTIONS:

Natural or man-made attractions/ Local sites and facilities including:

• Native/cultural sites, heritage/historical sites, parks and community-based tourism initiatives

• Museums, galleries, interpretive centres, spa/health and wellness facilities, casinos, cabarets, nightclubs, amusement/recreational parks, performances, shopping facilities etc.

EVENTS AND CONFERENCES:

Meetings, Incentives, Conferences and Exhibitions (MICE MARKET) e.g.:

• Special events, incentive travel, festivals, cultural events, sporting events, symposia, trade shows/fairs, conventions, hallmark and niche market events

FOOD AND BEVERAGE:

Food and beverage facilities/service providers:

• Bars, restaurants, coffee chops, fast food operations

• Catering establishments, specialty culinary shops,

• Local farms, food tours and culinary experiences.

TOURISM SERVICES:
Tourism Support Services such as:
• National Tourism Organizations (NTOs), tourism information and research services, travel trade media, professional associations, consultants, tourism educators
• Local, regional and international tourism development organizations
• Hospitality and Tourism Trade Associations

TRANSPORTATION:
Land, air and water-based transportation including:
• Cruise lines, buses, motor vehicles, recreational vehicles, certified air carriers

TRAVEL TRADE:
Travel trade intermediaries such as:
• Travel agents, tour operators, reservation/booking services, advertising agencies, destination marketing and management organizations, international tourism suppliers and retail operations.

Tourism Sub-sector/s worked in:

- ☐ N/A
- ☐ Accommodation
- ☐ Adventure Tourism and Recreation
- ☐ Attractions
- ☐ Events and Conferences
- ☐ Food and Beverage
- ☐ Tourism Services
- ☐ Transportation
- ☐ Travel Trade

Gender:

- ☐ Male
- ☐ Female
- ☐ Prefer not to say

Age Range:

- ☐ Under 21
- ☐ 21-30
- ☐ 31-40
- ☐ 41-55
- ☐ 56-67
- ☐ Over 67

Years working in tourism:

- ☐ Less than 1 year
- ☐ 1-5 years
- ☐ 6-10 years
- ☐ More than 10 years

Are you a:

□ Permanent Employee
□ Temporary Employee
□ Contract Worker
□ Seasonal Worker

Please state how much you agree with the following statements or issues using the following scale: 1 = Strongly Disagree 2 = Disagree 3 = Agree 4 = Strongly Agree

1. Tourism and hospitality is a good industry to work in.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

2. I would recommend MY JOB to a friend or relative.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

3. I would recommend THIS INDUSTRY to a friend or relative.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

4. I still see myself in this industry in the next:

0-1 year
2-5 years
6-10 years
11-20 years
20+ years

5. The actual pay for my job is fair.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

6. In my workplace, I receive the following benefits:

Pension
Health insurance
Profit share
Gratuity/Tips
Housing

7. The benefits for my job are fair.

e.g., pension, health insurance

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

8. At my job, working conditions are good.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

9. It is difficult to balance my job and my family obligations.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

10. I am comfortable with the working hours at my job.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

11. I understand the system for promotion.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

12. The system for promotion is fair.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

13. Men and women are treated equally in my workplace.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

14. Explain your answer to Question 13:
Please explain under the following categories: Pay, Promotion, Training Opportunities and Mentoring

_____

15. I am proud to say that I work in tourism and hospitality.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

16. My workplace treats people of different races/ethnicities equally.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

17. Young people are treated fairly and well in my workplace.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

18. People who are 50 and over are treated fairly and well in my workplace.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

19. In general, I enjoy my job.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

20. I received formal training and certification in a Tourism Discipline before entering the industry.
Yes
No

21. I received formal training and certification in a Tourism Discipline whilst working in the industry.
If you answer 'Yes' you will be directed to question 22.
Yes

No

22. The formal training that I received was helpful in my career.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

23. I received on-the-job training that prepared me for this current job.
Yes
No
If you answer 'Yes' you will be directed to question 24.

24. The on-the-job training that I received was helpful in my career.
Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

25. I would like to receive further training in:
_____

Educational and Training Institutions Survey Instrument





The Caribbean Tourism Organization (CTO) is conducting a REGIONAL HUMAN RESOURCES DEVELOPMENT KNOWLEDGE and SKILLS AUDIT for the Tourism and Hospitality Industry.

The audit is being implemented by the Caribbean Tourism Organization (CTO) with funding from the Caribbean Development Bank, to better understand how human resource development can be optimally leveraged to support the growth, development, innovation and competitiveness of the Caribbean Tourism Sector. You may find additional information at https://www.onecaribbean.org/our-work/human-resource-development/regional-hr-development-knowledge-skills-audit/

Given that you are important stakeholders in the tourism industry, your perspectives are important and will help to shape the future of human resource management in the sector. We are therefore asking you to take five minutes to respond to the following statements which require responses to multiple choice responses.

Please note that the information that you provide here will be treated as confidential and you will remain anonymous.

A-Z Information Jamaica Limited was selected to carry out this project based on an internationally competitive procurement process.

Thank you very much for your participation

Your Country:

- ☐ Anguilla
- ☐ Antigua and Barbuda
- ☐ The Bahamas
- ☐ Barbados
- ☐ Belize
- ☐ British Virgin Islands
- ☐ Cayman Islands
- ☐ Dominica
- ☐ Grenada

- ☐ Guyana
- ☐ Haiti
- ☐ Jamaica
- ☐ Montserrat
- ☐ St Kitts and Nevis
- ☐ St. Lucia
- ☐ St Vincent and the Grenadines
- ☐ Trinidad and Tobago
- ☐ Turks and Caicos Islands
- ☐ Curacao
- ☐ Martinique
- ☐ Puerto Rico
- ☐ St. Eustatius
- ☐ St. Maarten
- ☐ Saint Martin

Other: _____

Position/Job Title: _____

Name of Organization: _____

Definitions of the 8 Sub-Sectors in Tourism.

ACCOMMODATION:

Includes traditional and non-traditional accommodation facilities such as:

• Mega resorts and large, medium and small hotels

• Non-hotel accommodation e.g. villas, lodges, guest houses, bed and breakfasts, campsites, hostels, home and room rentals.

ADVENTURE TOURISM AND RECREATION:

Tours and recreational activities including:

• Eco-tourism/nature-based activities, agro-tourism

• Hard and soft adventure sports and activities (land and marine based).

ATTRACTIONS:

Natural or man-made attractions/ Local sites and facilities including:

• Native/cultural sites, heritage/historical sites, parks and community-based tourism initiatives

• Museums, galleries, interpretive centres, spa/health and wellness facilities, casinos, cabarets, nightclubs, amusement/recreational parks, performances, shopping facilities etc.

EVENTS AND CONFERENCES:

Meetings, Incentives, Conferences and Exhibitions (MICE MARKET) e.g.:

• Special events, incentive travel, festivals, cultural events, sporting events, symposia, trade shows/fairs, conventions, hallmark and niche market events

FOOD AND BEVERAGE:

Food and beverage facilities/service providers:

• Bars, restaurants, coffee chops, fast food operations

• Catering establishments, specialty culinary shops,

• Local farms, food tours and culinary experiences.

TOURISM SERVICES:

Tourism Support Services such as:

• National Tourism Organizations (NTOs), tourism information and research services, travel trade media, professional associations, consultants, tourism educators

• Local, regional and international tourism development organizations

• Hospitality and Tourism Trade Associations

TRANSPORTATION:

Land, air and water-based transportation including:

• Cruise lines, buses, motor vehicles, recreational vehicles, certified air carriers

TRAVEL TRADE:

Travel trade intermediaries such as:

• Travel agents, tour operators, reservation/booking services, advertising agencies, destination marketing and management organizations, international tourism suppliers and retail operations.

Tourism Sub-sector/s worked in:

- ☐ N/A
- ☐ Accommodation
- ☐ Adventure Tourism and Recreation
- ☐ Attractions
- ☐ Events and Conferences
- ☐ Food and Beverage
- ☐ Tourism Services
- ☐ Transportation
- ☐ Travel Trade

Please state how much you agree with the following statements or issues using the following scale: 1 = Strongly Disagree 2 = Disagree 3 = Agree 4 = Strongly Agree

1. Most of our graduates find positions quickly.

- ☐ Strongly Disagree 1 2 3 4 Strongly Agree

2. Most of our graduates get the jobs for which they were trained.

Strongly Disagree 1 2 3 4 Strongly Agree

3. We consult with shareholders/members of the tourism industry before determining the following tourism related issues:

- ☐ course content

- assessment
- certification standards

4. In general, we feel supported by the tourism industry.

Strongly Disagree 1 2 3 4 Strongly Agree

5. We work closely with tourism establishments to place our trained and certified graduates.

- Yes
- No

6. We work closely with tourism establishments to find out their needs.

- Yes
- No

7. We organize job/career fairs to match students and jobs.

- Yes
- No

8. It is easy to find work experience and internship placements for our students within the tourism and hospitality industry.

Strongly Disagree 1 2 3 4 Strongly Agree

9. The tourism and hospitality industry is considered by our students as a good career choice.

Strongly Disagree 1 2 3 4 Strongly Agree

10. Male students generally find positions more quickly than female students.

Strongly Disagree 1 2 3 4 Strongly Agree

11. Tourism and hospitality careers are viewed in a more positive light today than they were ten years ago.

Strongly Disagree 1 2 3 4 Strongly Agree

12. Employers express a preference for males for specific jobs for internship placements.

Strongly Disagree 1 2 3 4 Strongly Agree

13. Based on our current funding arrangements, we are financially sustainable.

Strongly Disagree 1 2 3 4 Strongly Agree

14. We have difficulties in attracting students to our tourism and hospitality related programmes.

Strongly Disagree 1 2 3 4 Strongly Agree

15a. Do you receive financial support from the government?

- Yes
- No

15b. The support from government is adequate for our operations.

Please rate your level of agreement with the above statement.

Strongly Disagree 1 2 3 4 Strongly Agree

16. We are AWARE of the resources available through the Caribbean Tourism Organization.

- Yes
- No

17a. We UTILIZE the resources/training available through the Caribbean Tourism Organization.

- Yes
- No

17b. Please explain how you utilize these resources: _____

18. Our institution has high student retention levels according to records.

- True
- False
- Unsure

19. Surveys carried out by our institution show high levels of satisfaction among students.

- True
- False
- Unsure

Unions and Associations Survey Instrument





The Caribbean Tourism Organization (CTO) is conducting a REGIONAL HUMAN RESOURCES DEVELOPMENT KNOWLEDGE and SKILLS AUDIT for the Tourism and Hospitality Industry.

The audit is being implemented by the CTO with funding from the Caribbean Development Bank (CDB), to better understand how human resource development can be optimally leveraged to support the growth, development, innovation and competitiveness of the Caribbean Tourism Sector. You may find additional information at https://www.onecaribbean.org/our-work/human-resource-development/regional-hr-development-knowledge-skills-audit/

Given that unions and employee associations are important stakeholders in the tourism industry, your perspectives are important and will help to shape the future of human resource management in the sector. We are therefore asking you to take five minutes to respond to the following statements which require responses to multiple choice responses.

Please note that the information that you provide here will be treated as confidential and you will remain anonymous.

A-Z Information Jamaica Limited was selected to carry out this project based on an internationally competitive procurement process.

Thank you very much for your participation.

Your Country:

- ☐ Anguilla
- ☐ Antigua and Barbuda
- ☐ The Bahamas
- ☐ Barbados
- ☐ Belize
- ☐ British Virgin Islands
- ☐ Cayman Islands

- Dominica
- Grenada
- Guyana
- Haiti
- Jamaica
- Montserrat
- St Kitts and Nevis
- St. Lucia
- St Vincent and the Grenadines
- Trinidad and Tobago
- Turks and Caicos Islands
- Curacao
- Martinique
- Puerto Rico
- St. Eustatius
- St. Maarten
- Saint Martin

Other: _____

Position in Union/Employee Association: _____

Name of Organization: _____

Definitions of the 8 Sub-Sectors in Tourism.

ACCOMMODATION:

Includes traditional and non-traditional accommodation facilities such as:

• Mega resorts and large, medium and small hotels

• Non-hotel accommodation e.g., villas, lodges, guest houses, bed and breakfasts, campsites, hostels, home and room rentals.

ADVENTURE TOURISM AND RECREATION:

Tours and recreational activities including:

• Eco-tourism/nature-based activities, agro-tourism

• Hard and soft adventure sports and activities (land and marine based).

ATTRACTIONS:

Natural or man-made attractions/ Local sites and facilities including:

• Native/cultural sites, heritage/historical sites, parks and community-based tourism initiatives

• Museums, galleries, interpretive centres, spa/health and wellness facilities, casinos, cabarets, nightclubs, amusement/recreational parks, performances, shopping facilities etc.

EVENTS AND CONFERENCES:

Meetings, Incentives, Conferences and Exhibitions (MICE MARKET) e.g.:

• Special events, incentive travel, festivals, cultural events, sporting events, symposia, trade shows/fairs, conventions, hallmark and niche market events

FOOD AND BEVERAGE:

Food and beverage facilities/service providers:

• Bars, restaurants, coffee chops, fast food operations

• Catering establishments, specialty culinary shops,

• Local farms, food tours and culinary experiences.

TOURISM SERVICES:

Tourism Support Services such as:

• National Tourism Organizations (NTOs), tourism information and research services, travel trade media, professional associations, consultants, tourism educators

• Local, regional and international tourism development organizations

• Hospitality and Tourism Trade Associations

TRANSPORTATION:

Land, air and water-based transportation including:

• Cruise lines, buses, motor vehicles, recreational vehicles, certified air carriers

TRAVEL TRADE:

Travel trade intermediaries such as:

• Travel agents, tour operators, reservation/booking services, advertising agencies, destination marketing and management organizations, international tourism suppliers and retail operations.

Tourism Sub-sector/s worked in:

- □ N/A
- □ Accommodation
- □ Adventure Tourism and Recreation
- □ Attractions
- □ Events and Conferences
- □ Food and Beverage
- □ Tourism Services
- □ Transportation
- □ Travel Trade

Please state how much you agree with the following statements or issues using the following scale: 1 = Strongly Disagree 2 = Disagree 3 = Agree 4 = Strongly Agree

1. Tourism and hospitality work is considered a positive career by locals.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

2. Working conditions in tourism and hospitality make work less attractive to potential employees.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

3. Working conditions in tourism and hospitality are unattractive to women.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

4. Pay and benefits in tourism and hospitality make work less attractive to potential employees.

Pay and benefits include things like Pension, Health insurance, Profit share, Gratuity/Tips, Housing etc

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

5. Employees are treated fairly in tourism and hospitality industry.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

6. Men and women are treated equally in the tourism and hospitality industry.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

7. The best paid jobs in tourism and hospitality tend to be occupied by men.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

8. Family and domestic concerns limit upward mobility in tourism and hospitality workplaces for women.

e.g., child/elder care, household responsibilities

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

9. Current employment legislation offers adequate protection for tourism and hospitality employees.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

10. There are adequate legislative mechanisms to deal with situations where employees are treated unfairly within the industry.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

11. Working conditions in hotels and other tourism establishments have improved in the last 5 years, pre-pandemic.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

12. Working conditions in hotels and other tourism establishments have been negatively impacted by the pandemic.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

13. Compensation packages in hotels and other tourism establishments have improved in the last 5 years, pre-pandemic.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

14. Trade Unions/Employee Associations are viewed positively by hospitality and tourism EMPLOYERS

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

15. Trade Unions/Employee Associations are viewed in a positive light by hospitality and tourism EMPLOYEES.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

16. According to the International Labour Organization (ILO), work is considered decent when 'it pays a fair income, it guarantees a secure form of employment and safe working conditions'. Based on this definition, tourism work is decent work.

Strongly Disagree □ 1 □ 2 □ 3 □ 4 Strongly Agree

17. How easy is it for Trade Unions/Employee Associations to function effectively in tourism and hospitality?

- □ Very Easy
- □ Easy
- □ Difficult
- □ Very Difficult

Impact of COVID on Labour Availability Survey Instrument – Final Questions to CTO Member States





1. What country are you based in? _____

2. Is there a shortage of tourism employees since COVID-19?

- ☐ Yes
- ☐ No

3. Which type of employees are most in demand i.e., greatest shortage? _____

4. Which of the following is causing the shortage?

(Check as many as apply and specify other)

- ☐ Increased demand
- ☐ Employees have moved on to other activities
- ☐ Wages in Tourism are uncompetitive
- ☐ Working hours in Tourism are too long and unpredictable

Other: _____

5. What is being done to resolve the labour challenges etc.? _____

(Check as many as apply and specify other)

- ☐ Collaborating with training institutions
- ☐ Offer higher wages
- ☐ Using an employment agency
- ☐ Asking staff to refer friends or families
- ☐ Paying a signing bonus
- ☐ Asking staff to work overtime

Other: _____

6. Is the labour shortage temporary?

- ☐ Yes
- ☐ No

7. What could government do to assist with the labour shortage?

(Check as many as apply and specify other)

- ☐ Train more people for tourism
- ☐ Be more flexible with the issuing of work permits
- ☐ Stop facilitating overseas recruiters

Other: _____

8. What are the most important skills that tourism workers will need going forward? _____

9. What is the most important type of knowledge that tourism workers will need going forward? __

10. Do Education and Training Institutions in your country work closely together to ensure that the tourism industry is supplied with the required set of skills and knowledge?

- ☐ Yes
- ☐ No

Explain: _____

11. As we reopen what are the biggest challenges you are facing? _____

12. Is there a need to rethink compensation benefits in the Tourism Sector in your country?

- ☐ Yes
- ☐ No

Explain: _____

13. How important would you see internships in your country?

- ☐ Important
- ☐ Not Important

Explain: _____

14. How important do you view language skills among tourism staff?

- ☐ Important
- ☐ Not Important

Explain: _____

APPENDIX 2:

LIST OF NATIONAL FOCAL POINT PERSONS (NFPPS) AND DATA COLLECTION ASSISTANTS (DCAS)

Country	NFPP	DCA
Anguilla	Gina Brooks	None
Antigua	Simone Richards-Nicholas	Darren Richards Kiera Vigo
Bahamas	Jonell Deveaux	Lauren Seymour Picecella Forbes Treva Strachan
Barbados	Kerry Allen	Joshua Bishop Aquila Williams
Belize	Jonelle Hemmans Noriko Gamero	None
British Virgin Islands	Vionie Pickering	None
Cayman Islands	Carol Britton and Eldon Chisholm	Letanya Thomspon Cindy Powery
Dominica	Priscilla James/Daphne Vidal	Odile Jno Baptiste
Grenada	Kirl Hoschtialek	Samantha Thomas Sibongile Dickson
Guyana	Kamrul Baksh	Romel Richmond Tamika Inglis
Haiti	Ewenson Simon MEDEE	Johanne Barthelemy Sandra Pierline Raphaël
Jamaica	Marshalee Johnson-Spencer	Antonio Ross Shanta Hutchinson Janine Mundell
Montserrat	Rosetta West-Gerald	Rosetta West-Gerald Junicia Irish
St Kitts	Therez Ambrose-Versailles Novelette Morton	None
Nevis	Nicole Liburd	None
St Lucia	Nathania Augier	Tameeka Jn Baptiste Angela Alphonse
St Vincent and the Grenadines	Camille Soleyn Faylene King	None
Trinidad	Shaneil Sutherland	Satesh Sookhai
Tobago	Nadia Wilson-Thomas	Andrew Thom
Turks and Caicos Is-lands	Brian Been	Cheryl Ann Foreman

APPENDIX 3:

LIST OF INTERVIEWS WITH PUBLIC AND PRIVATE SECTOR LEADERS IN THE CARIBBEAN TOURISM SECTOR

	Name	Organisation	Country
1.	Mr. Noorani Azeez	Saint Lucia – HTA	Saint Lucia
2.	Minister of Tourism and Officials	Ministry of Tourism	Antigua and Barbuda
3.	Minister of Tourism and Officials	Minister of Tourism	Anguilla
4.	Phyllis Fleming-Banks	Manager for the British Overseas Territories UWI Open Campus	Anguilla
5.	Brian Bean (and others)	Ministry of Tourism	Turks and Caicos Islands
6.	Angela Greenaway	Part-time Lecturer at the Montserrat Community College	Montserrat
7.	Mr. Clifton Reader	JHTA	Jamaica
8.	Robert Sands	Baha Mar Resort	Bahamas
9.	Basil Smith	Former E.D. TPDco, marine consultant – Bahamas	Bahamas/Jamaica
10.	M. Jeliel Darius	Ministry of Tourism	Haiti
11.	Mme Raina FORBIN	Haiti's Tourism Association (ATH)	Haiti
12.	Mme Linda DELAIN	Southern Tourism Association (AT-Sud)	Haiti
13.	M. Jean Rony GUSTAVE	Center for Studies on Heritage and Tourism in Haiti (CEPAT-H)	Haiti
14.	M. Godson LUBRUN	Support and Reflection's Group on Haitian Tourism (GARTH)	Haiti
15.	Mme. Sadais JANNITE	Technical Framework of the Ministry of Tourism	Haiti
16.	M. Guylin MARCELLUS	The Studies and Programming Unit, Ministry of Tourism	Haiti
17.	M. Rudolf DEROSE	Promoters of Solidarity Tour-ism (RENAPROTS)	Haiti
18.	M. Valery TASSY	Management's Organisation of North Destination of Haiti (OGDNH)	Haiti
19.	M. Kesler Bien-Aimé	Haitian Heritage and Tourism Institute (INAPAT)	Haiti
20.	M. Sterlin ULYSSE	Heritage and Tourism Department Haitian State University (UEH)	Haiti
21.	Fred Smith	Tropical Tours	Jamaica
22.	Ministry of Tourism Officials	Ministry of Tourism	St. Vincent and The Grenadines
23.	Therez Ambrose-Versailles, Ministry of Tourism Raquel Brown, CEO St Kitts Tourism Authority	Mixture of Tourism organisa-tions	St. Kitts and Nevis

	Name	Organisation	Country
23.	Therez Ambrose-Versailles, Ministry of Tourism Raquel Brown, CEO St Kitts Tourism Authority	Mixture of Tourism organisa-tions	St. Kitts and Nevis
24.	Myrtle Dwyer	Glamour Tours	Jamaica
25.	Marcia Brandon	Caribbean Centre of Excellence for Sustainable Livelihoods	Barbados
26.	Jeremy Jones	Sandals International	Jamaica
27.	Stacy Cox - CEO	TCIHTA	Turks and Caicos Islands
28.	Sheba Wilson and Yolander Forbes - HR Committee Directors of the HTA (TCI)	TCIHTA	Turks and Caicos Islands
29.	Donovan White – Tourism Director	Jamaica Tourism Board	Jamaica
30.	Ed. Bartlett	Minister of Tourism	Jamaica
31.	Carol Rose-Brown	JCTI	Jamaica
32.	Gail Springer	Vivere Human Resources Consulting	Barbados
33.	Valerie Veira	JBDC	Jamaica
34.	Wayne Cummings	Arya Resort Management	Jamaica
35.	Josef Forstmayr	Round Hill	Jamaica
36.	CTO HR Thought leaders		
37.	Basil Springer	BEHANZIN Inc.	Barbados
38.	Roy Page	Asterix Tourism- Destinations Management Services	Jamaica
39.	Nicola Madden Greig, President CHTA.	Caribbean Hotel Tourism Association	Jamaica
40.	Marcia Guerrero	Mariposa	Trinidad and Tobago
41.	Mark Pike	ATL	Jamaica
42.	Sophia Rolle	UOB and UWI	Bahamas
43.	Chris James, President of the Tobago Hotel and Tourism Association	Tobago Hotel and Tourism As-sociation	Tobago
44.	Rohan Malone	Talent Acquisition	Barbados
45.	Andrew Welsh	Countrystyle Tour	Trinidad and Tobago
46.	Carey Wallace	Tourism Enhancement Fund. (TEF)	Jamaica
47.	Dennis McIntosh	Culinary Federation	Jamaica

	Name	Organisation	Country
48.	Marcia Erskine & Associates	Caribbean Communications	Jamaica
49.	Andrew Spencer	Formerly at TPDco, and CHTM, UWI	Jamaica
50.	Amanda Charles	Sustainable Tourism, CTO	Barbados
51.	Jonelle Hemans	Ministry of Tourism	Belize
52.	Sharnett Yearwood	University of Belize	Belize
53.	Alina Saldivar	Belize Hotel Association	Belize
54.	Denise Collymore	Asne Chastnet	Saint Lucia
55.	Amad Rashad Thomas	SISCO Bahamas, Formerly Ocean Club	Bahamas
56.	Tiersa Smith-Hall	The Hartling Group	Turks and Caicos Islands
57.	Ralph Taylor	Arcadia Hotel	Barbados
58.	P. Brewster	Ministry of Education	Turks and Caicos Islands
59.	Edwin Taylor	Commission of Labour	Turks and Caicos Islands
60.	T. Thomas	Ministry of Education	Turks and Caicos Islands
61.	Gaunett Sinclair-Maragh	Utech	Jamaica
62.	Charles Hernandez	Tourism and Investment Minis-try	Antigua and Barbuda
63.	Colin Piper	Discover Dominica Authority	Dominica
64.	Noorani Azeez	Saint Lucia Hospitality and Tourism Association	Saint Lucia
65.	Bianca Porter	St. Vincent and the Grenadines Tourism Authority	St. Vincent and the Grenadines
66.	Kim Halbich	St. Vincent and the Grenadines Hotel Association	St. Vincent and the Grenadines
67.	Sandra York-Gumbs	Manager, Comprehensive Learning Centre	Anguilla
68.	Karl Woodley	Head of Hospitality Studies, Albena Lake Hodge Comprehensive School	Anguilla
69.	Karimah Carty	Chef de Partie, Anguilla Community College	Anguilla
70.	Warren Solomon	Director of Tourism	Montserrat
71.	Ron Barzey	CathRon Souvenir products	Montserrat

REFERENCES

REFERENCES

1. Amaral, N., Azura, O., Gonzalez, S., Ospino, C., Pages, C., Rucci, G., & Torres, J. (n.d.). The Future of Work in Latin America and the Caribbean. ***The Future of Work in Latin America and the Caribbean.***

2. Are you ready to manage the workplace of the future. (2019). ***University of Waterloo, 71.***

3. ***Barbados Draft White Paper. (n.d.).***

4. ***Barbados Tourism Master Plan. (n.d.).***

5. Baum, T., Cheung, C., Kong, H., Kralj, A., Mooney, S., Nguyễn Thi Thanh, H., Ramachandran, S., Dropulić Ružić, M., & Siow, M. (2016). ***Sustainability*** and the Tourism and Hospitality Workforce: A Thematic Analysis. ***Sustainability***, 8(8), 809. https://doi.org/10.3390/su8080809

6. Baum, T., & Szivas, E. (2008). HRD in tourism: A role for government? ***Tourism Management***, 29(4), 783–794. https://doi.org/10.1016/j.tourman.2007.09.002

7. Beaven, K. (2016). The Staggering Difference between Average Hotel Rates and Minimum Wage in the World's Most Popular Destinations. ***The Staggering Difference between Average Hotel Rates and Minimum Wage in the World's Most Popular Destinations.***

8. Blue Growth Coastal Master Plan: Grenada. (2016).

9. ***CAPRI, Sun, Sand and Sustainability: A way forward for Caribbean tourism. (2021).***

10. Caribbean Tourism COVID-19 Business Impact and Recovery Survey Results. (2021). ***Caribbean Hotel & Tourism Association, 70.***

11. Caribbean Workers to help with Jersey's hospitality staff shortage. (2022). In ***ITV***.

12. ***Cayman Islands National Tourism Plan 2019-23. (2018).*** https://www.visitcaymanislands.com/Visitcaymanislands.com/files/e3/e32b4905-39fb-4575-8762-0144676f068a.pdf

13. CHTA calls for region to prepare for projected employment growth. (2022). ***In The Virgin Islands Daily News.***

14. Clayton, R. (2022). ***Tourism Ministry tries to train its way out of labour shortage***.

REFERENCES contd.

15. ***Commonwealth of Dominica National Tourism Policy 2020.*** (2013, June 7). Google.com. https://www.google.com/url?sa=t&rct=j&esrc=s&source=appssearch&uact=8&cd=0&cad=rja&q&sig2=HqbnLgsjznIsFjen5h6a4g&ved=0ahUKEwjJoPHRiLr6AhVBRV0KHVLWD5M4ABABKAAwAA&url=http://faolex.fao.org/docs/pdf/dmi193520.pdf&usg=AOvVaw06qOqopycVLyoi_4zaQgsc

16. Developing Jamaica's Tourism Product through Rural Tourism. (n.d.). ***Rural Tourism Conference***, 79.

17. Diversification of Caribbean Tourism Experiences. (2019). ***Compete Caribbean***.

18. Downes, A., Mamingi, N., & Antoine, R. B. (2004). ***Labour Market Regulation and Employment in the Caribbean, In Law and Employment: Lessons from Latin America and the Caribbean*** (pp. 517–551). J.J. Heckman & C.

19. ***Draft National Tourism Policy: Guyana – South America Undiscovered.*** (n.d.).

20. Edlong. (2021). ***Top 7 Food Industry Trends for 2021.*** 81.

21. Ellis, L., & Yang, A. (2022, August 12). If your co-workers are 'Quiet-Quitting' here's what that means. ***The Wall Street Journal.***

22. ***Euromonitor International, Future of Work and Education.*** (2022).

23. ***Global Employment Trends for Youth 2020: Technology and the future of jobs.*** (2020). ILO Geneva.

24. ***Global Gender Gap Report*** 2020 (p. 73). (2020). World Economic Forum.

25. ***Global Report on Adventure Tourism*** (p. 78). (2014). AM Reports: Volume 9.

26. Golding, B. (2019, March 3). Jamaica's labour market regulations in perspective. ***Jamaica Observer.***

27. Goolsaran, S. J. (2005). Caribbean Labour Relations Systems: An Overview, 2nd Ed. ***ILO Port of Spain***.

28. ***Government of Antigua and Barbuda Medium-Term Development Strategy 2016 to 2020. (2015).*** Antigua and Barbuda Tourism Authority Website. https://www.oneplanetnetwork.org/sites/default/files/antigua_barbuda_medium_term_development_strategy.pdf

29. Green, E. (2020). ***Multi-Hazard Risk Management Guide for the Caribbean Tourism Sector.*** CTO.

30. Grenada Tourism Master Plan 1997. (n.d.). ***Cited in CTO Sustainable Report.***

REFERENCES contd.

31. ***Haiti Sector Identification Sector Report 3: Tourism.*** (2017, October 25). http://cfihaiti.com/index.php/en/cfi-services/documents-library?view=download&id=23

32. Harvey, E. (2012). ***Food Tourism and Food Festivals: Lessons Learned from the Caribbean.*** 83.

33. Higher Education Mobility in Latin America and the Caribbean: Challenges and Opportunities for a renewed convention on the recognition of studies, degrees and diplomas. (2019). ***UNESCO***.

34. Hines, H. (2019, April 15). Minister calls for end to short-term contracts for hotel workers. ***Daily Observer***.

35. HOW AIRBNB TOOK OVER THE CARIBBEAN. (2019, October 29). ***Repeating Islands***.

36. ***Human Resource Development 2030 Strategy: Unlocking Caribbean Human Potential***. (n.d.). CARICOM.

37. ***ILO The Future of Work in the Tourism Sector: Sustainable and Safe Recovery and Decent Work in the Context of the COVID-19 Pandemic- Geneva.*** (2022).

38. ***ILO: Tourism recovery is key to overcoming COVID-19 labour crisis in Latin America and the Caribbean***. (2021, June 30). Www.ilo.org. https://www.ilo.org/caribbean/newsroom/WCMS_809331/lang–en/index.htm

39. ***Improving Competitiveness in the Caribbean Tourism Sector through ICT-based Innovations.*** (2015). https://www.competecaribbean.org/wp-content/uploads/2015/04/Improving-Competitiveness-in-the-Caribbean-Tourism-Sector-Through-ICT-Based-Innovations_September_v4_docx.pdf

40. Inc, G. (n.d.). ***Employee Experience***. Gallup.com. https://www.gallup.com/workplace/242252/employee-experience.aspx

41. ***Inter-generational continuum goes from Baby Boomers to Generation Alpha***. (n.d.).

42. Is the Future Ready for Youth: Youth Employment Policies for Evolving Labour Markets. (2021). ILO.

43. Jainchill, J. (2019, July 17). ***From marketing to Managing***. Travelweekly.com; Travel Weekly- destination marketing organisations. https://www.travelweekly.com/Travel-News/Government/destination-marketing-organisations-From-marketing-to-managing

44. ***Jamaica Master Plan for Sustainable Development Vision 2030 Jamaica - Final Draft Tourism Sector Plan***. (n.d.).

45. Joint Communique for Caribbean World Tourism Day Virtual Conference. (2021, September 27). ***The Future of Caribbean Tourism – Redefining the 3 S's.***

REFERENCES contd.

46. Kandil, M., Chen, Q., Li, X., Lindow, G., Mansilla, M., Chiedu Okwuokei, J., Santoro, M., & Schmittmann, J. (2014). Labor Market Issues in the Caribbean: Scope to Mobilise Employment Growth. SSRN ***Electronic Journal.*** https://doi.org/10.2139/ssrn.2475013

47. King, E., Finkelstein, L., Thomas, C., & Corrington, A. (2019). ***Generational Differences At Work Are Small. Thinking They're Big Affects Our Behavior.***

48. Kitts, S. (n.d.). ***THIRD INTERNATIONAL CONFERENCE ON SMALL ISLAND DEVELOPING STATES (SIDS) National Preparatory Process BACKGROUND REPORT.*** https://sustainabledevelopment.un.org/content/documents/1129245SKN%20Final%20Draft%20National%20Report.pdf

49. Kollewe, J. (2022, June 6). Thousands of UK Workers begin world's biggest trial of four day week. ***The Guardian***.

50. ***Living Guyana Tourism Strategic Action Plan: 2018-2025 (Draft)***. (n.d.).

51. Madden, M. (2022, May 19). CHTA warns of growing labour needs. ***Barbados Today***.

52. McBain, H. (2007). Caribbean tourism and agriculture: linking to enhance development and competitiveness. ***ECLAC, 44.***

53. McCarthy, J. (2021, March 11). What is the Gender Pay Gap and How Do We Close It? ***Global Citizen***.

54. McGuinness, Poiliakas, & Redmond. (2017). ***Typology of skills mismatch***.

55. ***MONTSERRAT TOURISM MASTER PLAN, 2015-2025 Final Report Government of Montserrat.*** (2016). http://www.gov.ms/wp-content/uploads/2018/11/MONTSERRAT-TOURISM-MASTER-PLAN.pdf

56. ***National Sustainable Tourism Master plan for Belize 2030***. (2012). Presentation at the State of the Coastal Zone Summit. https://www.belizetourismboard.org/wp-content/uploads/2018/01/tourism.pdf

57. Newsdesk. (2022, June 14). ***St. Kitts Study Shows Local Desire for Community-Centric Tourism***. Travel Agent Central. https://www.travelagentcentral.com/destinations/st-kitts-resident-survey-shows-local-desire-community-centric-tourism

58. ***Now relaunched as Aurora Anguilla Golf Resort and Spa*** (p. 82). (n.d.).

59. ***OECD Tourism Trends and Policies 2018.*** (2018). https://www.thinktur.org/media/TENDENCIAS.pdf

60. ***OECS, COVID-19 and beyond: Impact Assessments and Responses.*** (2020).

REFERENCES contd.

61. ***Port St. Maarten to pursue employment opportunities onboard cruise ship (sic) for Sint Maarteners.*** (2015). Port St. Maarten.

62. pub02. (2016). WSQ. Ssg.gov.sg. https://www.ssg.gov.sg/wsq.html

63. Quality Consultants. (1999). ***Tourism Training for the New Millennium: A study of Tourism Education and Training Needs in the Caribbean.***

64. Rahimi, R., Akgunduz, Y., & Bilghain, A. (2022). Impact of COVID-19 on mental health and career anxiety of hospitality and tourism workers in the UK. ***Journal of Hospitality and Tourism Insights***.

65. Ransthel, D. (2021). How benefits can help hotels overcome hiring challenges. ***Hotel Management***, 74.

66. ***Recovery to development plan of the Virgin Islands***. (2018, July). Website: Http://Www.gov.vg; Disaster Recovery Coordinating Committee, Government of the Virgin Islands. https://bvirecovery.vg/wp-content/uploads/2020/03/Recovery-to-Development-Plan.pdf

67. Regional Tourism at the Cross-Roads: Perspectives of Caribbean Tourism Organisation's Stakeholders. (2014). ***Journal of Sustainable Development***, 7, 1, 17–32.

68. Resort Chains Weighing More Villa Investments as Preferences Change. (2021, November 24). ***Jamaica Gleaner,*** 76.

69. Rethinking Tourism & MSMEs in Times of COVID-19. Future-Tourism in the Eastern Caribbean. (2021). ***Regional Policy Dialogues: Summary Report. UNDP.***

70. ***Rethinking Tourism & MSMEs in times of COVID-19: Regional Policy Dialogues: Summary Report.*** (2021). UNDP.

71. ***Revised National Tourism Policy (Draft) Trinidad and Tobago***. (n.d.).

72. Roman, E. (2022). ***Most Gen Zers "would not work five days a week in an office," researcher says.*** Finance.yahoo.com. https://finance.yahoo.com/news/gen-z-work-five-days-office-173640467.html

73. Saha, T. (2021, July 9). ***AI is Reimagining Travel Personalisation.*** Medium. https://towardsdatascience.com/ai-is-reimagining-travel-personalisation-c72685faa378

74. ***Saint Lucia Tourism Strategy and Action Plan 2020-2030.*** (2019).

75. Sakamoto, A., & Sung, J. (n.d.). ***Skills and the Future of Work Strategies for inclusive growth in Asia and the Pacific.*** https://www.ilo.org/wcmsp5/groups/public/—asia/—ro-bangkok/—sro-bangkok/documents/publication/wcms_650239.pdf

REFERENCES contd.

76. Servoz, M. L., & from International Labour Organisation. (n.d.). ***Hotels, catering and tourism sector***. www.ilo.org/Tourism. Retrieved July 24, 2021, from https://www.ilo.org/global/industries-and-sectors/hotels-catering-tourism/lang–en/index.htm

77. Silvera, J. (2021). Key Advantage to ***Fix Middle-Management Crisis in Tourism Sector***.

78. ***Skills and Future of Work: Strategies for Inclusive Growth in Asia and the Pacific***. (2018). International Labour Organisation (ILO). https://www.ilo.org/wcmsp5/groups/public/@asia/@ro-bangkok/@sro-bangkok/documents/publication/wcms_650239.pdf

79. ***St Lucia's Medium Term Development Strategy 2020-23.*** (n.d.). https://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Saint%20Lucia%20MTDS%202020-2023.pdf

80. ***St. Kitts Tourism Sector Strategy and Action Plan 2014-2019***. (n.d.).

81. ***St. Vincent and The Grenadines National Economic and Social Development Plan 2013-2025***. (2013, January 11). https://observatorioplanificacion.cepal.org/sites/default/files/plan/files/SanVicenteylasgranadinascompleto.pdf

82. State of the Global Workplace 2022 Report: The Voice of the World's Employees. (2022). ***GALLUP***.

83. ***Sustainable tourism: A driving force of job creation, economic growth and development.*** (2016, May 17). www.ilo.org. https://www.ilo.org/global/about-the-ilo/newsroom/news/WCMS_480824/lang–en/index.htm

84. Terry, W. C. (2011). Geographic limits to global labor market flexibility: The human resources paradox of the cruise industry. ***Geoforum, 42***(6), 660–670. https://doi.org/10.1016/j.geoforum.2011.06.006

85. The Future of Work and Skills Development in Tourism. (2019). ***UNWTO/CEGOS***.

86. ***The Haiti Roadmap: A 2020-2040 Vision Prepared by the NAAHP Working Group – 2018***. (2018). Cfihaiti.com. https://cfihaiti.com/index.php/en/business-sectors/tourism

87. ***The Singapore Workforce Skills Qualification Framework (WSQ Framework) SSG | Skills Framework for Tourism***. (n.d.). Www.skillsfuture.gov.sg. Retrieved September 29, 2022, from https://www.skillsfuture.gov.sg/skills-framework/tourism

88. ***Tourism Industry Reform: Strategies for Enhanced Economic Impact. (2017).*** Caribbean Development Bank.

89. ***Tourism Sector in the English and Dutch Speaking Caribbean: An Overview and the Impact of COVID-19 on Growth and Employment.*** (2020). ILO.

REFERENCES contd.

90. ***Tourism Services Final Project Report.*** (2018). CARICOM/Caribbean Export.

91. ***Tourism Travel & Hospitality Workforce Development Strategy 2014-19.*** (n.d.). Service Skills Australia.

92. Training Needs Next 3-5 Years: Quality Consultants. (1999). ***Quality Consultants***, 98.

93. ***Travel & Tourism Economic impact 2015 WORLD***. (2015). World Travel and Tourism Council. https://caribbean-hotelandtourism.com/wp-content/uploads/data_center/global/WTTC-WorldEconomicReport2015.pdf

94. ***Travel and Tourism Economic Impact*** 2021. (2021, June). https://wttc.org/Portals/0/Documents/Reports/2021/Global%20Economic%20Impact%20and%20Trends%202021.pdf

95. ***TURKS AND CAICOS ISLANDS DEVELOPMENT STRATEGY.*** (2013). http://www.caribbeanelections.com/eDocs/strategy/tc_strategy/tc_development_strategy_2013_2017.pdf

96. U.N. Environment. (2018a, January 23). ***Green Economy***. UNEP - UN Environment Programme. https://www.unep.org/regions/asia-and-pacific/regional-initiatives/supporting-resource-efficiency/green-economyAccording to UNEP a green economy is defined as low carbon, resource efficient and socially inclusive. In a green economy, growth in employment and income are driven by public and private investment into such economic activities, infrastructure and assets that allow reduced carbon emissions and pollution, enhanced energy and resource efficiency, and prevention of the loss of biodiversity and ecosystem services

97. U.N. Environment. (2018b, January 23). ***Green Economy***. UNEP - UN Environment Programme. https://www.unep.org/regions/asia-and-pacific/regional-initiatives/supporting-resource-efficiency/green-economyAccording to CARICOM Secretariat, The orange economy, also known as the creative economy includes all sectors whose goods and services are based on the creation of intellectual property, such as design and visual arts, tourism and cultural heritage, new media and software, performing arts, music, and literary arts and publications

98. Ventura, A., & Wint, S. (2020). ***Building a Framework for an Integrated Caribbean Science, Technology and Innovation System for Socio-economic development***.

99. ***Vision 2040: National Development Plan of The Bahamas.*** (2017, May). Https://Observatorioplanificacion.cepal.org/Sites/Default/Files/Plan/Files/Plan%20de%20desarrollo%202040.Pdf.

100. Work, G. P. to. (n.d.). ***Great Place to Work***. Great Place to Work United States. https://www.greatplacetowork.com

101. ***World, Transformed: Megatrends and their implications for Travel & Tourism***. (2021). World Travel & Tourism Council (WTTC) and Bloomberg MediGroup.

REFERENCES contd.

102. WTTC. (2021). ***Economic Impact | World Travel & Tourism Council (WTTC)***. Wttc.org. https://wttc.org/Research/Economic-Impact

103. (n.d.-a). Https://Www.un.org/Regularprocess/Sites/Www.un.org.regularprocess/Files/Rok_part_2.Pdf; United Nations. World Bank defines the blue economy as the "sustainable use of ocean resources for economic growth, improved livelihoods, and jobs while preserving the health of ocean ecosystem

104. (n.d.-b). https://caribbeantourisminstitute.com


CARIBBEAN DEVELOPMENT BANK
CARIBBEAN TOURISM ORGANIZATION