

**SOMMET
EDUCATION**

The State of Hospitality 2022



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EDITORIAL

Graduating from HEC business school in Paris, Benoît-Etienne Domenget started his career with Accor Group, managing different hotel properties before joining the corporate office as Senior Vice-President Development to head the group's strategic development in Europe, Middle-East and Africa (EMEA) regions.

From 2011 to 2015, Benoît-Etienne acted as Managing Director of Accor Switzerland, leading the expansion of the brand portfolio in the Swiss market and directly supervising its 55 properties. He was then called to the helm of Michel Reybier Hospitality Group, including luxury hotels such as La Réserve and Victoria-Jungfrau Collection, vineyards and wellness businesses.

In January 2017, Benoît-Etienne was appointed CEO of the newly-formed Sommet Education.

Hospitality is a people-to-people sector. Hospitality is more than a business. It's a community of contemporary nomads sharing the same curiosity for travel, an openness to different cultures, the attention to detail, the willingness to welcome and please others.

Having spent the last 20 years in that industry, I had the opportunity to experience how much people make a difference. People in our industry are more than a key success factor, they are the very heart of our DNA.

At Sommet Education, we believe that education is a driving force of Hospitality. We prepare the new generation of talents that will shape the Hospitality industry of tomorrow. Throughout the world, we have asked number of industry Leaders to share their views on the current challenges and trends of our sector.

They all acknowledge the recent circumstances and issues faced by the Hospitality industry. They also all acknowledge the need for further developing the new generation of Hospitality professionals and giving them access to education and life-long learning opportunities.

Hospitality is a land of opportunities, and education is a key to seize them.

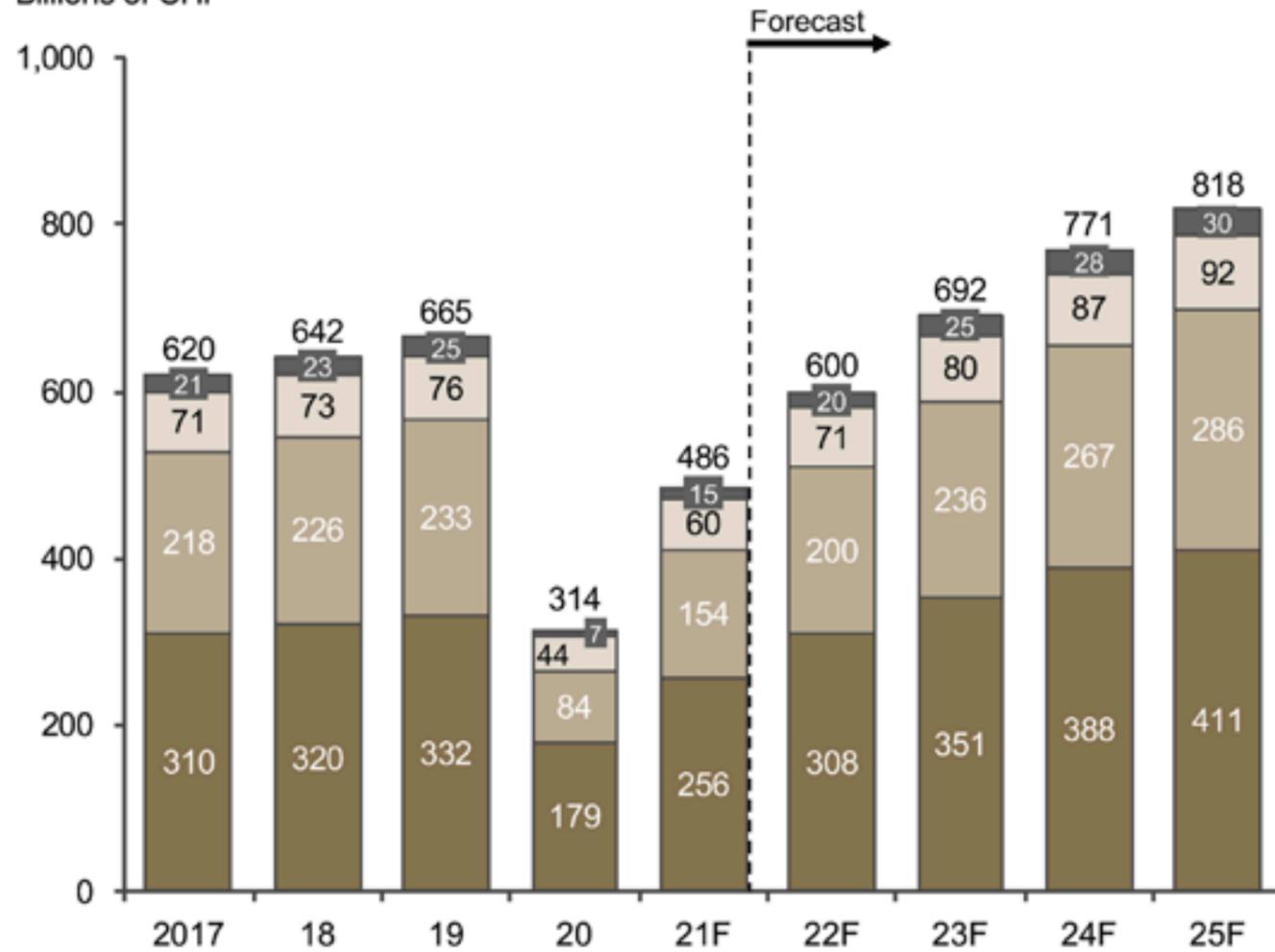
Benoît-Etienne Domenget
CEO Sommet Education

SHARP RECOVERY AHEAD

HOSPITALITY INCLUDES HOTELS, PACKAGE HOLIDAYS, VACATION RENTALS AND CRUISES. SPEND ON THESE AREAS IS EXPECTED TO RECOVER SHARPLY FROM 2020-21, SURPASSING PRE-COVID LEVELS IN 2023 FORECAST, WITH GROWTH ACROSS VERTICALS

Total spend on travel and tourism industry, by segment (2017-25F)

Billions of CHF



	CAGR		
	('17-'19)	('19-'20)	('20-'25F)
Total	3.6%	(52.8%)	21.1%
Cruises	7.5%	(71.6%)	34.1%
Vacation Rentals	3.3%	(41.7%)	15.8%
Package Holidays	3.4%	(63.9%)	27.7%
Hotels	3.5%	(46.1%)	18.1%

Drivers for growth



Government Stimulus

- Most countries have launched recovery plans to safeguard jobs and restart tourism industry



Pent-up demand

- General population is increasingly keen to resume traveling

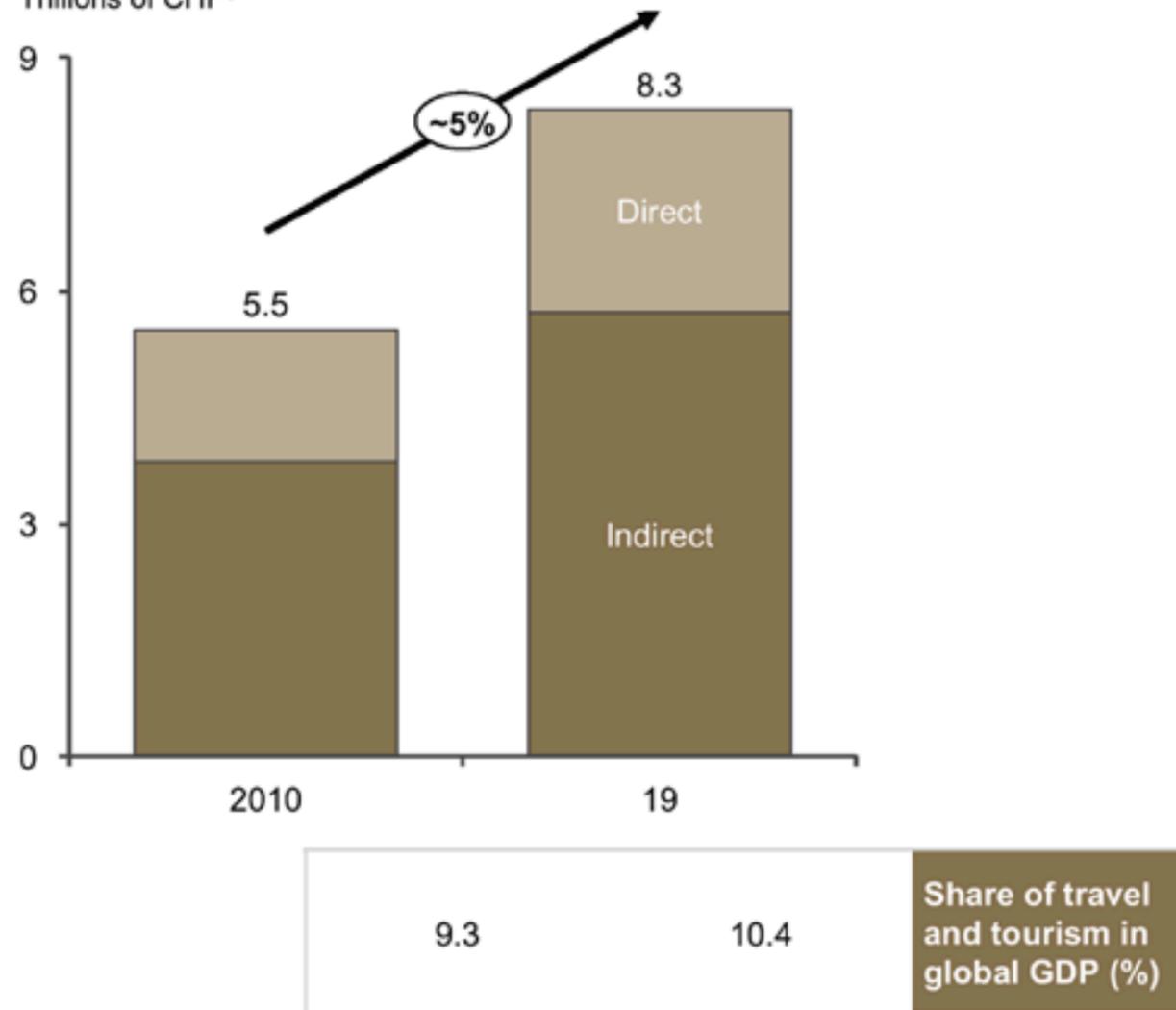
Note: ¹Conversion ratio used to convert source data: 1 CHF = 1.12 USD
Source: Statista Travel and Tourism report 2020, research and analysis

STEADY GDP CONTRIBUTION

HOSPITALITY CONTRIBUTED ~CHF 8T TO GLOBAL GDP IN 2019,
OUTPACING THE GROWTH IN GLOBAL GDP OVER THE PAST DECADE

Total contribution of travel and tourism to global GDP, by type (2010-19)

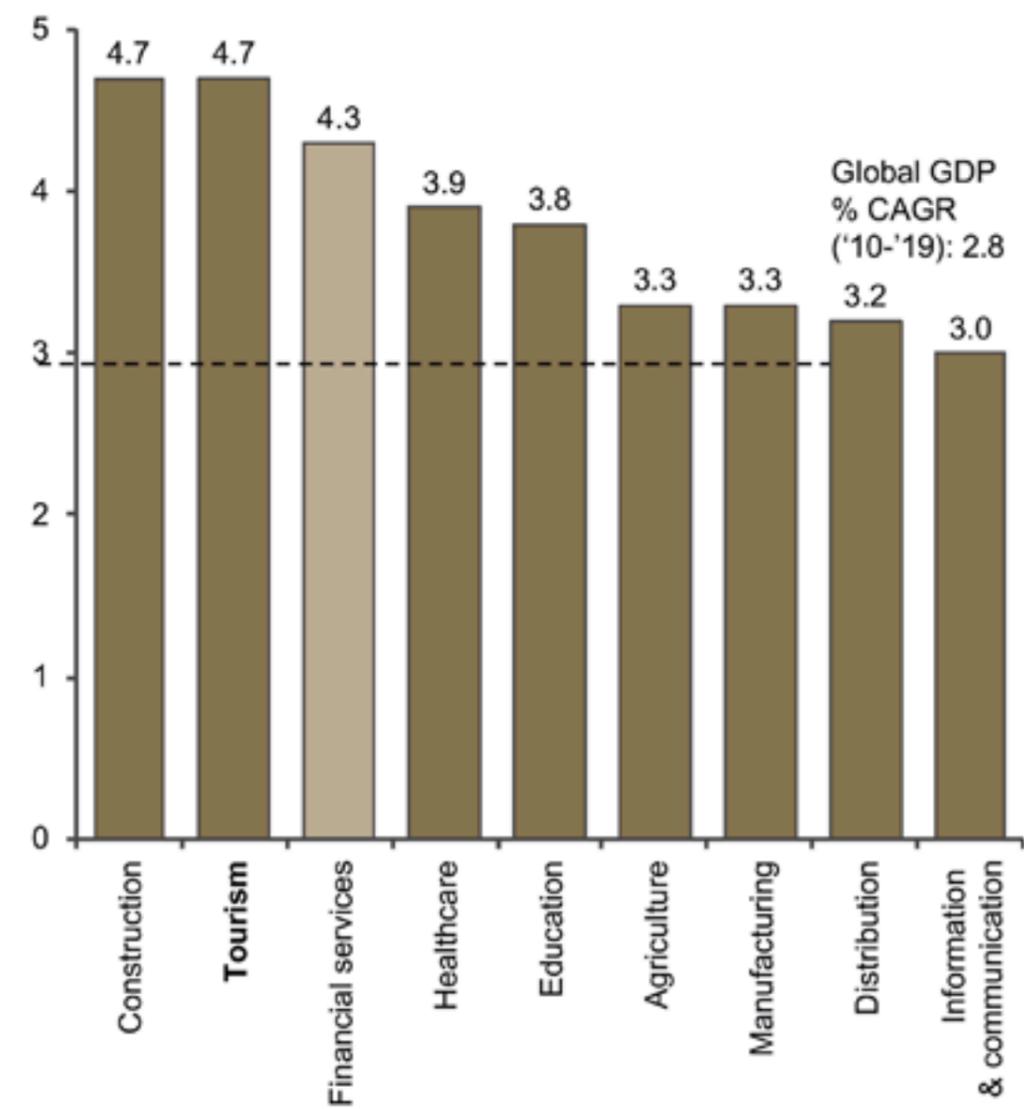
Trillions of CHF¹



Note: ¹Conversion ratio used to convert source data: 1 CHF = 1.12 USD
Source: WTTC, World Bank, Oxford Economics, research and analysis

Global GDP growth, by fast-growing sectors (2010-19)

% CAGR

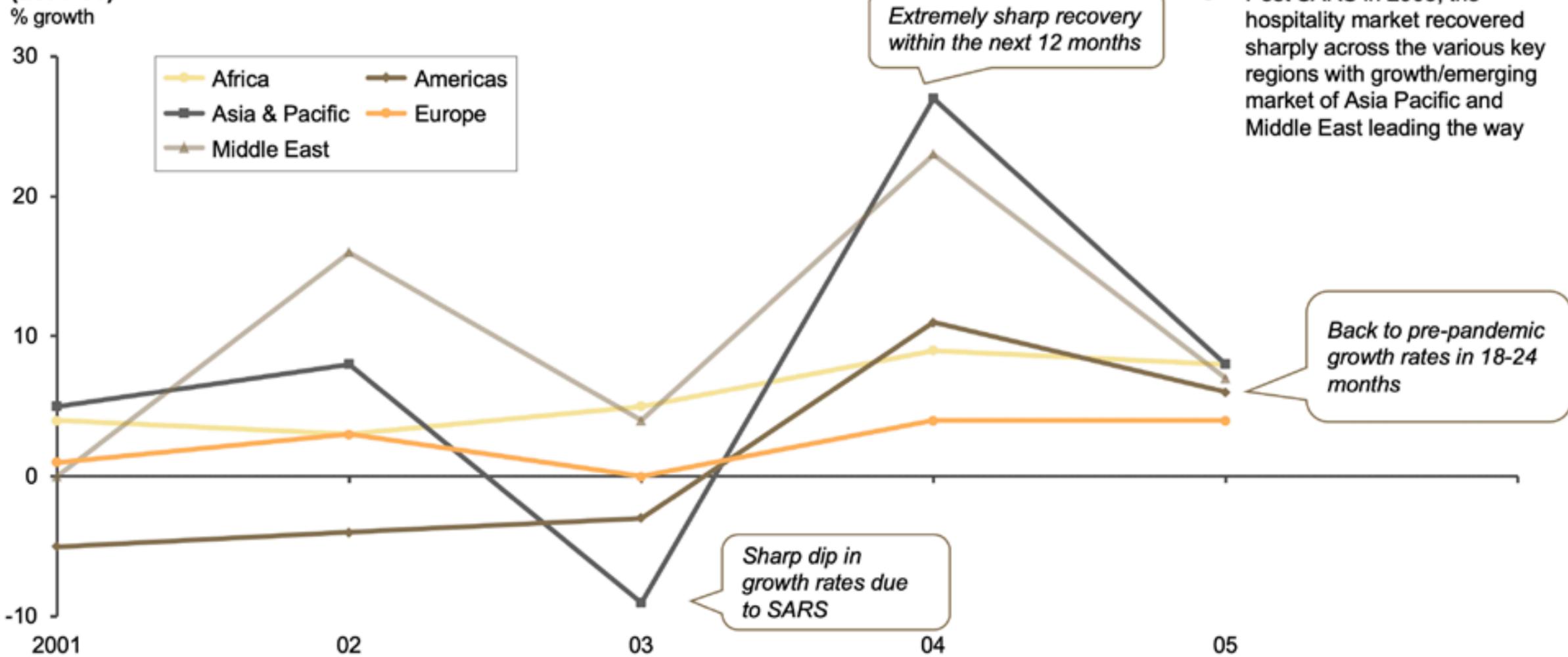


PROVEN RESILIENCE

HISTORICALLY, THE HOSPITALITY SECTOR HAS RECOVERED STRONGLY FROM SIMILAR PREVIOUS SHOCKS (E.G. SARS)

Tourism levels saw a rapid recovery post SARS

Growth in international tourism arrivals to global regions, by region (2001-05)

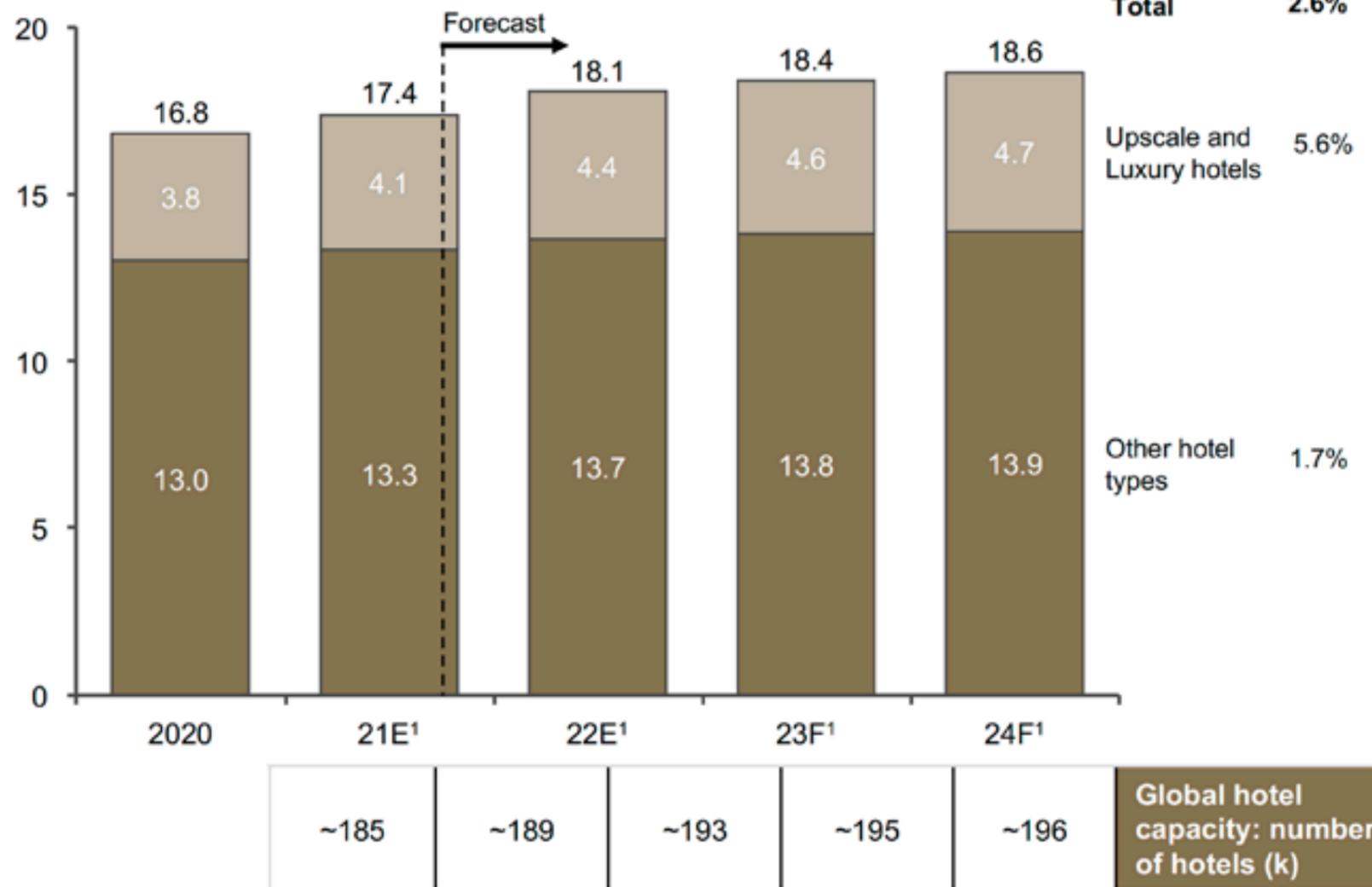


FUTURE INVESTMENTS

INVESTMENTS IN FUTURE CAPACITY BY LUXURY AND UPSCALE HOTEL CHAINS ARE EXPECTED TO DRIVE GROWTH IN THE MARKET

Hotel capacity, by segment (2020-24F)

Millions of hotel rooms



- Hotel capacity is expected to grow despite the impact of the pandemic on the travel and tourism industry

“... Hotel chains did large investments to increase their capacity and did not stop their constructions despite the pandemic. **Marriot, for instance, has lots of new hotels opening in both MEA and APAC, as well as Hilton.** Companies will need to recruit heavily once the new hotels / rooms will be operating ...”

- General Manager, Marriott



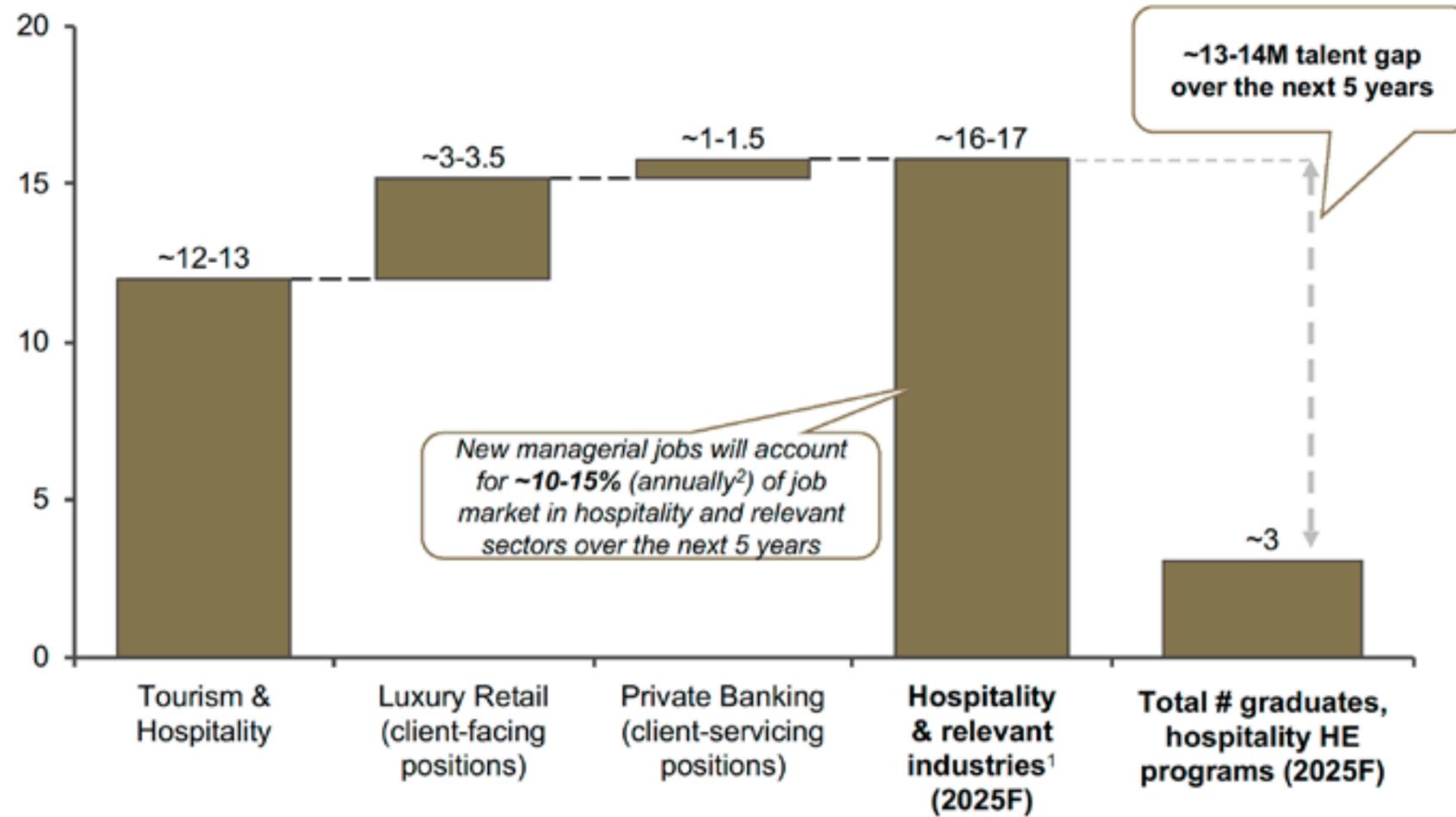
Note: ¹Capacity for 2021 and 2022 is already built-in / under construction process and thus is classified as estimate while 2023-24 is a forecast
 Source: STR Global, research and analysis

TALENT GAP OPPORTUNITY

OVER THE NEXT 5 YEARS, THERE WILL BE A SEVERE TALENT GAP FOR POSITIONS THAT WOULD BE WELL SUITED FOR HOSPITALITY GRADUATES

New jobs requiring higher education degrees, by hospitality and relevant industries (2020-25F)

Millions of employees



Industry feedback highlights lack of quality talent in current hiring pool

“... The talent disruption is real. It is not just a cyclical insurgency. The market forces driving this disruption are structural and long-term...countries such as U.S, Canada, Australia, Germany, the UK and Japan are facing severe challenges in **attracting qualified talent into the hospitality sector**, with an estimated combined millions of jobs unfilled and growing, amidst a wave of hotel openings in the next few years ...”

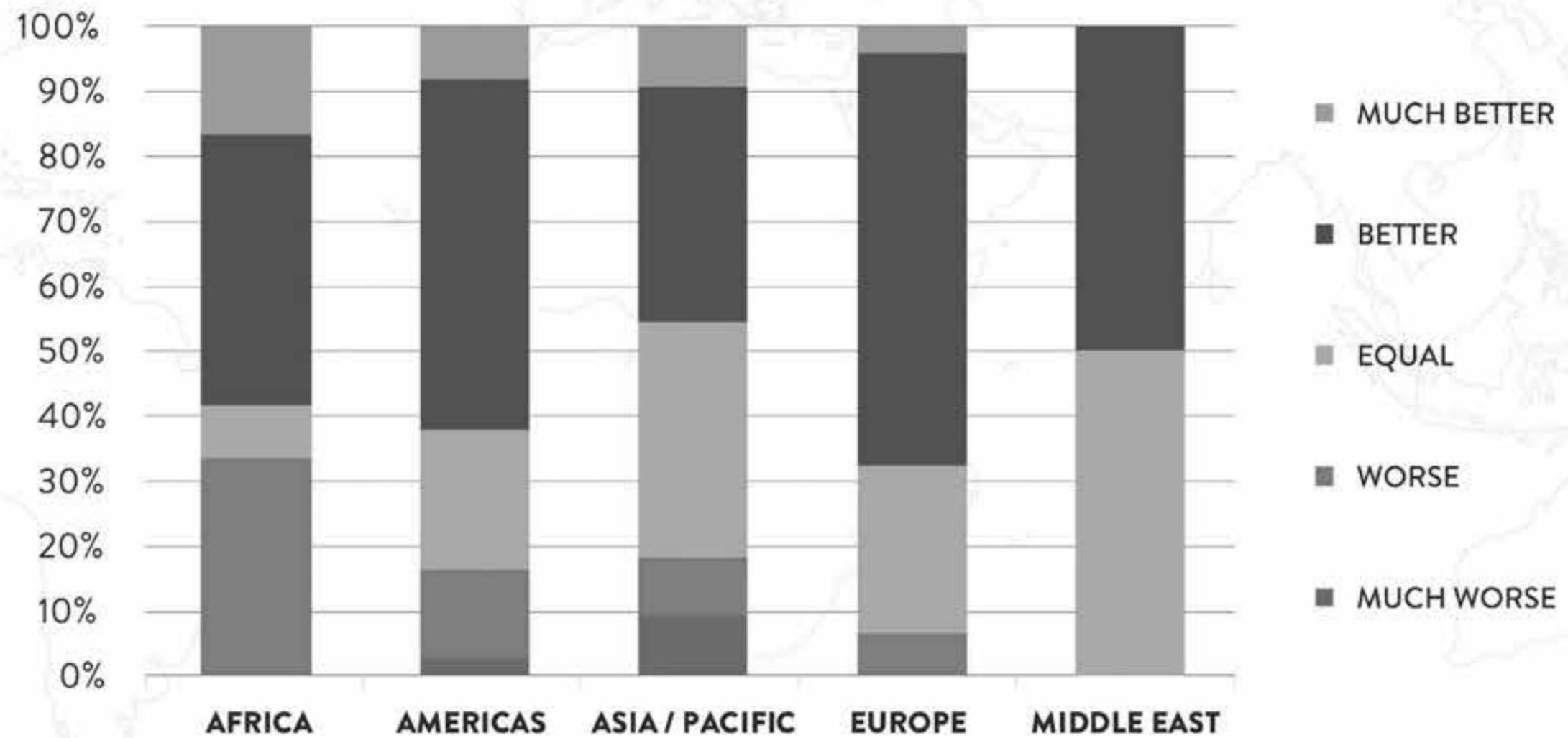
- Founder & CEO of Mogul, a venture-backed technology company in hospitality and real estate, (2020)

Note: ¹Estimated based on forecasts of incremental tourism and travel jobs between 2020 and 2025F share of managerial positions; ²Assumed uniform spread of total 5-year incremental over the period of 2020-25F

Source: WTTC, Statista, IBIS World, research and analysis

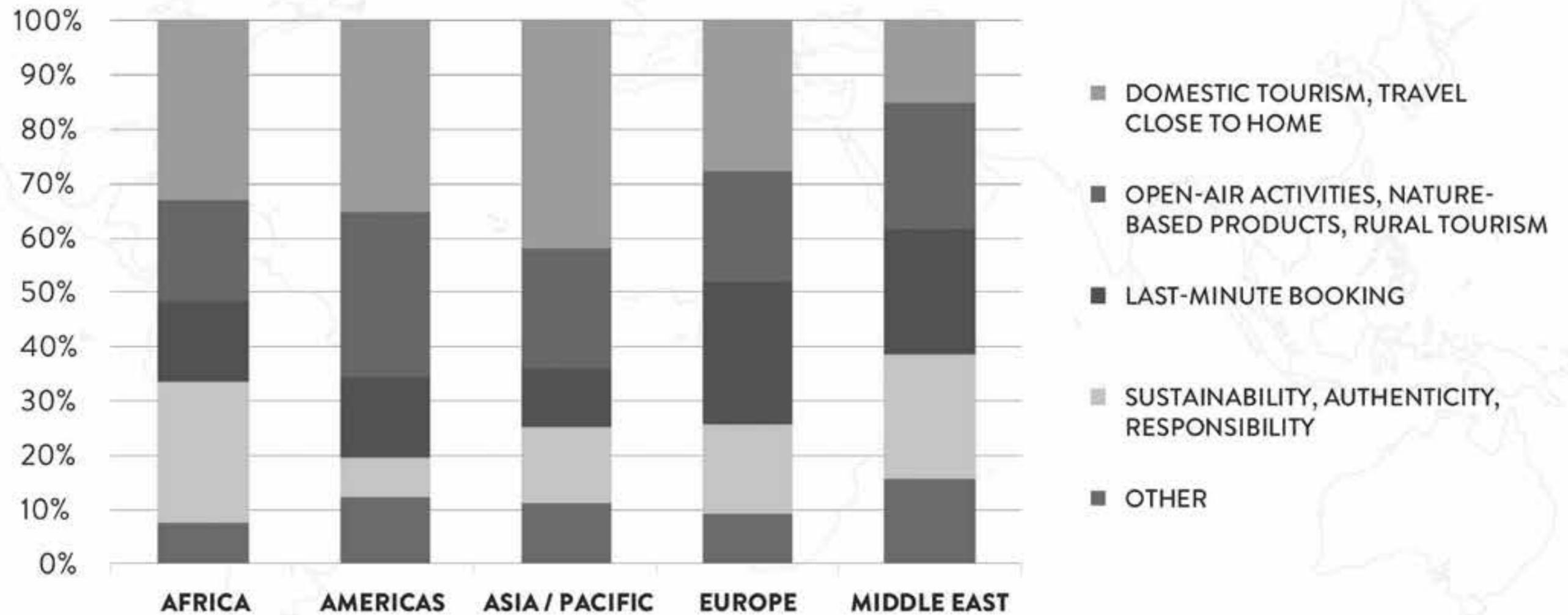
EXPERTS FROM MOST WORLD REGIONS INDICATE BETTER PROSPECTS FOR 2022

WHAT ARE YOUR PROSPECTS FOR TOURISM PERFORMANCE IN YOUR
DESTINATION OR BUSINESS IN 2022 AS COMPARED TO 2021?



SOURCE: WORLD TOURISM ORGANIZATION (UNWTO)
UNWTO PANEL OF EXPERTS, JANUARY 2022 SURVEY

DOMESTIC TOURISM, TRAVEL CLOSE TO HOME, OPEN-AIR ACTIVITIES, NATURE-BASED PRODUCTS AND RURAL TOURISM IDENTIFIED AS MAJOR TRAVEL TRENDS IN 2022



SOURCE: WORLD TOURISM ORGANIZATION (UNWTO)
UNWTO PANEL OF EXPERTS, JANUARY 2022 SURVEY

CHANGES IN CONSUMER TRENDS SHORT-LIVED TRENDS OR HERE TO STAY?

CLOSER

Domestic tourism has shown positive signs in many markets since people tend to travel closer. Travelers go for 'staycations' or vacations close to home.

GET AWAY

Nature, Rural Tourism and Road Trips have emerged as popular travel choices due to travel limitations and the quest for open-air experiences.

MORE RESPONSIBLE

Sustainability, authenticity and localhood: travelers believe in the importance of creating a positive impact on local communities, increasingly searching for authenticity.

LONGER STAYS & HIGHER SPENDING

2021 has seen a significant increase in spending per trip and longer stays.

SOURCE: UNTWO

MR. LUIS ARAUJO

PRESIDENT OF TURISMO DE PORTUGAL & PRESIDENT OF THE EUROPEAN TRAVEL COMMISSION (ETC)



Luis Araújo is the President of Turismo de Portugal (Portuguese National Tourism Authority) since February 2016.

He is also President of ETC - European Travel Commission since September 2020 and President of NEST - Tourism Innovation Center in Portugal. He has a degree in Law.

Board Member at Group Pestana responsible for the Hispanic America hotels operations Argentina, Venezuela, Colombia and Cuba. He was also Head of Development for the same Continent and Head of Sustainability since the creation of the department in 2009.

From 2001 to 2005 he worked for the Brazilian branch of the company where he was successively Board's Associate for New Projects in Brazil, Board Member and Vice President for the Group Pestana in South America, with responsibility for New Business Development and Area Operations.

He served the Portuguese Government as Head of the Cabinet of the Portuguese Secretary of State for Tourism between 2005 and 2007.

Why is there such a labor shortage?

Tourism has faced, over the years, issues of reputation regarding its work labor: low salaries and intensive work, instability mainly due to seasonality, no need for trained staff in order to execute certain tasks, low digitalization of the sector. If we add to this the need for soft skills trained staff for many companies outside tourism, the lack of attractiveness and of qualifications and the ageing of populations in many touristic destinations (mostly in Europe), it becomes clear why the sector is facing such a labor shortage.

What do private actors do to attract and retain talents in this context?

Attract people from other countries or train those who came to our countries searching for better living conditions (ex. specific training programmes for refugees); accelerate digitalization through fiscal incentives, support training as a benefit for the employee, support entrepreneurship in the sector, improve digital training programmes both for young people as for people working; support not seasonable touristic products; attract longer stays and diversify markets.

How can we improve the role of women in Hospitality & Tourism to have a more inclusive industry?

Establishing quotas in public and private sector; including gender parity as one of the most important criteria for the ESG; supporting leading role of women in private and public sectors; stimulate women visibility in the sector; establishing strict laws and fines against gender pay gap; Help women gain power; refuse to participate in public events that are not gender balanced; provide training about inclusion; create rules of having diversity in teams.

« support training as a benefit for the employee.



Ashwin joined L.E.K. in 2018 and was previously a Managing Director at the Education Centre of Excellence at EY- Parthenon.

Ashwin Assomull is a Partner at L.E.K. Consulting, head of both the Mumbai and Singapore offices, and a founding member of the firm's education practice. Ashwin has worked on over 300 education-specific cases and has led more than 200 engagements in the education sector, across all verticals including K-12, Higher and Vocational Education, Transnational Education, English Language Training and Education Technology.

Ashwin frequently advises CEOs of top education companies and investors on buy- and sell-side diligences, market-entry strategy, and pricing strategy, and full potential assessments. He is also a regular speaker at industry-leading conferences such as EdEx MENA, UK-Middle East Education Summit, IPSEF and Abu Dhabi Ideas Weekend and has close links with regulatory bodies like the KHDA and ADEK. In addition, Ashwin is often quoted by prominent publications like The Economist, Financial Times, Khaleej Times, Gulf News and Arabian Business.

He holds a Bachelor of Science from the London School of Economics and a Master of Business Administration from London Business School.

What is your definition of the Hospitality industry?

Hospitality includes hotels, package holidays, vacation rentals and cruises.

What are the economical and financial perspectives of the Hospitality industry?

Hospitality contributed ~CHF 8t to global GDP in 2019, outpacing the growth in global GDP over the past decade.

Is the sector showing resilience, how and where?

A recovery has been observed in the market since the height of the pandemic in April/May 2020. The rebound has been sharper in markets (such as China and Middle East) where COVID-19 cases are relatively lower and government regulations have allowed mobility within the country and internationally. Industry experts foresee a return to travel driven by pent-up demand and vaccination campaign; reaching pre-COVID levels by 2022 Forecast. Let's state of few key actors :

"... There is a strong desire to travel again as soon as possible, signs of recovery were seen at the end of 2020, but then the second wave emerged. Thanks to vaccination campaign we expect a healthy recovery by 2022 ..."
- VP HR EMEA, Hyatt Hotels

"... As the vaccine gets widely distributed, we see strong and steady prospects for demand growth in travels. Companies tell us to be anxious to return meeting face to face with their business partners and customers ..."
- CEO, Marriot (02/2021)

"... Thanks to vaccination campaigns, people will be allowed to travel again soon. The first step will be domestic travels, but by 2022 we expect to have returned to normal everywhere ..."
- Former HR Director, Mandarin Oriental Group

Business travel continues to remain under pressure but we are confident that leisure travel is rebounding and will continue to grow. In the past, we have seen Hospitality recover from shocks such as SARS.

What roles play private and public actors in the state of this industry and its rebound?

The private sector is investing significantly in capacity especially in luxury Hospitality.

Do they complement each other or follow different strategies?

The public actors are very keen to encourage tourism in all parts of the world. For example, markets that have never promoted themselves for mainstream tourism are investing in promotion (e.g. Saudi Arabia). Many government agencies are keen to encourage established Hospitality brands to invest and build capacity in their markets.

What do you think is within this context the role of education?

We are observing a few major trends that the role of education will need to play in ensuring that the Hospitality has the right levels of talent to support the growth of the sector.

The sector needs to attract and encourage students from schools to pursue Hospitality education. Over the next 5 years, there will be a severe talent gap for positions that would be well suited for Hospitality graduates.

Operators need to provide higher levels of training and deeper levels of learning through a broader range of Postgraduate offerings. Postgraduate courses are more in demand.

Institutes must also offer more short courses to help students throughout their careers to 'upskill' and reskill.

ANURAAG BHATNAGAR

CHIEF OPERATING OFFICER - THE LEELA HOTELS, RESORTS & PALACES



Over the years, he has spearheaded world-renowned Indian and International hotel brands through his strategic and inspirational leadership.

Anuraag Bhatnagar, the Chief Operating Officer at The Leela Palaces, Hotels and Resorts is a dynamic leader with a career spanning over 27 years. Anuraag has a passion for operational excellence and an unwavering focus on delivering highly personalized and memorable guest experiences.

He is a result-oriented leader who is an expert at building and nurturing high-performance teams and motivating them towards achieving visionary goals. Apart from being a seasoned Hospitality professional, Anuraag's strategic business acumen and interpersonal skills have held him in good stead to create stakeholder value. He is known to effectively align brand values with key business initiatives to curate luxury brand experiences with all the knowledge that he has imbibed over the years.

Anuraag spent his early years with the Oberoi Group of Hotels before joining Starwood Hotels and Resorts and subsequently transitioning into Marriott International. Post the merger of the two companies, he was the Multi-Property Vice President for Mumbai, and Goa overseeing 12 hotels. He has worked across brands like St. Regis, W Hotels and The Ritz-Carlton, where he honed his skills in delivering luxury Hospitality experiences. Anuraag believes that luxury is all about authenticity, anticipation, innovation, and personalization.

Known as the 'Man with the Midas Touch', Anuraag is dedicated to strengthening and elevating The Leela's

positioning as an epitome of true Indian luxury, while scaling the brand's growth to new heights. His global mindset and exemplary understanding of the luxury consumer segment is instrumental in leading the brand through the next phase of its growth trajectory.

Anuraag is one of the most felicitated and awarded hoteliers in India. He was recognized as the 'Hotelier of the Year' by Vir Sanghvi at the EazyDiner Awards 2017 and by Chef Sanjeev Kapoor at the Food Food India Awards 2018. In 2017, he won an award for the prestigious new category award; 'COO/VP of the Year - International' by Hotelier India.

A prolific orator, Anuraag regularly contributes his personal and professional time to speak at Academic Institutions and industry forums like HICSA. He is an alumnus of Delhi University, IHM Pusa and is also on the board of BW Hotelier and Hotelier India magazine. Anuraag has also done short Management and Leadership courses from the Indian Institute of Management, Bangalore, and the University of North Carolina.

He is an avid whisky and food enthusiast whose newfound joy is his fitness regime. He enjoys spending his leisure time watching movies, listening to music, and relaxing with some reading. Anuraag is an active trekker who seeks out new destinations to travel to and a family man, who enjoys spending time with his wife, son, daughter-in-law and their 2 dogs.

Education and learning continues to be important globally. Is there a need to increase focus on education within the tourism & Hospitality industry? What can be done in regard to addressing skill gaps through education for Hospitality professionals?

According to a recent study, by the year 2028, Tourism Industry will contribute \$460 billion towards India's GDP and the very next year, it will account for 53 million jobs. Such heavy growth needs to be supplemented with quality education that can bring out the best of our talent. An education that will not only equip this young talent with the skills they need, but also imbibe values for long term sustenance by providing students with 360°-degree holistic learning must be the focus of today's education.

There is a huge gap between the pre-set standards of learning at schools and what happens in the real world. The need of the hour is to create a system that learns, modifies and adapts with changing times and preferences. The new normal today has changed our thinking and is pushing all of us to adapt, innovate and think differently.

Besides the ongoing challenges, we need to design a sustainable learning model that will keep up with current demands. Today, Teaching methods need to be advanced and sensitive to the needs of different minds, teaching needs to focus on an industry-education collaboration, that will give the best of both worlds to Hospitality and tourism professionals. From inspirational guest lectures, sessions with influencers and inspirational achievers, intensive bootcamps, to value-based learning experiences, a wide variety of happenings need to be offered to one and all. Only then can we mould potential talent to become future leaders by strengthening them into taking leadership roles in the Hospitality and tourism industry.

How can the industry contribute towards the development of future leaders?

The industry is constantly evolving, growing in multitudes and will look way too different 10 years from now. The leaders of tomorrow should be individuals who can take on responsibility of a globally connected world, that is diverse in its offerings and have the bandwidth to take on challenges we haven't even witnessed till date. So, to shape our future ready leaders, the industry will have to create resources that can deploy a new collection of skills and mindsets to lead effectively. The stratagem should have nuances that cater to the needs of the Hospitality and tourism industry and the expectations of a luxury consumer.

One way to tackle the plot is by curating a leadership program that helps refine in-house talent woven into the brand and aids in becoming better decision makers by overall upskilling, training and development. Taking foreground

from this thought, The Leela Palaces, Hotels and Resorts has brought forward Leela Leadership Development Program, a tailored Management Training programme which trains professionals in global Hospitality competencies. With a combination of classroom and on the job training, the blended learning modules will develop the finest talent who have a passion for Hospitality while transforming and fast tracking their growth as future managers ready to fill in bigger shoes for the coming generations.

Such leadership programs are a great opportunity to upskill the talent and bridge the skill gaps. Learning, training and development is a constant process.

What are the challenges of ethical recruitment in the current economic and social climate of the tourism & Hospitality industry (employment of the less qualified workforce and young professionals, gender parity of the workforce within the sector and among different job types, levels of qualifications, etc.)? What should be the role of the industry in this regard?

For a while now, we all are witnesses of varying scenarios when it comes to lockdown and travel restrictions. It is all leading us to an era that no one has lived before, telling us go create a path around it and having to build our lives filling the gap between a pre pandemic world and of what we call the new normal. This gap brought in enormous changes, making us shift to a virtual world where learning was restricted to laptop screens and zoom classrooms. However, when it comes to the Hospitality and tourism industry, we are in the business of people, experiences and emotions which cannot always be relayed on a screen. A lot of the work that we undertake is practical, hands-on, focused on face to face interactions that can only be passed on through real life teaching methods and training.

We agree that a challenge persists, but the threats need to be tackled with a problem-solving approach. The industry needs to sensitize itself for the incoming batch and be more patient with inducting and training them in their new roles. We need to create a new pathway that will amplify learnings and convert them into real-life lessons. With the help of the Leela Leadership Development Program we have tried our best to build around a world class curriculum that will provide a solution to the pertaining issues. In partnership with Indian School of Hospitality (ISH) and in alliance with Les Roches, an institute of higher education, The Leela is reimagining Hospitality education for today's generation and tomorrow's businesses.

As an industry we need to be more accepting and patient and positively impart learning and skills by deepening the foundation and building leaders of tomorrow both in the Hospitality and tourism industry.

CATHERINE CHAUBEAU

HUMAN RESOURCES DIRECTOR – LARTISIEN GROUP



Expert in the world of luxury, Catherine Chaubeau has a rich and exciting background within several large corporations.

She is a graduate from the CMH school - International Hospitality Management - and holds a master's degree in social law and human resources management from "Conservatoire National des Arts et métiers" in France.

She began her career in 1998 with the L'Oréal group as Training Manager then joined the Hilton group to become Human Resource Manager. In 2002 she joined the luxury house Cartier where she successively held the positions of Director of Human Resources of Cartier Joaillerie, and Cartier International, then took on the HR functions of the Cartier North America subsidiary in New York to organize, structure and develop the Retail and Corporate teams.

What is the current state of the Hospitality, tourism, and travel industry in France and internationally? How does France compare to other countries in terms of tourism, development and innovation? What are the medium and long-term prospects?

The luxury Hospitality industry has of course suffered greatly over the past two years. France has been one of the countries most affected in terms of tourism. We will never forget the striking images of those iconic palace hotels whose gates remained closed for months on end. On the other hand, some destinations such as Dubai or the Maldives benefited from the stricter measures adopted by other countries, and we took a lot of bookings for these locations last year. France, and Paris in particular, is nevertheless experiencing strong growth in the luxury Hospitality sector, as evidenced by the openings of the Cheval Blanc and Bvlgari brands, something that has not happened on the Parisian scene for a long time.

What are the recruitment challenges within the current economic and social context of the tourism and Hospitality industry, particularly in France and in the countries where you are represented (Mauritius, Asia, Middle East)?

Our company is positioned more as a creator of exceptional travel and lifestyle experiences than as a pure hotel player. The challenge in terms of recruitment for our business is to attract talent mainly from the luxury industry by promoting the renaissance of the luxury tourism sector - which has suffered a lot during the public health crisis - and consequently of career opportunities. We also need to ensure that we remain competitive in terms of technological/digital innovation. Some of our functions such as IT for example are evolving within a very competitive international context.

The hotel industry also faces different challenges, as recruitment difficulties cannot be solved without an in-depth reflection on work organisation (managerial culture, working hours, revaluation of professions, etc.)

What are the new challenges and expectations for integrating the talents of tomorrow and what are their expectations? Are you implementing specific practices to attract these new talents? What is your vision of recruitment and employment in the next ten years?

The challenges are essentially based on the new values that the company must embody (diversity, CSR, employees' work-life balance, etc.), the meaning given to each of the

functions and the way in which the company values them. Future generations expect to demonstrate their entrepreneurial spirit and value creation. This is a real challenge for companies because not all functions are inherently able to satisfy these aspirations.

Lartisien offers this opportunity thanks to its size and family culture as well as an organisation with a hierarchy that is not strongly pyramid-based. Our ambition to develop innovative and high-end products is clearly a criterion for ensuring attractiveness. The challenge is to bring more structure to our still modestly sized organisation.

The ultra-swift evolution of new technologies and artificial intelligence will force companies in the sector to question the definition of required skills and the appearance of new professions while preserving service excellence and traditional expertise.

What role does education, and more specifically continuing education, play in your human resources policy?

Our company has defined this year - and for the years to come - the integration and continuing training as priority objectives within the context of Lartisien's high-end luxury positioning. This must be a major focus of employer brands within our field of activity. The luxury industry is an ultra-competitive sector and is no longer confined to 'The French Exception'.

Furthermore, the educational and cultural background of some employees can be a hindrance in achieving our ambition despite a very strong sense of customer relations (which is also the case in the hotel industry). It is the company's responsibility to support its internal talent in acquiring new knowledge and expertise.

Do you think that developing internal talent is a priority today?

We have to be clear-sighted about the fact that employees who are just starting out in their careers and the new generations are likely to change companies and work methods several times during their careers. The challenge is therefore to offer them a working environment and development prospects that are sufficiently attractive to retain them for several years, and to achieve this quickly. Speed and impatience are factors that must be taken into account in HR policies. The role of management is therefore key in identifying teams' aspirations.

STEVEN DAINES

CHIEF TALENT & CULTURE OFFICER - ACCOR



In 2019, Steven Daines was appointed Chief Talent & Culture Officer and member of Accor's Executive Committee.

Steven Daines is a French and British national. He is graduated in Economics and holds an MBA in Hospitality Management from ESSEC.

Steven Daines started his career in Florida as a Purser on cruise ships before joining Accor in 1994. For 10 years, Steven worked in Accor's subsidiary for Train services, Compagnie des Wagons-Lits, in France, the UK, Spain and eventually in Italy where he was Country Manager for 5 years. Steven then switched to the Hotel Business and held several positions in regional hotel operations, in France and South America. In 2012, he was appointed General Manager for Formule 1 and ibis Budget for France.

He was appointed at the Executive Committee in 2014, as Regional CEO in charge of Northern Europe and Russia. He was afterwards in charge of Middle East and Africa and of the New Businesses division until end of 2017, joining then Affidea, the European leader in the operation of Diagnostic Centers, in the healthcare business.

Currently a shortage of staff is observed at all levels of qualification within the hotel industry. What are the reasons for it and what are the initiatives you take as a leading actor?

The pandemic has undoubtedly impacted staffing levels across the Hospitality industry. Hotel workers have left the industry because they have sought a better work-life balance with more flexibility in their hours (not working at the weekend or evening etc.), or because they have been able to make more money in different fields.

We believe that offering incentives to attract and retain employees is essential. Providing new ways of working, training, and development/mobility opportunities are key to helping employees achieve career progression, allowing them to explore the wider possibilities of the industry. At Accor, there are more than 300 types of job available across 110 countries, from chef to IT developer.

What can be done by public authorities to support your actions?

During the Covid-19 crisis, governments quickly understood the economic and social importance of our industry. We have established strong ties and negotiated massive economic aids to save and support tourism. By creating a mutual trust, we were able to move forward together. To face labor shortages, we must give young people a thirst for the Hospitality sector. It's for this reason that we would like our industry to be granted exemptions from payroll taxes - to encourage employers to hire but also to provide favorable conditions in terms of funding. We also would like to see more regulation of apprenticeship schemes.

What do you think can be the role of education and training in this context?

Now, more than ever, we believe that it is important that our people feel they can progress their career, grow professionally, and develop their skills within the Group. INES, our e-learning platform, continues to support this ambition and enables us to provide 'learning for all' - our people can curate a personalized learning journey over 250+ courses directly related to our organization and the industry in general. We also have our "Accor Academy", a dedicated training center with eight regional academies and over 900 certified trainers, where all Accor employees can undertake professional training.

At Accor, there are more than **300** types of job available across **110** countries, from chef to IT developer.

« Now, more than ever, we believe that it is important that our people feel they can progress their career, grow professionally, and develop their skills within the Group.



If we had to sum up his personality in few words: passion, pleasure, sharing, harmony, performance, rigor, curiosity, diversity, excellence, respect, audacity and memory. These are his 12 values, his code of honor.

Born in the Landes, Alain Ducasse is at the helm of approximately thirty restaurants, from authentic bistros and casual brasseries to three-Michelin-star restaurants, disseminated throughout eleven countries. He founded Les Collectionneurs, a network of almost five hundred independent restaurants and hotels in Europe. Passionate by knowledge transmission, he created an international Education division (Ducasse Education) in culinary and pastry arts which is today developed with the partner Sommet Education, as well as an editing company specialized in cooking art (Ducasse Edition).

He is now expanding handmade bean-to-bar chocolate shops (Manufacture de chocolat Paris, London, Tokyo) handmade bean-to-cup coffee shops (Manufacture de café Paris, London), handmade ice cream parlors (Manufacture de glace Paris).

He is the advocate of an environmentally-aware cuisine and of a peasants' agriculture which takes care of eaters' health and respects the Planet. He therefore established the Collège culinaire de France where cooks and producers meet and exchange. In the same vein, he created an accessible version of his eco-friendly cuisine to be delivered or take away: Sapid.

Currently a shortage of staff is observed at all levels of qualification within the food service industry. What are the reasons for it and how can restaurants make their job offers more appealing and attract workforce?

The reasons are both structural and conjunctural. In Japan, for instance, the difficulties are very much linked to the full-employment situation and the ageing of the population. In Europe, the pandemic and the shut-down of the restaurants led many employees to drastically change their career plans. The balance between professional and private lives tends to become a crucial issue. From this viewpoint, our industry is facing a challenge. For answering it, we have to drastically revised our model and invent a new work organization, more respectful of our workforce's private life.

In restaurants, and in the Hospitality industry in general, professionals are often promoted into management roles due to their hard skills, but lack of the necessary soft skills for the managerial side of their position. How can these talents shape their softs skills and acquire the necessary competencies to become a great leader?

First, we witness a general raise in the level of vocational initial education - which makes this problem less important since these new, young professionals have already acquired the basis of these soft skills. Then, when this initial level does not fit the requisites, training is obviously the answer. Besides usual specialised modules, exercises of role exchange also prove to be very effective to open people's mind onto human resources management issues. Upstream, the emphasise must also be put on the identification of individuals' potential and, even more important, on the follow-up of their career.

What skills and competencies should a chef entrepreneur nurture to succeed in the very competitive world of culinary arts? By what means can chefs develop these skills and competencies?

Be curious: a chef-entrepreneur must have his eyes wide open onto the world. Paul Bocuse, an icon of our trade, was often stating, very proudly and rightly, "I made the cooks step out of the kitchen". Be daring: by nature, an entrepreneur must try to develop new projects. S/he must not be afraid of failure. They are part of the venture. Be well surrounded - by a team as well as by partners. Carefully chose them and listen to their ideas.

« Be curious:
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PHILIPPE GOMBERT

PRESIDENT RELAIS & CHÂTEAUX



In 2014, during the Relais & Châteaux annual Congress in Berlin, he was elected as the President of the group.

Philippe Gombert is the son and grandson of Paris-based hoteliers who originated from the southwest of France. He began his career in the hotel industry when in 1982 his family acquired the «Château de la Treyne» in Lacave, France, some 150 miles east of Bordeaux. For the next decade, he spent his weeks working in Paris as a lawyer and his weekends at the Château, while his German-born wife Stephanie managed the property and family. Ten years later, in 1992, the Château was accepted as a member of the Relais & Châteaux family. Passionate since an early age about Relais & Châteaux thanks to his mother, Philippe served the Relais & Châteaux association for 12 consecutive years, initially as a delegate and then as a Secretary General.

Currently, two of the main issues in the Hospitality industry are to attract staff, and to retain the existing workforce. In luxury Hospitality, what are the fundamental reasons for the workforce turnover? In other words, what pushes the Hospitality professionals to quit their job and sometimes to even switch to another industry?

Turnover in Hospitality is not unlike turnover in all other sectors that are experiencing «The Great Resignation»: it is evident that employees now seek greater purpose. We must be more responsive to talent in the post-pandemic world, empowering them with trust and responsibility while offering flexible work-life balance and higher remuneration.

How do you address these two challenges of attracting staff, and to retain the existing workforce at Relais & Châteaux and the solutions you launched or are going to launch in this regard?

Relais & Châteaux's collective vision (UNESCO, 2014) is the basis for the association's upcoming employer brand, which will be launched in late 2022. The employer brand will reassert Relais & Châteaux's values to even better position us in a labour market of evolving priorities. Part of this employer brand strategy is the new recruiting site «Relais & Châteaux Careers» that launched in January, featuring a sophisticated Applicant Tracking System (ATS). Furthermore, our aim is to offer international career mobility to employees so that they can discover the world and grow their career within the Relais & Châteaux network.

What are the characteristics of a luxury hotel in 2022 and what are the skills and competencies industry talent should develop to excel in their position in luxury hotels? How can talent develop these skills and competencies and what is the role of education in their development?

Our job opportunities must afford employees room for the joie de vivre so essential in providing our guests with the enthusiasm that they come in search of. At a Relais & Châteaux, luxury is discreet and rooted in local culture; that means a warm welcome, an authentic conversation and the discovery of a new wine. In other words, passionate and engaged talent is at the heart of the entire Hospitality experience, and education and growth opportunities are the recipe for success.

Relais & Châteaux's collective vision (UNESCO, 2014) is the basis for the association's upcoming employer brand, which will be launched in late

2022

« *passionate and engaged talent is at the heart of the entire Hospitality experience.*

MANDEEP S. LAMBA

PRESIDENT INDIA & SOUTH ASIA – HVS



An established industry leader, Mandeep has won several awards and recognitions in India and abroad for his accomplishments and contribution to the Hospitality industry.

Mandeep S. Lamba, President - South Asia, oversees the HVS global Hospitality practice for South Asia. He has spent over 30 years in the Hospitality industry of which the last 19 have been in CEO positions. Having worked with leading international and domestic Hotel Companies such as IHG, Radisson & ITC Hotels, he also set up joint venture companies with Dawnay Day Group UK and Onyx Hospitality, Thailand to own and operate hotels in India, giving him a broader exposure to the Hospitality business.

He is a Certified Hospitality Administrator from the American Hotels Association (CHA), a member of the Royal Institute of Chartered Surveyors, UK (MRICS) and a member of the Tourism Council of CII (Northern India). His views are often solicited for television and print media as a spokesperson for the Hospitality & tourism sector.

Prior to joining HVS in 2018, Mandeep was the Managing Director, Hotels & Hospitality Group for JLL.

Education and learning continue to be important globally. Is there a need to increase focus on education within the tourism & Hospitality industry? What can be done in regard to addressing skill gaps through education for Hospitality professionals?

The Indian Hospitality industry has grown rapidly in recent decades, employing 8.8% of the country's workforce in 2019. However, the industry has long struggled with a shortage of trained workforce although several students graduate from Hospitality colleges each year. As per a Ministry of Tourism study, the manpower shortage in 2018 was 2.6 million, and the deficit will be 1.1 million in 2025, posing a significant threat to the sector's recovery post-COVID. Several factors have contributed to this, and educational institutions play an important role in addressing them.

The immediate need of the hour is for Hospitality institutes to upgrade their curriculum and teaching infrastructure to align with the changing needs of the industry. Skill development courses in culinary, guest services, and communication must be prioritized. It is critical that Hospitality institutes running undergraduate courses impart knowledge beyond traditional hotel operations and include a deeper insight into the business of Hospitality. Continuous counselling of students on the nature of work, career growth, and problems they will experience along the way is equally important, so that the glamour which often attracts young aspirants to this field is blended with reality, and students are better prepared for their post-campus Hospitality careers.

How can the industry contribute towards the development of future leaders?

Hospitality professionals have specific 'high-in-demand' competencies such as adaptability, outstanding communication, and collaboration skills, as well as extensive exposure to a dynamic 24x7 work environment. Therefore, over the past decade, several other allied industries have started hiring Hospitality professionals in their teams. This trend has accelerated since the pandemic, as several Hospitality professionals who were displaced and compelled to find work in other industries are now hesitant to return to the industry.

It is, therefore, imperative that the industry focuses on improving compensation standards, defining career development paths, and implementing effective succession planning to attract and retain the talent pool. Moreover, emphasizing continual learning and employee reskilling through specialized training programs geared toward future leaders can help maximize potential and enhance operations. Industry leaders should devote time and resources to training the next generation of Hospitality Leaders to help the industry achieve its full potential.

What are the challenges of ethical recruitment in the current economic and social climate of the tourism & Hospitality industry (employment of the less qualified workforce and young professionals, gender parity of the workforce within the sector and among different job types, levels of qualifications, etc.)? What should be the role of the industry in this regard?

Last two years have been difficult. Hospitality companies resorted to layoffs and salary cuts to survive the COVID crisis, and displaced Hospitality professionals were compelled to find work in other industries. With rising demand, the industry is now confronted with new obstacles. Companies are having difficulty in attracting the right talent as experienced employees are hesitant to re-join at a lower salary and prefer joining allied industries. As a result of the lessons learned from the pandemic, Hospitality companies have now learned to recalibrate their numbers and deliver 'more with less'. The industry must now pass on a share of the savings from reduced manpower costs toward more competitive compensation and work environments. Industry stakeholders should collaborate to address these issues, protect employee rights for permanent and contract workers, and implement global best practises to prevent discrimination.

While the Hospitality industry has better diversity in recruitment than most other industries, renewing our focus on greater inclusion and diversity will only benefit us. There is enough anecdotal data to suggest that businesses that prioritise inclusion and diversity are more successful than those that do not. In recent years, we've seen positive results from employing differently abled resources, which, when combined with diversity in race, gender, education, and skills, may help us reach new levels of efficiency.

JANE PENDLEBURY

CHIEF EXECUTIVE
HOSPITALITY PROFESSIONALS ASSOCIATION



Jane Pendlebury is CEO of HOSPA – the UK-based Hospitality Professionals Association – whose members span the whole Hospitality spectrum from hotels, venues and restaurants to caterers and stadiums.

Typical members have commercial responsibility and roles include Finance, IT, Revenue Management, Sales, Marketing, Operations, HR Managers and Directors.

Kickstarting her career with a degree in Hotel Management, Jane worked with both chain and independent hotels. Thereafter, Jane spent many years assisting hotels with their technology decisions on Property Management, Point of Sale and Revenue Management, ending up as Vice-President and General Manager of Agilysys in Europe.

Her relationship with HOSPA was first as a sponsor and member, then after volunteering her time assisting with the HOSPACE Conference and Exhibition she was taken on as Head of HOSPA Membership and Events Office, before being promoted to CEO.

What are the main issues and challenges facing your members in terms of employment/skills shortages (including specific roles)?

The UK Hospitality industry has very much been impacted by the effects of Brexit on the labour market. Within continental Europe, Hospitality is often regarded as a 'noble' profession and something to be proud of - but UK attitudes tend to see it as a stop gap, a short-term option. With many EU workers having either returned home, or simply looking elsewhere for work, we've been left with a shortfall. Not only this though, good candidates are now spoilt for choice and can command premium salaries. Given the impact of the pandemic on revenues, meeting these salary expectations is enormously difficult for many struggling operators.

What are the reasons for this, and what initiatives are you taking to address these gaps?

Brexit, the pandemic and the overall industry image are all causes - creating an unfortunate cocktail of challenges to overcome. At HOSPA, we're very much aware of the issues and trying to do what we can to assuage them wherever possible. Recently we've launched #ShareYourSuccess - a campaign that seeks to encourage those who've achieved success in the industry to celebrate and showcase this to encourage others to join us. Alongside this, we're actively pushing #WhyILoveHospitality as a concept, urging people to highlight and shout about just what it is that makes them love the industry. The problems outlined above were also big focuses at our annual conference, HOSPACE, with several sessions dedicated to the topic.

What are the emerging talent areas that are needed?

It's pretty much across the board. Within HOSPA's specialisms though, we're seeing opportunities in finance, revenue management and technology in particular, but practically every area is in need of an influx of talent. It's an excellent time for anyone to join the industry as the need is very much there.

What is the role of, or the need from, education and training providers to support this?

Personal development is a key part of job satisfaction. If an individual feels like they're standing still and not achieving anything of note in the workplace it's all too easy for them to look to pastures new and a fresh challenge. By actively encouraging professional development and supporting staff in this, you help to ensure that there's a sense of reward and growth, but it also helps to tie employees in for a period of time. Those committed to a course of learning won't be keen to jump ship before it's concluded - helping you to avoid the downside of those keen to job hop. While it also positions you as an employer who's keen to foster personal growth - something that helps to build longer term loyalty with staff.

What can be done by government, and other industry/sector bodies, to help organisations attract, develop and retain talent?

Hospitality is one of the largest employers in the UK, contributing an enormous amount to the economy. It often feels this impact isn't recognised or indeed appreciated. I'd love for our contribution to be properly valued! Something that would hugely help though, is a reduction in VAT, which would have an enormous benefit on Hospitality operators struggling to stay afloat amidst the current financial climate.



Personal development is a key part of job satisfaction.

ZURAB POLOLIKASHVILI

SECRETARY-GENERAL - WORLD TOURISM ORGANIZATION (UNWTO)



Zurab Pololikashvili has been Secretary-General of the World Tourism Organization (UNWTO) since January 2018.

Prior to this, he worked in a number of high-level roles in both the private and public sectors. After graduating with a degree in banking, Mr. Pololikashvili gained extensive experience in the private sector, including with a prominent role in one of Georgia's biggest banks and as CEO of the country's leading football team, FC Dinamo Tbilisi.

After a year as Deputy Minister of Foreign Affairs, he was appointed the Ambassador Extraordinary and Plenipotentiary of Georgia to Spain, Andorra, Algeria and Morocco in 2006, and was then his country's Minister of Economic Development between 2009 and 2010. In this position, Mr Pololikashvili oversaw the development of tourism within Georgia, establishing the sector as a leading employer and contributor to national economic development.

At the 23rd General Assembly of the UNWTO, Member States unanimously approved his plan of action for global tourism, including the landmark Agenda for Africa and his focus on promoting tourism as a driver of gender equality, job creation and rural development.

« *Tourism is the ultimate people-to-people sector.*

Education and learning is currently one of the main pillars of your actions at the UNWTO. What are the reasons for putting the accent on education more than other aspects of the tourism industry? What are the concrete actions you put in place in regard to access to education and training for the tourism and Hospitality professionals?

Education has always been a crucial tool when it comes to innovating in tourism. Putting the focus on training opportunities will definitely build a sector that is led by promising tourism professionals. Education is the basis to form a solid and sustainable tourism sector adapted to the new times. To this end, the Tourism Online Academy, our flagship project in online education, has enabled more than 15,000 people from more than 190 countries to train and reinforce their knowledge of the tourism sector. The main objective is to democratize access to quality education.

What is the strategy behind developing partnerships between UNWTO, which is a public actor, and private institutions? How privileging relationships with the industry actors in tourism and in Hospitality education helps you identifying the skill gaps of the workforce and assess of the right actions to launch?

Public-private collaboration is essential. Adapting every part of the tourism sector so that it can effectively meet the current challenges relating to safety and security, as well to constant changes in consumer demands, including the rise of digitalization should be a shared priority. Partnerships with key private stakeholders allow UNWTO to enjoy a fuller vision of the challenges and opportunities facing our sector, allowing us to work more effectively to ensure that tourism benefits each and every community, leaving no one behind. More specifically, working shoulder to shoulder with top education institutions enables us to better understand the skill gaps of the sector and how to reduce them.

What are the challenges of ethical recruitment in the current economic and social climate of the tourism and Hospitality industry (employment of the less qualified workforce and young professionals, gender parity of the workforce within the sector and among the different job types, levels of qualifications, etc.)? What is the role of the UNWTO in these economic and social questions and what actions do you put in place in this regard?

Tourism is the ultimate people-to-people sector and one of the world's leading employers. UNWTO works with our Members to ensure the benefits it brings, including jobs and other opportunities. To give just one example: more than half (57%) of the students in our Tourism Online Academy are women, many of them advancing in their careers through the courses we offer with Sommet Education. Furthermore, at the global level, tourism employs more women than any other sector. To further advance equality of opportunity in tourism, last year, in collaboration with Hosco, we launched the Jobs Factory. This initiative connects talent with employers across the sector, offering the perfect solution for Hospitality recruitment and providing access to quality jobs for all.

*more than half
(57%)
of the students in our
Tourism Online Academy
are women**

*SOURCE: UNTWO

MS. MARIBEL RODRIGUEZ

SENIOR VICE PRESIDENT MEMBERSHIP
& COMMERCIAL WTTC



Accumulating over 20 years of sales, marketing, communication and commercial experience.

Maribel Rodriguez joined WTTC in 2014. She has built an extensive network within the Travel and Tourism industry public and private sector, accumulating over 20 years of sales, marketing, communication and commercial experience in Europe and Latin America in the airline and Hospitality industry. She was an Executive Commercial Director and Board Member for Travelodge Hotels Spain from 2008 to 2014.

Prior she spent 11 years in the aviation industry, gaining extensive experience in all aspects of commercial aviation managing among others the introduction of low-cost airline operations into the Southern European market for Virgin Express, Go-Fly, EasyJet and Ryanair. She also worked for British Airways for Spain, Portugal and France. Maribel has an Executive MBA at ICADE Business School, a Degree in Industrial Psychology from the University of Salamanca and holds a Senior Executive Program for Travel & Tourism at IESE & JSF. She speaks fluent English, Portuguese and a good level of French and Dutch.

What are the economical perspectives of the Hospitality industry?

Latest research from WTTC shows that as the world finally begins to recover from pandemic, the sector's contribution to both the global economy and employment could reach almost pre-pandemic levels this year. With regards to jobs, our latest studies show that if the vaccine and booster rollout continue at pace this year, and restrictions to international travel are eased around the world throughout the year - the sector could create 58 million jobs in 2022, to reach more than 330 million, just 1% below pre-pandemic levels and up 21.5% up on 2020.

Why is there such a labour shortage?

Recently, WTTC published a report on staff shortages together with Oxford Economics. Results reveal staff shortages across the six countries analyzed, with employment demand starting to outstrip the available labour supply. As unemployment rates decrease due to the rising demand, Travel & Tourism businesses are struggling to fill available job vacancies. One contributing factor to rising staff shortages is that a number of furloughed or laid off Travel & Tourism employees moved to other sectors or out of the labour force entirely during the crisis. Addressing the challenge of staff shortages within the sector will require the prioritization and implementation of policies and initiatives, ranging from the facilitation of labour mobility and remote work (where feasible), the upskilling and reskilling and retention of the workforce, to the provision of safety nets and enabling decent work.

How can we improve the role of women in Hospitality & Tourism to have a more inclusive industry?

Working together with public, private sector and academia to work towards an increased representation of women in senior leadership positions within the Travel & Tourism sector (T&T). In the WTTC, we have launched a Women Empowerment Initiative that will, through the creation of a Women's T&T Advisory Group and broad consultation across stakeholders, identify key activities and best practices to support women leadership in the T&T sector. Also, Maribel as President of Women Leading Tourism is working closely towards different goals among others: Gathering and sharing information about women presence in organizations, involve all agents to promote collaborations with public and private sector or promote leadership in the travel sector.

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SOMMET EDUCATION