



SADC TOURISM SKILLS GAP AUDIT

EXECUTIVE SUMMARY

The escalating skills shortage in the tourism and hospitality sectors has been identified as one of the primary impediments to growth.

To identify the extent of the problem and pinpoint the specific areas requiring attention and investment in skills development, the SADC Business Council conducted an audit survey of comprehensive skills in July and August 2023.

The survey aimed to explore a range of areas integral to the industry's functionality and competitiveness. These areas included communication and customer service, sales and marketing, digital skills, cultural awareness, as well as management and leadership skills.

A total of 227 responses from various sub-sectors and countries within the SADC were received, providing us with a robust data set for analysis.

Key findings show the top skills that are lacking are customer service, communication, digital, and management. Especially small enterprises need management skills. Responses from the Seychelles indicated a gap in event planning skills.

Respondents say current training is too theoretical, lacking practical components like internships. Soft skills development is inadequate and digital skills training is urgently required as technology becomes integral to operations.

Survey data indicates that meaningful gaps remain in communication and customer service skills, despite enterprises rating themselves as reasonably proficient currently. More conspicuous gaps exist in management, digital, and specialised skills like culinary arts.

Addressing these requires collaboration between government, training institutions and industry.

Recommended actions include increasing work-integrated learning opportunities, developing niche skills credentials, subsidising training access for SMEs, cultivating industry-academia partnerships, promoting tourism careers, and investing in upskilling trainers. Ongoing research should explore precise skills mismatches, quantify gaps, and identify best practices both locally and abroad.

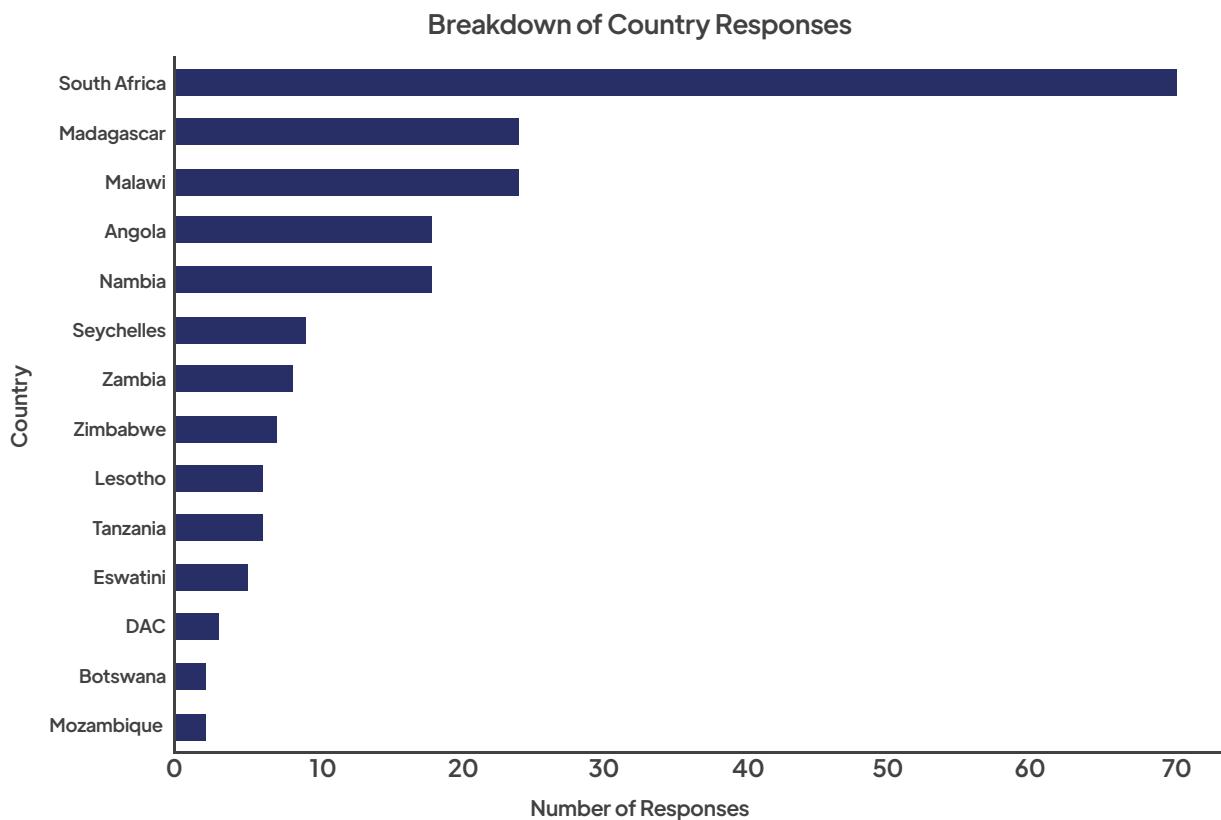


TABLE OF CONTENT

SECTION 1: OVERALL RESULTS	03
SECTION 2: ANALYSIS OF SURVEY RESPONSES	04
SECTION 3: VACANCIES	07
SECTION 4: SKILLS REQUIRED	09
SECTION 5: EXISTING SKILLS	15
SECTION 6: MAPPING REQUIRED AGAINST EXISTING SKILLS	21
SECTION 7: ARE THERE GAPS?	23
SECTION 8: SPECIFIC SKILLS REQUIRED	24
SECTION 9: STEPS BEING TAKEN TO ADDRESS SKILLS GAPS	25
SECTION 10: MOST REQUESTED SUPPORT	26



SECTION 1: OVERALL RESULTS



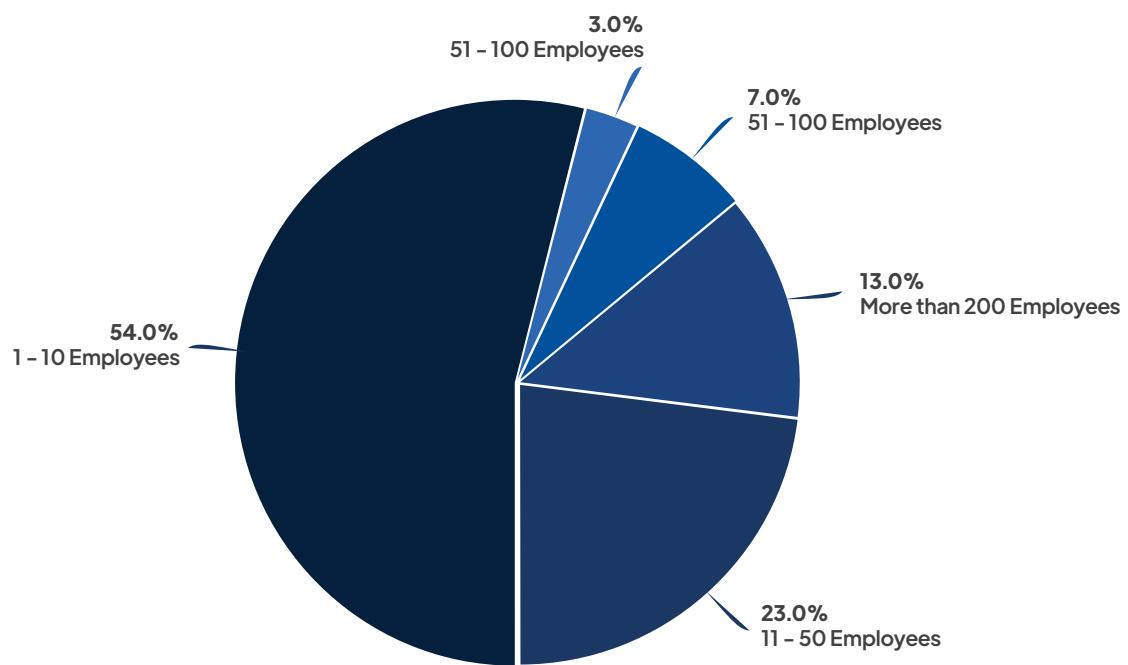
- 227 survey responses were received.
- Responses received from all SADC member states, except for the Comoros. Low responses received from Botswana and Mozambique.
- Highest no of vacancies is in management and front office. In the Seychelles, interestingly, the highest no of vacancies is for chefs.
- The top skills gaps identified were in customer service, communication, digital skills, and management/leadership.





SECTION 2: ANALYSIS OF SURVEY RESPONSES

Distribution of Responses by Business Size

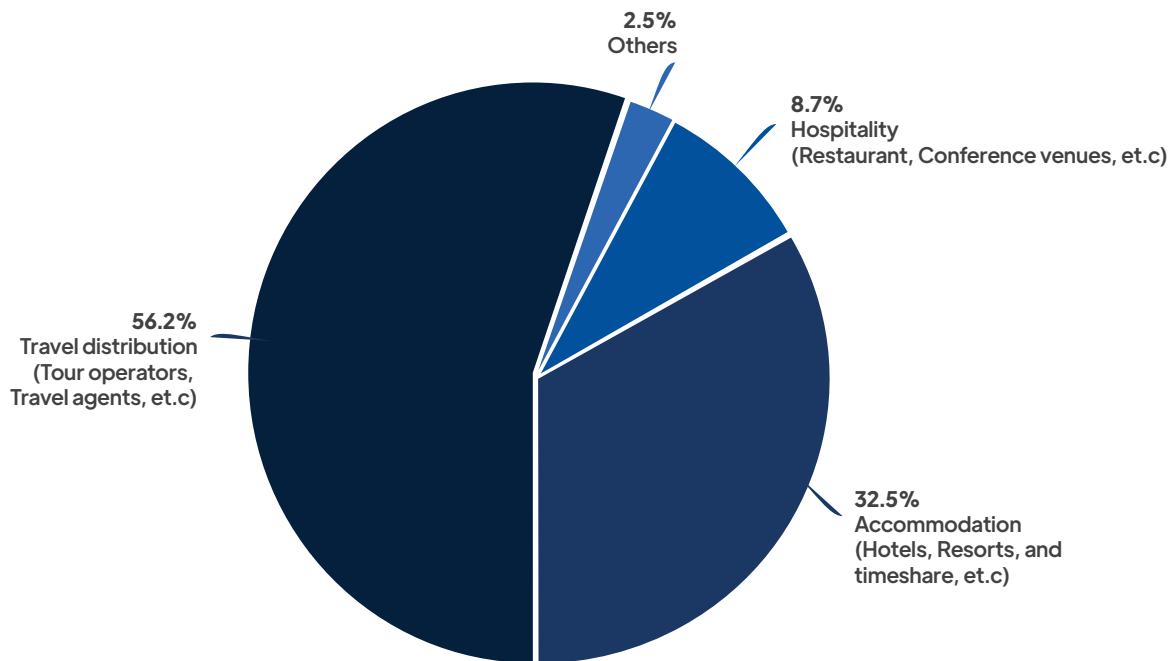


The distribution of responses by the number of full-time staff that enterprises employ. SADC's tourism sector appears to be dominated by smaller enterprises, implying that skills development and capacity-building initiatives should pay particular attention to the challenges and opportunities specific to these businesses. At the same time, the presence of medium and large enterprises indicates a need for diverse and scalable solutions.

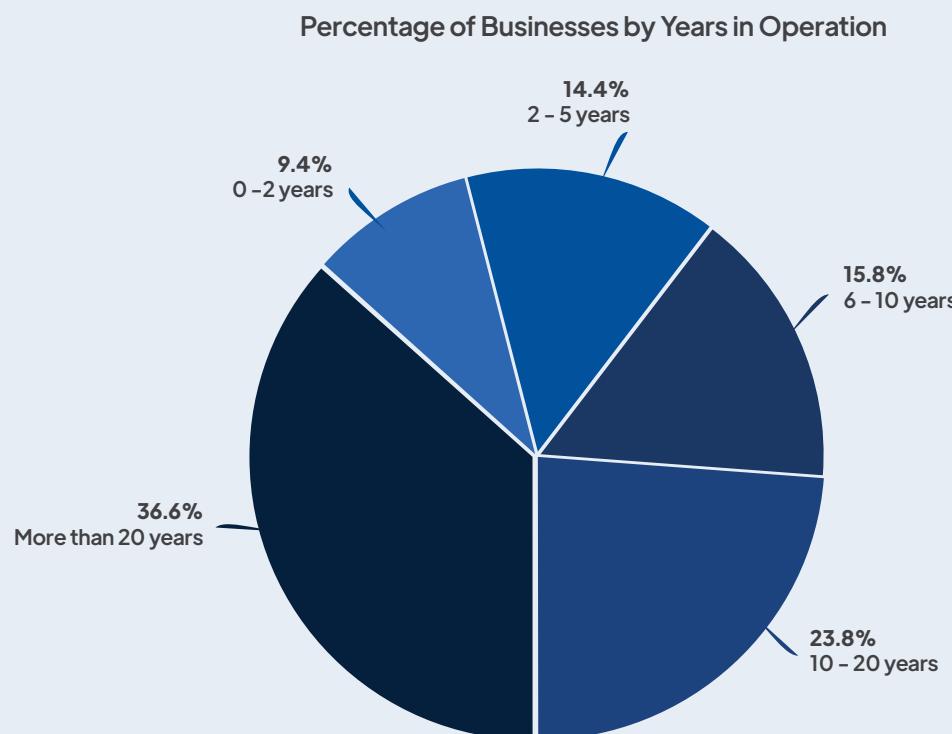
Sub-Sector

This is the breakdown of responses by the main service that enterprises offer. The largest percentage of respondents are from the travel distribution channel, followed by accommodation.

Breakdown of Responses by Main Service Offered



Years in operation



The breakdown of responses by the enterprises' years in operation – the largest percentage of respondents are from enterprises that have been in business for over 20 years, followed by 10-20 years.

This is useful for understanding the maturity level of the enterprises, which can be an important factor in determining the types of skills development interventions that may be needed.

Maturity levels based on years of operation

Start-ups (0 – 2 years): Likely to be newly established enterprises. They may require foundational skills training, including basic business management, customer service, and compliance with regulations.

Recommended interventions: Mentorship programmes, basic skill-set training, and initial capital investment advice.

Emerging (2 – 5 years): These enterprises have survived the initial start-up phase. The focus here may be on scaling up and improving operational efficiencies.

Recommended interventions: Advanced business management training, specialised skill development, and market expansion strategies.

Mid-Level (6 – 10 years): These enterprises have a level of established business but may face challenges in sustaining growth and competitiveness.

Recommended interventions: Leadership development, advanced technological training, and strategic planning assistance.

Established (10 – 20 years): These are well-established enterprises that have weathered market fluctuations. The focus may be on innovation and adapting to market changes.

Recommended interventions: Innovation workshops, upskilling in emerging technologies, and corporate governance training.

Mature (More than 20 years): These are enterprises that have been in the market for a long time and are likely to have set patterns and methods of operation.

Recommended interventions: Change management training, re-skilling for adapting to new market conditions, and succession planning.



SECTION 3: VACANCIES

Companies with "More than 200 employees" have the most vacancies, suggesting that larger enterprises might have a broader range of needs, leading to more vacancies.

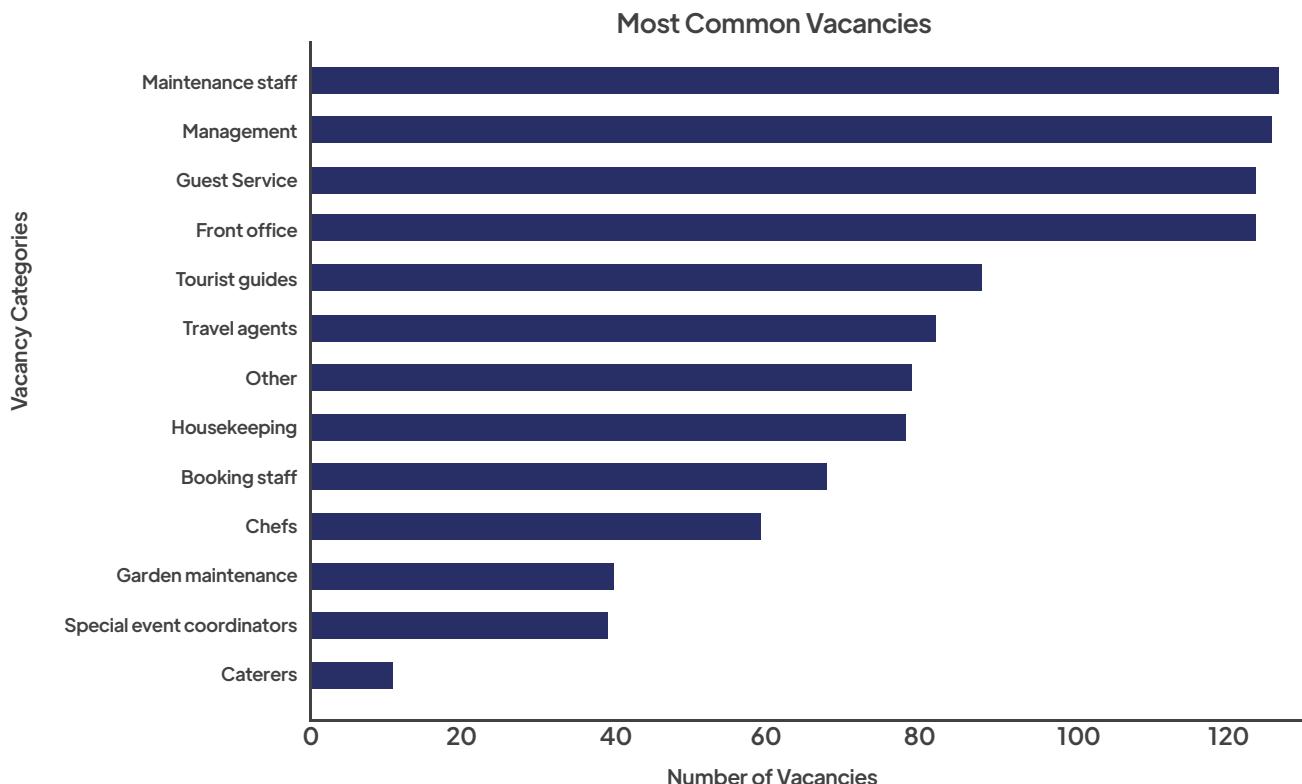
Small companies ("1 - 10 employees") also show a significant number of vacancies, indicating that smaller enterprises also face challenges in filling roles.

Most common vacancies

- **Management:** Appears to have the highest number of vacancies, signaling a significant need for managerial staff.
- **Front Office:** Also shows a considerable

number of vacancies, indicating a need for customer-facing roles.

- **Guest Service:** Like front office, there's a noticeable gap in guest service roles.
- **Housekeeping and Chefs:** These categories also show a significant number of vacancies.
- **Caterers, Special Event Coordinators, and Travel Agents:** These categories have fewer vacancies compared to others but still have a notable skills gap.
- **Garden Maintenance, Tourist Guides, Booking Staff, and Maintenance Staff:** These categories have relatively lower numbers of vacancies.



Most common vacancy in companies by size

Management roles appear to be the most common vacancies in companies across all sizes from "1-10 employees" to "More than 200 employees".

There is a disproportionate number of vacancies in certain company sizes, i.e.: companies with "More than 200 employees" have the highest total number of vacancies (454), and companies with "1-10 employees" also have a high total number of vacancies (257), indicating that small businesses are also struggling to fill roles.

Special event coordinators, travel agents, tourist guides, and booking staff roles are particularly hard to fill in companies with "1-10 employees", while caterers and garden maintenance roles are more vacant in companies with "11-50 employees".

Most common vacancy by country

Management roles appear to be the most common vacancies in all the countries. This suggests that there is a region-wide need for management skills. Further, roles such as Front Office, and Guest Service seem to be the hardest to fill across the region, indicating a generalised skills shortage.

Roles hard to fill:

- Management roles are particularly hard to fill in South Africa.
- Housekeeping roles are most vacant in Zimbabwe.
- Caterers and Garden maintenance roles are most vacant in Malawi.
- Travel agents and Booking staff roles are most vacant in Madagascar.
- Chefs, housekeeping and front offices roles are most vacant in Seychelles & Mauritius

Most common vacancy by sub-sector

Management roles appear to be the most common vacancies in the "Accommodation" and "Hospitality" sub-sectors. Travel agents and booking staff roles are most common in the "Travel distribution" sub-sector. The "Accommodation" sub-sector has the highest total number of vacancies (479), and the "Travel distribution" sub-sector also has a significant number of vacancies (262).

Roles hard to fill:

- Management roles are particularly hard to fill in the "Accommodation" sub-sector.
- Travel agents and booking staff roles are most vacant in the "Travel distribution" sub-sector.
- The "Accommodation" sub-sector, with the most vacancies, is facing a significant skills gap.
- Roles such as Management, Travel Agents, and Booking Staff seem to be the hardest to fill across the sub-sectors.



SECTION 4: SKILLS REQUIRED

The findings underline a uniform emphasis on Communication and Customer Service skills, irrespective of country or sub-sector. At the other end of the spectrum, skills such as Culinary and Event Planning are less in demand.

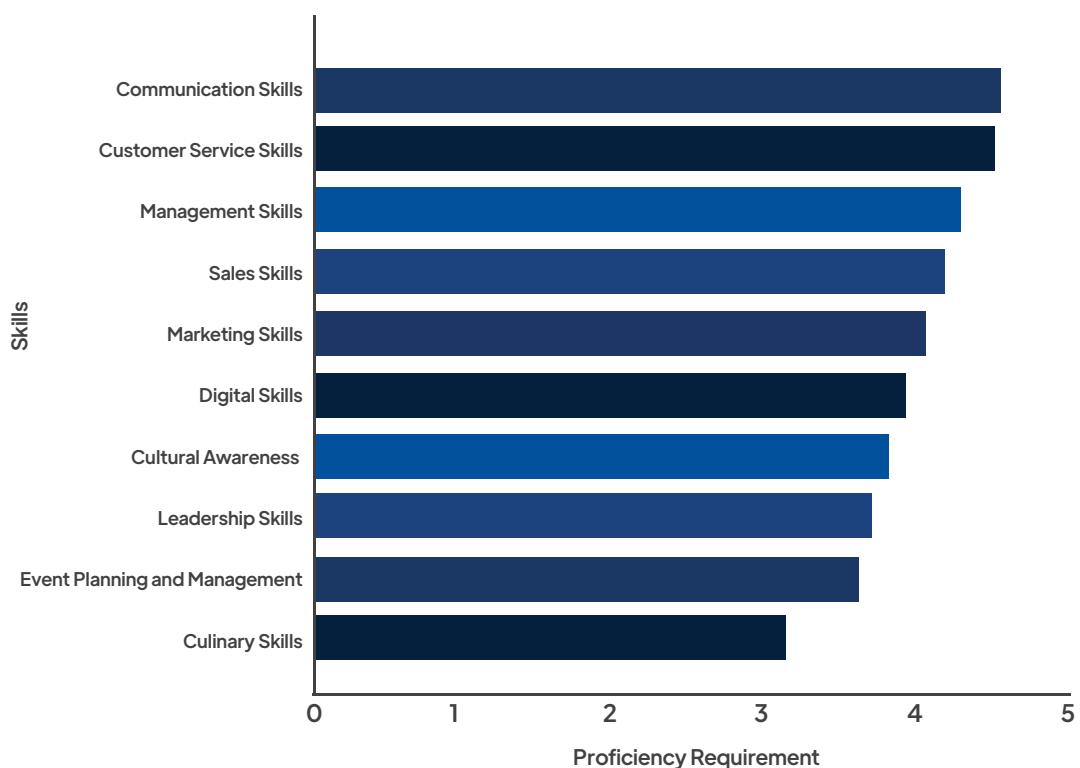
Furthermore, the data reveals intriguing geographical and sectoral variations: some countries showcase a heightened proficiency requirement, possibly indicative of more advanced tourism sectors.

Similarly, the "Accommodation" sub-sector stands out for its comprehensive skill set requirements.

Highest and lowest required proficiency skills

- Communication Skills (4.48) and Customer Service Skills (4.44) are the most highly required skills across the board.
- Culinary Skills (3.06) and Event Planning and Management (3.57) are the least required skills.
- The "Accommodation" sub-sector (4.21) has the highest overall proficiency requirements, also placing a high value on a wide range of skills, suggesting a diverse set of roles and responsibilities.

Proficiency Skills: Most Required to Least Required

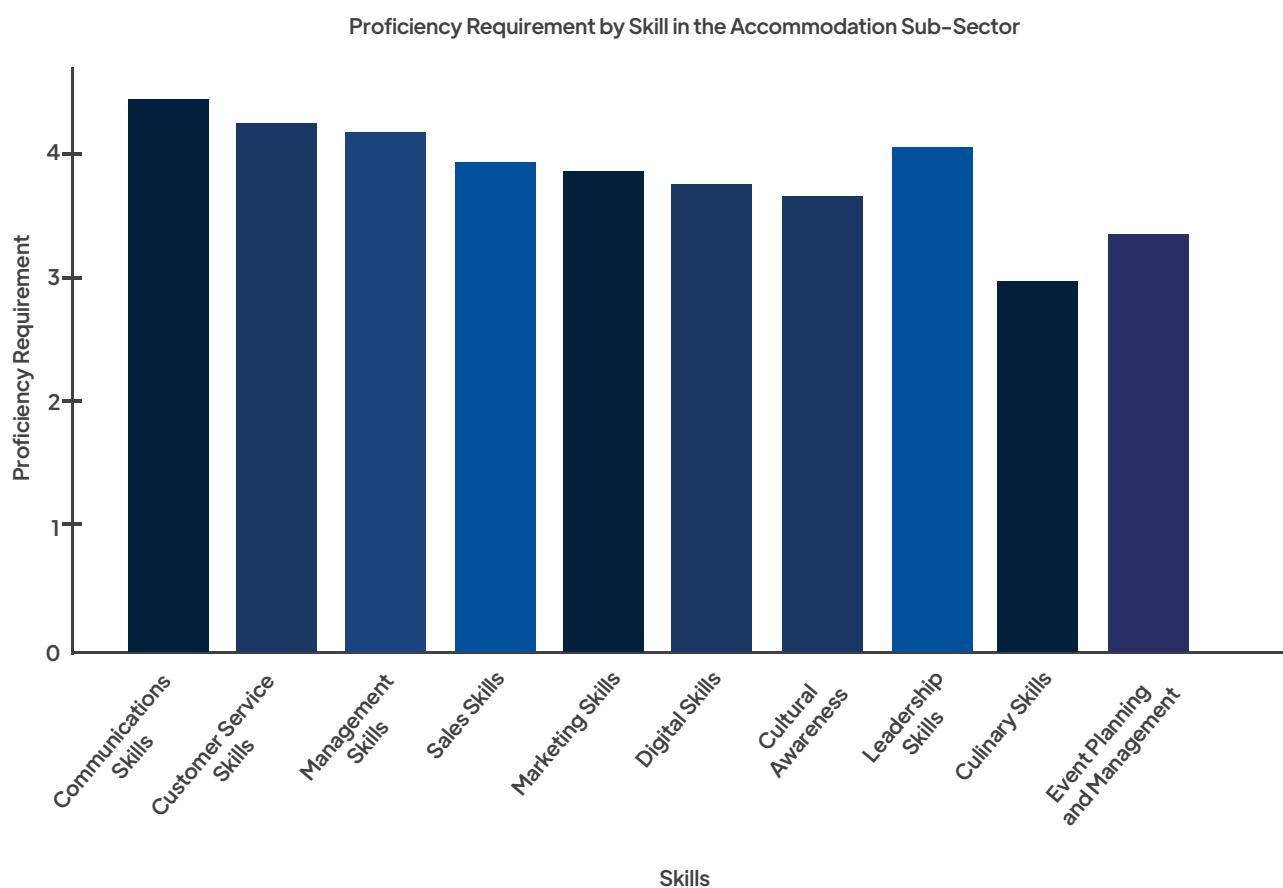


Required proficiency skills based on sub-sectors

Accommodation Sub-Sector

Critical Skills:

- Communication Skills,
- Customer Service Skills,
- Management Skills,
- Cultural Awareness



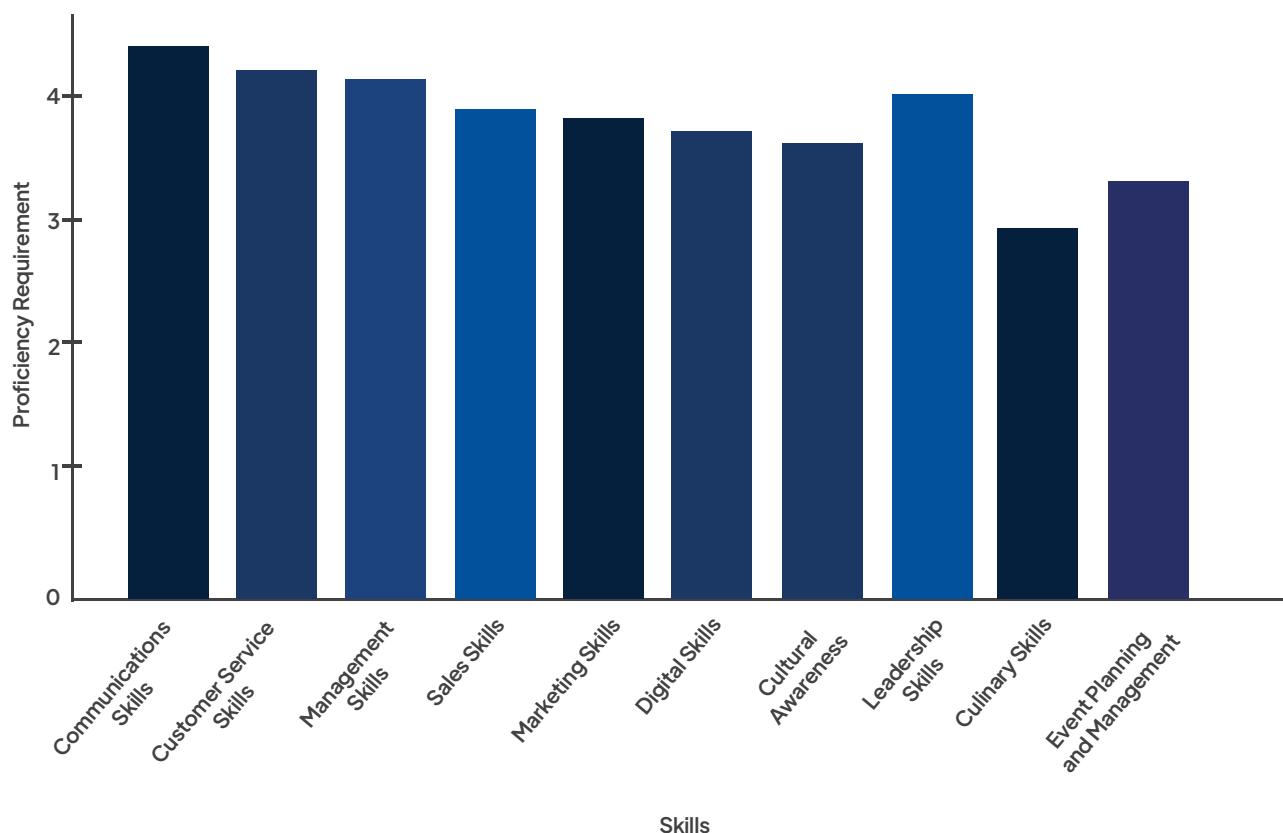


Hospitality Sub-Sector

Critical Skills:

- Communication Skills,
- Customer Service Skills,
- Management Skills,
- Cultural Awareness

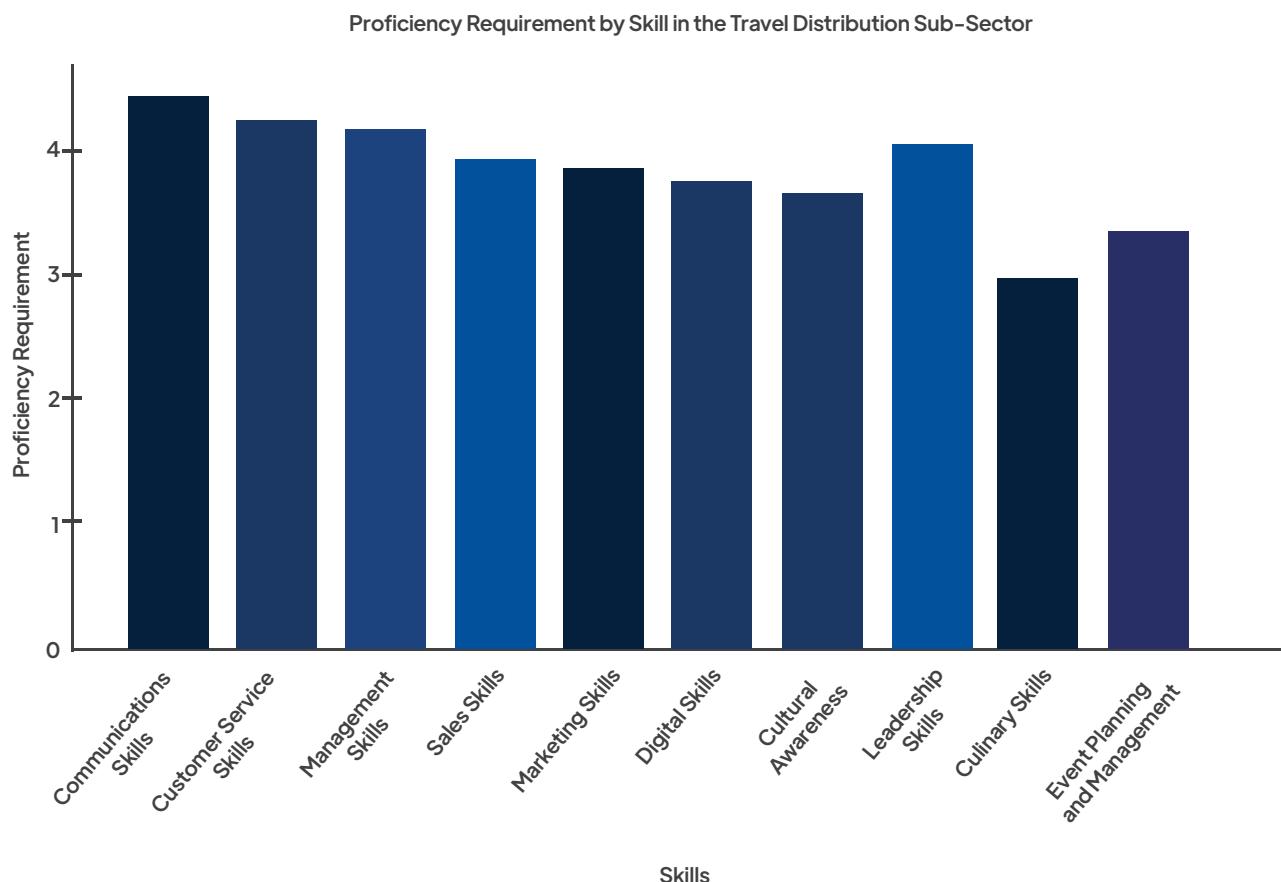
Proficiency Requirement by Skill in the Hospitality Sub-Sector



Travel Distribution Sub-Sector

Critical Skills:

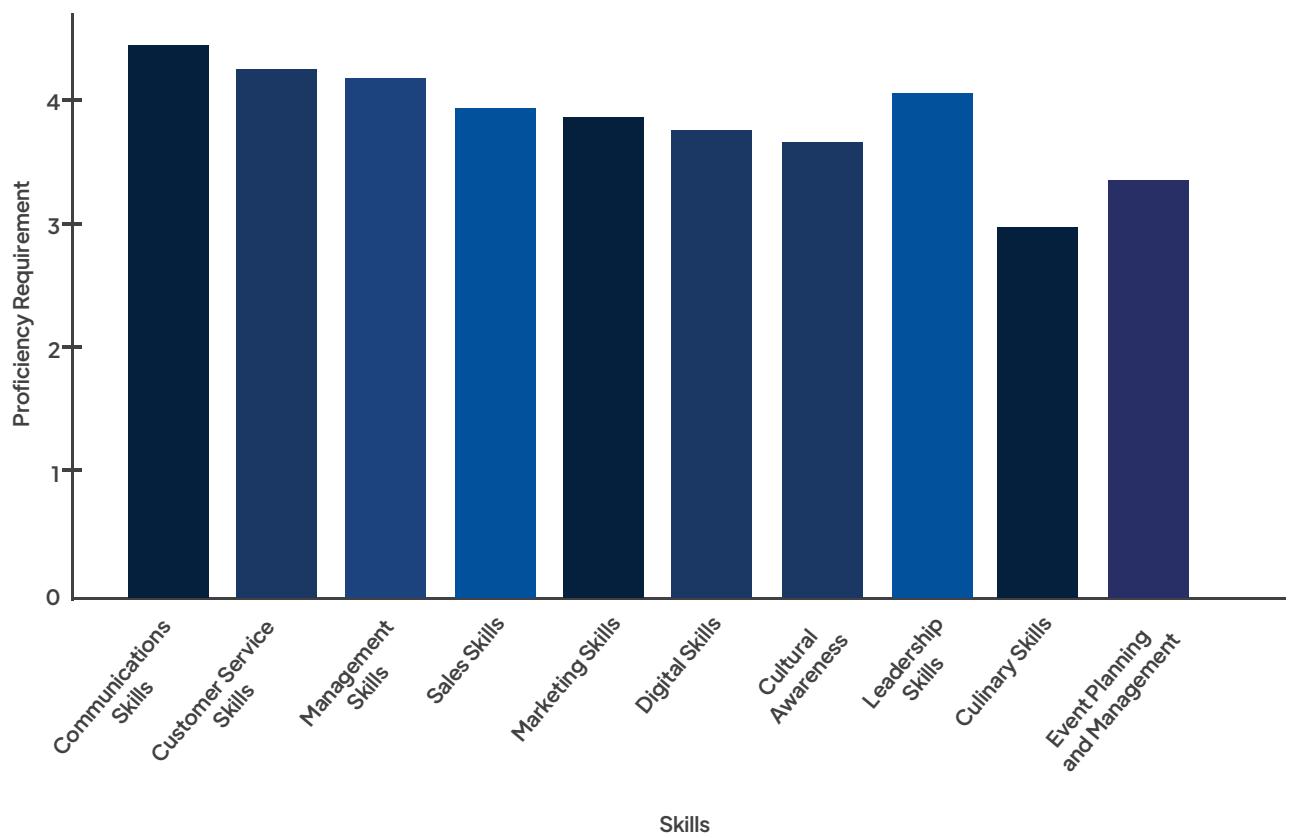
- Communication Skills,
- Customer Service Skills,
- Management Skills,
- Cultural Awareness





Other Sub-Sector

Proficiency Requirement by Skill in the Other Sub-Sector



Required proficiency skills based on size of enterprise

Small companies (1-10 employees)

- **Critical Skills:** Digital skills, marketing, financial management, and customer service.
- **Interpretation:** These companies are likely in their nascent stages and are looking to build a strong foundational skill set. The emphasis on digital skills and marketing suggests a focus on online presence and customer engagement.

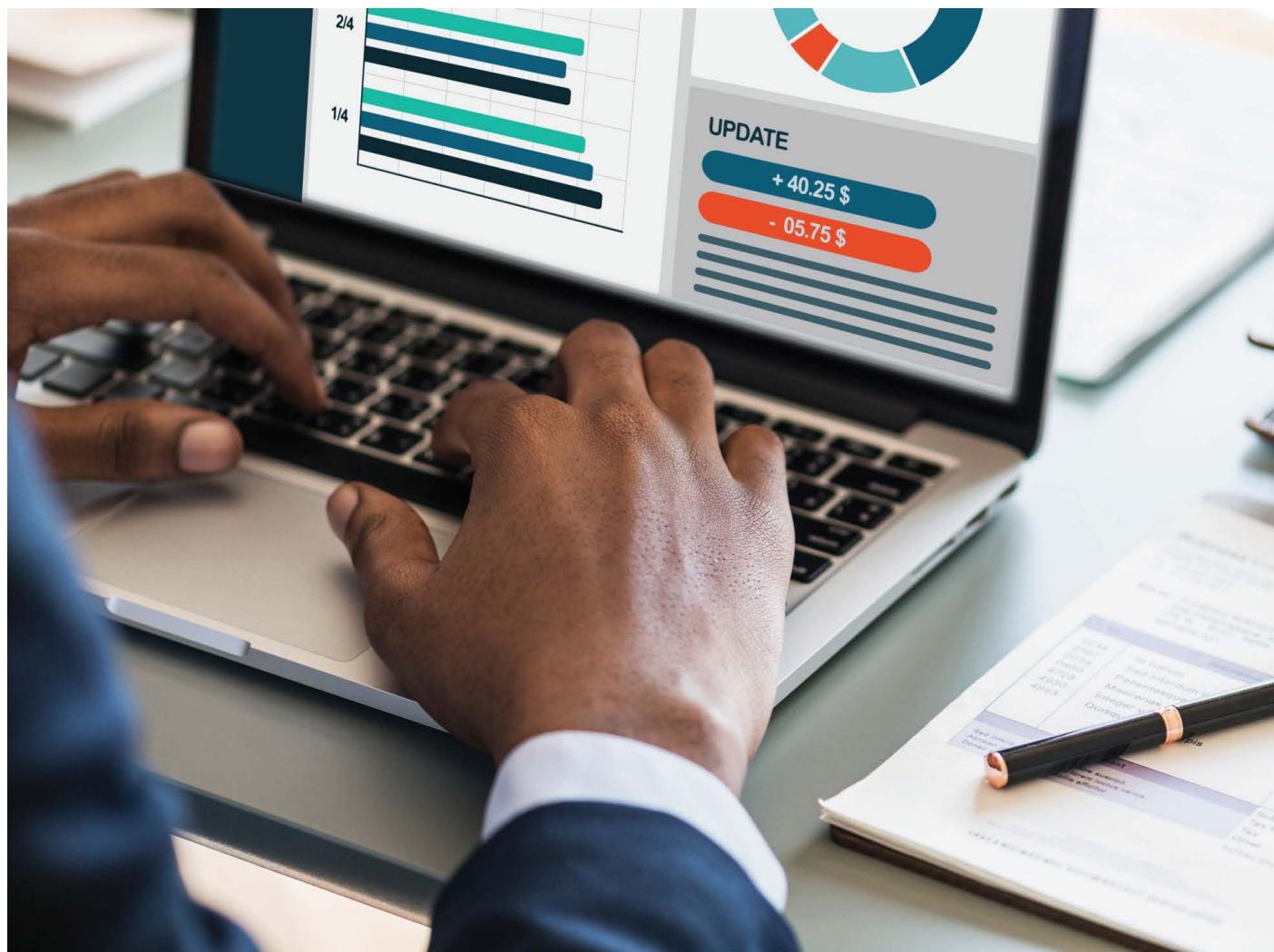
Mid-sized companies (11-50 employees)

- **Critical Skills:** Communication, technical job-specific skills like culinary and maintenance.
- **Interpretation:** These companies are likely to be more established and may have diversified service offerings, requiring more specialised skills.

Large companies (Over 200 employees)

Critical Skills: Management, sustainability, and specialised technical skills.

Interpretation: These companies are likely mature and looking to optimize and sustain their operations. The need for management skills suggests they have more complex organisational structures.



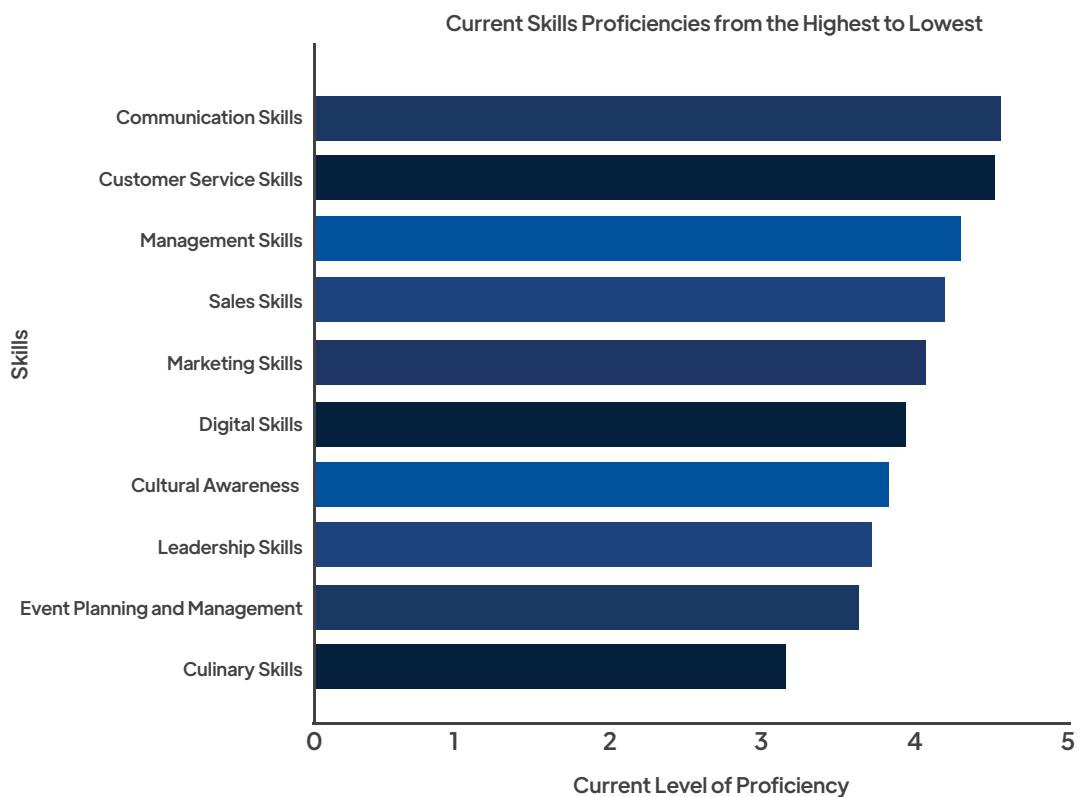
SECTION 5: EXISTING SKILLS

Companies that express a high level of confidence in foundational skills such as Communication and Customer Service, suggest a workforce that's well-equipped to manage essential interpersonal interactions.

However, the data also reveals areas for potential growth; most notably – in specialised skills like Culinary Arts and Event Planning.

Highest and lowest current skills proficiency

- Most Proficient Skills are Communication Skills (4.48), suggesting that enterprises feel their staff are highly competent in verbal and written communications.
- And Customer Service Skills (4.44) indicate that businesses believe their staff excel in delivering satisfactory customer experiences. This is pivotal in the service-oriented tourism sector.
- Least Proficient Skills are Culinary Skills (3.06) suggesting that businesses may perceive a gap in food-related services.
- And Event Planning and Management (3.57) indicating that enterprises may feel less confident in their staff's ability to manage and execute events, which could be crucial for conference tourism or special events.

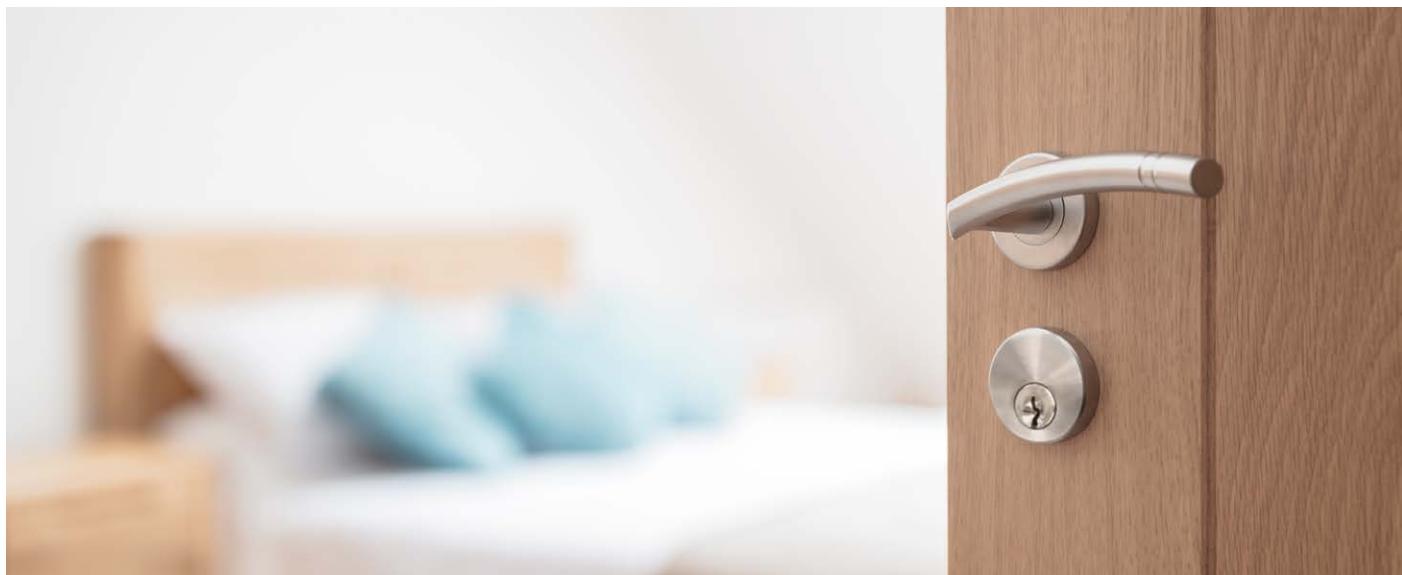
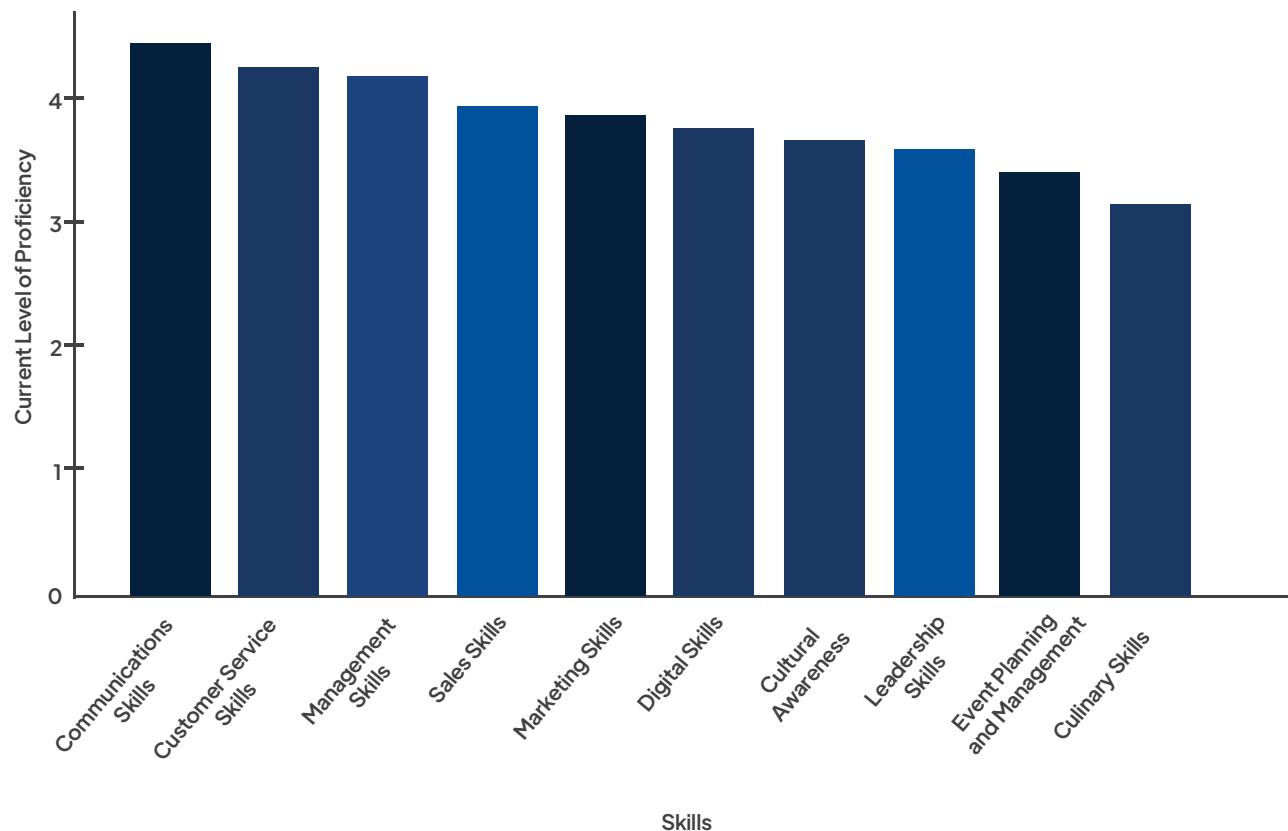


Current proficiency skills based on sub-sectors

Accommodation Sub-Sector

- Skills proficiency
- Communication Skills
- Customer Service Skills
- Management Skills

Current Skills Proficiency Requirement in Accommodation Sub-Sector

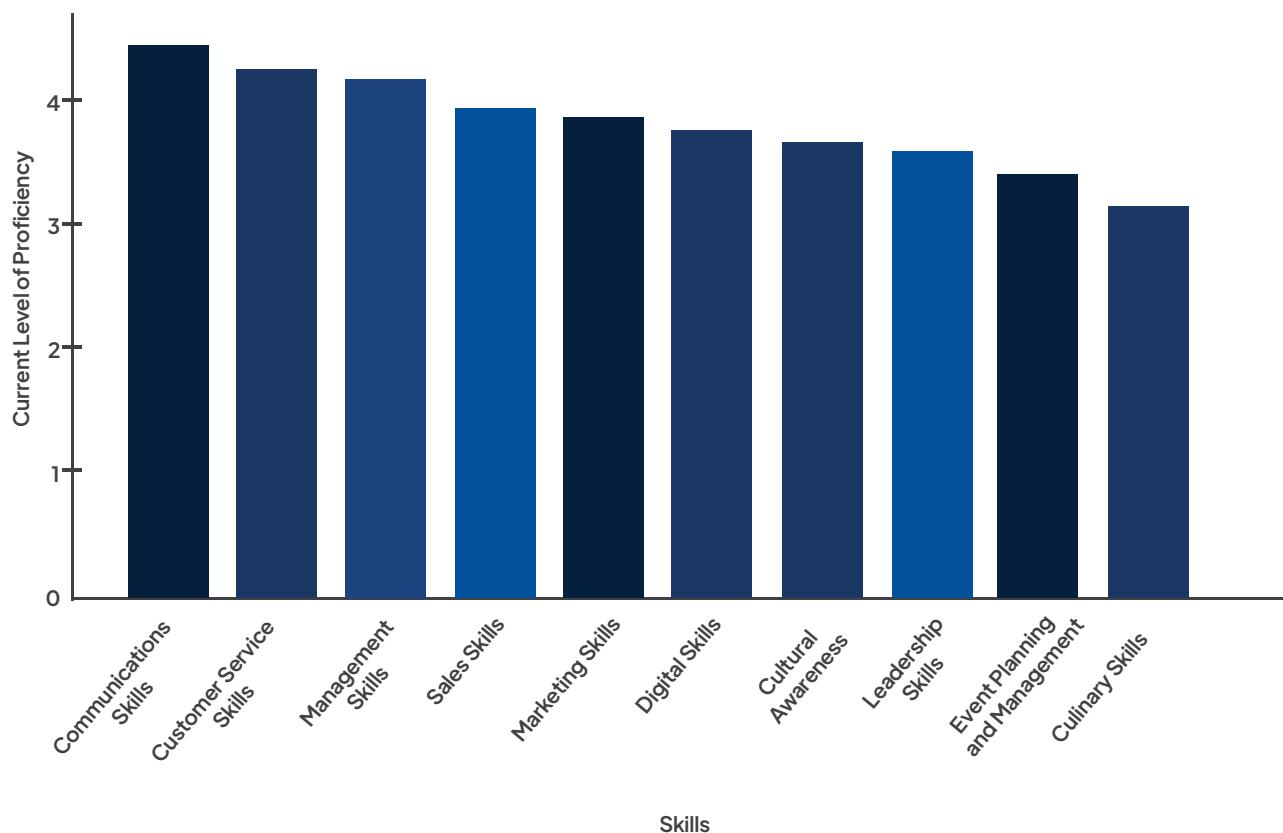




Hospitality Sub-Sector

- Skills proficiency
- Communication Skills
- Customer Service Skills
- Management Skills

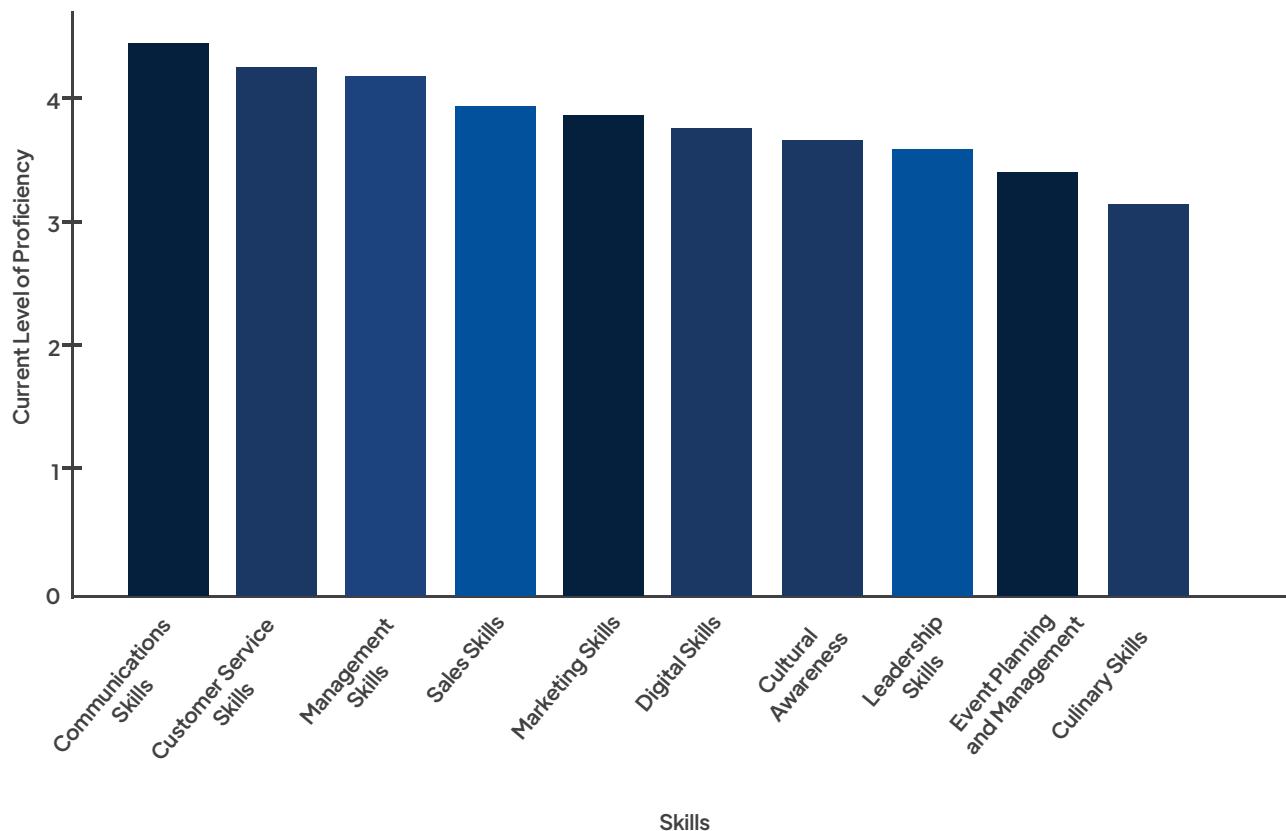
Current Skills Proficiency Requirement in Hospitality Sub-Sector



Travel distribution Sub-Sector

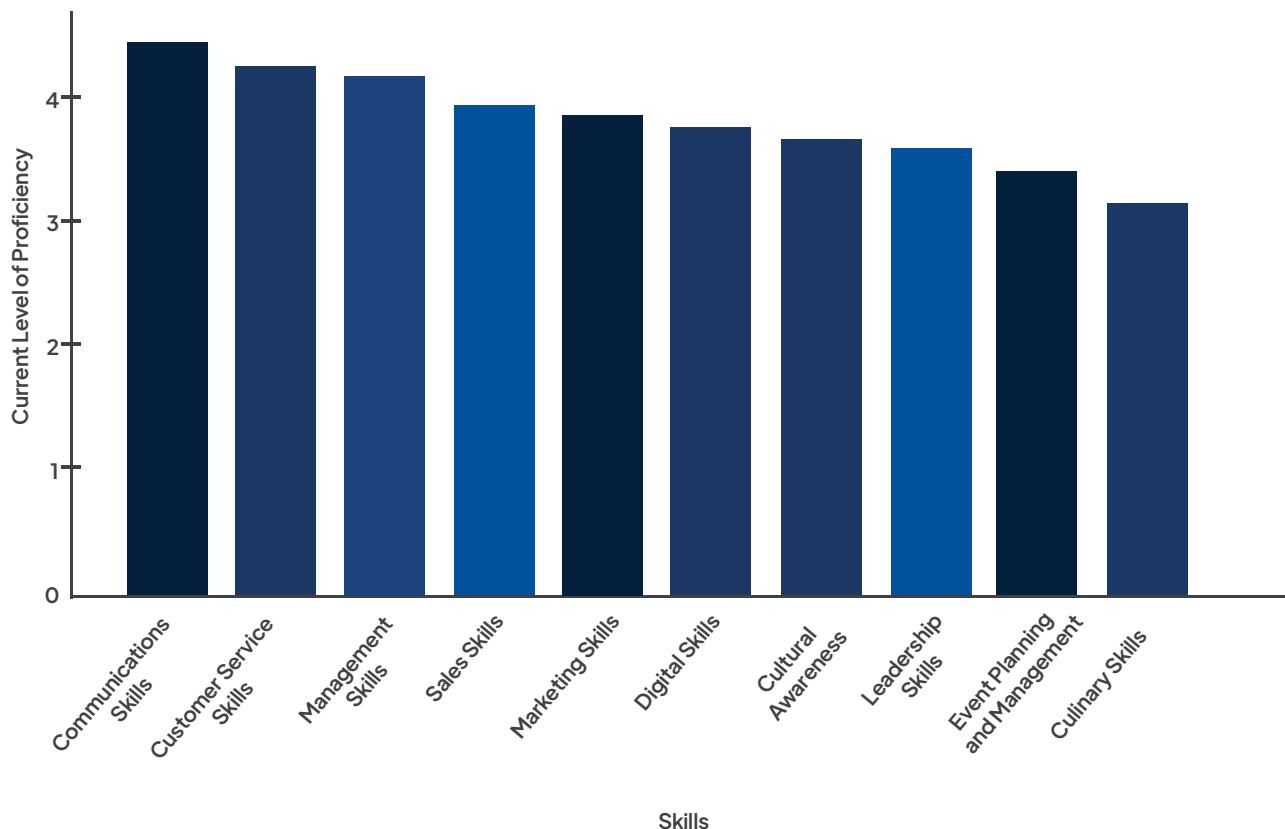
- Skills proficiency
- Communication Skills
- Customer Service Skills
- Management Skills

Current Skills Proficiency Requirement in Travel distribution Sub-Sector





Current Skills Proficiency Requirement in Other Sub-Sector



Current proficiency skills based on size of enterprise

Small Enterprises (1-10 Employees):

- **High Proficiency:** Communication Skills, Customer Service Skills
- **Low Proficiency:** Digital Skills, Culinary Skills, Event Planning
- **Interpretation:** Small businesses seem well-equipped in basic interpersonal skills but may lack in specialised or technical skills.

Medium Enterprises (11-50 Employees):

- **High Proficiency:** Management Skills, Sales Skills
- **Low Proficiency:** Cultural Awareness, Event Planning and Management
- **Interpretation:** Medium-sized companies appear to focus more on operational efficiency and sales, possibly overlooking areas that require a nuanced understanding of culture and event planning.

Large Enterprises (More Than 200 Employees):

- **High Proficiency:** Leadership Skills, Marketing Skills
- **Low Proficiency:** Event Planning and Management, Culinary Skills
- **Interpretation:** Large enterprises seem to invest in leadership and marketing capabilities. However, there may be gaps in specialised roles, which could be filled either through targeted training or strategic hiring.





SECTION 6: MAPPING REQUIRED AGAINST EXISTING SKILLS

In the realm of Communication Skills, although the industry is performing reasonably well with a current proficiency of 4.20 against the required 4.48, there's a minor but meaningful gap. This is particularly crucial in roles that demand robust customer interaction or internal coordination.

- **Communication Skills:** The minor gap indicates a need for ongoing development in customer-facing roles.
- Similarly, Customer Service Skills are almost up to the mark with the current proficiency at 4.35, just slightly shy of the required 4.44. This closeness suggests that a small additional focus on training could bridge this gap.
- **Customer Service Skills:** A very minor gap: small adjustments in training could bridge it.
- Management Skills present a more conspicuous divergence.
- **Management Skills:** Noticeable gap: required at 4.35 but currently at 4.15, this gap is pressing, especially for larger enterprises and the accommodation sector. Targeted management training could offer substantial benefits.
- **Culinary Skills:** Despite the lower overall requirement of 3.06, the existing proficiency is even lower at 2.75. This gap may not be numerically large but could be significant in areas like hospitality.
- **Digital Skills:** Noteworthy gap: upskilling is urgently needed as digital platforms become integral to operations.

By Size of Enterprise

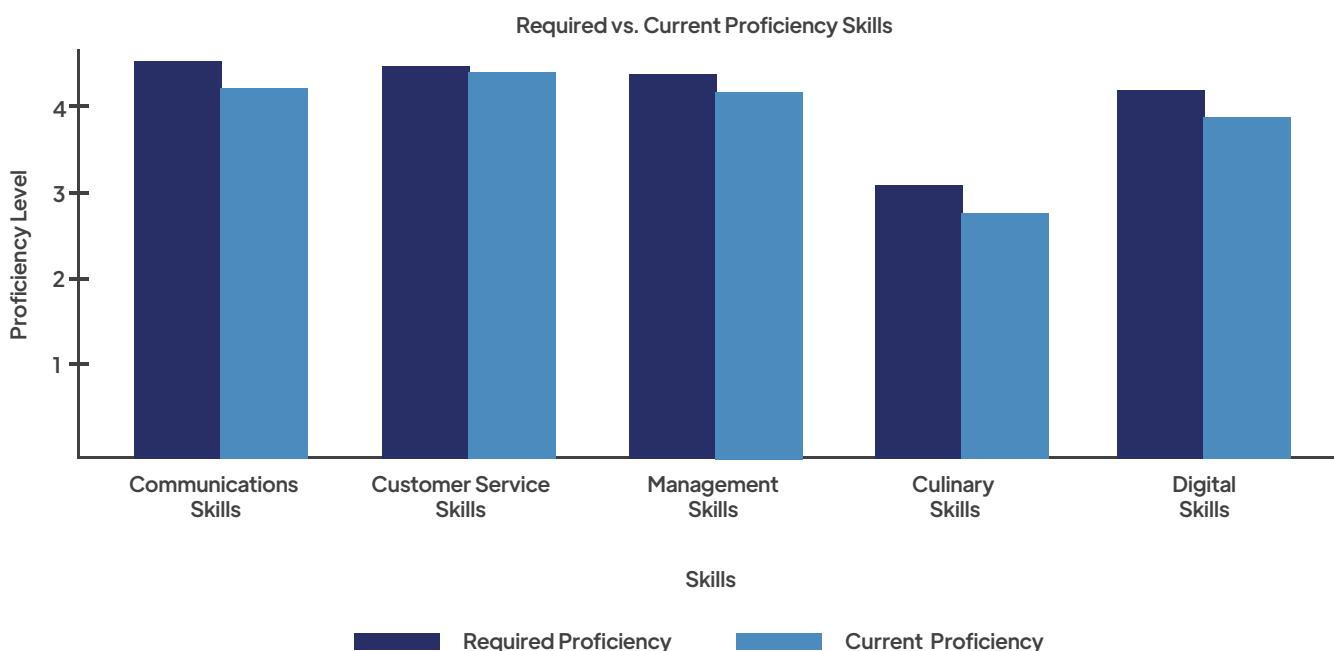
Small enterprises may find the gap in Digital and Management Skills to be indicative of a potential lack of resources for training. On the other hand, medium-sized companies could be experiencing gaps due to the growing diversity in roles, particularly in Management and Communication Skills. Large enterprises have a pressing need to focus on Management Skills, suggesting the utility of advanced training programmes.

- **Small Enterprises:** Gaps in Digital and Management Skills; likely due to resource constraints.
- **Medium Enterprises:** Gaps in Management and Communication; possibly due to fast growth and role diversity.
- **Large Enterprises:** Significant gap in Management Skills; calls for advanced training programmes.

By Sub-Sector

Each sub-sector brings its own set of challenges. For instance, the Accommodation sector's gap in Management Skills could be related to the diversity of services offered. Hospitality faces a particular challenge with Culinary Skills, and the Travel Distribution sector has to focus on the increasing need for Digital Skills. The 'Others' sub-sector requires attention in niche areas like Event Planning.

- **Accommodation:** Gap in Management Skills; possibly due to diverse service offerings.
- **Hospitality:** Gap in Culinary Skills; specialised training may be needed.
- **Travel Distribution:** Gap in Digital Skills; urgent upskilling required.
- **Others:** Gaps in specialised roles; could benefit from specialised training.



SECTION 7: ARE THERE GAPS?

The survey responses indicate that most respondents believe there are gaps in existing tourism industry training programs.

Several key themes emerge:

- **Practical experience vs theory:** Many respondents highlight that current training tends to be too theoretical and academic, lacking sufficient practical, hands-on components. There is a need for more work-integrated learning opportunities such as internships and apprenticeships.
- **Soft skills development:** Respondents frequently cite gaps in training for soft skills like communication, customer service, cultural awareness, problem solving, and teamwork. Technical skills alone are not adequate.
- **Digital skills:** With technology playing an increasingly important role in tourism, respondents note gaps in digital skills training including online marketing, social media, and IT systems.
- **Management skills:** Gaps exist in teaching important management skills like financial management, project management, human resource management. Leadership development is also lacking.
- **Specialised skills:** There is limited availability of specialised, role-specific training tailored to the diverse needs of different tourism professions.
- **Trainer skills:** Some respondents comment that trainers themselves lack sufficient industry experience and expertise.
- **Accessibility:** Training gaps disproportionately affect small enterprises and rural communities who

lack awareness of – and access to – programmes.

- In the case of the Seychelles, mention was made by one stakeholder that training programmes to one person per company which is limiting.

Potential actions:

- Conduct focus groups and interviews with industry associations and training institutions to further explore precise skills gaps and mismatches.
- Survey tourism enterprises on their current spending and needs related to staff training to quantify skills gaps.
- Review training curriculums in detail to identify opportunities to integrate more hands-on learning.
- Survey past trainees to assess the usefulness of existing programs based on career outcomes.
- Study best practices for industry-academia collaboration in skills development from other countries.
- Increase work-integrated learning through mandatory internships, apprenticeships and on-the-job training.
- Develop short course certificates and micro-credentials focused on priority niche skills.
- Subsidise or incentivise uptake of training among tourism SMEs.
- Cultivate industry-academia partnerships to align training with real skills demand.
- Invest in trainer upskilling and requirements for industry experience.
- Promote tourism careers and provide career guidance to improve talent recruitment.

SECTION 8: SPECIFIC SKILLS REQUIRED

The responses indicate a desire for a well-rounded workforce with strong soft skills, digital literacy, business acumen, and specialised technical abilities.

Smaller enterprises especially need help developing management capacity. Enhanced language skills enable better customer service.

The most cited skills needing development are:

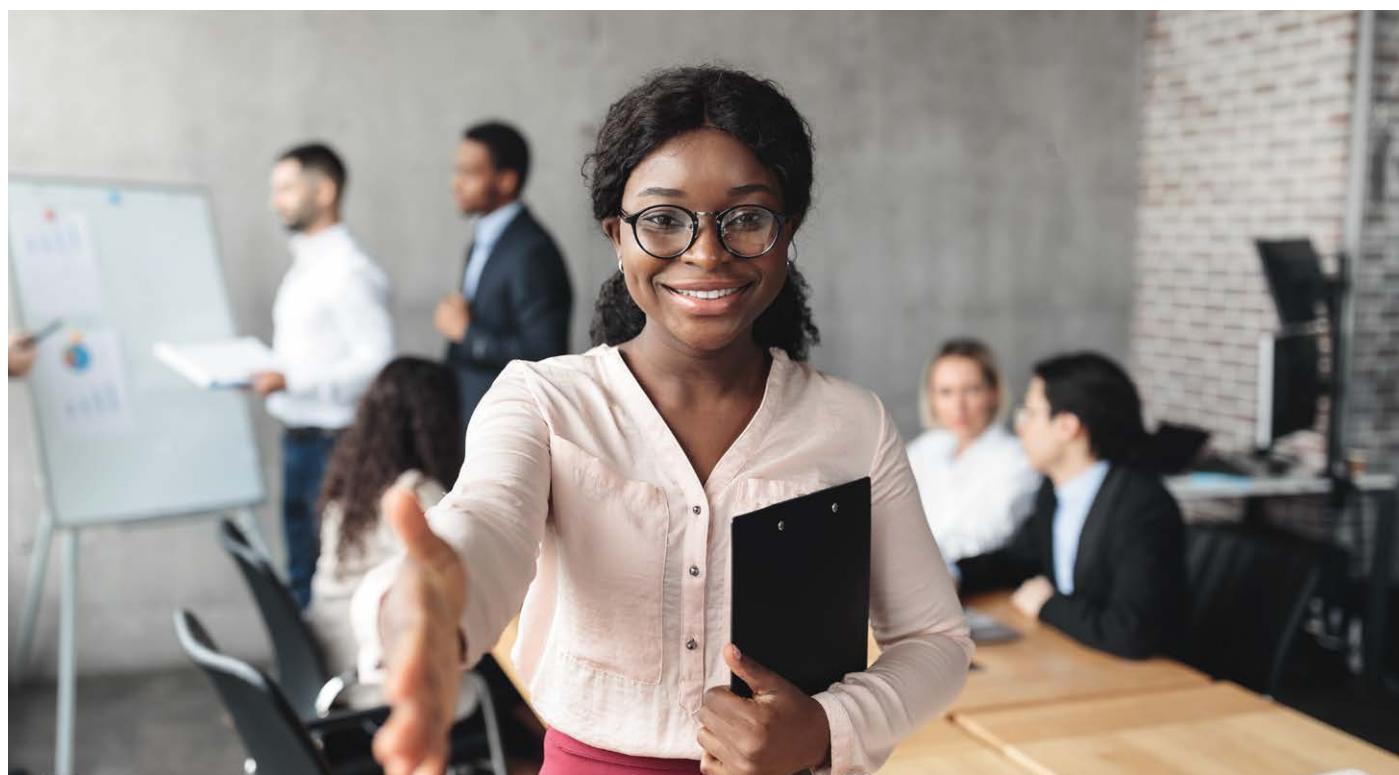
- **Customer service skills** – This includes communication, cultural awareness, problem-solving and exceeding expectations.
- **Digital skills** – Respondents want training in areas like social media marketing, online booking systems and IT fluency.
- **Management skills** – Financial management, project management, human resources and leadership are lacking.
- **Sales and marketing skills** – Building brand awareness and converting interest to sales needs improvement.
- **Culinary skills** – Enhancing food

preparation, nutrition, creativity and speed of service.

- **Technical skills** – Job-specific skills like tour guiding, booking procedures and hospitality protocols are needed.
- **Language skills** – Better proficiency in English and other foreign languages is required.
- **Sustainability practices** – Training in environmental awareness and eco-friendly operations.

Potential actions:

- Audit staff skills versus required competencies to identify precise development needs.
- Offer customised skills training, e-learning courses, job shadowing, and coaching.
- Hire specialists in digital marketing, sustainability, languages to build in-house capabilities.
- Subsidise fees for external training programs and industry certifications.
- Set KPIs for skills development and make it a criteria for promotion.





SECTION 9: STEPS BEING TAKEN TO ADDRESS SKILLS GAPS

The most common steps businesses are taking include:

- **In-house training:** This covers on-the-job training, job shadowing, coaching, and developing internal courses. This is the most widely used approach.
- **External training:** Sending staff to attend seminars, workshops, conferences and short courses offered by external providers. However, costs are often prohibitive especially for small businesses.
- **Recruiting:** Hiring people with existing skills and experience to fill immediate gaps, but applicant pools are often limited.
- **Outsourcing:** Using consultants and contractors to provide specialised skills like IT, digital marketing etc. This gives rapid access to skills but can be expensive.
- **Partnerships:** Collaborating with industry associations, government departments and training institutes to develop skills. But these partnerships are not yet widespread.
- **Learning from peers:** Interacting with

industry networks, competitors and international operators to exchange knowledge and ideas.

Potential actions:

- Document the availability, accessibility and affordability of external training options by region.
- Assess the expertise and capacity of industry associations to support skills development mandates.
- Profile successful case studies of industry-academia collaboration driving skills transfer.
- Develop centralised hub that connect businesses to vetted skills development resources and training partners.
- Create database of accredited skills development programmes, trainers and training materials.
- Incentivise tuition reimbursement and skills development budgets and training time for staff.
- Fund "train-the-trainer" programs to develop quality in-house capabilities.
- Sponsor mentoring and peer-learning programmes to facilitate knowledge sharing.

SECTION 10: MOST REQUESTED SUPPORT

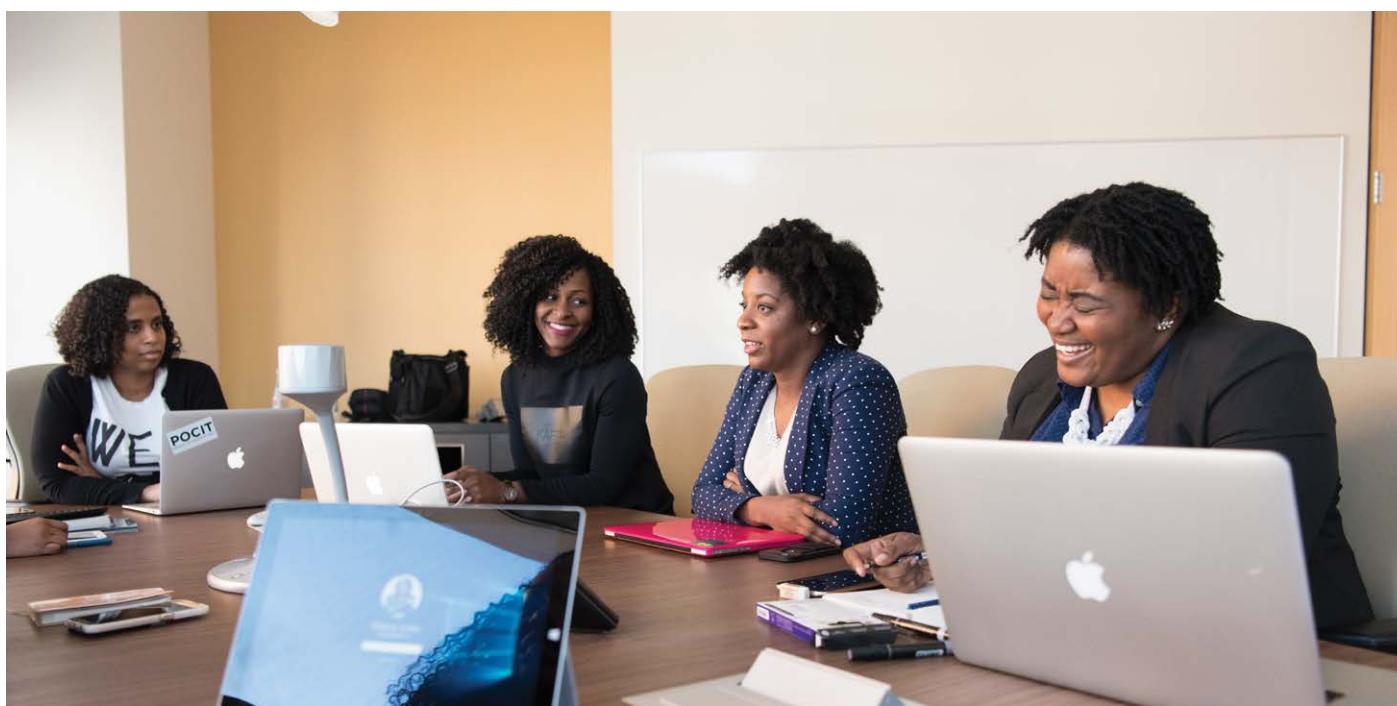
The most requested additional supports are:

- **Funding and subsidies:** Financial aid to offset the costs of external training, skills certifications, hiring specialists, and developing in-house programs. This is the most prevalent request.
- **Training programmes:** Widespread access to quality skills training from industry experts at affordable rates. And programmes customised to business needs.
- **Digital learning:** Online courses, tutorials, webinars and mobile-friendly content to develop skills.
- **Mentorship and coaching:** Guidance from experienced professionals to transfer knowledge directly to less experienced staff.
- **Job shadowing:** Opportunities for staff to directly observe skilled roles first-hand within their own or other organisations.
- **Equipment and facilities:** Access to tools, simulators and demo environments tailored to acquiring specialised skills.
- **Networks and events:** Industry conferences, workshops and networking platforms to share skills knowledge.

- **Apprenticeships:** Paid on-the-job training combined with classroom learning over an extended period.
- **Resources:** Skills guides, toolkits, templates and collateral to support in-house training.

Potential actions:

- Assess availability and pricing of customised skills training options across different providers.
- Study successes and best practices from existing mentorship programs both within the industry and externally.
- Profile skills development approaches from regions where tourism is thriving for potential knowledge transfer.
- Create a central portal to connect businesses with skills development funding opportunities, partners and resources.
- Develop national and regional plans to increase funding and support for tourism skills development.
- Facilitate cross-organisation mentorships and secondments.
- Showcase businesses that are receiving training support to inspire others.





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