

RWANDA SKILLS SURVEY 2012



TOURISM & HOSPITALITY SECTOR REPORT

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List of Acronyms

GOR	Government of Rwanda
HCID	Human Capital and Institutional Development
HLI	Higher learning Institutions
IPRC	Integrated Polytechnic Regional Center
KIST	Kigali Institute of Science & Technology
MINEDUC	Ministry of Education
NCHE	National Council for Higher Education
NSIR	National Institute of Statistics Rwanda
NUR	National University of Rwanda
RDB	Rwanda Development Board
TSS	Technical Secondary School
TVET	Technical Vocational Education and Training
VTC	Vocational Training Centers

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Executive Summary

This Report presents the findings of the skills survey of the Tourism Sector Establishments in the Private Sector in Rwanda. The focus is on skills profiles, proficiencies, and gaps in the Tourism Sector establishments in the Private Sector. The report is part of the RDB-HCID commissioned national private sector skills survey targeting 8 priority sectors including ICT, Mining, Energy, Tourism, Manufacturing, Construction, Agriculture, Finance and Insurance. The survey was carried out in the five provinces in the country targeting large, medium, small and micro financial sector establishments in the Private Sector.

Principal Activities and Overall Labor Units in the Sector

The Tourism & Hospitality sector in Rwanda has 12 principal activities. "Hotel & Hospitality/Accommodation" and "Restaurant and Mobile Food service" are the dominant activities in the sector, consisting of 29.4% of and 29.1% respectively. Other activities include: Tour & Travel Agency, Tour Guides, Event Management, Creative Arts & Entertainment Activities, Heritage Activities, Museums and Historical sites, Operation of Sport facilities and National Parks Management.

Tourism & Hospitality sector had a total of 20,860 employees working as Managers, Financial/Insurance Professionals, Liberal Professionals, Technicians, and Artisans. Women account for 35.7% and 64.3% of labor units in the sector. The expatriates in the sector constitute 3.7%; the majority (65.8%) of which are employed in the Hotel & Accommodation subsector.

Skills Gaps: - The survey indicates that the main impediment to growth and good quality customer service is the large skills deficit in the sector that consequently extends to the industry's subsectors in both the public and private establishments. The survey indicates that the Tourism & Hospitality sector has a skills gap of over 5, 068 in technical areas in the short-term. This is 24.3% of the labor force in the sector. The skills deficits are more acute in hotel & hospitality industry, including hotel managers, tour guides, chefs, cooks, waiters, as well as service personnel and technicians for the hotels. The sector also experiences gaps in soft skill competencies, especially in international languages like English, French, Spanish and Chinese.

Supply of Skills by Training Institutions: - The existing training institutions offering tourism & hospitality courses in Rwanda are still limited in meeting the market demand. The following were noted:

- There is only one higher learning institution in Rwanda offering a degree program in Tourism, with enrolment of 400 students.
- Current enrolment in Training institutions in Rwanda is about 1,000 students for certificate and diploma courses. About 300-500 come out of the institutions into the labor market every year.
- Courses offered by the training institutions in Rwanda are traditional and basic in hotel and hospitality areas (targeting basic skills in cooking, general customer service, restaurant management, and basic hospitality skills). Whereas critical skills that are needed in making Rwanda competitive in the region are greatly lacking.

The findings of the skills survey imply that there is need for concerted, coordinated and comprehensive efforts, strategy and investment to enhance skills development for the fast growing tourism & hospitality sector in Rwanda. Comprehensive and urgent efforts are needed to provide skilled personnel to drive and sustain tourism & hospitality industry. Thus the following recommendations are put forth:

- i. There is need to establish sector skills councils to provide a central and coordinated approach to addressing the sector skills gaps. This is largely a private sector employer led initiative bringing together the training institutions as well.
- ii. There is need to enhance efforts, through incentives, to mobilize and sensitize owners/investors of establishments and train them on management systems for their businesses. There is also urgent need to develop job descriptions and evaluation guidelines for such establishments.
- iii. The culture/practice of management by unqualified managers and micro-management by owners must be broken in Rwanda, through mobilization, sensitization (mass media, visits and district based forums) and training on management, if the quality of service in the establishment is to improve and make the industry competitive regionally.
- iv. For sustainability and greater impact, RDB – HCID and Tourism Department should work with districts institutions and stakeholders and launch short term tailor-made/facility based practical courses for technicians and artisans in the industry.
- v. There is need to enhance efforts, through incentives, to mobilize and sensitize owners in the medium term (1 to - 3 years). HCID should facilitate and work with other stakeholders in the industry to develop a 3 year 'Marshal Plan' for skills development for tourism & hospitality sector in Rwanda.

1.0 RWANDA TOURSIM & HOSPITALITY SECTOR

1.1 Sector Overview

Tourism¹ and hospitality is regarded as the fastest growing industry in the world, with Africa having a significant potential for developing the sector. Many African countries including Rwanda can achieve sustainable economic development and poverty reduction through tourism. According to the World Travel & Tourism Council (WTTC) and the International Labor Office (ILO), there is worldwide consensus that employment generated by tourism/hospitality industry can be substantial in many national economies, contributing to their economic growth and providing employment and income to people (World Employment Report 1998-1999, ILO, 1999, Geneva).

The Government of Rwanda has identified tourism sector as one of the priority sectors in achieving Vision 2020 and contributor to the eradication of poverty in the country (Republic of Rwanda, 2007). The period 1994-2001 marked the government's efforts to revive tourism sector in the country by improving and establishing a tourism friendly policies and environment. Policy and legal frameworks, functioning institutional arrangements for coordination, reporting/communication and mobilization have been established to enhance the operation of the sector in Rwanda. The Rwanda Tourism Strategy was developed in a participatory and inclusive manner and approved by the Cabinet in 2002. A National Tourism Policy was put in place in 2009. A revised Tourism Strategy ("Sustaining the Momentum") was elaborated in 2007. The revised tourism strategy (2007) identified primates as Rwanda's unique selling proposition, but recognized the need to diversify the tourism sector and identified international conferences as well as birding as two additional core segments. Adjustment, refocus and diversification are strategic processes in the tourism industry all over the world. This is because of new and emerging challenges including: increased competition among tourist destinations, greater expectations on the part of the customers, and the opportunities offered by expanding segments of demand. The effectiveness of these adjustments, and the improvement of quality of products and services, depends strongly on the availability of skilled human capital (stock) for the sector. A high quality and skilled work force can ensure effective competitiveness and innovation, increased number of visitors and foreign exchange earnings, increased turnover for establishments, and effective adjustment of the sector to changing market demands (Ibid).

1.2 Policy Issues

A 10-year Sustainable Tourism Master Plan for Rwanda has been developed with support from the United Nations World Tourism Organization (Republic of Rwanda, 2009b). This master plan consolidates the previous strategies and policies, gives clear and detailed recommendations, and sets ambitious targets. Tourist arrivals are projected to increase

¹ *Tourism comprises activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and professionalism, recreation, holiday, visiting friends/ relatives, health, treatment, religion, pilgrims or other purposes not related to the exercise of an activity remunerated from within the place visited*

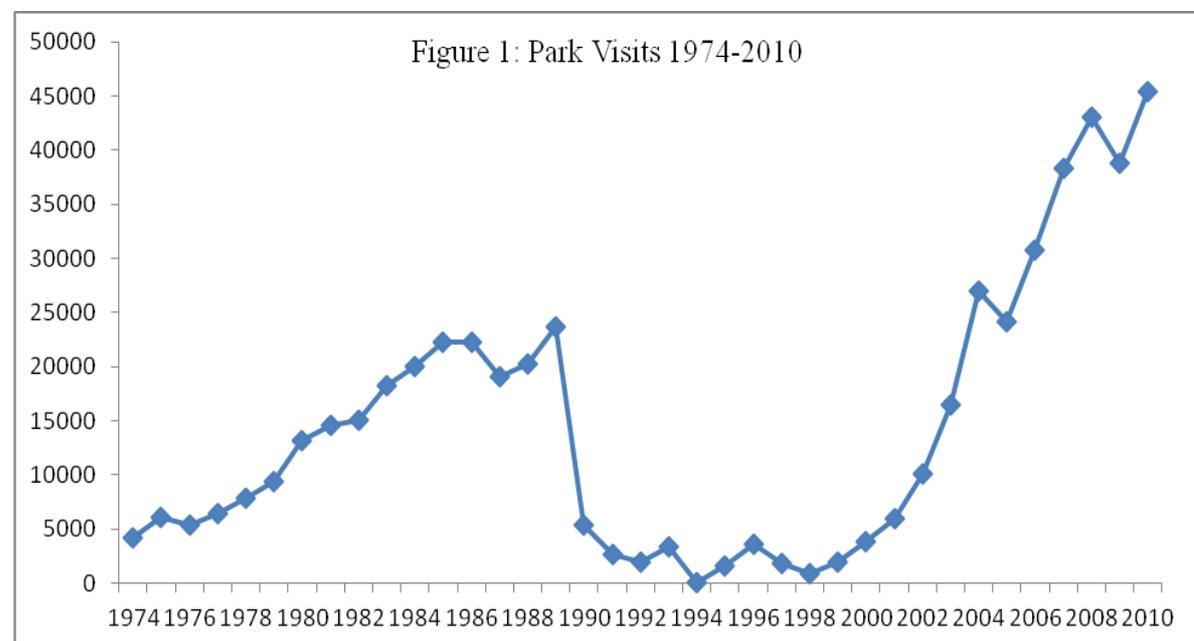
from about 980,000 in 2008 to over 2 million in 2020, thereby increasing foreign exchange earnings from about US\$ 200 million to over US\$ 600 million.

The government has shown strong commitment to reform. Although the different strategies have not yet been implemented completely, the government has consistently demonstrated its strong commitment to the execution of reforms and the overall improvement of the performance of the sector. A number of incentives are offered to investors in the tourism & hospitality industry. According to the investment code, tax exemptions are granted to investors who invest US\$ 100,000 or more in a facility. Airplanes imported to transport tourists are tax exempt and specialized vehicles such as hotel shuttles are exempt from import and excise duty. An investor in the tourism and hotel industry is also exempted from payment of import duties on equipment, such as bedroom fittings, swimming pools, outdoor leisure equipment, etc.

1.3 Economic contribution

Another contributor to the growth of tourism sector in Rwanda is the Parks. Figure 1 presents the trend in number of visitors to the Parks from 1974 to 2010. The flow of tourist rose steadily from 4,157 in 1974 and reached a peak of 23,698 in 1989 and declined up to the lowest levels. The flow picked up again from 1999 and reaching a peak of 45,359 in 2010. In 2011, total Park activities were dominated by visits to volcanoes 51% followed by Akagera National Parks 37% and Nyungwe national Park 12%. Of the total park activities, foreign tourists accounted for 69%, Rwandan residents 22% and foreign residents 9%.

Figure 1: Park Visits from 1974-2010



Source: Constructed from data obtained from Rwanda Development Board.

Cultural heritage (CH) and community-based tourism (CBT) are two sectors with obvious potential to help broaden the product range and provide the visitor with a more satisfying experience in Rwanda. Developing such sub-sectors is essential and urgent.

Table 1 shows that the main purpose of visitors coming to Rwanda is for “conference/business”, which has grown from 33.3 % of the total visitors in 2007 to 46.0% in 2010. This is followed by “visiting friends and relatives”, comprising of 30.1% of total visitors in 2010.

Table 1: Number of Visitors by Purpose of Visits, 2007-2010

Purpose of Visits	Number				Percent			
	2007	2008	2009	2010	2007	2008	2009	2010
Holiday/Vacation	21,492	59,437	50,476	69,124	2.6	6.1	7.2	10.3
Visiting friends/relatives	331,962	248,332	198,397	201,527	40.2	25.3	28.4	30.1
Business /Conference	275,837	345,898	341,718	307,721	33.4	35.3	48.9	46.0
Transit	150,125	307,825	34,846	27,642	18.2	31.4	5.0	4.1
Other purpose	46,959	19,085	73,515	62,439	5.7	1.9	10.5	9.3
Total	826,375	980,577	698,952	668,453	100.0	100.0	100.0	100.0

Source: Rwanda Statistical Year Book, 2011

Table 2 indicates visitors by country of origin. The majority of visitors (81.8%) were from African Countries.

Table 2: Number of Visitors to Rwanda by place of Origin, 2007 & 2010

Origin	2007		2010	
	Number	%	Number	%
Africa	732,464	88.6	547,026	81.8
America	23,349	2.8	33,188	5.0
Europe	39,707	4.8	54,258	8.1
Others	30,855	3.7	33,982	5.1
Total	826,375	100.0	668,454	100.0

Source: Rwanda Statistical Year Book, 2011

In 2008 it was estimated that each of the three big business hotels in Kigali generates about US\$ 500,000 per year in income directly from visitors and indirectly from food producers and artisans. Tourists visiting the Volcanoes National Park and the Musanze area generate around US\$ 1 million in income for poor workers and producers. In addition, the area receives large amounts of donations (SNV and ODI, 2008). Most hotels source their supplies from the local market to contribute to the economy. Figures published by Ministry of commerce indicate that the fast growing sector earned the highest figure at US\$251 million in 2011.

Estimates in 2009 indicated that tourism industry directly employs 33,800 people, whereas the direct and indirect employment accounts for 74,300 jobs. This represents 4.0 % of total employment, compared to 4.6% in sub-Saharan African and 7.6% the worldwide average. In Kenya, Tanzania and Uganda this percentage is 7.1, 7.1 and 6.6 respectively (World Travel and Tourism Council, 2009). Employment in the industry has grown by 2.8 percent on

average over the last 10 years, compared to 3.4 percent in Kenya, 2.5 percent in Tanzania and 2.4 percent in Uganda.

1.4 Challenges

Despite the good performance of the tourism sector in Rwanda, available studies, documents and experiences indicates that the tourism/hospitality sector in Rwanda faces some challenges that need to be addressed. These include the following:

- The quality of customer service is not consistent and generally poor compared with neighboring states. Also the tourism attraction tends to focus on gorilla and tend to target rich tourists.
- The main impediment is the large skills deficit in the sector in all the subsectors in both the public and private establishments. The skills deficit applies to all areas of hotel & hospitality industry, including hotel managers, tour guides, chefs, cooks, waiters, as well as service personnel and technicians for the hotels.

As stated in the Sustainable Tourism Master Plan for Rwanda – 2009 *“at present, the majority of high-value international visitors to Rwanda spend no more than three nights on average in the country, leaving little time to visit out-of-the way places or attractions that are not already included in their tour operator’s itinerary. For the ‘high-end’ tourists who spend US\$500 or more a day - and who have been the main target of the tourism industry’s marketing strategy since 2002 - Rwanda is essentially an add-on destination at the end of a tour of East Africa so that they can do the gorilla experience. These realities will only change if a program of concerted action is put in place. The development and marketing of a range of cultural and community tourism products that meet specified high standards will lead gradually to an increase in visitor numbers and length-of-stay and, in turn, create demand for more tourism products”* (GoR/UNWTO, 2009:8).

But what kind of skills profiles are there in the tourism and hospitality industry in Rwanda? And how do the supply of skills relate to the market demand of the same in the industry? This report provides insights to the skills availability and needs for the sector.

2.0 CONTEXT OF THE SKILLS SURVEY

The Rwanda Development Board's (RDB) mandate is to promote private sector development through investment promotion. In order to attract the requisite investment, it's important to ensure that the country has the right quantity and quality of skills to support the emerging and growing industries. The Human Capital and Institutional Development (HCID) Department at RDB supports the private sector by developing mechanisms to ensure there is adequate and availability skills with the right quality. It is expected to address the human capital challenge both from an institutional and individual level, through sustainable interventions. Establishing and running such strategic interventions to fill skills gaps in the private sector requires evidence-based quantitative and qualitative data/information. HCID is committed to supporting interventions that would fill the potential gaps and reconcile both labor supply and demand in the private sector in Rwanda.

2.1 Rationale for the survey

Strategic and sustained investment in skills development requires credible and comprehensive labor market data and information in the private sector and training institutions. Presently, there is inadequate data and information on skills gaps in the private sector and the match and/or mismatch between the supply of skills by various training institutions (TVET and university institutions) and the labor market demand particularly in the priority sectors.

In addition, though RDB has a Labor Market Information system (LMIS), it is still new and hence difficult to know the actual skills needs and gaps of various sectors of development let alone identifying the labor/skills challenges and opportunities the various sectors are facing/having. It is also not possible to conduct medium and long-term labor force forecasting for the various sub-sectors in the private sector. This is mainly because of lack of a series of cumulative credible data and limited use of robust methodological approaches. This skills survey is a strategic start towards building a credible skills database for decision making and planning.

It is from the above context that RDB-HCID commissioned a national private sector skills survey targeting 8 priority sectors including ICT, Mining, Energy, Tourism, Manufacturing, Construction, Agriculture, Finance and Insurance. A regional consultancy firm OWN and Associates Limited, working with the HCID team, was commissioned to lead this strategic national skills survey in the private sector in Rwanda. The survey was launched in August 2011.

2.2 Objectives

This national skills survey targeted the Private Sector in Rwanda, with a focus on:

- ❖ Establishing a robust methodology for strengthening Labor Market Information System (LMIS) and conducting periodical labor market forecasting and manpower surveys.

- ❖ Collecting, collating and reconciling both labor supply and private sector labor demand: establishing sufficient quantitative and qualitative information to identify the potential skills gaps in the private sector.
- ❖ Providing RDB/HCID with comprehensive empirical data on the existing and/or projected human capacity gaps against which training /capacity development interventions and performance can be based, including sustainable and cost effective interventions such as internships, trainings, and scholarships.
- ❖ To conduct a SWOT analysis of respective private sector companies with respect to human capital covering individual, institutional and environment.
- ❖ Provide prioritized recommendations and an action plan that the government and other key stakeholders should undertake to address these gaps.

2.3 Design and Methodology

To carry out a comprehensive, credible and informative skills survey in the selected sub-sectors a rapid assessment methodology, applying qualitative and quantitative techniques was used. The survey was national and carried out on appropriately selected sectors in all the 5 provinces of the country, reflecting both the urban and rural settings. The research team worked with the National Institute of Statistics Rwanda (NISR) to get the right sampling framework and sample size for the skills survey. The NISR Establishment Census 2011 was used as a basis for the selection of the organisations to be visited during the study.

The key respondents during the survey were; employers (owners or/CEOs), employees, and representatives of academic departments of training institutions in Rwanda. The results of the “Establishment Census 2011” conducted by the Ministry of Public Service and Labor, Ministry Commerce and Industry, National Institute of Statistics Rwanda and the Private Sector Federation² were used as the framework to determine the sample sizes of the respective sectors for the National Skills Sector Survey.

Based on the Establishment Census 2011 data, NISR worked with the research core team and used a stratified sampling method to select the establishments for the survey across the country. The respondents were stratified using the following 3 criteria:

1. Sectorial activity,
2. Firm size,
3. Geographical location

The stratification by firm size divides the population of firms into a 4 strata as in the Establishment Census, 2011: i.e.

- Micro firms (1 Employee)
- Small Firms (2-3 Employees)
- Medium Firms (4-9Employees)
- Large Firms (10+Employees)

² Republic of Rwanda. (June 2011). *Establishment Census, 2011: Final Results*. Kigali: Ministry of Public Service and Labor, Ministry of Commerce and Trade, National Institute of Statistics Rwanda, and Private Sector Federation.

A geographical distribution is defined to reflect the distribution of the economic establishments across the country within the different provinces i.e. Kigali, Southern, Eastern, Northern and Western Provinces.

Sector activity was based on the eight (8) priority sector identified by RDB as part of the terms of reference.

2.4 Sampling framework

The sectors identified by RDB were categorized within the economic activities of the establishment census as shown in Table 2 below. Using the formulae below the sample size was determined for each sector.

$$\text{Using Yamane (1967:888) } n = \frac{N}{1 + N(e)^2}$$

Where N is the population size

n- Sample size

e -level of precision: a precision of 5% was assumed for the skills sector surveys

Weights

To ensure that all sample estimates are reflective of the population parameters, weights for the different strata against the respective sample sizes have been tabulated. These have been reported in the respective sections. Weights have been computed using $w = n/N$, the reciprocal of which will be used to weight the sample results to get the overall population skills status magnitude. All weights have been incorporated in the databases.

Table 3: Sector Survey Sampling Framework

Sector*	Population**	Sample Size	Sample%
ICT (Information and Communication)	558	223	40
Energy	360	250	69
Mining	50	50	100
Construction	117	117	100
Tourism	33,305	476	1
Manufacturing	4,559	439	10
Agriculture	675	282	42
Finance & Insurance	970	330	34

This population is based on the NISR **Establishment Census, 2011 Report

2.5 Data collection

Through a collaborative process between the research core team, RDB and NSIR, a questionnaire was developed which had a core set of questions along with a series of sector specific modules which directly related to the footprints of each of the sectors. The core set of questions which examined generic recruitment issues, skills gaps, resources for training and future skills needs were drawn from the international skill survey instruments.

For each of the sectors an individual set of questions (or modules) were developed which varied depending upon the priorities of that particular sector. The importance of such an approach was twofold. First, it allowed each of the sectors to gather specific workforce data on organizations which fell into their footprint. Second, it captured the duality of functions that employees often fulfill within private organizations and that would have otherwise not been captured through the more generic core questions.

Given the complexity of the questionnaire and the need to ensure that as many as possible establishments and training institutions within the sector were included in the research, focus groups and telephone interviews were deemed to be the most appropriate, manageable and cost effective method. The interviews were conducted by trained bilingual enumerators.

The number of respondents from the organizations and training institutions are shown in table 4. Experts from RDB HCID, sectoral department, and key stakeholders in each sector validated the survey instruments and were also involved in focus group discussion and/or interviews

Table 4: Sector Survey Respondents per Sector

Sector*	Establishments	Training institutions
ICT (Information and Communication)	211	31
Energy	243	31
Mining	41	31
Construction	83	33
Tourism	476	33
Manufacturing	439	33
Agriculture	310	19
Finance & Insurance	310	19

2.6 Report structure

While the surveys were conducted over three phases with at least 2 sectors being analyzed at a time, the reports have been developed separately for each of the eight sectors under review.

The following sections of this report present the **Tourism and Hospitality sector** finding and recommendations.

The findings are divided into two parts.

Part 1 (Section 3) focuses on principal activities in the Tourism and hospitality establishments in Rwanda, as well as employment by categories of occupation (labor profiles), skills proficiency, skills gaps, and capacity building issues.

Part II (Section4) deals with supply of skills for the Tourism and hospitality sector (capacities of training institutions) including; courses offered, enrolment and output from HLIs, equipment/training facilities and academic staff.

Section 5 of the reports presents the implications of the findings and specific recommendations that need to be studied and implemented to bridge the skills gaps in the industry.

3.0 PART I: FINDINGS OF THE SKILLS SURVEY IN TOURISM ESTABLISHMENTS IN THE PRIVATE SECTOR

This section focuses on principal activities in the Tourism & Hospitality Sector establishments in Rwanda, as well as employment by categories of occupation (labor profiles), skills proficiency, skills gaps, and capacity building issues.

3.1 Principal Activities & Size of Establishments

The survey targeted establishments in the Tourism & Hospitality sector in the private sector across Rwanda. A sample of 476 establishments was selected through stratified sampling based on subsector, size and location of establishment. A total of 394 establishments responded to the survey, giving a response rate of 82.7%.

Table 5 indicates the 12 main principal activities in the Tourism & Hospitality sector in Rwanda, which are spread across the country. The two principal activities that are dominant in the sector are “Hotel & Hospitality/Accommodation” consisting of 29.4% of the businesses in the sector, and “Restaurant and Mobile Food service” consisting of 29.1%, of the enterprises in the sector.

Table 5: Principal Activities in the Tourism/Hospitality Sector

Principal Activity	Percent
Passenger Air Transport (Office in Rwanda)	0.8
Hotels and Hospitality/Accommodation	45.5
Restaurants and Mobile Food service	29.1
Tour and Travel agency	8.2
Tour guides	3.6
Event Management Activities	2.9
Creative, Arts and Entertainment activities	3.2
Heritage Activities Museums Historical sites	1.3
Operation of Sports Facilities	1.5
National Parks Management	.6
Curious Products	2.7
Others	0.6
Total	100.0

Establishments’ Geographical location: - The majority (75.1%) of the Tourism/Hospitality establishments visited during the survey were mainly located in urban areas with 75.1% of them located in Kigali, 7.4% are in the Southern province, 9.4% in Northern and (5.8%)Western Province, and 2.3% in Eastern province (Table 6).

Table 6: Location of Construction Establishments

Province	Frequency	Percent
Kigali	296	75.1
Northern	37	9.4
Southern	29	7.4
Western	23	5.8
Eastern	9	2.3
Total	394	100.0

In terms of legal status, 80.5% of the Tourism establishments reported to have been sole proprietorship, 5.8% limited liability by share capital, 4.3% legally established partnership, and 3% were unregistered (Table 7).

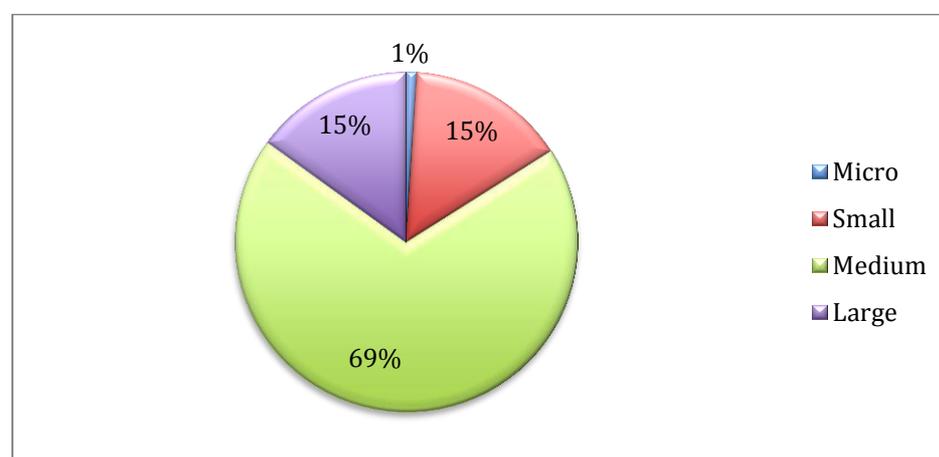
Table 7: Legal Status of Tourism Establishments

Legal status of this establishment	Percent
Unregistered	3.0
Registered, sole proprietorship	80.5
Legally established partnership	4.3
Limited liability company by share capital	5.8
Limited liability company by guarantee	.5
Cooperative	2.0
Not for profit business enterprise (NGO)	.8
Other (State)	3.0
Total	100.0

Categories of Tourism/Hospitality Establishments by Size: - The size of the establishments was adopted from the establishment census that was done by the National Institute of Statistics which defined micro establishments as employing one labor unit, Small (1-4) labor units, medium (5-9) and large (10 plus).

Figure 2 indicates that the majority of the establishments are Medium enterprises constituting 69.5%, Large and Small businesses comprise 15% respectively, and the Micro enterprises constitute approximately 1% of the establishments visited.

Figure 2: Distribution of Establishments by Size



Ownership Structure: - The results presented in Table 7, shows that 86.5% of the establishments were private fully Rwandese owned.

Table 8: Distribution of Establishment by Ownership Structure

Ownership structure of this establishment	Percent
Private, fully Rwandese owned	86.5
Private, Rwandese majority owned	3.6

Private, Fully Majority Owned	1.3
Private, Fully Foreign Owned	4.8
Public, Fully Rwandese (i.e. Government)	2.8
Joint Public and Private (Rwandese)	.8
Joint Public and Private (Rwandese and Foreign)	.3
Total	100.0

Managers' Education and Qualification in the Sector: - In any business undertaking the level of education and professional qualification are important variables for effectiveness and efficiency and quality of service. In this survey respondents were asked to indicate the highest education level and professional qualifications of managers. Table 9 presents the distribution of manager's by highest level of education. Of the institutions which responded, about 59% of the establishments did not disclose the level of education of their managers. For those who indicated, only 35.5% of the enterprises reported having managers who are university graduates and only 3% of the establishments reported having TVET graduates.

Table 9: Managers' Education Level

Managers' Education Level	Percent
Lower secondary graduate	0.3
Attended but didn't finish upper secondary	0.5
Upper secondary graduate	4.3
TVET graduate	0.3
University Student	0.5
University graduate	35.5
No mention of Education	58.6
Total	100.0

3.2 Skills Profiles by Categories of Occupation

3.2.1 Overall Labor Units in the Sector

Tourism & Hospitality sector had a total of 20,860 employees comprising of 35.7% women and 64.3% men. Table 10 indicates the labor units by gender and nationality in each of the subsectors. The expatriates in the sector constitute 3.7%, the majority (65.8%) of these are employed in Hotel & Accommodation subsector.

Table 10: Employment in Tourism Sector by Subsector, Gender & Nationality

Subsector	Total Number Existing	Women	Expatriates
Hotel & Accommodation	13,818	4,976	503
Restaurants	2,443	1,059	73
Travel Agency	990	320	03
Tour Guides Services	1,183	409	12
Creative, Arts & Entertainment Centers	400	115	00
Museum & Memorial Centers	104	35	03
Sports Facilities Services	491	115	06
National Parks	160	16	00
Events Management	70	22	0
Curious Shops	147	57	8
Passenger Air Transport	1,054	322	157
Total	20,860	7,446	765

3.3 Employment by Sub- Sector: Hotel & Accommodation

3.3.1 Labour units and occupations

Table 11 indicates the labor units in the “Hotels and Accommodation” subsector in Tourism & Hospitality Sector. The subsector employs 13,818 labor units, with women accounting for 36% whereas expatriates account for 4% of the labor force. Waiters and cooks have the largest share of the labor units in this subsector with each having an absolute number of 2472 (17.9%) and 2058 (14.9%) respectively.

The majority of women are mainly working as waiters and cooks in the sectors constituting 23% and 14% respectively. The existing expatriates are mainly working as waiters 19.7% and housekeepers 12.7%, hotel managers 11% and cooks 12.7%.

It’s important to note that there are no health professionals, and management and organization analysts in the hotel establishments in the country. Interview with the established hotels indicates that they do not have health personnel employed formally in their facilities. But have private doctors/nurses on call. But medium and small hotels and restaurants do not have such arrangements. And usually when a visitor becomes unwell they are referred to established health facilities (public and/or private ones).

Table 11: Labor Units by Occupations within the Hotel & Accommodation Sub Sector

Occupation	Existing Number	Women	Expatriates
Hotel managers	661	191	56
Front Office Manager/Public Relations Manager	265	45	5
Restaurant managers	402	107	15
Chefs	364	39	25
Head Cooks	542	165	8
Cooks	2058	706	64
Food and Beverage Management/Specialist	198	28	13
Pastry and bakery activities specialists	145	3	0
Translators, interpreters and other linguists	56	30	3
Advertising and marketing professionals	41	13	3
Public relations professionals/Customer Handlers/Customer service professionals	158	43	3
Sports, recreation and cultural center managers	104	15	3
Conference and event planners	79	56	0
Travel consultants and clerks	31	10	0
Contact Centre information clerks	69	38	0
Telephone switchboard operators	97	15	10
Hotel receptionists/Inquiry Clerks	434	257	38
Receptionists (general)	486	321	43
Administrative and Executive Secretaries	295	257	13
Waiters	2472	1131	99
Bartenders	912	231	18
Cleaning and housekeeping supervisors in offices, hotels and other establishments	338	155	0
Cashiers and ticket clerks	193	96	0
Food service counter attendants	270	132	0
Security guards	612	30	15

Car, taxi and van drivers	302	28	5
Housekeepers, Cleaners and helpers in offices, hotels and other establishments	865	363	64
Florists/Gardeners, sweepers and other related activities	127	71	0
Interior Designers and other related activities	3	3	0
Fast food preparers	46	35	0
Kitchen helpers	369	155	0
Sales and Marketing agents	117	36	0
Technicians/Electricians/Plumbers/Repairers	213	5	0
Sweepers and related laborers	269	137	0
Services managers not elsewhere classified	38	5	0
Financial and investment advisers	8	3	0
Events/Tour organizers/Manager	11	0	0
Financial analysts	84	16	0
Management and organization analysts	0	0	0
Policy administration professionals	0	0	0
Training and staff development professionals	5	0	0
Advertising and marketing professionals	0	0	0
Public relations professional	5	5	0
Lawyers	28	0	0
Health professionals	0	0	0
Transport officers/drivers and other related activities	18	0	0
Other activities not captured above	28	0	0
Total	13,818	4976	503

3.3.2 Distribution of employees in Hotel and Accommodation

In relation to the above, the labor units are distributed within large, medium and small establishments within the hotel and accommodation subsector. The large establishments have a proportion of 50.8%, medium establishments 47.2% and small establishments 2% of labor units.

a) Large Establishments

The large establishments employ 7026 labor units with women accounting for 35% whereas expatriates account for 5.5%. Waiters and cooks have the largest share of the labor units with each having an absolute number of 1217 and 869 respectively.

Table 12 indicates the labor units by gender and nationality. Women are mainly working as waiters in the sectors with 22% of the existing women working as waiters and 5% of women working as receptionists. The existing expatriates in the large establishments are mainly working as waiters, cooks, and housekeepers among others.

Table 12: Labor Units by Occupation within Large Establishments in Hotel & Accommodation

Occupation	Existing Number	Women	Expatriates
Hotel managers	229	38	33
Front Office Manager/Public Relations Managers	117	25	0
Restaurant managers	178	74	13
Chefs	201	18	8
Head Cooks	229	79	5
Cooks	869	249	58
Food and Beverage Management/Specialist	132	15	13

Pastry and bakery activities specialists	74	3	0
Translators, interpreters and other linguists	56	30	3
Advertising and marketing professionals	23	8	3
Public relations professionals/Customer Handlers/Customer service professionals	135	38	3
Sports, recreation and cultural center managers	84	15	3
Conference and event planners	79	56	0
Travel consultants and clerks	28	10	0
Contact Centre information clerks	69	38	0
Telephone switchboard operators	79	8	10
Hotel receptionists/Inquiry Clerks	203	119	15
Receptionists (general)	216	127	43
Administrative and Executive Secretaries	94	74	13
Waiters	1217	496	99
Bartenders	574	152	18
Cleaning and housekeeping supervisors in offices, hotels and other establishments	183	81	0
Cashiers and ticket clerks	119	58	0
Food service counter attendants	201	89	0
Security guards	264	25	10
Car, taxi and van drivers	119	28	0
Housekeepers, Cleaners and helpers in offices, hotels and other establishments	333	170	38
Florists/Gardeners, sweepers and other related activities	76	43	0
Interior Designers and other related activities	0	0	0
Fast food preparers	28	25	0
Kitchen helpers	224	122	0
Sales and Marketing agents	102	33	0
Technicians/Electricians/Plumbers/Repairers	175	5	0
Sweepers and related laborers	178	89	0
Services managers not elsewhere classified	0	0	0
Financial and investment advisers	3	0	0
Events/Tour organizers/Manager	3	0	0
Financial analysts	64	13	0
Management and organization analysts	0	0	0
Policy administration professionals	0	0	0
Training and staff development professionals	5	0	0
Advertising and marketing professionals	0	0	0
Public relations professional	5	3	0
Lawyers	23	0	0
Health professionals	0	0	0
Transport officers/drivers and other related activities	10	0	0
Other activities not captured above	25	0	0
Total	7026	2456	388

b) Medium Establishments

The medium establishments employ 6519 labor units with women accounting for 36.4% whereas expatriates account for 1.6% (Table 13). Waiters and cooks have the largest share of the labor units with each having an absolute number of 1255 and 1169 respectively. Women are mainly working as waiters and cooks. The existing expatriates in the medium establishments are mainly working as hotel managers and chefs to mention but a few.

Table 13: Labor Units & Occupation in Medium Establishment Hotel & Accommodation

Occupation	Existing Number	Women	Expatriates
Hotel managers	399	140	23
Front Office Manager/Public Relations Manager	140	18	5
Restaurant managers	216	28	3
Chefs	130	18	18
Head Cooks	310	86	3
Cooks	1169	442	5
Food and Beverage Management/Specialist	66	13	0
Pastry and bakery activities specialists	71	0	0
Translators, interpreters and other linguists	0	0	0
Advertising and marketing professionals	18	5	0
Public relations professionals/Customer Handlers/Customer service professionals	23	5	0
Sports, recreation and cultural center managers	20	0	0
Conference and event planners	0	0	0
Travel consultants and clerks	3	0	0
Contact Centre information clerks	0	0	0
Telephone switchboard operators	18	8	0
Hotel receptionists/Inquiry Clerks	226	137	23
Receptionists (general)	206	140	0
Administrative and Executive Secretaries	201	183	0
Waiters	1255	635	0
Bartenders	338	79	0
Cleaning and housekeeping supervisors in offices, hotels and other establishments	155	74	0
Cashiers and ticket clerks	74	38	0
Food service counter attendants	69	43	0
Security guards	338	5	0
Car, taxi and van drivers	183	0	5
Housekeepers, Cleaners and helpers in offices, hotels and other establishments	468	163	18
Florists/Gardeners, sweepers and other related activities	51	28	0
Interior Designers and other related activities	3	3	0
Fast food preparers	18	10	0
Kitchen helpers number	145	33	0
Sales and Marketing agents	15	3	0
Technicians/Electricians/Plumbers/Repairers	38	0	0
Sweepers and related laborers	66	23	0
Services managers not elsewhere classified	38	5	0
Financial and investment advisers	5	3	0
Events/Tour organizers/Manager	8	0	0
Financial analysts	20	3	0
Lawyers	5	0	0
Transport officers/drivers and other related activities	8	0	0
Other activities not captured above	3	0	0
Total	6519	2371	103

c) Small Establishments

The small establishments employ 273 labor units with women accounting for 53.8% whereas expatriates account for 4.7%. Hotel receptionists, housekeepers, chefs and managers dominate the labor units (Table 14). Women are mainly working as receptionists and housekeepers. But there are also existing expatriates in the small establishments working as housekeepers and helpers as receptionists.

Table 14: Labor Units & Occupation in Small Establishment Hotel & Accommodation

Occupation	Number	Women	Expatriates
Hotel managers	33	13	0
Front Office Manager/Public Relations Manager	8	5	0
Restaurant managers	8	5	0
Chefs	33	3	0
Head Cooks	3	0	0
Cooks	20	15	0
Hotel receptionists/Inquiry Clerks	5	0	0
Receptionists (general)	64	51	0
Security guards	10	0	5
Housekeepers, Cleaners and helpers in offices, hotels and other establishments	64	30	8
Sweepers and related laborers	25	25	0
Total	273	147	13

3.3.3 Proficiency of employees in Hotel and Accommodation

Of the existing 13,818 labor units, 20.8% were reported by the employers not to be proficient. Table 15 indicates that the skills areas with the highest absolute non proficient labor units were Services managers with a proportion of 52.6%, housekeeping supervisors with a proportion of 37.6%, waiters with 36.3%, cooks with 29.2%, and Pastry and bakery activities specialists with 26.2% and housekeepers with 17.3%.

Table 15: Proficiency of Labor Units in Hotel & Accommodation Sub Sector

Occupation	Number	Not Proficient (Absolute No)	Not Proficient %
Waiters	2472	897	36.3
Cooks	2058	601	29.2
Bartenders	912	221	24.2
Housekeepers, Cleaners and helpers in offices, hotels and other establishments	865	150	17.3
Cleaning and housekeeping supervisors in offices, hotels and other establishments	338	127	37.6
Receptionists (general)	486	90	18.5
Hotel managers	661	82	12.4
Kitchen helpers	369	74	20.1
Food service counter attendants	270	68	25.2
Car, taxi and van drivers	302	66	21.9
Head Cooks	542	54	10
Security guards	612	52	8.5
Cashiers and ticket clerks	193	44	22.8
Pastry and bakery activities specialists	145	38	26.2
Food and Beverage Management/Specialist	198	35	17.7
Chefs	364	31	8.5
Front Office Manager/Public Relations	265	30	11.3

Occupation	Number	Not Proficient (Absolute No)	Not Proficient %
Manager			
Public relations professionals/Customer Handlers/Customer service professionals	158	30	19
Hotel receptionists/Inquiry Clerks	434	27	6.2
Technicians/Electricians/Plumbers/Repairers	213	22	10.3
Services managers not elsewhere classified	38	20	52.6
Florists/Gardeners, sweepers and other related activities	127	18	14.2
Restaurant managers	402	17	4.2
Sports, recreation and cultural center managers	104	15	14.4
Sales and Marketing agents	117	15	12.8
Telephone switchboard operators	97	11	11.3
Administrative and Executive Secretaries	295	10	3.4
Other activities not captured above	28	10	35.7
Fast food preparers	46	5	10.9
Translators, interpreters and other linguists	56	3	5.4
Sweepers and related laborer	269	2	0.7
Travel consultants and clerks	31	1	3.2
Events/Tour organizers/Manager	11	1	9.1
Advertising and marketing professionals	41	0	0
Conference and event planners	79	0	0
Contact Centre information clerks	69	0	0
Interior Designers and other related activities	3	0	0
Financial and investment advisers	8	0	0
Financial analysts	84	0	0
Training and staff development professionals	5	0	0
Public relations professional	5	0	0
Lawyers	28	0	0
Transport officers/drivers and other related activities	18	0	0
Total	13,818	2869	20.8

3.3.4 Skills Gaps in Hotel and Accommodation Sub Sector

Table 16 indicates the skills gaps in the Hotel and Accommodation subsector. The sub-sector has a skills gap of 3370 labor units. Waiters, cooks, bartenders, housekeepers, hotel managers, and receptionists dominate the skills gaps.

Table 16: Skills Gaps in Hotel & Accommodation Sub Sector

Occupation	Not Proficient (Absolute No)	Expatriates	Gap
Waiters	897	99	996
Cooks	601	64	665
Bartenders	221	18	239
Housekeepers, Cleaners and helpers in offices, hotels and other establishments	150	64	214
Hotel managers	82	56	138
Receptionists (general)	90	43	133
Cleaning and housekeeping supervisors in offices, hotels and other establishments	127	0	127
Kitchen helpers	74	0	74
Car, taxi and van drivers	66	5	71

Food service counter attendants	68	0	68
Security guards	52	15	67
Hotel receptionists/Inquiry Clerks	27	38	65
Head Cooks	54	8	62
Chefs	31	25	56
Food and Beverage Management/Specialist	35	13	48
Cashiers and ticket clerks	44	0	44
Pastry and bakery activities specialists	38	0	38
Front Office Manager/Public Relations Manager	30	5	35
Public relations professionals/Customer Handlers/Customer service professionals	30	3	33
Restaurant managers	17	15	32
Administrative and Executive Secretaries	10	13	23
Technicians/Electricians/Plumbers/Repairers	22	0	22
Telephone switchboard operators	11	10	21
Services managers not elsewhere classified	20	0	20
Florists/Gardeners, sweepers and other related activities	18	0	18
Sports, recreation and cultural center managers	15	3	18
Sales and Marketing agents	15	0	15
Other activities not captured above	10	0	10
Translators, interpreters and other linguists	3	3	6
Fast food preparers	5	0	5
Advertising and marketing professionals	0	3	3
Sweepers and related laborer	2	0	2
Events/Tour organizers/Manager	1	0	1
Travel consultants and clerks	1	0	1
Total	2867	503	3370

3.4 Restaurants Sub Sector

3.4.1 Labour Units and Occupations

Table 17 shows the labor units in the Restaurant subsector. The subsector employs 2,443 labor units with women accounting for 43.4% whereas expatriates account for 3%. Waiters and cooks have the largest share of the labor units with each having an absolute number of 349(14.3%) and 359(14.7%) respectively. Other dominant labor units include chefs, bartenders and kitchen helpers. Women are mainly working as waiters in the sectors (21.5%) and 19% working as bartenders. The existing expatriates are mainly working as cooks 27.4% and food and beverage specialists 19.2%, pastry and bakery specialist 16.4% and managers 15.1%.

Table 17: Labor Units in Restaurant Sub Sector

Occupation	Existing Number	Woman	Expatriates
Restaurant manager/supervisor	81	5	11
Chefs	102	6	2
Head Cooks	104	14	4
Cooks	359	34	16
Food and Beverage Management/Specialist	133	60	14
Pastry and bakery activities specialists	112	48	12
Translators, interpreters and other linguists	2	2	0
Advertising and marketing professionals	39	18	0

Public relations professionals / Customer Handlers/Customer service professionals	55	15	1
Hotel receptionists	130	117	0
Cooks	81	35	0
Waiters	349	228	11
Bartenders	280	201	0
Cleaning and housekeeping supervisors in offices, hotels and other establishments	23	18	0
Cashiers and ticket clerks	130	120	0
Security guards	125	0	0
Car, taxi and van drivers	104	0	0
Cleaners and helpers in offices, hotels and other establishments	33	21	0
Kitchen helpers	152	110	0
Sales and Marketing agents	2	2	2
Florists, gardeners and related activities	30	5	0
Sweepers and related laborers	17	0	0
Total	2443	1059	73

a) Restaurants Large Establishments

The large establishments employ 249 labor units with women accounting for 25.7% whereas expatriates account for 3.2%. Waiters have the largest share of the labor units with an absolute number of 134 (53.8%) (Table 18). Women are mainly working as cooks in the sectors with 54.7% of the existing women working as cooks. The existing expatriates in the large establishments are working as cooks and managers.

Table 18: Labor Units in Restaurant Large Establishments

Occupation	Existing Number	Women	Expatriates
Restaurant manager/supervisor number	5	0	3
Chefs	8	0	0
Head Cooks	8	3	0
Food and Beverage Management/Specialist	10	0	0
Receptionists	5	0	0
Cooks	134	35	5
Waiters	23	0	0
Cleaning and housekeeping supervisors in offices, hotels and other establishments	23	18	0
Cashiers and ticket clerks	3	3	0
Florists, gardeners and related activities	30	5	0
Total	249	64	8

b) Restaurant Medium Establishments

The medium establishments employ 2197 labor units with women accounting for 45.2% whereas expatriates account for 3%. Waiters have the largest share of the labor units with a proportion of 14.8%, cooks 13.7% and bartenders 12.7% (Table 19).

Women are mainly working as mainly as waiters, bartenders and cashiers with proportions of 23%, 20.2% and 11.8% respectively. The existing expatriates in the medium establishments are working as waiters, food and beverage specialists and pastry and bakery specialists.

Table 19: Labor Units Restaurant Medium Establishments

Occupation	Existing Number	Women	Expatriates
Restaurant manager/supervisor	76	5	8
Chefs	94	6	2
Head Cooks	96	11	4
Cooks	301	29	11
Food and Beverage Management/Specialist	123	60	14
Pastry and bakery activities specialists	112	48	12
Translators, interpreters and other linguists	2	2	0
Advertising and marketing professionals	39	18	0
Public relations professionals / Customer Handlers/Customer service professionals	55	15	1
Receptionists	125	117	0
Cooks	5	5	0
Waiters	326	228	11
Bartenders	280	201	0
Cashiers and ticket clerks	127	117	0
Security guards	125	0	0
Car, taxi and van drivers	104	0	0
Cleaners and helpers in offices, hotels and other establishments	33	21	0
Kitchen helpers	152	110	0
Sales and Marketing agents	2	2	2
Sweepers and related laborers	17	0	0
Total	2197	993	66

3.4.2 Restaurants Employees' Proficiency

Table 20 indicates the level of proficiency of employees in the Restaurant subsector as reported by employers of the establishments that participated in the survey. Of the existing 2443 labor units within subsector, 38.2% were reported by the employers not to be proficient. The skills areas with the highest absolute non-proficient labor units include cooks with a proportion of 46.8%, bartenders, 54.6%, waiters 41.5% and kitchen helpers 57.9%.

Table 20: Proficiency of Employees in Restaurant Sub Sector

Occupation	Existing Number	Not Proficient	Percent
Cooks	359	168	46.8
Bartenders	280	153	54.6
Waiters	349	145	41.5
Kitchen helpers	152	88	57.9
Cashiers and ticket clerks	130	60	46.2
Pastry and bakery activities specialists	112	56	50.0
Head Cooks	104	49	47.1
Food and Beverage Management/Specialist	133	41	30.8
Chefs	102	37	36.3
Hotel receptionists	130	28	21.5
Public relations professionals / Customer Handlers/Customer service professionals	55	23	41.8
Cleaning and housekeeping supervisors in offices,	23	23	100.0

hotels and other establishments			
Advertising and marketing professionals	39	14	35.9
Security guards	125	11	8.8
Cooks	81	8	9.9
Car, taxi and van drivers	104	8	7.7
Restaurant manager/supervisor	81	6	7.4
Florists, gardeners and related activities	30	5	16.7
Sweepers and related laborers	17	5	29.4
Cleaners and helpers in offices, hotels and other establishments	33	4	12.1
Translators, interpreters and other linguists	2	2	100.0
Sales and Marketing agents	2	0	0.0
Total	2443	934	38.2

3.4.3 Restaurants Skills' Gap

Table 21 indicates the skills gaps in the Restaurant subsector. The restaurants subsector has a total skills gap of 1007 labor units. The skills gap is dominated by the following occupations: waiters, cooks, bartenders and housekeepers to mention but a few, as indicated in the table below.

Table 21: Skills Gaps in the Restaurant Sub Sector

Occupation	Expatriates	Not Proficient	Gap
Cooks	16	168	184
Waiters	11	145	156
Bartenders	0	153	153
Kitchen helpers	0	88	88
Pastry and bakery activities specialists	12	56	68
Cashiers and ticket clerks	0	60	60
Food and Beverage Management/Specialist	14	41	55
Head Cooks	4	49	53
Chefs	2	37	39
Hotel receptionists	0	28	28
Public relations professionals / Customer Handlers/Customer service professionals	1	23	24
Cleaning and housekeeping supervisors in offices, hotels and other establishments	0	23	23
Restaurant manager/supervisor	11	6	17
Advertising and marketing professionals	0	14	14
Security guards	0	11	11
Car, taxi and van drivers	0	8	8
Cooks	0	8	8
Florists, gardeners and related activities	0	5	5
Sweepers and related laborers	0	5	5
Cleaners and helpers in offices, hotels and other establishments	0	4	4
Sales and Marketing agents	2	0	2
Translators, interpreters and other linguists	0	2	2
Total	73	934	1,007

3.5 Travel Agency Sub Sector

3.5.1 Labour Units and Occupations

The Travel Agency subsector employs 990 labor units with women accounting for 32.3% whereas expatriates account for 0.3%. Travel consultants, tour guiding specialists, sales and marketing professional, ticket clerks have the largest share of the labor units (Table 22).

Women are mainly working as ticket clerks, receptionists and office supervisors. The existing expatriates are working as sales and marketing manager and tourism and hospitality specialists, as indicated in the table below.

Table 22: Labor Units & Occupation in Travel Agency Sub Sector

Occupation	Number	Women	Expatriates
Sales and marketing managers	38	24	1
Advertising and public relations managers	12	0	0
Research and development managers	18	8	0
Tour Guiding professionals/specialists	62	12	0
Tourism & Hospitality specialists/professionals	10	4	2
Customer service professionals	16	13	0
Office supervisors number of which expatriates	57	35	0
Translators, interpreters and other linguists	32	16	0
Travel consultants and clerks	55	13	0
Contact centers information clerks	15	8	0
Telephone switchboard operators	12	0	0
Hotel receptionists	2	1	0
Enquiry clerks	14	1	0
Receptionists (general)	26	28	0
Cashiers and ticket clerks	83	63	0
Food service counter attendants	24	26	0
Security guards	118	0	0
Car, taxi and van drivers	251	16	0
Domestic cleaners and helpers	2	0	0
Cleaners and helpers in offices, hotels and other establishments	20	5	0
Fast food preparers	22	15	0
Kitchen helpers	6	1	0
Sales and Marketing agents	10	7	0
Sweepers and related laborers	31	14	0
Services managers not elsewhere classified	5	0	0
Financial and investment advisers	7	2	0
Financial analysts	12	0	0
Management and organization analysts	5	5	0
Policy administration professionals	13	3	0
Training and staff development professionals	0	0	0
Advertising and marketing professionals	12	0	0
Public relations professional	0	0	0
Lawyers	0	0	0
Other activities not captured above	0	0	0
Total	990	320	3

a) Travel Agency's Large Establishments

The large establishments in the subsector employ 575 labor units with women accounting for 27.1%. No expatriates were reported to have been working in the large establishments in the subsector. Car drivers, ticket cashiers, translators and travel consultants are the main occupations in the subsector (Table 23).

Women are mainly working as ticket clerks, translators, and office supervisors with a proportion of 32%, and 2.6% respectively.

Table 23: Labor Units & Occupation in Large Establishment Travel Agency Sub Sector

Occupation	Number	Women	Expatriates
Sales and marketing managers	0	0	0
Advertising and public relations managers	0	0	0
Research and development managers	17	8	0
Tour Guiding professionals/specialists	25	0	0
Tourism & Hospitality specialists/professionals	8	3	0
Customer service professionals	0	0	0
Office supervisors number of which expatriates	38	15	0
Translators, interpreters and other linguists	30	15	0
Travel consultants and clerks	28	5	0
Contact centers information clerks	15	8	0
Telephone switchboard operators	12	0	0
Hotel receptionists	0	0	0
Enquiry clerks	10	0	0
Receptionists (general)	13	10	0
Cashiers and ticket clerks	65	50	0
Food service counter attendants	20	13	0
Security guards	96	0	0
Car, taxi and van drivers	109	0	0
Domestic cleaners and helpers	0	0	0
Cleaners and helpers in offices, hotels and other establishments	20	5	0
Fast food preparers	22	10	0
Kitchen helpers	5	0	0
Sales and Marketing agents	10	5	0
Sweepers and related laborers	2	0	0
Services managers not elsewhere classified	5	0	0
Financial and investment advisers	7	2	0
Management and organization analysts	5	5	0
Policy administration professionals	13	3	0
Total	575	156	0

b) Travel Agency Medium Establishment

The medium establishments in the subsector employ 391 labor units with women accounting for 31.7% whereas expatriates account for 1%. Car drivers have the largest share of the labor units with an absolute number of 130 (33.2%). These are followed by tour guiding specialists, sales and marketing specialists (Table 24).

Women are less evenly distributed among sales and marketing specialists, tour guiding specialist, receptionists and ticket clerks. The existing expatriates in the large establishments are working as tourism and hospitality specialists and sales and marketing managers.

Table 24: Labor Units & Occupation in Travel Agency Medium Establishments

Occupation	Number	Women	Expatriates
Sales and marketing managers	26	12	1
Advertising and public relations managers	12	0	0
Research and development managers	1	0	0
Tour Guiding professionals/specialists	37	12	0
Tourism & Hospitality specialists/professionals	2	1	3
Customer service professionals	16	13	0
Office supervisors number of which expatriates	19	16	0
Translators, interpreters and other linguists	2	1	0
Travel consultants and clerks	27	8	0
Hotel receptionists	2	1	0
Enquiry clerks	4	1	0
Receptionists (general)	13	13	0
Cashiers and ticket clerks	18	13	0
Food service counter attendants	4	1	0
Security guards	22	0	0
Car, taxi and van drivers	130	16	.
Domestic cleaners and helpers	2	0	0
Kitchen helpers	1	1	0
Sweepers and related laborers	29	14	0
Financial analysts	12	0	0
Advertising and marketing professionals	12	0	0
Total	391	124	4

c) Travel Agency's Small Establishments

The small establishments in the sector employ 24 labor units with women accounting for 50% whereas there were no expatriates reported to be working in the small establishments (Table 25). The labor units are equally distributed between sales and marketing managers and car drivers. All the existing women work as sales and marketing managers.

Table 25: Labor Units in Travel Agency Small Establishments

Occupation	Number	Women	Expatriates
Sales and marketing managers	12	12	0
Travel agency's Car, taxi and van drivers	12	0	0
Total	24	12	0

3.5.2 Travel Agency Employees' Proficiency

Table 25 indicates the proficiency level of employees in the Travel Agency subsector as reported by employers. Of the existing 990 labor units within subsector, 4.1% were reported by the employers not to be proficient. The levels of non-proficiency were reported amongst only artisan labor units namely sweepers, security guards, cashiers, drivers, and Tourism & Hospitality specialists/professionals

Table 26: Employees Proficiency in the Travel Agency Sub Sector

Occupation	Existing Number	Not Proficient	Percent
Sweepers and related laborers	31	12	38.7
Security guards	118	11	9.3
Cashiers and ticket clerks	83	10	12.0
Car, taxi and van drivers	251	7	2.8
Tourism & Hospitality specialists/professionals	10	1	10.0
Advertising and marketing professionals	12	0	0.0
Advertising and public relations managers	12	0	0.0
Cleaners and helpers in offices, hotels and other establishments	20	0	0.0
Contact centers information clerks	15	0	0.0
Customer service professionals	16	0	0.0
Domestic cleaners and helpers	2	0	0.0
Enquiry clerks	14	0	0.0
Fast food preparers	22	0	0.0
Financial analysts	12	0	0.0
Financial and investment advisers	7	0	0.0
Food service counter attendants	24	0	0.0
Hotel receptionists	2	0	0.0
Kitchen helpers	6	0	0.0
Management and organization analysts	5	0	0.0
Office supervisors	57	0	0.0
Policy administration professionals	13	0	0.0
Receptionists (general)	26	0	0.0
Research and development managers	18	0	0.0
Sales and Marketing agents	10	0	0.0
Sales and marketing managers	38	0	0.0
Services managers not elsewhere classified	5	0	0.0
Telephone switchboard operators	12	0	0.0
Tour Guiding professionals/specialists	62	0	0.0
Translators, interpreters and other linguists	32	0	0.0
Travel consultants and clerks	55	0	0.0
Total	990	41	4.1

3.5.3 Skills Gap in Travel Agency Subsector

Table 27 indicates the skills gaps in Travel Agency subsector. The total skills gap is 44 labor units. The skills gap is dominated by artisan skills areas and hospitality professionals and sales and marketing specialists.

Table 27: Skills Gap in Travel Agency Sub Sector

Occupation	Expatriates	Not Proficient	Gap
Sweepers and related laborers	0	12	12
Security guards	0	11	11
Cashiers and ticket clerks	0	10	10
Car, taxi and van drivers	0	7	7
Tourism & Hospitality specialists/professionals	2	1	3
Sales and marketing managers	1	0	1
Total	3	41	44

3.6 Tour Guides Sub Sector

3.6.1 Labour Units and Occupations

Table 28 indicates the total labor units employed in the Tour Guides subsector. The subsector employs 1183 labor units with women accounting for 39.6% whereas expatriates account for 1%. Apart from the artisans' skills, tour guiding and administration professionals, translators, sales and marketing managers and contact center information clerks have the largest share of the labor units in the subsector, with each having an absolute number of 196 (16.6%), 121 (10.2%), 98 (8.3%) and 93 (7.9%) respectively.

Of the existing employees, women are mainly working as translators (19.6%), receptionists (18.5) % and tour guiding specialists (17.3%). The existing expatriates are working as translators.

Table 28: Labor Units and Occupation n Tour Guides Sub Sector

Occupation	Number	Women	Expatriates
Tour Guiding and Administration professionals	196	81	0
Sales and marketing managers	98	63	0
Advertising and public relations managers	40	24	0
Research and development managers	23	0	0
Geographers/Historians/Archeologists	35	6	0
Office supervisors	58	29	0
Translators, interpreters and other linguists	121	92	12
Travel consultants and clerks	24	12	0
Contact center information clerks	93	63	0
Telephone switchboard operators	17	0	0
Receptionists	6	6	0
Enquiry clerks	12	6	0
Receptionists (general)	104	87	0
Security guards	103	0	0
Car, taxi and van drivers	253	0	0
Total	1183	469	12

a) Tour Guides Large Establishments

The large establishments in the Tour Guides subsector employ 305 labor units with women accounting for 19% whereas expatriates account for 4% (Table 29). Apart from the artisan skills namely security guards and car drivers, the main occupations with more labor units are translators, tour guiding specialists and research and development managers. Women are mainly working as translators, advertising and public relations managers and receptionists. All expatriates are working as translators, for details see table below.

Table 29: Labor Units and Occupation in Large Establishments Tour Guides

Occupation	Number	Women	Expatriates
Tour Guiding and Administration professionals	29	0	0
Sales and marketing managers	0	0	0
Advertising and public relations managers	17	12	.

Research and development managers	23	0	0
Geographers/Historians/Archeologists	12	0	0
Office supervisors	12	0	0
Translators, interpreters and other linguists	35	29	12
Travel consultants and clerks	12	0	0
Contact center information clerks	12	0	0
Telephone switchboard operators	17	0	0
Hotel receptionists	0	0	0
Enquiry clerks	12	6	0
Receptionists (general)	12	12	0
Security guards	86	0	0
Car, taxi and van drivers	29	0	0
Total	305	58	12

b) Tour Guides Medium Establishments

The medium establishments employ 874 labor units with women accounting for 46.7% whereas there are no expatriates reported to have been working in the medium establishments of the subsector (Table 30). Tour guiding specialists, sales and marketing managers, translators and contact center information clerks dominate the labor units in the subsector. Women are mainly working as receptionists, contact center information clerks, tour guiding specialists and sales and marketing managers.

Table 30: Units & Occupation in Medium Establishments Tour Guides

Occupation	Number	Women	Expatriates
Tour Guiding and Administration professionals	167	81	0
Sales and marketing managers	98	63	0
Advertising and public relations managers	23	12	0
Research and development managers	0	0	0
Geographers/Historians/Archeologists	23	6	0
Office supervisors number	46	29	0
Translators, interpreters and other linguists	86	63	0
Travel consultants and clerks	12	12	0
Contact center information clerks	81	63	0
Telephone switchboard operators	0	0	0
Hotel receptionists	6	6	0
Enquiry clerks	0	0	0
Receptionists (general)	92	75	0
Security guards	17	0	0
Car, taxi and van drivers	224	0	0
Total	874	408	0

3.6.2 Employees' Proficiency in Tour Guides Sub Sector

Table 31 indicates the level of employees' proficiency as reported by the managers. Of the existing 1183 labor units within the tour guides subsector, only 2.4% were reported by the employers not to be proficient. The levels of non-proficiency were reported amongst security guards with a proportion of 10.7%, translators 4.96% and public relations officers 12.5%.

Table 311: Employees' Level of Proficiency in Tour Guides Subsector

Occupation	Number	Non Proficient	Percent
Security guards	103	11	10.68
Translators, interpreters and other linguists	121	6	4.96
Advertising and public relations managers	40	5	12.50
Travel consultants and clerks	24	1	4.17
Contact center information clerks	93	1	1.08
Tour Guiding and Administration professionals	196	0	0.00
Sales and marketing managers	98	0	0.00
Research and development managers	23	0	0.00
Geographers/Historians/Archeologists	35	0	0.00
Office supervisors	58	0	0.00
Telephone switchboard operators	17	0	0.00
Receptionists	6	0	0.00
Enquiry clerks	12	0	0.00
Receptionists (general)	104	0	0.00
Car, taxi and van drivers	253	0	0.00
Total	1183	24	2.03

3.6.3 Skills Gap in Tour guides Sub Sector

Table 32 indicates the skills gap in the Tour Guide subsector. The tour subsector has a total gap of 36 labor units. Translators, interpreters and artisan skills dominate the skills gap in the subsector.

Table 32: Skills Gaps in Tour Guides Subsector

Occupation	Expatriates	Non Proficient	Gap
Advertising and public relations managers	0	5	5
Contact center information clerks	0	1	1
Security guards	0	11	11
Translators, interpreters and other linguists	12	6	18
Travel consultants and clerks	0	1	1
Total	12	24	36

3.7 Creative, Arts and Entertainment Sub Sector

3.7.1 Labour Units and Occupations

Table 32 indicates the labor units within Creative, Arts and Entertainment Subsector. The Creative, Arts and Entertainment subsector employs 400 labor units with women accounting for 28.7% whereas there are no expatriates working in the subsector. Dancers and choreographers dominate the labor units with a proportion of 42.7%; musicians, singers and DJs 17.26 % and sales and marketing specialists 13.75% follow in that order.

Table 33: Labor Units & Occupation in Creative, Art & Entertainment

Occupation	Number	Women	Expatriates
Conference and event planners	11	4	0
Office supervisors	7	0	0
Administrative and executive secretaries	17	2	0
Visual artists	20	11	0
Musicians, singers and DJs	69	6	0
Dancers and choreographers	171	82	0
Travel consultants and clerks	0	0	0
Contact center information clerks	0	0	0
Telephone switchboard operators	0	0	0
Receptionists	2	2	0
Receptionists/Inquiry	11	4	0
Security guards	33	0	0
Car, taxi and van drivers	4	0	0
Event organizers and publicity specialists	0	0	0
Sales and marketing specialists	55	4	0
Total	400	115	0

a) Large Establishments

The Large establishments in the subsector employ 166 labor units with women accounting for 39.1% whereas there are no expatriates (Table 33). 68.1% of the labor units are working as dancers and choreographers, the employed women in the large establishments are working mainly as dancers and choreographers with a proportion of 84.6%.

Table 34: Labor Units & Occupation within the Large Establishments Creative & Arts

Occupation	Existing Number	Women	Expatriates
Conference and event planners	11	4	0
Administrative and executive secretaries	2	2	0
Musicians, singers and DJs	40	4	0
Dancers and choreographers	113	55	0
Total	166	65	0

b) Medium Establishments

The medium establishments employ 215 labor units with women accounting for 20.4% whereas there are no expatriates (Table 34). Most of the labor units are working as dancers, sales and marketing specialists, musicians, singers and DJs, and visual artists. The employed women in the medium establishments are working mainly as dancers and choreographers and visual artists.

Table 35: Labor Units & Occupation in Medium Establishments Creative, Arts & Entertainment

Occupation	Existing No.	Women	Expatriates
Office supervisors	7	0	0

Administrative and executive secretaries	13	0	0
Visual artists	16	7	0
Musicians, singers and DJs	22	2	0
Dancers and choreographers	58	27	0
Receptionists	2	2	0
Receptionists/Inquiry	9	4	0
Security guards	31	0	0
Car, taxi and van drivers	4	0	0
Sales and marketing of products	53	2	0
Total	215	44	0

c) Small Establishments

The small establishments within the subsector employ 19 labor units with women accounting for 31.5% whereas there are no expatriates. Most of the labor units are working as musicians, singers and DJs, and visual artists (Table 35). The employed women in the small establishments are working as visual artists and sales and marketing specialists, for more specific details see table below.

Table 36: Labor Units within Small Establishments Creative, Arts & Entertainment

Occupation	Number	Women	Expatriates
Administrative and executive secretaries	2	0	0
Visual artists	4	4	0
Musicians, singers and DJs	7	0	0
Receptionists/Inquiry	2	0	0
Security guards	2	0	0
Sales and marketing Specialist	2	2	0
Total	19	6	0

3.7.2 Employees' Proficiency

Table 37 indicates employees' proficiency levels within the Creative, Arts and Entertainment subsector as reported by the employers. Of the existing 400 labor units within subsector, 1% was reported by the employers not to be proficient. The levels of non-proficiency were reported amongst visual artists with a proportion of 20%.

Table 37: Employees' Proficiency Levels in Creative, Arts & Entertainment

Occupation	Number	Non Proficient	Percent
Visual artists	20	4	20
Conference and event planners	11	0	0
Office supervisors	7	0	0
Administrative and executive secretaries	17	0	0
Musicians, singers and DJs	69	0	0
Dancers and choreographers	171	0	0
Receptionists	2	0	0
Receptionists/Inquiry	11	0	0
Security guards	33	0	0
Car, taxi and van drivers	4	0	0
Sales and marketing of products	55	0	0
Total	400	4	1

3.7.3 Skills Gaps within Creative, Arts & Entertainment Sub Sector

The tour guide subsector has a total gap of 4 labor units who are only the virtual artists; these were all non-proficient existing employed labor units (Table 38).

Table 38: Skills Gaps- Creative, Arts & Entertainment

Occupation	Expatriates	Non Proficient	Gap
Visual artists	0	4	4
Total	0	4	4

3.8 Museum and Memorial Centers Subsector

3.8.1 Labour Units and Occupations

Table 39 indicates the labor units and occupations in the Museum and Memorial Center subsector. The subsector employs 104 labor units with women accounting for 33.6% of the labor units, whereas the expatriates account for 2.8% of the labor units. Outside the artisan skills namely cleaners, tour guides dominate the labor units both at a supervision and non-supervision role with a proportion of 41.3%. The employed women in the sub sector are working mainly as cleaners and tour guides. The existing expatriates are working as tour guide supervisors.

Table 39: Labor Units & Occupations in Museum & Memorial Centers Sub Sector

Occupation	Number	Women	Expatriates
Managers	13	3	0
Gallery, museum and library technicians	5	0	0
Conservator and Art expert	0	0	0
Heritage/Cultural professionals: Historians, Archeologists, Geographers, Cultural Specialists, Sociologists	0	0	0
Curators, painters number	0	0	0
Translators, interpreters and other linguists	5	0	0
Tour Guide Supervisor	28	8	3
Tour Guides	15	5	0
Travel consultants and clerks	0	0	0
Contact center information/ Inquiry Clerks /Receptionists	5	5	0
Telephone switchboard operators	0	0	0
Security guards	0	0	0
Car, taxi and van drivers	0	0	0
Domestic cleaners and helpers	20	5	0
Cleaners and helpers in offices, security guards	10	10	0
Other activities not captured above	3	0	0
Total	104	35	3

a) Medium Establishments

-The Medium establishments within the sub sector employ 93 labor units with women accounting for 37.6% whereas the expatriates account for 3.2%. Tour guides, managers, and

the artisans namely cleaners are the main employed labor units in the medium establishments (Table 39).

Table 40: Labor Units Medium Establishment Museum & Centers

Occupation	Medium	Women	Expatriates
Managers	10	3	0
Gallery, museum and library technicians	5	0	0
Translators, interpreters and other linguists	5	0	0
Tour Guide Supervisor	23	8	3
Tour Guides	15	5	0
Contact center information/ Inquiry Clerks /Receptionists	5	5	0
Domestic cleaners and helpers	20	5	0
Cleaners and helpers in offices, security guards	10	10	0
Total	93	35	3

b) Small Establishments

The small establishments within the subsector employ 10 labor units with no women and expatriates working in the small establishments (Table 40). Tour guides and managers, are the only employed labor units in the small establishments within the sector.

Table 41: Labor Units within Small Establishments Museums & Centers

Occupation	Small	Women	Expatriates
Managers	3	0	0
Tour Guide Supervisor	5	0	0
Other activities not captured above	2	0	0
Total	10	0	0

3.8.2 Employees' Proficiency

Table 42 indicates the level of employees' proficiency in the Museum and Memorial Centers subsector as reported by employers. Of the existing 104 labor units within the creative arts and entertainment subsector, 7.7% were reported by the employers not to be proficient. The levels of non-proficiency were reported amongst tour guides with a proportion of 33.3% and tour guide supervisors with a proportion of 10.71%.

Table 42: Proficiency of Employees in Museum & Memorial Centers

Occupation	Number	Not Proficient	Percent
Tour Guides	15	5	33.33
Tour Guide Supervisor	28	3	10.71
Managers	13	0	0.00
Gallery, museum and library technicians	5	0	0.00
Translators, interpreters and other linguists	5	0	0.00
Contact center information/ Inquiry Clerks /Receptionists	5	0	0.00
Domestic cleaners and helpers	20	0	0.00
Cleaners and helpers in offices, security guards	10	0	0.00

Other activities not captured above	3	0	0.00
Total	104	8	7.69

3.8.3 Skills Gaps in Museum & Memorial Center

Table 43 indicates the skills gaps in the Museum and Memorial subsector. The subsector has a total skills gap of 11 labor units. These are tour guides both at supervisor level and non-supervisor level.

Table 43: Skills Gaps in Museum & Memorial Centers

Occupation	Expatriates	Not Proficient	Gap
Tour Guide Supervisor	3	3	6
Tour Guides	0	5	5
Total	3	8	11

3.9 Sports Facilities Sub Sector

3.9.1 Labour Units and Occupations

All the establishments in this sub sector are medium. Table 44 indicates the labor units and occupations within Sport Facilities subsector. The subsector employs 491 labor units with women accounting for 23.4% whereas the expatriates account for 1.22% of the labor units. Outside the artisan skills namely cleaners and receptionists, sports trainers and sports managers dominate the labor units with proportions of 14% and 8% respectively. The employed women in the sub sector are working mainly as cleaners, receptionists, telephone switchboard clerks and contact center information clerks. The existing expatriates are working as massage and health specialist.

Table 44: Labor Units & Occupation within Sports Facilities Subsector

Occupation	Number	Women	Expatriates
Sports, recreation and cultural center managers	40	0	0
Massage and health specialists	17	6	6
Sports Specialists/Experts: Trainers	69	0	0
Contact center information clerks	34	23	0
Telephone switchboard operators	29	29	0
Receptionists /Inquiry Clerks	62	28	0
Contact center information clerks	6	0	0
Security guards	23	0	0
Car, taxi and van drivers	17	0	0
Cleaners and helpers in offices, hotels and other establishments	194	29	0
Total	491	115	6

3.9.2 Employees' Proficiency

Of the existing 491 labor units within the sports facilities subsector, it was reported by the owners that there are no employees who do not have full proficiency (Table 45). Thus, no skills gaps exist.

Table 45: Employees' Proficiency in Sports Facilities Sub Sector

Occupation	Number	Proficient	Not Proficient
Sports, recreation and cultural center managers	40	40	0
Massage and health specialists	17	17	0
Sports Specialists/Experts: Trainers	69	69	0
Contact center information clerks	34	34	0
Telephone switchboard operators	29	29	0
Receptionists /Inquiry Clerks	62	62	0
Contact center information clerks	6	6	0
Security guards	23	23	0
Car, taxi and van drivers	17	17	0
Cleaners and helpers in offices, hotels and other establishments	194	194	0
Total	491	491	0

3.10 National Parks

3.10.1 Labour Units and Occupations

The National Parks subsector employs 160 labor units with women accounting for 10% of the National parks labor force (Table 46). There are no expatriates employed in the subsector.

The main occupations are Conservation Officers with a proportion of 28.75%, Game Park Managers 11.25%, and Receptionists 17%. The employed women in the sub sector are working mainly as cleaners, receptionists and translators (Table xx).

Table 46: Labor Units & Occupation within National Parks Sub Sector

Occupation	Number	Women	Expatriates
Game Park managers/supervisors	18	0	0
Wildlife Management professionals	0	0	0
Marine and Fresh water Biologists	0	0	0
Conservation officers	46	0	0
Flora and Fauna specialists	9	0	0
Translators, interpreters and other linguists	8	6	0
Lodge managers	0	0	0
Game Warden	0	0	0
Tour Guides	9	0	0
Travel consultants and clerks	0	0	0
Telephone switchboard operators	0	0	0
Receptionists	27	0	0

Receptionists (general)/Inquiry Clerks	5	5	0
Contact center information clerks	0	0	0
Security guards	0	0	0
Car, taxi and van drivers	33	0	0
Cleaners and helpers in offices, hotels and other establishments	5	5	0
Other activities not captured above	0	0	0
Total	160	16	0

3.10.2 Employees' Proficiency

Table 47 indicates that there of the existing 160 labor units within the National Parks subsector, there were no levels of non-proficiency among employees as reported by managers. Thus no skills gaps reported.

Table 47: Employees' Proficiency within National Parks Sub Sector

Occupation	Existing No	Not Proficient	Percent
Game Park managers/supervisors	18	0	0
Conservation officers	46	0	0
Flora and Fauna specialists	9	0	0
Translators, interpreters and other linguists	8	0	0
Tour Guides	9	0	0
Hotel receptionists	27	0	0
Receptionists (general)/Inquiry Clerks	5	0	0
Car, taxi and van drivers	33	0	0
Cleaners and helpers in offices, hotels and other establishments	5	0	0
Total	160	0	0

3.11 Event Management Sub Sector

3.11.1 Labour Units and Occupations

The Event Management subsector employs 70 labor units with women accounting for 31.4% of the labor force. There are no expatriates employed in the subsector (Table 48).

The main occupations are advertising officer, sales and marketing, tour guides and managers. The employed women in the sub sector are working mainly as finance managers, advertising specialists and sales and marketing specialists.

Table 48: Labor Units & Occupation within Event Management Sub Sector

Occupation	Number	Women	Expatriates
Sales and marketing managers	6	2	0
Advertising and public relations managers	7	3	0
Research and development managers	3	0	0
Conference and event planners	4	1	0
Leisure management specialists	0	0	0
Office supervisors	6	3	0
Administrative and executive secretaries	3	2	0
Translators, interpreters and other linguists	5	0	0

Tour Guides	6	1	0
Managing directors and chief executives	6	1	0
Finance managers	7	5	0
Human resource managers	4	1	0
Policy and planning managers	2	1	0
Business services and administration managers	0	0	0
Travel consultants and clerks	0	0	0
Contact center information clerks	0	0	0
Telephone switchboard operators	0	0	0
Receptionist/ Inquiry Clerks	2	0	0
Security guards	1	0	0
Car, taxi and van drivers	0	0	0
Domestic cleaners and helpers	0	0	0
Cleaners and helpers in offices, hotels and other establishments	1	0	0
Sales and Marketing agents	1	0	0
Sweepers and related laborers	0	0	0
Other activities not captured above	6	2	0
Total	70	22	0

a) Medium Establishments

The Medium establishments employ 63 labor units with women accounting for 31.7% whereas there are no expatriates (Table 49). Tour guides, finance managers, advertising and sales personnel are the dominant occupations with high labor units working in the medium establishments.

Table 49: Units within Medium Establishments Events Management

Occupation	Medium	Women	Expatriates
Sales and marketing managers	4	1	0
Advertising and public relations managers	5	3	0
Research and development managers	3	0	0
Conference and event planners	4	1	0
Office supervisors	6	3	0
Administrative and executive secretaries	3	2	0
Translators, interpreters and other linguists	5	0	0
Tour Guides	6	1	0
Managing directors and chief executives	4	1	0
Finance managers	6	4	0
Human resource managers	4	1	0
Policy and planning managers	2	1	0
Receptionist/ Inquiry Clerks	2	0	0
Security guards	1	0	0
Cleaners and helpers in offices, hotels and other establishments	1	0	0
Sales and Marketing agents	1	0	0
Other activities not captured above	6	2	0
Total	63	20	0

b) Event Management Small Establishments

The small establishments employ 7 labor units with women accounting for 2 labor units whereas there are no expatriates (Table 50). The dominant occupation in the subsector include sales & marketing, advertising personnel, and managers.

Table 50: Labor Units in Small Establishments- Event Management

Occupation	Small	Women	Expatriates
Sales and marketing managers number	2	1	0
Advertising and public relations managers number	2	0	0
Managing directors and chief executives number	2	0	0
Finance managers number	1	1	0
Total	7	2	0

Table 51 indicates that the owners reported that all their employees were fully proficient. And they do not have skills gap in this sector.

Table 51: Event Management Employee Proficiency

Occupation	Number	Proficient	Not Proficient
Sales and marketing managers number	6	6	0
Advertising and public relations managers number	7	7	0
Research and development managers number	3	3	0
Conference and event planners number	4	4	0
Leisure management specialists number	0	0	0
Office supervisors number	6	6	0
Administrative and executive secretaries number	2	3	1
Translators, interpreters and other linguists number	5	5	0
Tour Guides number	6	6	0
Managing directors and chief executives number	6	6	0
Finance managers number	7	7	0
Human resource managers number	4	4	0
Policy and planning managers number	2	2	0
Business services and administration managers number	0	0	0
Travel consultants and clerks number	0	0	0
Contact center information clerks number	0	0	0
Telephone switchboard operators number	0	0	0
Receptionist/ Inquiry Clerks number	2	1	0
Security guards number	1	1	0
Car, taxi and van drivers number	0	0	0
Domestic cleaners and helpers number	0	0	0
Cleaners and helpers in offices, hotels and other establishments number	1	1	0
Sales and Marketing agents number	1	1	0
Sweepers and related laborers number	0	.	0
Other activities not captured above number	7	7	0
Total	70	70	0

3.12 Curio Shops Subsector

3.12.1 Labour Units and Occupations

The curious shops subsector employs 147 labor units with women accounting for 38.8% of the labor force. Expatriates account for 5.4% of the employed labor units in the subsector (Table 52).

The main occupations are shopkeepers (36%), sales and marketing managers (30.6%) and advertising officers 8%. The employed women in the sub sector are working mainly as shops keepers 50.8% and sales and marketing managers 21%.

Table 52: Labor Units & Occupation within Curious Shops Sub Sector

Occupation	Number	Women	Expatriates
Sales and marketing managers	45	12	0
Advertising and public relations managers	12	4	0
Curious products' Shopkeeper	53	29	0
Curious products' Translator, Interpreters and other linguists	8	8	0
Curious products' Security Guards number	29	4	8
Total	147	57	8

Medium Establishments

The Medium establishments within the sector employ 57 labor units with women accounting for 21%. There are no expatriates. Sales and marketing managers, advertising and public relations managers are the main occupation with working in the medium establishments (Table 53).

Table 53: Labor Units within Medium Establishments Curious Shops

Occupation	Medium	Women	Expatriates
Sales and marketing managers	24	0	0
Advertising and public relations managers	12	4	0
Shopkeeper	8	0	0
Translator, Interpreters and other linguists	8	8	0
Security Guards	4	0	0
Total	57	12	0

Small Establishments

The small establishments employ 90 labor units with women accounting for 50% (Table 53). The existing expatriates account for 8.8%. 50% of the employed labor units in the small establishments work as shopkeepers, with the rest working as sales managers and security guards. The existing women in the small establishments work mainly as advertising managers and sales and marketing managers.

Table 54: Labor Units in Small Establishments

Occupation	Small	Women	Expatriates
Sales and marketing managers	20	12	0
Advertising and public relations managers	0	0	0
Shopkeeper	45	29	0
Security Guards	24	4	8
Total	90	45	8

3.12.2 Employees' Proficiency and Skills Gaps within Curious Shops

According to the owners of establishments that participated in the survey, all the employees in the subsector are fully proficient. There are also no skills gaps.

3.13 Passenger: Air Transport Sub Sector

3.13.1 Labour Units and Occupations

The Passenger: - Air transport subsector employs 1054 labor units with women accounting for 30%. Expatriates working in the subsector account for 15% of the total labor force in the sector (Table 55). The existing women and expatriates work mainly as aircraft pilots and related associated professionals.

Table 55: Labor Units & Occupations within Air Transport Sub Sector

Occupation	Number	Women	Expatriates
Aircraft pilots and related associate professionals	908	291	83
Air traffic controllers	83	3	66
Air traffic safety electronics technicians	12	3	5
Safety and Security guards	30	6	0
Liberal Professionals	21	19	3
Total	1054	322	157

Large Establishments: - The Large establishments within the subsector employ 1,023 labor units with women accounting for 29.6%. Expatriates accounts for 14.6% of the labor force (Table 56). The employed women in the large establishments are working mainly as Aircraft pilots & related associate professionals (96% of the existing women employed). The existing expatriates are working as Aircraft pilots & related associate professionals and Air traffic controllers.

Table 56: Labor Units within Large Establishment – Air Transport

Occupation	Large	Women	Expatriates
Aircraft pilots and related associate professionals	900	291	80
Air traffic controllers	81	3	65
Air traffic safety electronics technicians	12	3	5
Translators, interpreters and other linguists	0	0	0
Safety and Security guards	30	6	0
Health Professionals	0	0	0

Other Transport Related Professionals	0	0	0
Other Liberal Professionals	0	0	0
Total	1023	303	149

Medium Establishments: - The medium establishments within the subsector employ 30 labor units with women accounting for 57%, and expatriates accounts for 27% (Table 57). Of the existing labor force, 70% are working as Liberal Professionals, with the rest working as Aircraft pilots & related associate professionals and aircraft controllers. The existing women work as liberal professionals.

Table 57: Labor Units Medium Establishments – Air Transport

Occupation	Medium	Women	Expatriates
Aircraft pilots and related associate professionals	8	0	3
Air traffic controllers	2	0	2
Liberal Professionals	21	17	3
Total	30	17	8

3.13.2 Employees' Proficiency

Table 57 indicates employees' proficiency level in the Air Transport subsector as reported by the managers of the establishments. Of the existing 1054 labor units within the subsector, 42.79% were reported by the employers not to be fully proficient. The levels of non-proficiency were reported amongst aircraft pilots & related associate professionals with a proportion of 45%, and air traffic controllers with a proportion of 39.8%.

Table 58: Employees' Proficiency within Passenger Air Transport Sub Sector

Occupation	Existing No	Not Proficient	Percent
Aircraft pilots and related associate professionals	908	408	44.93
Air traffic controllers	83	33	39.76
Air traffic safety electronics technicians	12	5	41.67
Safety and Security guards	30	5	16.67
Other Liberal Professionals	21	0	0.00
Total	1054	451	42.79

3.13.3 Passenger Skills Gaps

Table 58 indicates the skills gap in the Passenger: -Air Transport subsector. The subsector has a total skills gap of 608 labor units. The skills gap is dominated aircraft pilots, air traffic controllers.

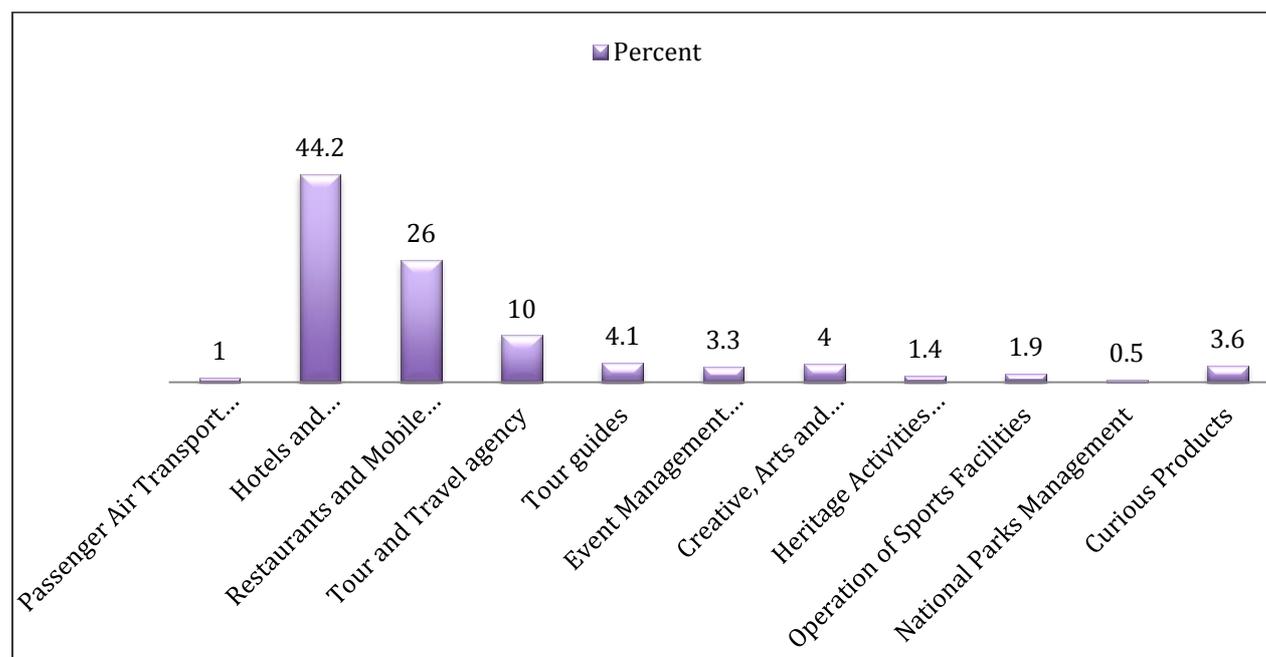
Table 59: Skills Gaps - Passenger Air Transport Sub Sector

Occupation	Expatriates	Not Proficient	Gap
Aircraft pilots and related associate professionals number	83	408	491
Air traffic controllers number	66	33	99
Air traffic safety electronics technicians number	5	5	10
Safety and Security guards number	0	5	5
Other Liberal Professionals number	3	0	3
Total	157	451	608

3.14 Vacancies (Demand) in the Sector

At the time the data was collected (May 2012 to June 2012) was done, 10.7% of the establishments reported to have had vacancies and these were 2,582 labor units. They were mainly reported in the hotel and restaurant sub sectors with proportions, for more details see graph below.

Figure 3: Vacancy Proportion per Principal Activity



The main vacancies reported were cooks, fast food preparers, waiters, and Bartenders among others (Table 60).

Table 60: Vacancies in Tourism Establishments

Occupations	Total Vacancies
Cooks	376
Fast food preparer	264
Waiters	623
Advertising & marketing skills	141
Bartender	217
Customer attendant	95
Receptionist	72
Manager	65
Food & beverage manager	71
Guides	42
Sauna massage agent	35
Kitchen skills	50
Finance specialists	24
Front office manager	49
Accountant	21

Cashier	16
Air Hostess	10
Quick service agent	10
Choreographers /coaches	6
Housekeepers	6
Pastry and bakery specialist	35
Chefs	49
Public relation officer	9
Room attendant	254
Travel adviser	4
Driver	18
Event management Designer	3
Hospitality skills	3
Boat conductor	2
IT staff	2
Maintenance & control center engineers	2
Telecommunication engineers	2
Trainers	2
Cleaners	1
Gardener	1
Music Producer	1
Pilots	1
Total	2,582

Whereas 2,582 vacancies were reported within the industry at the time of the study, 123 were identified by the employers as hard to fill vacancies; with a search for such skills taking between 2-6 months (Table 61).

Table 61: Hard-to-Fill Vacancies by Occupation

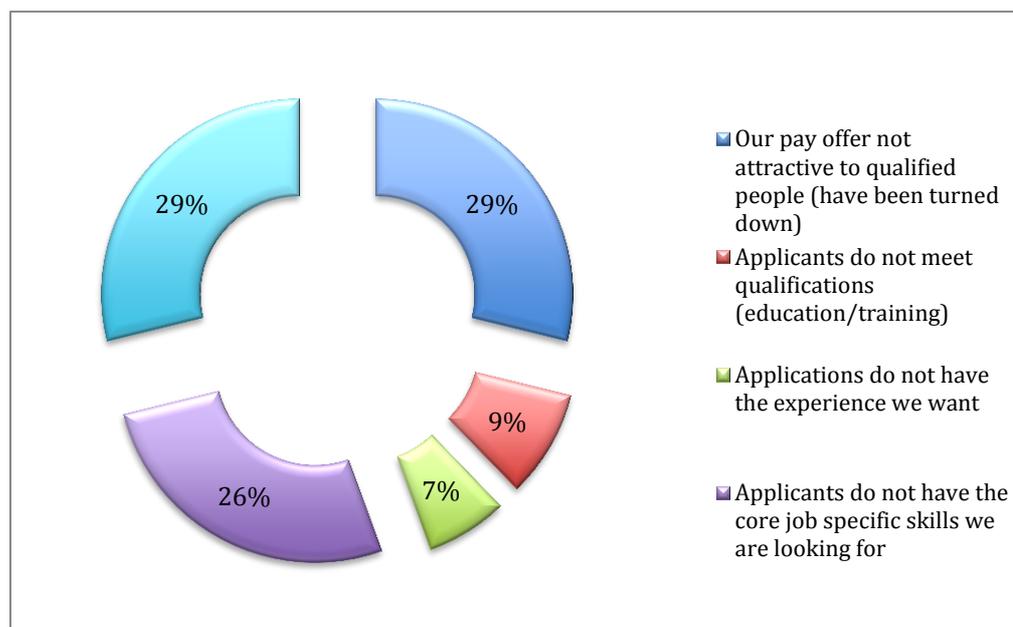
Occupation	No of Hard to fill vacancies	Duration of search Weeks	Duration of search Months¹
Boat conductor	2	0	2
Cashier	6	0	2
Cook	8	1	1
Drivers	2	0	2
Financial & investment adviser	10	0	6
Front office	10	0	4
Front office manager	1	6	0
Head cooks	2	0	1
House cleaner	10	0	4
Maintenance & control center engineers	4	0	6
Producer	1	0	6
Traumatism counselor	4	2	0
Waiters	4	1	0
Advertising & marketing agent	10	0	4
IT manager	1	6	0
Marketing officer	10	0	3
Pilots	20	0	2
Waiters	10	0	2
Bar and lounge manager	1	6	0

Drivers	7	0	2
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Reasons for Hard to Fill Occupations

Figure xx indicates the employers responses on the main reasons identified as being behind the 'hard-to-fill' skills. These includes unattractive pay, applicants lack of cross cutting skills like languages and general IT Skills, and applicants lack of core job specific skills.

Figure 4: Reasons for Hard to Fill Occupations



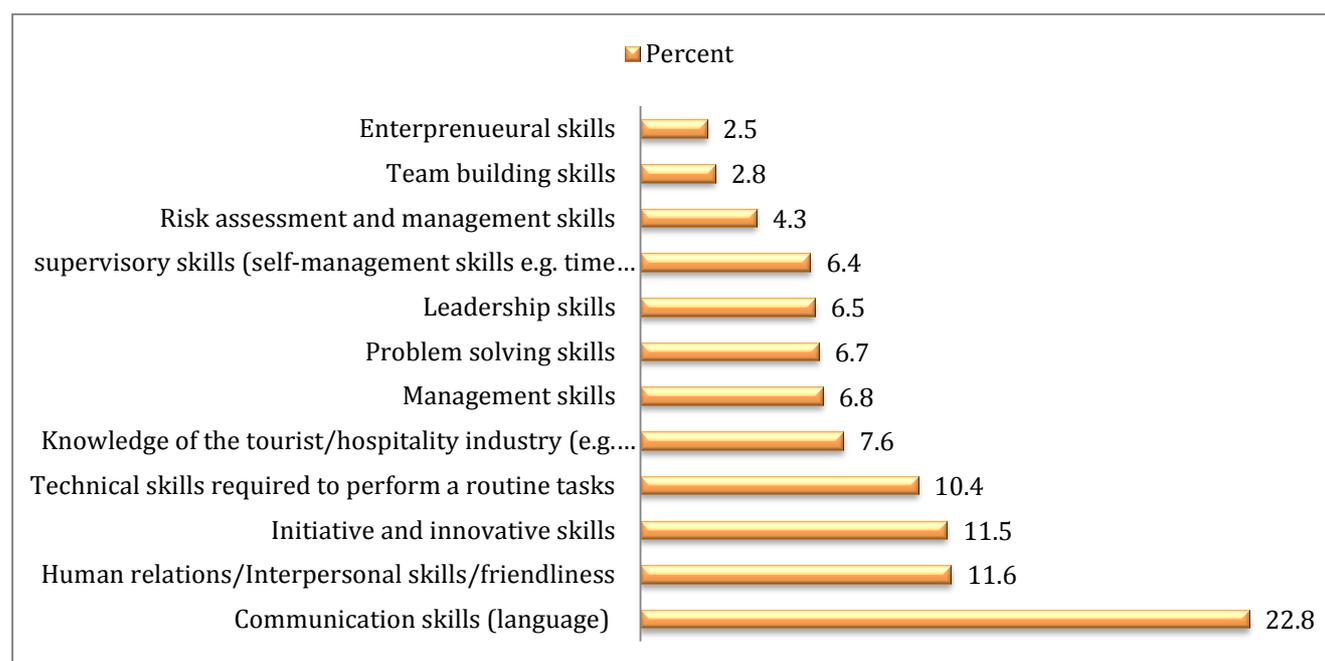
3.15 Employees' Competency in Qualitative (Soft) Skills

Making Tourism & Hospitality sector in Rwanda diverse, competitive, innovative and offer quality service requires employees who are not only skills in technical professionals. But also must be competent in qualitative (soft) skills. Both hard and soft skills when used effectively increase employees' performance, competitiveness and quality delivery.

In this study, employees were asked to assess their competency by indicating if they were either 'fully competent', 'not fully competent' or 'needed further training' in seven soft skills areas, including: Communication, leadership, problem solving, team work, customer service, managing change, and risk assessment and management. The findings are presented below.

Figure 5 indicates that the most desired skills in Hotel Subsector are: 'communication skill' (22.8%), Human relations/interpersonal skills (11.6%), and Initiative & Innovative skills (11.5) %.

Figure 5: Hotel Qualitative Desired Skills



Research and experience from countries where tourism/hospitality sector is established like Mauritius, South Africa, and E.U. Countries conform that these qualitative skills are critical and employees must be empowered to be efficient and effective in them to make their hotels, restaurants, event managements, tour guides services, and entertainment services among others attractive and competitive.

Figure 6 indicates the soft skills needed in the Restaurants subsector in Rwanda

Figure 6: Restaurants Qualitative Desired Skills

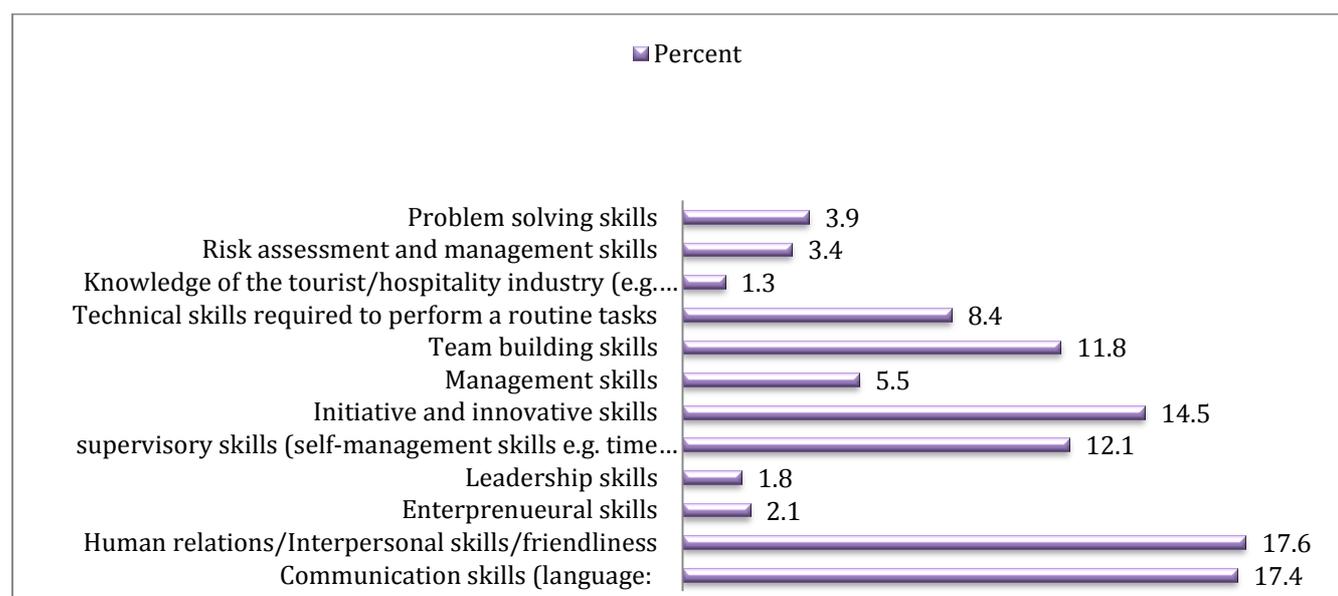


Figure 7 indicates the soft skills required in the Travel Agency subsector.

Figure 7: Travel Agency Qualitative Desired Skills

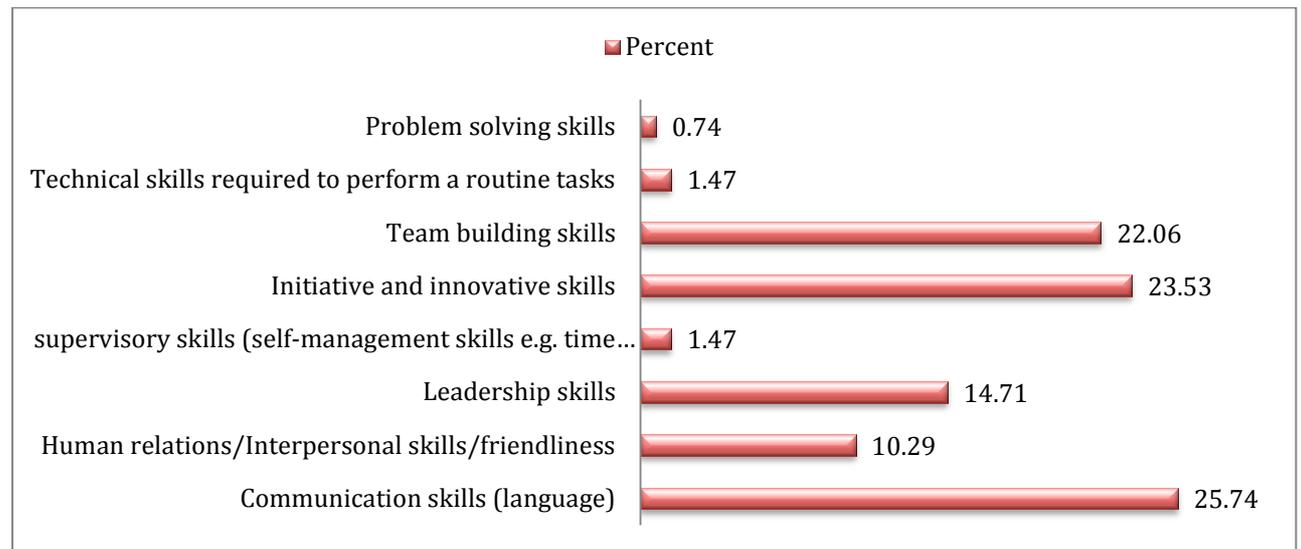


Figure 8 indicates the kind of soft skills required in Tour operators services subsector.

Figure 8: Tour Operators Desired Qualitative Skills

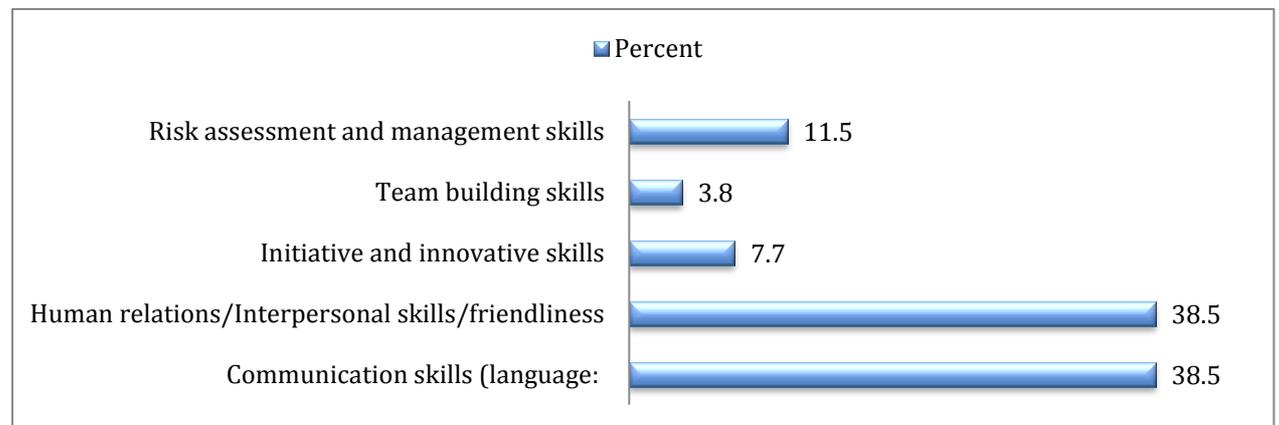
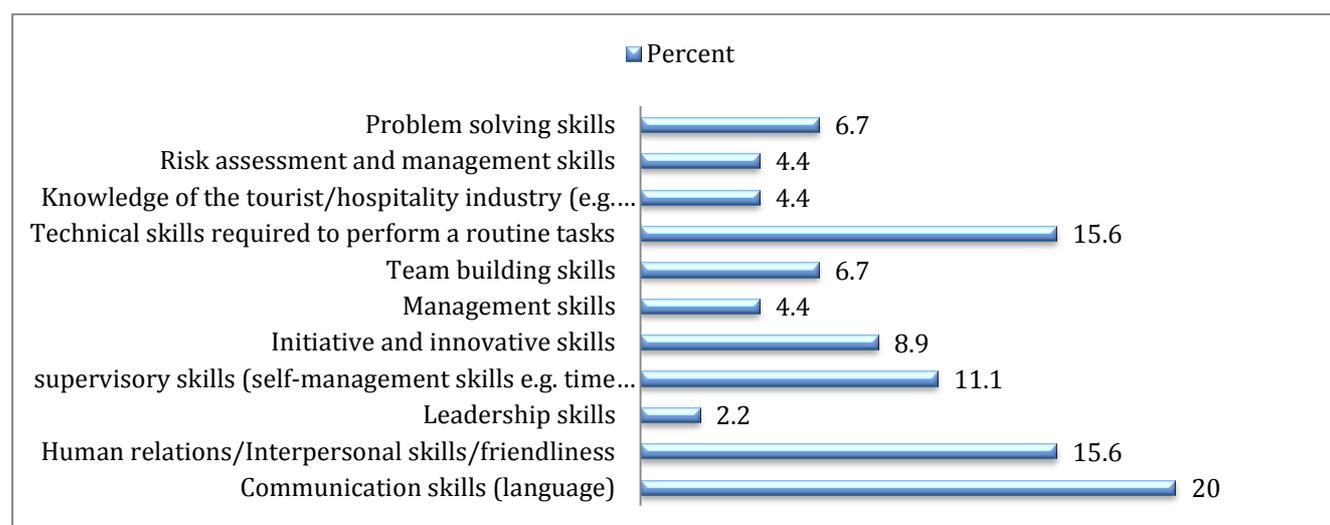


Figure 9 indicates the soft skills required in the Creative, Arts and Entertainment subsector in Rwanda.

Figure 9: Creative, Arts, & Entertainment Desired Qualitative skills



The same soft skills, which are critical in other subsectors presented above, are also critical in Museums and Sports facilities services Subs Sector (Figures 10 and 11 below).

Figure 10: Museums' Desired Qualitative Skills

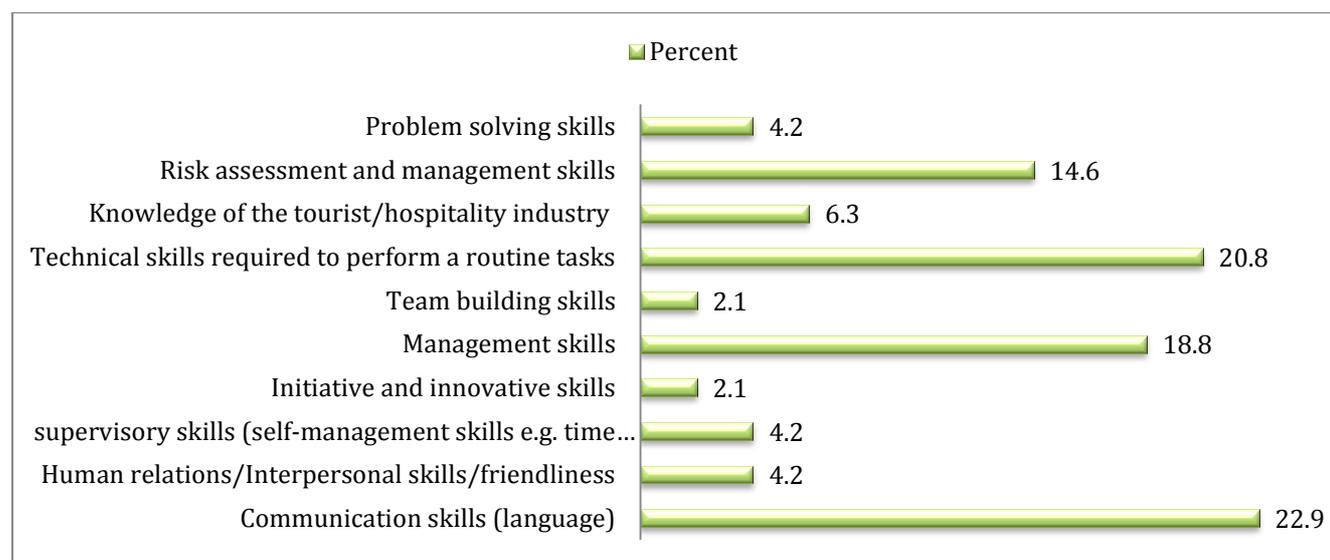
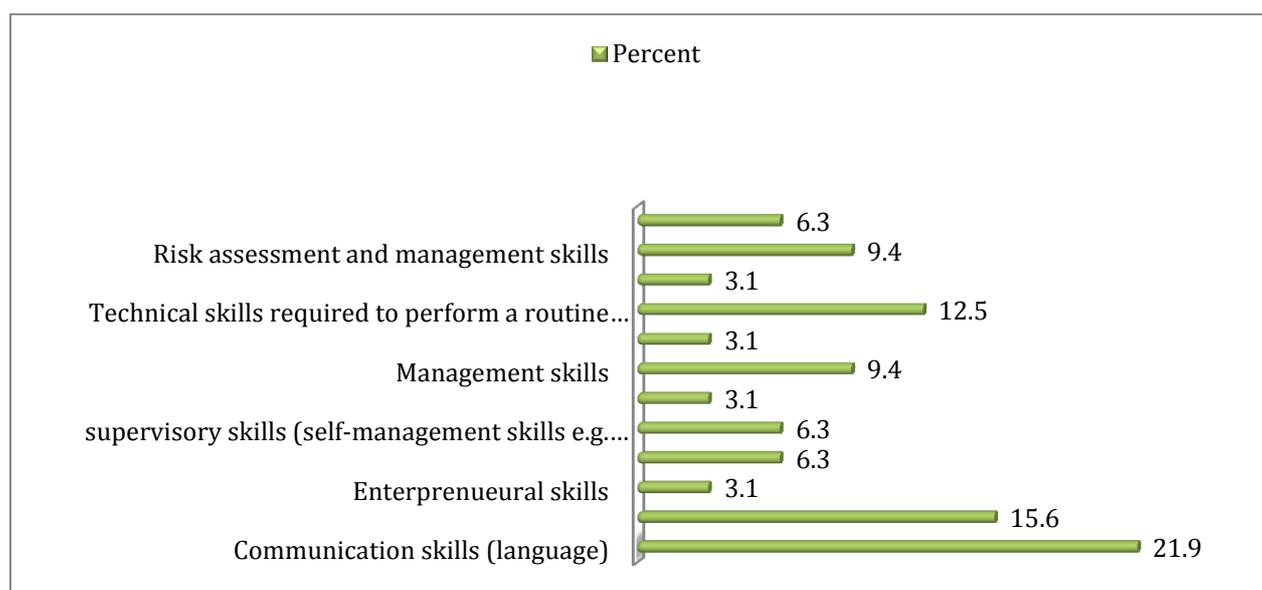


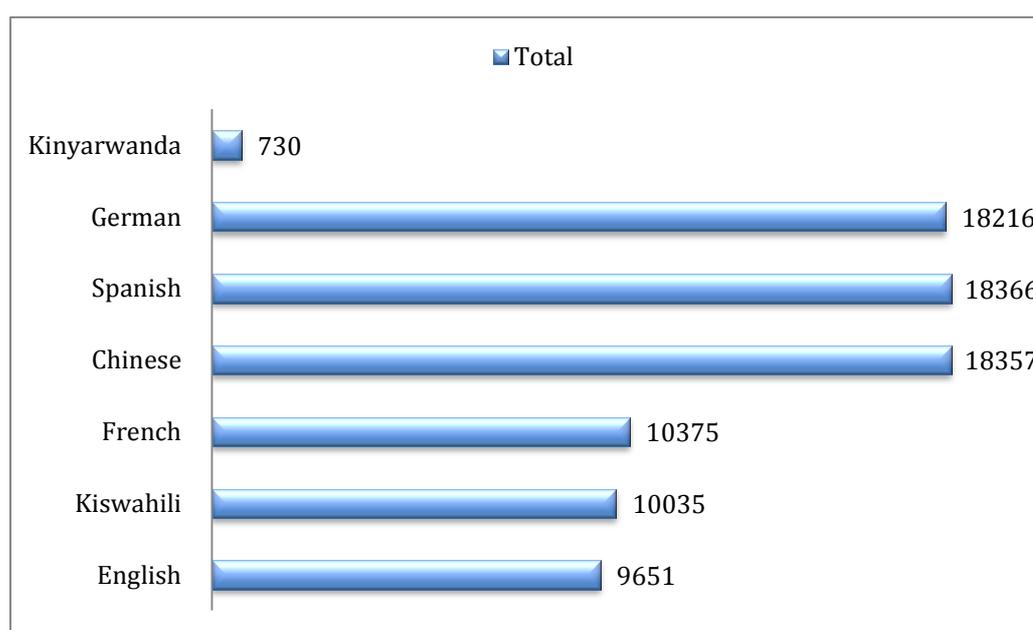
Figure 11: Sports Facilities Desired Qualitative Skills



3.16 Language Competencies in the Tourism & Hospitality Sector

The employers identified the language problem as a critical challenge in the Tourism & Hospitality. All the established facilities visited indicated that they need their employees trained in languages to be fluent in speaking, understanding and writing. Employers identified 7 different languages namely English, Kiswahili, French, Chinese, Spanish, German and Kinyarwanda. As indicated in Figure 12, the most highly demanded languages were Spanish, Chinese and German. The least demanded for language in terms of training was Kinyarwanda.

Figure 12: Number of Employees requiring Training in the Respective Languages



In relation to the above, all the languages' training are demanded for by employees in hotels and Restaurants sub sectors, for more specific details (Table 62).

Table 62: Number of Employees Needing Language Training per Sub Sectors

Principal Activity	English	Kiswahili	French	Chinese	Spanish	German	Kinyarwanda
Passenger Air Transport (Office in Rwanda)	8	6	20	6	6	6	9
Hotels and Hospitality/Accommodation	6612	6724	6833	12779	12764	12774	361
Restaurants and Mobile Food service	1400	1025	1969	1144	1131	1138	142
Tour and Travel agency	344	467	357	904	913	945	0
Tour guides	378	686	411	1658	1686	1489	0
Event Management Activities	369	425	355	630	630	630	136
Creative, Arts and Entertainment activities	239	243	131	364	364	364	2
Heritage Activities Museums Historical sites	48	85	45	100	100	100	0
Operation of Sports Facilities	177	143	126	371	371	371	0
National Parks Management	43	56	14	99	99	97	80
Curious Products	33	175	114	302	302	302	0
Total	9,651	10,035	10,375	18,357	18,366	18,216	730

Both the employers and employees who participated in the survey indicated that they would like additional training in Chinese, Spanish, Germany, Kiswahili, English and French due to the fact that more and more tourists coming to Rwanda are now coming from various countries, where these languages are spoken. Workers need to be fully competent in these languages to improve customer service and serve the tourists effectively and efficiently.

3.17 Summary of Skills Gaps

The survey indicates that the Tourism & Hospitality sector has a skills gap of over 5,068 in technical areas. Besides, it also has gaps in qualitative (soft) skills competencies, especially in international languages. Table 63 indicates that the highest technical skills gap is in Hotel & Accommodation subsector, constituting 66.5% and Restaurant subsector at 19.9%.

Table 63: Summary of Skills Gaps by Sub Sectors

Subsector	Number Skills Gaps	% of the Sector
Hotels and Hospitality/Accommodation	3,370	66.5
Restaurants and Mobile Food service	1,007	19.9
Tour and Travel Agency	44	0.9
Tour Guides Services	24	0.5
Creative, Arts and Entertainment activities	4	0.1
Museums and Historical sites	11	0.2
Event Management Activities	-	-

Operation of Sports Facilities	-	-
National Parks Management	-	-
Curious Products/Shops	-	-
Passenger Air Transport (Office in Rwanda)	608	12.0
Total	5,068	100

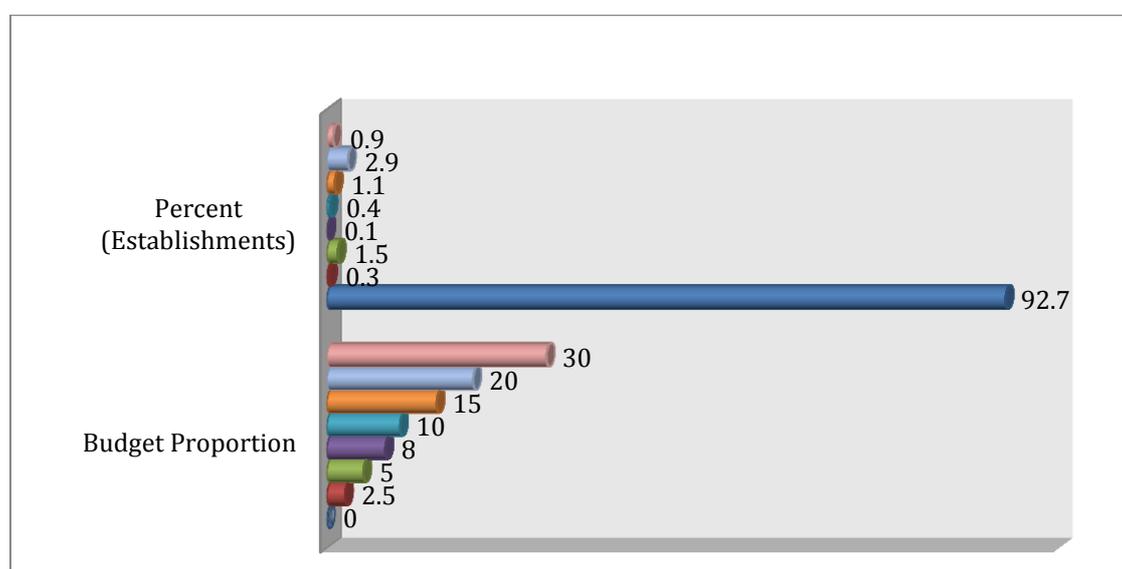
In terms of soft (qualitative) skills, languages for effective customer service, in particular, the sector has a skills gap of over 85,730. The majority of respondents (21.4%) and (21.2%) require training in Chinese, Spanish, and Germany respectively. 11.7% and 11.3% wants training in Kiswahili and English respectively. And 0.9% of the respondents want additional training in Kinyarwanda.

3.18 Training and Staff Development

Training and in servicing of existing employees is one of the strategies of sustaining productivity and quality of service in the Tourism & Hospitality sector, or any other sector for that matter. Employers were asked to indicate if they have training programs within their establishments and the amount of financial resources allocated to the same. Figure xx indicates that 27.5% of the establishments in the tourism sector offered or arranged training to their employees. The total number of employees who were reported to have received training is 4845 labor units.

Whereas 27.5% of the establishments reported to have offered or arranged training, it was 7.3% of the establishments that had some financial resources allocated to trainings of their employees with a budget of between 2.5% to 30% of the establishments.

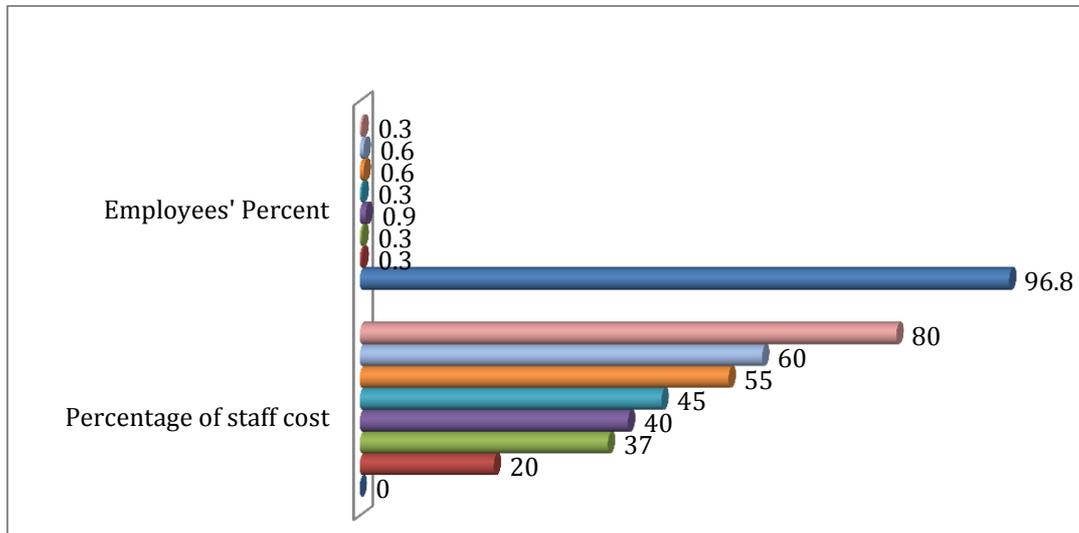
Figure 13: Establishments' Training Budget Allocation



In relation to the above employees within 3.2% of the establishments attended trainings with commitments of resources from their own incomes. Those who contributed to their own training committed resources ranging from 20% to 80% of the actual cost of training

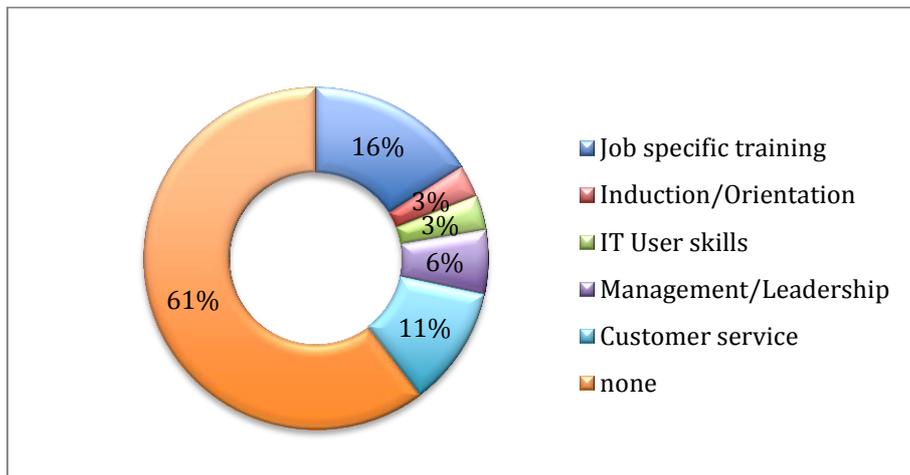
with the rest being generated from establishments' budgets. For more details see graph below.

Figure 14: Employees' Budget Allocation to Training



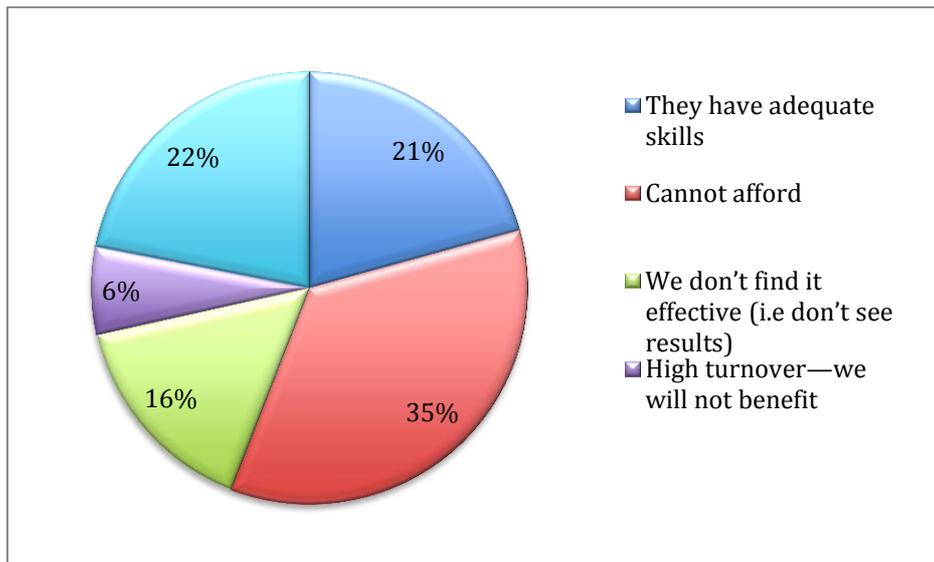
The establishments that offered or arranged training mainly gave job specific training and customer service training (Figure 15). Customer service dominated the arranged training, which was offered by third parties, especially RDB and PSF. Other trainings identified were induction, leadership and IT user training, for more specific details, see graph below.

Figure 15: Type of Training Offered by Establishments



As indicated in Figure 16, the 72.5% establishments that do not offer or arrange any form of training identified lack of affordability as the main reason for not offering or arranging trainings for their employees. The other reasons mentioned were employees' adequate skills, ineffectiveness of training and high turnover, for more specific details on the proportions see the following pie chart.

Figure 16: Establishment's Reasons for Not Offering Training



3.19 Intern Accommodation

During the survey employers in the establishment visited were asked to indicate if they accept interns to train in their enterprises. As indicated in Figure 17, only 29.6% of the establishments in the sector accommodate interns. And these are only big and medium hotels & restaurant, and tour guide companies.

Figure 17: Establishments' Intern Accommodation

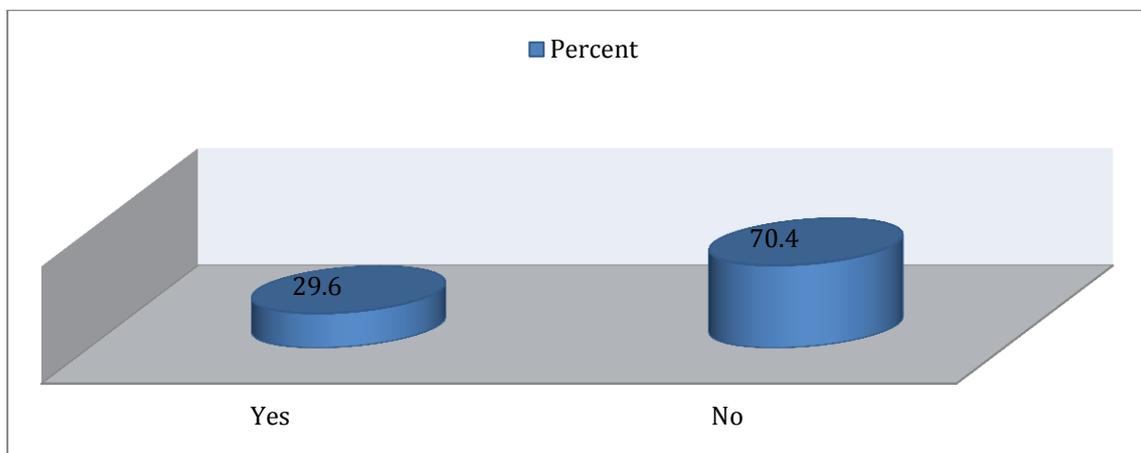


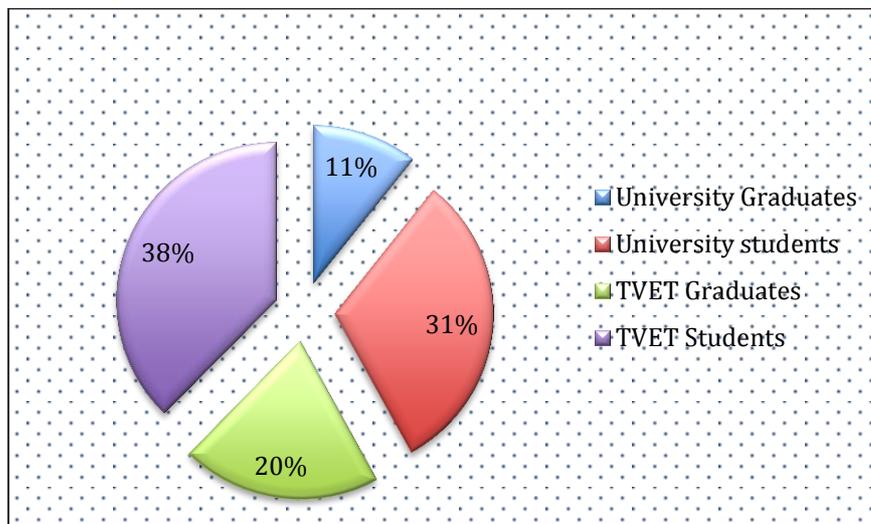
Table 63 shows that a total number of 1,641 interns were accommodated by establishments in the 12 months prior to the study. See Table 64. These interns include graduates and existing students at the different education levels.

Table 64: Interns per Education Level

Education Level	Absolute No
University Graduates	175
University students	514
TVET Graduates	334
TVET Students	618
Total	1641

As indicated in Figure 18 most of the interns in the sector are TVET students (38%), university students (31%), TVET graduates 20% and university graduates 11%. The internship period was reported to range from 1 to 12 months.

Figure 18: Interns' Education Level



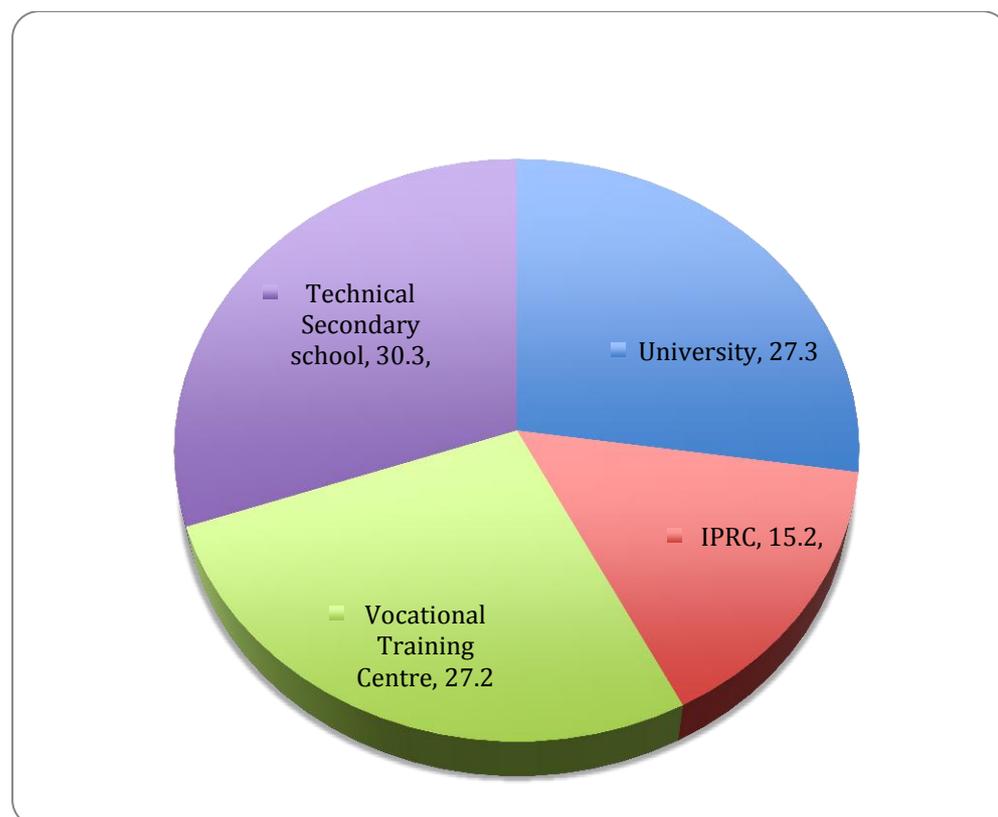
4.0 PART II SUPPLY OF SKILLS FOR THE SECTOR

To complete the picture and situation of skills profiles in the Tourism/Hospitality sector in Rwanda, this section of the report presents issues and concerns about the supply of skills for the sector by the training institutions in Rwanda. The survey sought information on the training institutional profiles, training programs, outputs in terms of students, linkages with industry, and institutions capacities to supply needed skills.

4.1 Higher Institutions in the Survey

The study covered universities, Integrated Polytechnic Regional Centers (IPRC), Vocational Training Centers (VTC) and Technical Secondary Schools (TSS). As indicated in Figure 19, a total of 33 institutions responded to the survey questionnaires, consisting of university 27.3%, technical secondary schools 30.3%, vocational training centers 27.3%, and IPRC 15.2%.

Figure 19: % Distribution of Training Institution by Type of Institution



A majority of the training institutions visited were located in Kigali. Out of the 33 institutions 23 (69.7%) were based in Kigali and 10 in the provinces. In Kigali 39.1% of the institutions were universities, IPRS and VTC each comprised of 17.4% and TSS 26.1%. In the other provinces, TSS comprised of 30.3% of the institutions, followed by University and VTC each 27.3% and IPRC 15.2% respectively.

4.2 Education and Training Programs

Table 65 indicates the types of courses offered by various training institutions in Rwanda and level of training of such programs.

Table 65: Type of Training Courses by Training Institutions & Level

Type of institution	Name Sector/Courses	Level of Training
Technical Secondary Schools (TSS)	Tourism & Hospitality	Certificate
	Tourism & Hospitality	Certificate
IPRCs	Hospitality & Management	Certificate & Diploma
VTCs	Catering, tailoring, hairdressing	Certificate
	Tourism & Hospitality	Certificate
	Hairdressing	Certificate
	Cooking and food preparation	Certificate
	Tourism & hotel management	Certificate
University	Travel and tourism management	Degree, Diploma & Certificate
	Hotel & Restaurant management; Travel & Tourism management; Vocational training program TVET, IATA.	
	Hotel & Restaurant Management.	

1) Supply of Professionals - Degree graduates: -At the time of skills survey, there was only one higher learning institution in Rwanda offering a degree program in Tourism. This is a private university college (accredited in 2008) by the Ministry of Education/National Commission for Higher Education (NCHE). It had over 1000 enrolled students for both degree and certificate courses. It had 346 degree students – the first batch who are expected to graduate at the end of this academic year (2012/2013) (also refer to Box 1).

Compared to universities in the region (Box 1), tourism/hospitality courses offered in the only HLI in Rwanda are few, limited and generally academic oriented in scope. The institution, for example, has only one B Sc. Course in tourism and does not have masters and doctoral programs to train skilled professionals in the industry. (Refer to Box 2 – A regional university case).

The survey indicates that the existing tourism/hospitality courses offered by the training institutions in Rwanda are traditional and basic in hotel and hospitality areas (targeting basic skills in cooking, general customer service, restaurant management, and basic hospitality skills). Some of the critical courses that are critical to moving Rwanda to the next level and making it competitive in the region are lacking. These include the following courses at both certificate/diploma and degree levels:

- Tourism Product Development and Management
- Destination Management

- Tourism business development & management specialist
- Tourism Marketing
- Tourism & Hospitality Entrepreneurship
- Tourism Resort Operations
- Management of Game parks and Historical sites
- Wildlife management; Wildlife Health & Management
- Events Organization and Management
- Cultural tourism Specialists
- Eco Tourism specialists
- Tourism historians and archeologists
- National Arts & Music
- Front Office Management and Operations
- Event management specialists
- Hotel Engineers
- Interior Design and Décor.

Training institutions in South Africa, Mauritius, Cape Verde, and Kenya have diversified their tourism and hospitality programs to include some of the above courses. This is according to each country's requirement and demand in the tourism industry.

2. Diploma and certificate graduates: An average of 500 trainees are produced in various diploma and certificate colleges in the country – as technicians and artisans for the tourism/hospitality establishments. As indicated in Table 66 and Table 67, most of these trained are from TSS, VTCs and IPRC.

Table 66: Number of Certificate graduates in Tourism/Hospitality by Type of Institution, 2009-2010

	2009			2010		
	Male	Female	Total	Male	Female	Total
Tourism						
University	0	0	0	0	0	0
IPRC	0	0	0	0	40	40
VTC	62	350	412	80	348	428
TSS	36	82	118	39	51	90
Total	98	432	530	119	439	558

Table 67: Number of Diploma/Certificate Graduates by Sector, Type of Institutions & Gender 2009-2011

Diploma	2009			2010			2011		
	M	F	Total	M	F	Total	M	F	Total
Tourism									
University	-	-	-	-	-	76	-	-	424
IPRC	-	-	-	-	40	40	-	-	60
Total	-	-	-	-	-	116	-	-	484

BOX 1: CASE STUDY OF THE ONLY HLI OFFERING DEGREE COURSE IN TOURISM IN RWANDA

Started in 2006. The college offers three main courses: i. Hotel & Restaurant Management ii. Travel & Tours Management, and iii. Business Information Technology. First started with diploma and advanced diploma courses. But in 2008 accredited by MINEDUC to offer degree courses on the above courses.

Outputs: 1,000 students enrolled for certificate courses. So far 300 have graduated with certificates in tourism (For example, 76 got certificates in 2011, and 124 got certificates in 2012). Currently, 1000 students are enrolled. About 346 students are enrolled for a degree course (BSC in Tourism) and are in the final year. They are expected to graduate by end of 2012/2013 Academic year.

Academic Staff and students' ratio: The institution has a total of 76 full-time academic staff. 5 have PhD, 42 have Master's degree, and 29 with Bachelor's degrees. 11% are women and 89% are men. Current ratio is 1:16. International benchmark is 1:12, with 80% practical instructions and 20% of the time for theory (classroom based knowledge of the industry).

42% of the staff is foreigners. The institution has 3 Professors (and 2 of them are part time), 5 have PhDs and 42 of academic staff have masters .International/regional benchmarks require that 30% of lecturers have PhD. Currently the institution has only 10% of this, falling sort of the required benchmark.

Training Facilities: - The College puts more emphasis on practical instructions. For Certificate courses the ratio is 70% of the instruction time is practical instruction, and 30% for theoretical instructions. For Degree courses the ratio is 60% of the time is for practical instructions and 40% theory instructions. The institution has "three kitchens for practical instruction" and a "mini reception facility". But there are over-stretched due to increased number of students". The institution management "would like to have own hotel for practical training otherwise currently use attachments/internships in and outside the country in neighboring countries' establishments, Kenya in particular." In 2011 send 30 to Kenya and 2012 sent 100 for 3 months attachment. The institution paid 1mRwF per student.

Salary: Earning for the academic staff at the institution is as follows: Professor: 1.6M RWF, and Lecturer average of 600,000 RWF.

Challenges: i. Attachment in Kenya training institutions for their students is done twice in the 2nd and 4th year. But the institution does it only once due to high cost implications and different curriculum. Harmonizing with the Kenyan curriculum remains a challenge. ii. Language barrier. Rwanda students are limited in communicating in English and Kiswahili languages, which are critical in the tourism and hospitality industry in the region.

NB: RTUC has a mandatory English (Communication) course, which all students must take and receive a certificate of proficiency. No graduation without the proficiency certificate.

The stakeholders at the institutions indicated the following as major issues in Customer Service in Tourism & Hospitality industry in Rwanda:

*Most investors/owners lack formal qualification and training in the industry. Thus manage their establishment with limited professionalism.

*Most investors recruit their relatives who are not qualified and have necessary skills to offer various services.

*Low remuneration in the industry is also a discouraging fact for professionals:

- Certificate holders = earn about 120,000 per month
- Diploma holders = earn about 150,000 per month
- Degree holders (professionals) = earn about 300,000 per month

*Limited communication skills, in particular poor mastery of English, French and Kiswahili.

*Most hotels and restaurants lack necessary facilities and supplies to offer quality services. For example, a hotel or restaurant using a single family (domestic) cooker for commercial purposes; not having enough utensils.

SWOT Analysis of on the Supply of Skills to Tourism & Hospitality Sector in Program

STRENGTH	WEAKNESS
<ul style="list-style-type: none"> a) Has an established HL institution accredited by Rwanda Ministry of Education / (NCHE) to offer degree program in the country. b) Have WDA/IPRC with a clear vision and purpose of increasing skills in the sector. c) There are also middle level training institutions with great potential of offering training and in-servicing for technicians and artisans. d) Students have easy access within Kigali for field work and potential job networking e) Owners and managers of established training institutions are members and work closely with the relevant associations within the Tourism Chamber in PSF Rwanda. f) Established training institutions has good working relationship with Utalii Collage in Kenya - one of the most established training institutions in the region. 	<ul style="list-style-type: none"> a) The training program is not diversified enough to cover much needed skills in tourism and hospitality in Rwanda. b) There is lack of sufficient and up to date equipment to train the students to acquire skills rather than only knowledge of the industry c) Shortages of qualified academic staff and technicians. d) The few established training institutions tend to focus on training managers instead of technicians and artisans who are needed in the industry e) The training institutions-industry linkages is very limited, if there is only in internships. f) There are no research on understand the needs of the industry. g) The training institutions have very limited and general courses on tourism sector, which are mostly theoretical.
OPPORTUNITY	THREATS
<ul style="list-style-type: none"> a) The increased and fast growth of tourism/hospitality industry in Rwanda means increased demand for trained/skilled human stock in the industry. Thus the demand for courses offered is assured. b) The working and training policy environment is conducive and supportive for the institution. There exist enabling training environment offered by the GoR and the PSF. c) Tourism Sector being one of priority sector within the country and RDB. Potential for partnership and support is very high. d) Good governance and leadership has attracted external support including development partners to fund development programs/projects in Rwanda. c) Viability of establishing a world class training institution. 	<ul style="list-style-type: none"> a) Competition from other established regional training institutions like Utalii in Kenya. b) There is a general negative perception by the public in Rwanda about working in the tourism industry. Thus discouraging bright and innovative young people from joining the sector. c) Most of the established foreign establishments in the industry in Rwanda provide their own foreign trained staff or send them abroad for further/additional training. d) Non-competitive salaries and incentives increases the chances of not recruiting, motivating and retaining qualified staff, who are very limited in the region. Thus end up having those who are not well suited for the job.

**Box 2: CASE OF SCHOOL OF HOSPITALITY AND TOURISM MANAGEMENT,
KENYATTA UNIVERSITY, KENYA**

DEPARTMENT OF HOSPITALITY MANAGEMENT

Academic Staff and Specializations: - The School of Hospitality and Tourism is comprised of a group of dedicated, experienced and a committed team of 15 teaching staff. These individuals teach, research as well as consult on various areas of competence: Foods & Nutrition Research, Community Resource Management & Human Development Research, Tours and Travel Operations Management, Tourism Management, Sustainable Tourism, Tourism Training & Education, Property Management, Hospitality Marketing, Accommodation Management, Current Issues and Trends in Hospitality & Tourism amongst others.

Programs: The following undergraduate and postgraduate programs.

a) Diploma Program: - Diploma in Hospitality Management

b) Undergraduate Courses: i. Bachelor of Science (BSc.) in Hospitality and Tourism Management, ii. Bachelor of Science (BSc.) in Tourism Management, and iii. Bachelor of Philosophy (BPhil) in Hospitality & Tourism Management.

c: Postgraduate Courses: - Master's Degree Courses:- i. Master of Science (MSc.) in Hospitality & Tourism Management, ii. Masters Business Administration (MBA) in Hospitality & Tourism. And **PhD. (Doctor of Philosophy):** Doctor of Philosophy (PhD) in Hospitality & Tourism Management

Resource and Facilities: - Kenyatta University recently acquired the North Coast Beach hotel in Mombasa, in its endeavor to improve the quality of hospitality and tourism training in the country. This facility provides the students with hands on approach to learning, as some of the practicum courses will be undertaken in the facility. The hotel doubles up as a commercial enterprise. The school has tourism and travel training labs with state-of-the-art technology (global distribution and meeting management systems).

II: The Kenya Utalii College is a public training institution, which since 1975 when it was established have offered training programs and facilities for the tourism and hospitality sector in Eastern, Central and Southern Africa. It is training facility with a four star hotel, which is run commercially and is also used as a training facility offering various courses including:

- Hotel Management & Operations
- Hospitality Management and Operations
- Food Production
- Food and Beverage Management and Service
- Front office & Administration
- Tourism Management
- Pastry & Bakery
- Cake Making and Decorations
- Cooking Skills.
- Tourism and Business Studies.

It has trained about 50,000 graduates for the regional market. Under bilateral agreement, the Government of Kenya sponsors 4 Rwandans to train in this college every year. The college also has a working relationship with Rwanda Tourism University College (URTC).

5.0 IMPLICATIONS & RECOMMENDATIONS

5.1 Emerging Issues & Discussions

The findings of the skills survey in the Tourism & Hospitality sector in Rwanda indicate that the sector is one of the fast growing industries in the country. This is also a sector where the shortages of skilled labor force and poor quality service is critical and affecting the image of the growing industry across the country.

As it has been indicated in this report, out of the current 20, 860 employees in the sector, over 5,000 labor units lack necessary technical skills to make the industry effective and competitive. Besides, over 50% of them need additional training in each of the five key international languages: Chinese, Spanish, Germany, French, English and Kiswahili, which are the languages of the majority of tourists who visit Rwanda every year. The existing established training institutions in Rwanda tend to focus more on managers for the industry; yet the industry needs technicians and artisans. There is also very limited training institutions- industry linkage. If it is there, such linkage is restricted to internship and there is no research by the institutions to understand the needs of the fast growing and changing industry.

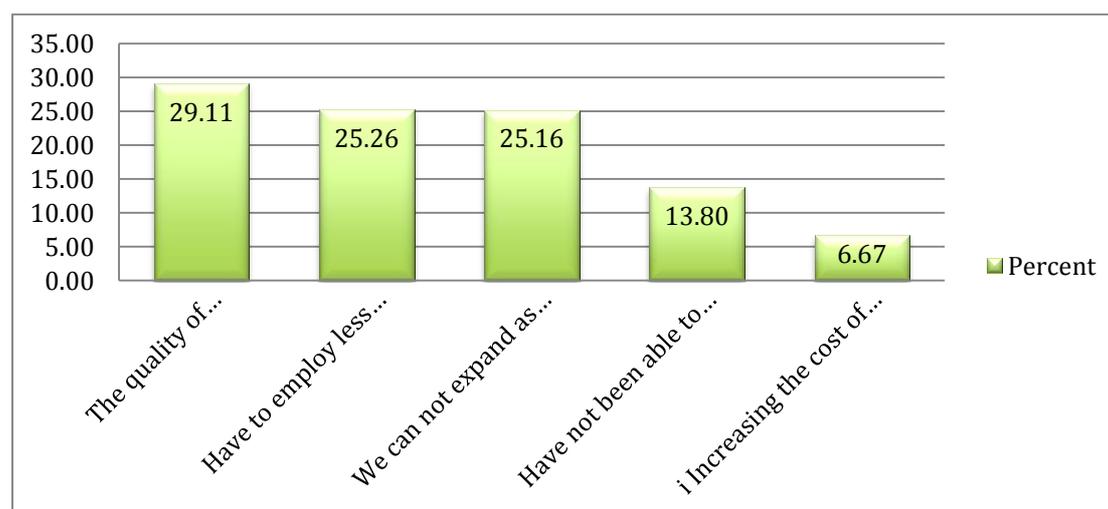
The skills gap explains the current poor customer service in the industry across the country. The challenge of limited skills or lack of is going to worsen in the next 12 months unless strategic and sustained capacity building interventions and instituted. For example, in the next 12 months 4 in Kigali alone new four-five star hospitality facilities will have been established in Kigali alone. They will require about 1,200 additional skilled professionals in the hotel and accommodation subsector. This will be a struggle for the existing labor units in the market. A manager of one of the well-established hotel facility summarized it all:

The push and shove for the few skilled employees has started already. I know for example about 30-40% of my senior technical staff have already applied to join the big upcoming hotels/facilities. We cannot prevent them from moving. But definitely we shall be affected. The whole industry will be somehow negatively affected. For us, we have resources to hire and train/retrain. But others do not have this privilege. When their workers are 'poached' they will just look for whatever skills will present themselves. They cannot employ qualified foreigners. In a nutshell, the cost of doing business will definitely increase for us. And for others, the customer service is likely to remain poor or even become worse. We need practical action to be taken to cushion us. I know it is market forces. But it is unfair for a big investor to come to the country without a human capital plan... Big investors in this industry in an environment where skills are limited should show come up with skills development action plan.... (Facility Country Manager, 2010).

The number of skills that will be required is definitely more than this putting into consideration the fact that there are other new upcoming establishments/facilities for tourism and hospitality sector in the districts outside Kigali

The investors and managers in the sector indicate that the absence of skilled personnel in different sub-sectors in the tourism/hospitality industry has affected their businesses negatively. About 29.11% of the establishments indicated that lack of skilled has compromised quality of services they offer to clients. Another 25.3% indicated that they are forced to employ unqualified staff to run their businesses, and another 25.2% indicated that they have failed to operate at an optimum level. Thus their turnover is lower than they had expected when investing into the business.

Figure 20: Impact of Absence of Skills



Other critical issues are that the employment of unskilled personnel in the sector negatively affects the establishments' turnover (profitability). All the big and medium establishments who responded to the survey, although have no specific figures, indicated that there is a direct link between skilled personnel and profitability.³ A manager in one of the establishment in Rwanda, shades lights into this issue by comparing such an establishment in Kigali with those in Kampala, Dar-es-Salaam and Nairobi (Table 68).

Table 68: Indication of Skilled Personnel & Increased Turnover/Profitability

Location	% of Turnover/ Profitability	Remarks
Kampala Establishment	23	The size of this establishment is the same as that of Kigali. But they have employed more qualified staff, who are in the local market.
Kigali Establishment	7	The size of the establishment is the same as the one in Kampala. But there is huge skills gap, thus we employ people with limited skills who are available in the local market. But also employ qualified foreigners to fill the gap & train. The foreigners are very

³The link between skilled personnel and profitability (turnover) is strategic and needs a systematic study in Rwanda, and East Africa as a whole for comparison purposes. More available studies are on business environment and governance, but not on this important issue.

		expensive. Thus increases operation costs.
Dar-es-Salaam Establishment	20	Same size of establishment as in Kigali and Kampala. But workers are not as qualified as in Kampala. But also not as unqualified as in Kigali. Thus doing better than the Kigali establishment.
Nairobi Establishment	26-27	The country has many trained and qualified professionals in the sector. Recruiting qualified and experienced personnel not a problem in the local market. Their facilities are more effective and efficient.

The critical factor here is the cost of operation and maintenance. Such costs are higher in Kigali compared to establishments in Nairobi, Kampala and Dar-es-Salaam. Cases sited in Box 1 and Box 2 below explains this phenomenon further;

Case 1: Four Star Hotel & Accommodation Subsector

“Our experience in this business has shown that there is a direct link between hiring skilled people and a hotel’s high turn-over and profitability. Cost of operation is the deciding factor. This is because of the following factors:

i. We employ many unskilled people to do the job that is supposed to be done by just a few skilled people. For example, in our restaurant we have employed 6 people (Restaurant Manager, Restaurant Supervisor and 4 waiters) instead on only 3 (Rest Supervisor and 2 Waiters). Thus more people on salary.

We have 45 extra workers in one establishment in Kigali, and in another establishment outside Kigali; 26 extra workers. This increases the cost of doing business, thus lowers profits.

ii. With unskilled people, repairs and maintenance cost goes up. Unskilled workers break down things, misuse, mishandle facilities/equipment etc. Thus replace and repair rate very high. Hotel equipment in all areas kitchen, laundry, and rooms are generally very expensive. And since they are not there in the Rwanda market, they have to be imported. Then one has to fly in experts to diagnose the problem and sort it out. This cost money and making the operational costs very high. For example, in 2010 technicians blocked a ‘breather’ for a room cooling system without knowing, assuming that the system was leaking. This blew-up the systems in 13 rooms. The rooms could not be used for 10 days, waiting for replacements and experts from Dubai. We lost (13 times 300\$ a day for ten days) plus air ticket, accommodation and food for the expert, plus the cost of replacing the coolers.

iii. Since you have unskilled people in the market, you recruit and then you spend more money training and re-training thus increase the operational cost. For example, we spend an average of US\$10,000 annual on training.

iv. Skilled professionals in technical areas like kitchen, restaurant, bar etc., means quality product and quality service, thus more customers more money. Even PR and good communication/customer care means more money. Thus more profits.

In a nutshell, the opportunity cost of unskilled workers is very high and increases the operation cost in the hotel & accommodation industry in Rwanda. This generally lowers business turnover.

Facility Country Manager, 2012.

Another critical reality is that in the next five years the demand for skilled labor force in the sector will continue to be more than the supply of skills from the training institutions. There are three critical implications, if there are no comprehensive interventions in terms of capacity building and training.

- i. Most establishments will continue employing poorly educated and untrained labor force, thus affecting negatively the quality of service and image of the sector.
- ii. The established facilities will continue importing skilled labor from the region thus increasing the cost of operation and making the country lose the much-needed foreign currency.
- iii. There will be little diversification, innovations and branding/rebranding in the industry, thus exposing the sector to stiff competition from the region. In the long run reducing the number of tourists visiting the country. And also making the business less profitable.

Case II: Established Restaurant in Kigali

We have five outlets with about 134 employees. Out of these only 60% are fully proficient. This makes our service a bit longer. For example serving tea or food tend to take long in most establishments in Rwanda because of 'chain-reaction' and 'multi-plier' effect of using unskilled staff: For example, the scenario is as follows:

Unskilled staff takes the order-> Takes time to order-> Give the order to unskilled Cook or Barrister-> Who takes time to prepare & cook - > Then takes time to alert the unskilled Waiter-> Who bring the order back late and in bits. Thus time lag is higher than expected: Tea takes even up to 15 minutes instead of 2 – 3 minutes, and food 40 minutes instead of 20 to 25 international standards.

These are costly to a business like ours. We keep on giving excuses and begging customers to 'bear with us'. Unskilled staff are expensive because:

- i. We employ more unskilled people in various departments, including ground floor staff (waiters) because that is what is available in the local market. We have about 20% of excess staff.
- ii. With unskilled workers, repairs and maintenance expenses are high
- iii. Wastage of food, raw materials like spices etc. also go up because they work and train at the same time;
- iv. Low Quality products and bad customer service means more little customers, less income, high operation expenditure.
- v. Spend money in training and re-training of unskilled staff.
- vi. Managing unskilled staff is difficult and expensive.
- vi. Hotel/restaurant industry is labor intensive. Then one has to feed them, cloth them, provide training, and provide transport for late or early assignment. This can be very expensive if one adds the availability of unskilled staff.

In a nutshell, operation costs with skilled staff are lower than with unskilled staff. Thus, high turnover and profits.

Facility Manager, 2012.

5.2 Challenges

The survey has identified the following challenges facing the tourism/hospitality sector in Rwanda.

i. Rate of investment in tourism & hospitality sector is higher than skills development. In 2004 there were only 640 hotels/restaurants in the country. In 2012 there are over 6,500. These investments need trained and qualified skills to operate effectively and efficiently, thus improve the image of the industry and increase their turnover. But there are limited trained skills and hiring foreign professionals and technicians is too expensive. Most owners/investors tend to use the skills that are available in the market and they can afford so long as “they have some interest and/or little idea/skills in the industry for example, cooking or being a waiter”. The demand for qualified skills surpasses the supply at all key occupational levels: professionals, technicians and artisans, in the industry.

ii. There has been no higher education institution offering courses on tourism and hospitality, especially at graduate and diploma levels until 2008/09 when RTUC was accredited and started a program. In addition, the few existing training institutions are not currently offering the critical and priority courses that could support the industry in Rwanda. Such courses, as indicated early include the following:

- Tourism Product Development and Management
- Destination Management
- Tourism business development & management specialist
- Tourism Marketing
- Tourism & Hospitality Entrepreneurship
- Tourism Resort Operations
- Management of Game parks and Historical sites
- Events Organization and Management
- Cultural tourism Specialists
- Eco Tourism specialists
- Tourism historians and archeologists
- National Arts & Music
- Front Office Management and Operations
- Event management specialists
- Hotel Engineers
- Interior Design and Décor.

The survey has also revealed that the few available training institutions also have the following major challenges:

- Lack or have limited facilities and equipment for practical instruction in hotel and hospitality industry
- Have limited qualified academic staff
- Have no or small library and very few relevant text-books
- Have limited financial resources
- Most of the institutions are small privately owned by investors, who have limited idea of what is needed in the industry.

With this kind of scenario, such institutions cannot offer effective training.

iii. Financial resources on 'customer service' training. A lot of financial resources and energy is spent on 'customer service' training and awareness creation annually. Although the results have been encouraging, the training has not reached the big number of employees in the sector who are less competent in soft skills including languages. As customer service continues, specific skills training on technical areas should also be mounted and funded countrywide. This is because, as these respondents summarized it:

"The on-going trainings on customer service are okay. But they are too general and more beneficial to those already with technical skills in the sector. Talking about good customer service in training is one thing but acquiring specific practical skills in an industry is a different thing all together. It needs hands-on training" (Hotel Manager, 2012).

Another one pointed out that

"Is it possible to organize sector-based and/or facility based customer-care training? This is because taking the employees out of their working environment is a big challenge to many establishments in the sector. Apart from employers/investors reluctance to release their employees, there is also a problem of making the training theoretical in a in a big hall outside their working environment (Restaurant Manager, 2012).

The respondents, both employers and employees, indicate that the financial resources spend on customer service training should be channeled to training on specific skills for specific sub-sectors in the industry.

v. Most of the tourism & hospitality establishments, experts in the industry in particular, do not own hotels/restaurants. They are owned by owners/investors, who are also not professional managers. However, the investors/owners tend to manage their establishments themselves. Even if they employ qualified managers and professionals, they tend to 'micro-manage' them – directing them of what to do even if it means going against professional requirements in the industry. Professional and technical staff, even if employed, are not given chance by the owners to undertake their duties independently- constant requirement of clearance even in minor thing like changing a bunt bulb'. Most of these hotels and restaurant are run this way and thus cannot offer quality service leave alone competing.

This is explained by the fact that hotel and restaurant industry lack proper management systems and guidelines in the country. Thus management is thus largely ad hoc.

vi. Most establishments in the sector have no induction courses/training and do not invest their resources in training and in-servicing those they employ regardless of their low skills. The assumption is that they will learn on the job. Some investors are not aware that the services being offered are of low quality so long as business continues.

vii. Rwanda Tourism & hospitality industry – hotels and restaurants in particular, have a history of 'bad public image.' Apart from the last five years, hotel industry in Rwanda

has not been a big deal. "The public, parents and students do not recognized working in a hotel or restaurants a serious jobs for professionals and/or achievers. It has been left to "those who fail to get other prestigious occupations like doctors, engineers, lawyers, ICT experts among others". With the negative public image, those who join the mushrooming facilities:

- Do so as the last resort
- Have no certificate to talk about
- Have no skills
- Thus get low salaries.

viii. **Students join training institutions offering tourism/hospitality courses as the 'last resort'**. Most students pick tourism and hospitality institutions as the 'last resort' because they did not do well in S4 or S6 examinations. With low grades, they are unable to be admitted to pursue other courses. Thus choose hotel/hospitality industry as the only remaining option and/or use it as a stepping-stone to other professions. There are anecdote evidence that such students have failed in languages, mathematics, geography, sciences, history. And they join tourism/hospitality training institution with limited facilities. Such students do have little positive attitude for the industry. Transforming such a person to be skilled and motivated to work in the industry is big task and challenge.

ix. **Effective, efficient and competitive hotel & restaurant depends on the mastery of languages and communication in general by employees, front desk and waiters in particular.** But in Rwanda, as the survey has indicated, have limited individuals in the market who are good in language necessary and needed in the sectors. The majority of those currently in employment in the industry also have poor communication and listening skills because of their school background and lack of comprehensive training.

x. The majority of establishments have no financial resources for training and upgrading of workers in the industry, despite the high demand of such services by employees. There is anecdote evidence that owners/investors also find it difficult to release the few workers they have for training. But even the owners themselves find it difficult to attend training organized, for example, by RDB and/or PSF. The general perception is that such training is not effective and not going to make the business thrive.

6.2 Conclusions & Recommendations

The findings of the skills survey imply that there is need for concerted, coordinated and comprehensive efforts, strategy and investment to enhance skills development for the fast growing tourism & hospitality sector in Rwanda. Comprehensive and urgent efforts are needed to provide skilled personnel to drive and sustain tourism & hospitality industry. The findings also indicate the fact that the problem facing tourism and hospitality industry as far as skills are concerned is beyond customer service. The problem trickles down to those doing technical work like cooks, chefs, engineers, room attendants among others. Such people require technical skills to be effective in their professions and hotel/tourism industry in general.

The following recommendations are put forth with this objective in mind.

6.3 Strategic Recommendations

1) Establishment of Sectors Skills Councils (SSC's)

The Sector Skill Councils are national partnership organizations that will bring together all the stakeholders – industry, labour and the training providers, for the common purpose of workforce development within the industry sectors. The sectors will be key in developing qualifications standards to ensure that the quality of trainees in technical schools, higher learning institutions and professional development stages is relevant and globally competitive. The SSC's will also be the center mechanism for coordinating school to industry linkages that provide work based experiential learning for skills development.

2) Capacity building for business owners

There is need to enhance efforts, through incentives, to mobilize and sensitize owners/investors of establishments and train them on management systems for their businesses. There is also urgent need to develop job descriptions and evaluation guidelines for their establishments. The culture/practice of management by unqualified managers and micro-management by owners must be broken in Rwanda if the quality of service is to improve and to make the industry competitive regionally.

3) Practical training of employees

Tourism and hospitality stakeholders should work with districts institutions and stakeholders in capacity building and short term tailor-made practical training programs for technicians and artisans in the industry.

4) In the short run (1-13 months)

Stakeholders (investors and training institutions) to increase and create a pool of skilled persons for the industry. Government agencies should support and work with other relevant stakeholders like PSF and WDA and contract reputable and professional firms to launch competitive practical courses on technical skills. There is need to support tailor-made and facility based training/in-servicing in addition to or rather than 'mass training' on 'customer service'. HCID could support/fund setting up of a team of skilled TOT from the region, who can come to Rwanda and visit various identified establishments for hands-on training. The following skills should be targeted:

- Chefs
- Cooks
- Waiters
- Room attendants
- Managers/Supervisors, and
- Barristers
- Tour guides.

Various Associations in the Tourism Chambers of PSF have already developed Action Plans. But lack funding to operationalize them.

5) Develop soft skills and language skills

Identify and contract reputable and experienced regional firms/individuals to mount competitive courses on soft (qualitative) skills. And specifically on languages identified by the employees including: Chinese, Spanish, Germany, English and Kiswahili. The over 10,000 existing employees need to be targeted. Also have continuous comprehensive language courses for the youth who are interested in joining the industry.

Identify established hotels and restaurants (e.g. 5 and 4 stars) in and outside Kigali and enter into an MOU and contract them to train existing workers in various technical skills. Such establishments can also be funded to offer internship opportunities for young Rwandans who are interested in developing their careers in the industry.

6) Knowledge Transfer partnerships

The government, RDB, PSF Tourism chambers and the investors in the sector need to develop a strategy for taking advantage and using foreign skills (borrowed capital) to support, develop and make the sector competitive and grow faster than it is now:

- Mobilize and market Rwanda to attract professionals who can volunteer to come
- Target friends of Rwanda (philanthropists, Rwanda in diaspora, private investors etc.) to start and support a 'Rwanda Tourism Expert Fund' (RUTEF) that can be used to give foreigners incentives to come, work and stay in Rwanda.

7) Investment in training institutions

Long-term (5 years and beyond), support and work with established training institutions in the country to make their training program demand driven and practical. This should also target expanding training opportunities at the institution. Support and work with such institutions to offer technical courses for more students at the district levels. WDA/IPRC Kigali has plans to establish a training facility for hotel/hospitality industry. Such facility need to be established and made fully functional, and equipped with facilities and have capacity to attract, motivate and keep qualified training staff. It should follow the Kenya Utalii model and be competitive in the region.

Critical courses and professional skills currently missing in Rwanda: Hard-to fill but necessary include the following should be offered:

- Tourism product development specialists
- Tourism management and development specialists
- Destination management specialists
- Tourism product development specialists
- Tourism business development & management specialist
- Tourism Marketing specialists
- Performing arts specialist
- Event management specialists
- Eco Tourism specialists
- Cultural tourism specialists
- Tourism historians and archeologists
- Wildlife management; Wildlife health & Management

8) Research

There is need to conduct a comprehensive study /research on the following"

- The impact of unskilled labor on profitability of tourism establishments in Rwanda and the EAC countries.
- The cost of doing business in Tourism & Hospitality sector in Rwanda compared to other East Africa countries
- The rate of closure (winding up) of tourism & hospitality establishment in Rwanda and the reasons behind such closures.

9) Enhance Customer service Standards

Instilling basic customer service by mainstreaming “Customer Service’ in secondary education from S1 through S6. The Association of Hotel & Restaurants has already requested MINEDUC, through the Office of the Prime Minister, to consider curriculum review that will accommodate and introduce ‘Quality of Service’ as a subject in Secondary School. All stakeholders in the sector should support this effort. The rationale is that by the time one leave S4; the person has some basics in hotel/restaurant sector. This will be one of the strategies of motivate bright students to pursue training in tourism/hospitality sector.