ENABLING PRIVATE SECTOR-LED TOURISM GROWTH

Building the Tourism Workforce: Skills for a Competitive Sector

Nov 18, 2026

Auditorium 2, ADB HQ

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Question: What skills will tourism sector workers need the most by 2035?

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Sustainable tourism through local partnership

Nov 18, 2026



Presented by: Uyanga Galbadrakh

The story begins in Mongolia, through its people and landscapes.



Remote and disconnected. This is where the personal journey starts.











Local partners learn, lead and take ownership.






Mobile bar:
local


Where local hospitality is served

Local knowledge becomes expertise. Lasting connections.





Local experts become local expertise: locally curated


Mutual Understanding, Lasting Partnerships

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AI Exposure in Tourism Sector and Skills Development Strategies

Nov 18, 2026



Presented by: Angela Chen-Delantar

Research which focuses on implication of AI exposure to jobs and implication for skills development

What AI could do

Theoretical exposure (AIOE)

How closely a job's required abilities overlap with AI capabilities.

What we observe AI doing

Observed exposure (Anthropic)

How much of a job's task mix appears in work-related Claude use, weighted toward tasks handed to AI.

Research Process:

1. **Match**

   537 U.S. occupations (O*NET) that have both scores. Each counts once (not yet by the size of the workforce in each of the jobs)

2. **Compare**

   Plot every occupation on both scores and measure how closely they move together.

3. **Classify**

   Split each score at the middle of the sample. Four patterns emerge.

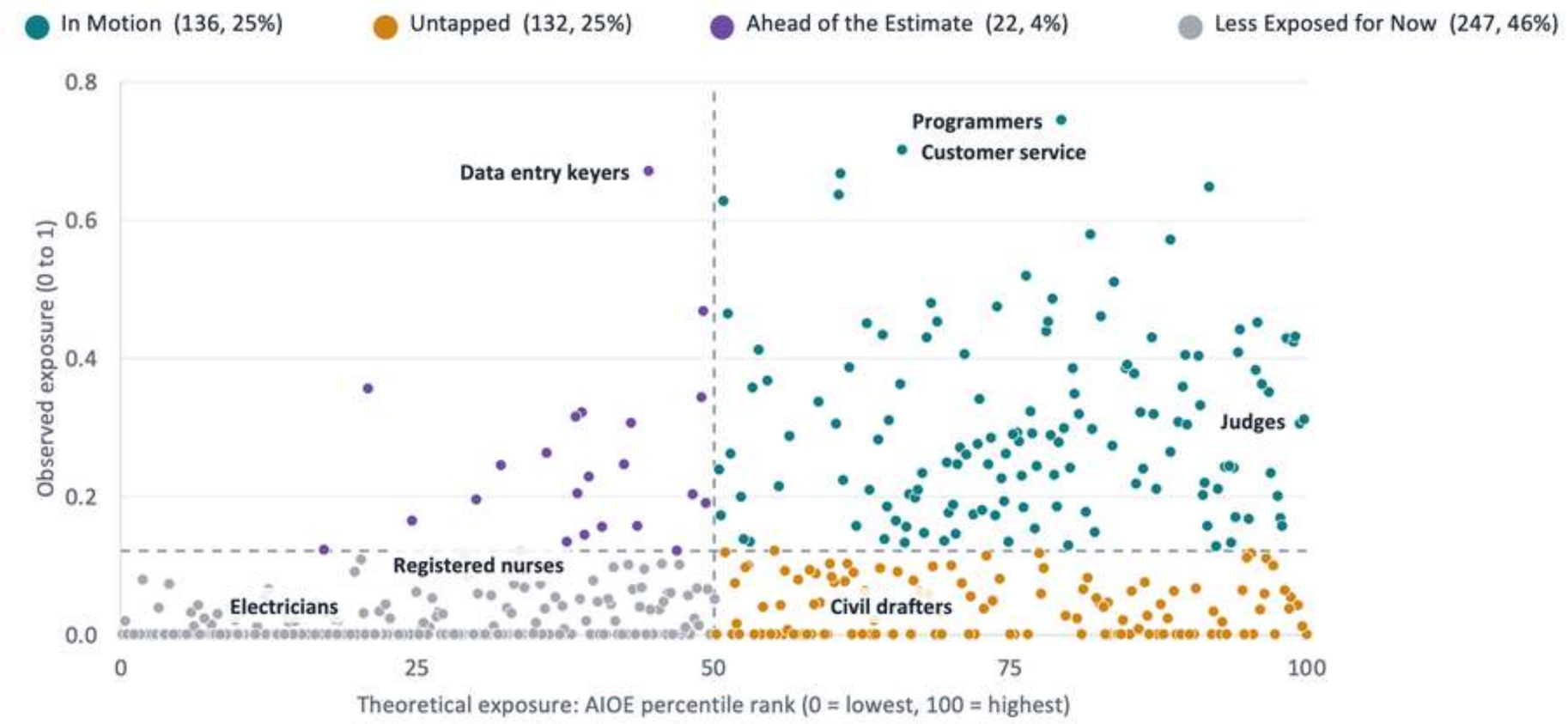


Four patterns: In Motion, Untapped, Ahead of the Estimate, Less Exposed for Now

Felten, Raj & Seamans (2021), Strategic Management Journal; Pizzinelli et al. (2023), IMF WP 23/216; Anthropic Economic Index (2025–26); Massenkoff & McCrory (2026), Anthropic.

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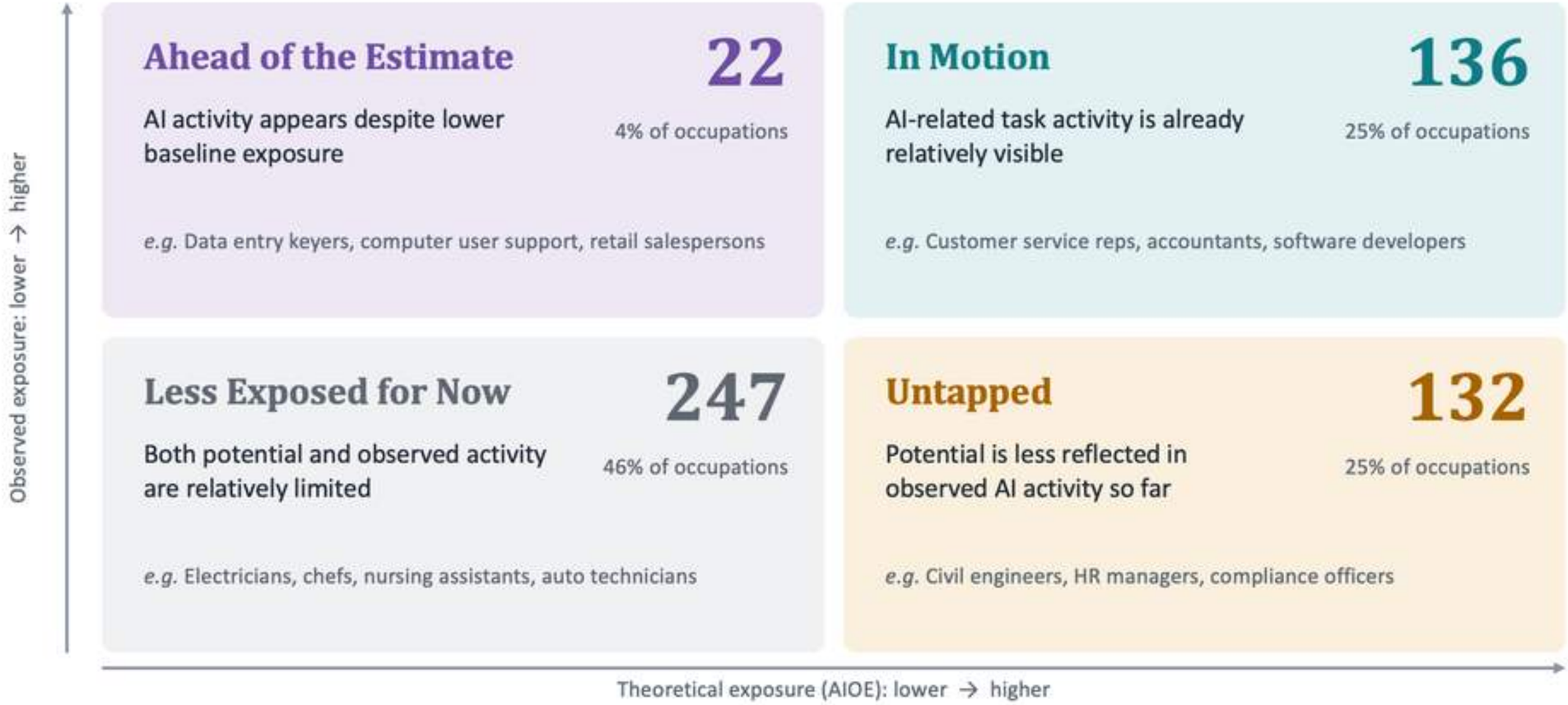
Expected AI exposure VS observed AI exposure using Claude user data



Felten, Raj & Seamans (2021), Strategic Management Journal; Pizzinelli et al. (2023), IMF WP 23/216; Anthropic Economic Index (2025–26); Massenkoff & McCrory (2026), Anthropic.

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4 distinct occupational patterns emerge for AI exposure



Felten, Raj & Seamans (2021), Strategic Management Journal; Pizzinelli et al. (2023), IMF WP 23/216; Anthropic Economic Index (2025–26); Massenkoff & McCrory (2026), Anthropic.

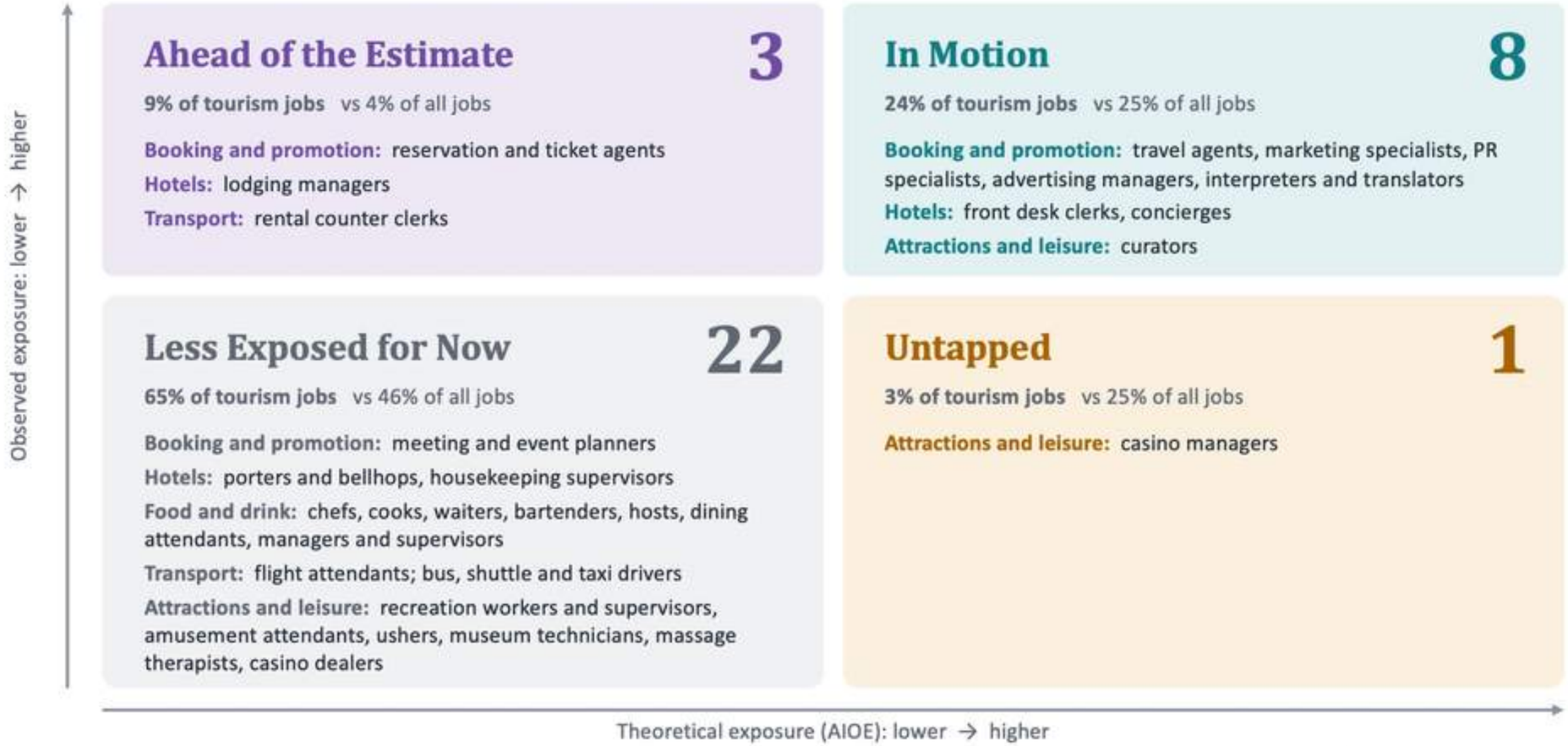
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Question for audience:

What is the AI exposure of Tourism related jobs?

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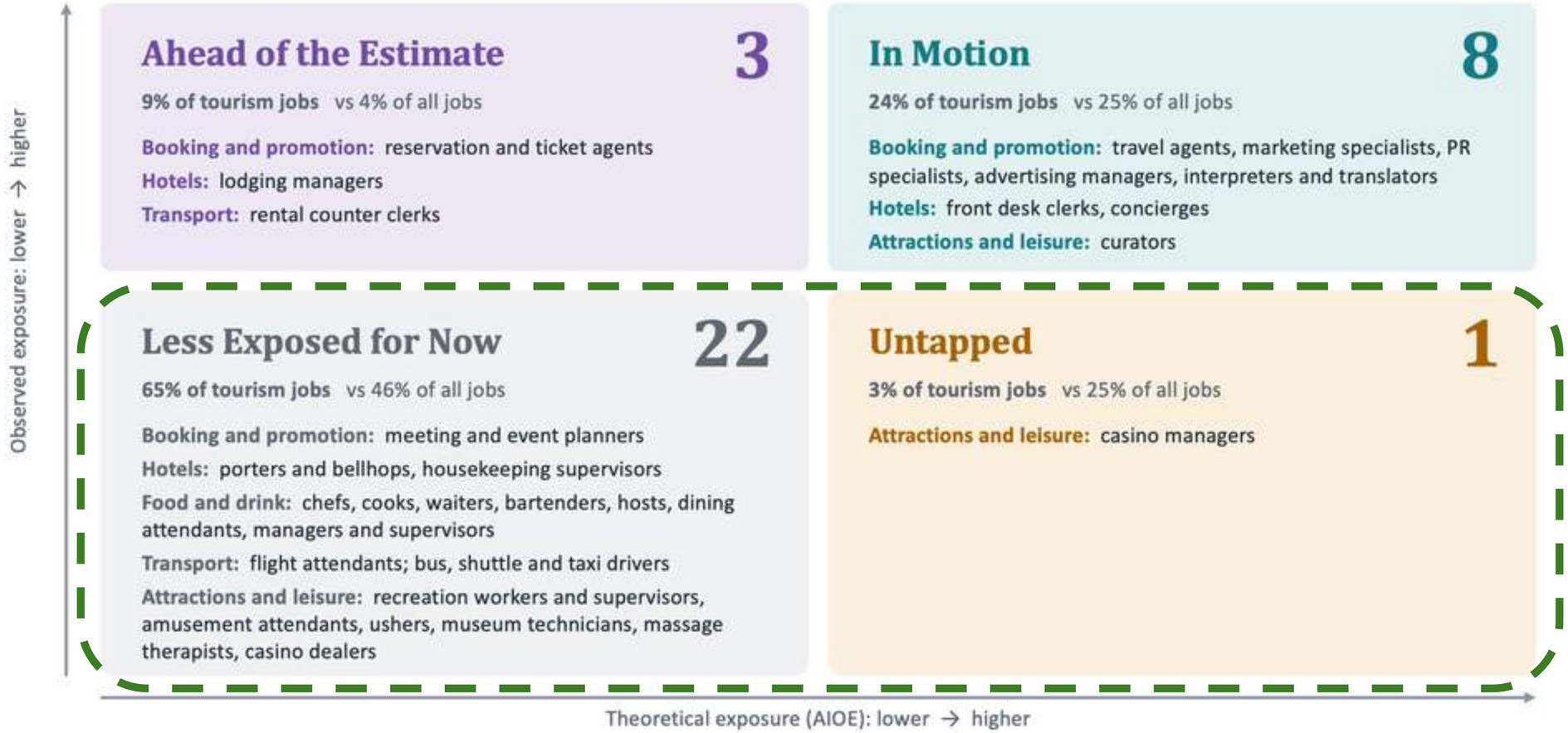
65% of the 34 tourism-related jobs currently sit within ”Less Exposed” category



34 tourism-related occupations, selected by job title. Not currently in the data: tour guides, room attendants, airline pilots.

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What do the lower AI-exposed Tourism jobs have in common?



34 tourism-related occupations, selected by job title. Not currently in the data: tour guides, room attendants, airline pilots.

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What they have in common is a focus on human relationship, guest interaction and care

Accountability and regulation

Outputs need sign-off where mistakes carry legal or financial risk.

Specialist tools and physical settings

Work runs through CAD, machines or a site rather than a chat window.

Institutional employers

Procurement, data rules and approvals slow new tools.

Relationships and care

The value lies in human contact and trust.

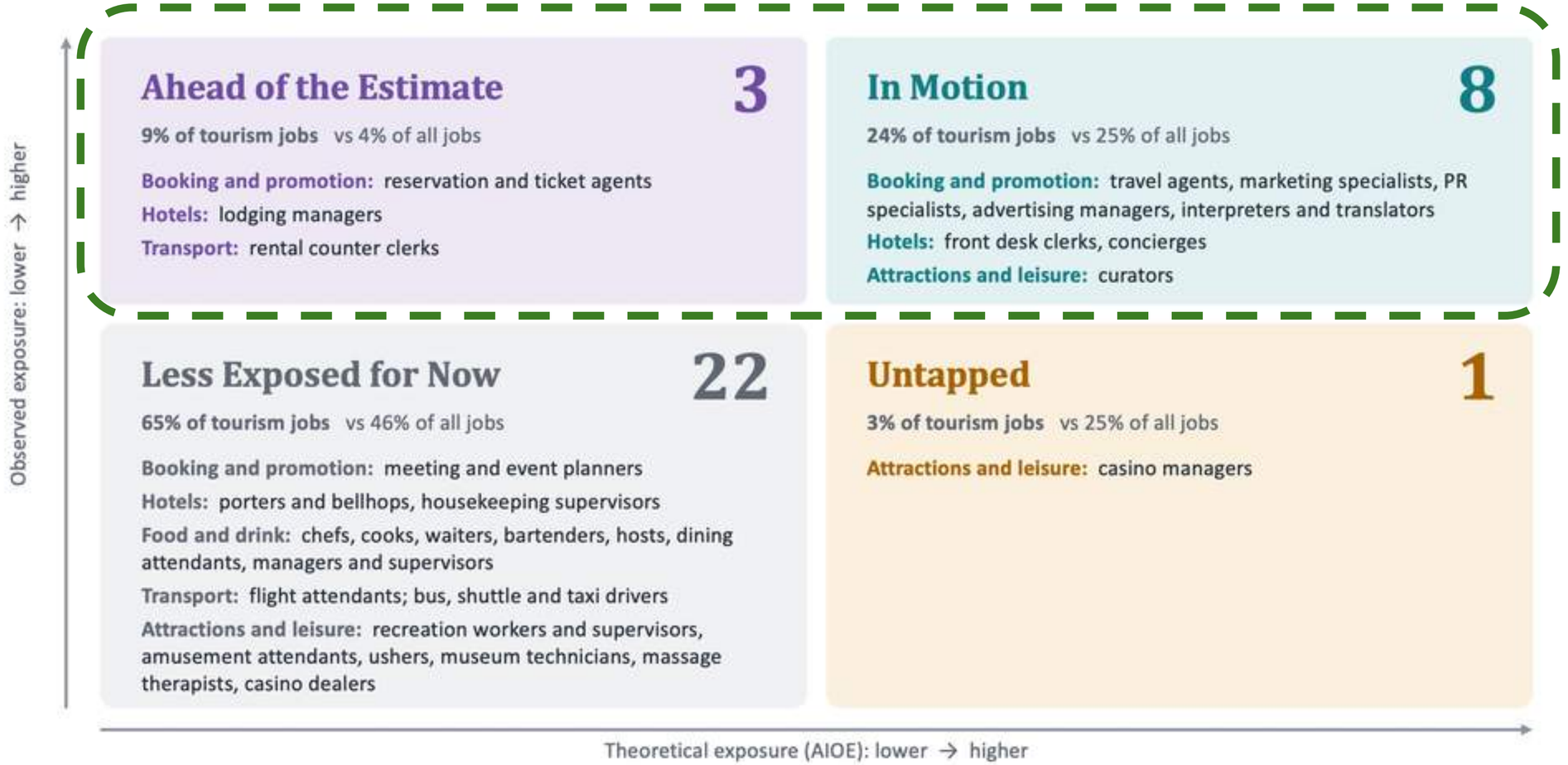
What the data can see

The research is limited by Claude user data so this is only one snapshot; specialist AI is not captured.

Felten, Raj & Seamans (2021), Strategic Management Journal; Pizzinelli et al. (2023), IMF WP 23/216; Anthropic Economic Index (2025–26); Massenkoff & McCrory (2026), Anthropic.

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What do the higher AI-exposure Tourism jobs have in common?



34 tourism-related occupations, selected by job title. Not currently in the data: tour guides, room attendants, airline pilots.

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AI integration is taking place at key points of the guest journey for information roles in the Tourism sector

Discovery and marketing	Planning and reservations	Pre-arrival communication	On-site guest service	Follow-up and retention
AI can assist	**AI can assist**	**AI can assist**	**AI can assist**	**AI can assist**
• Draft listings and posts • Translate content	• Draft itineraries • Answer booking questions	• Confirmation and FAQ replies • Messages in guests' languages	• Staff quick reference • Shift handover notes	• Summarise reviews • Draft thank-you notes
Human-led	**Human-led**	**Human-led**	**Human-led**	**Human-led**
Telling the place's story	Tailoring special requests	Reassuring anxious guests	Welcome, food, care, problem recovery	Personal recovery after complaints
Marketing, PR: In Motion	Travel agents: In Motion; reservation agents: Ahead	Desk clerks, concierges: In Motion	Chefs, waiters, porters: Less Exposed	Marketing, customer service: In Motion

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Skills development strategies related to tourism jobs

Strategy	What the data shows currently	Workforce Development Strategies	Who can lead
1 Strengthen the human core	**22 of 34** tourism jobs are Less Exposed for Now: food and drink, transport, hotel operations, attractions	• Keep building service skills: hospitality, care, safety, languages • Add basic digital skills for orders, schedules and handover notes	TVET providers, employers
2 Build AI fluency in information roles	**8 of 9** tourism jobs with higher AI potential already show AI activity, against about half across all jobs	• Train staff to draft, translate and plan with AI, and to check its output • Build AI-assisted tasks into front office, travel services and marketing courses	Employers, training providers
3 Redesign roles around the guest journey	**4 of 5** guest journey stages include roles already showing AI activity; on-site service stays human-led	• Use AI for routine messages so staff time goes to welcome, special requests and recovery • Set clear rules on who reviews AI output and how guest data is protected	Hotels, tour operators, destinations
4 Build local evidence and track change	**There are other roles not in the dataset:** e.g., tour guides, room attendants, airline pilots	• Validate the patterns with local employers and workforce surveys • Re-check each year and update training as AI use shifts	Government, industry bodies, researchers

In Motion · Untapped · Ahead of the Estimate · Less Exposed for Now

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Thank you!

angela.chen@gse.harvard.edu

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PIB COLLEGE
School of Tourism, Digital & Creative Arts

Bali has the world's hotel brands. Does it have the talent to run them?

Research briefing for government on hotel supply and the hospitality talent gap

November 2026 · All figures from official statistics, industry research and operator data

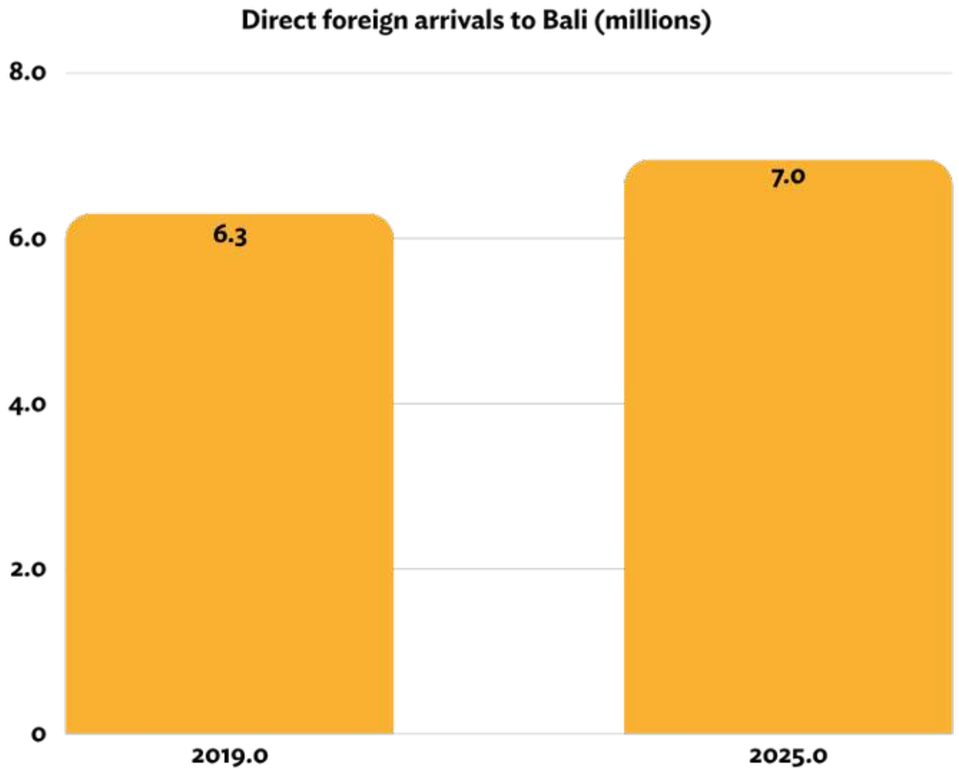


Presented by:

Dr. Paulus Herry Arianto, M.A., CBC

Deputy Director of PIB College

Bali receives almost half of Indonesia's foreign Visitors and fills its star hotels better than any province



6.95M
foreign arrivals in 2025, a record, up 9.72% on 2024

45%
of Indonesia's 15.39M foreign arrivals came to Bali in 2025

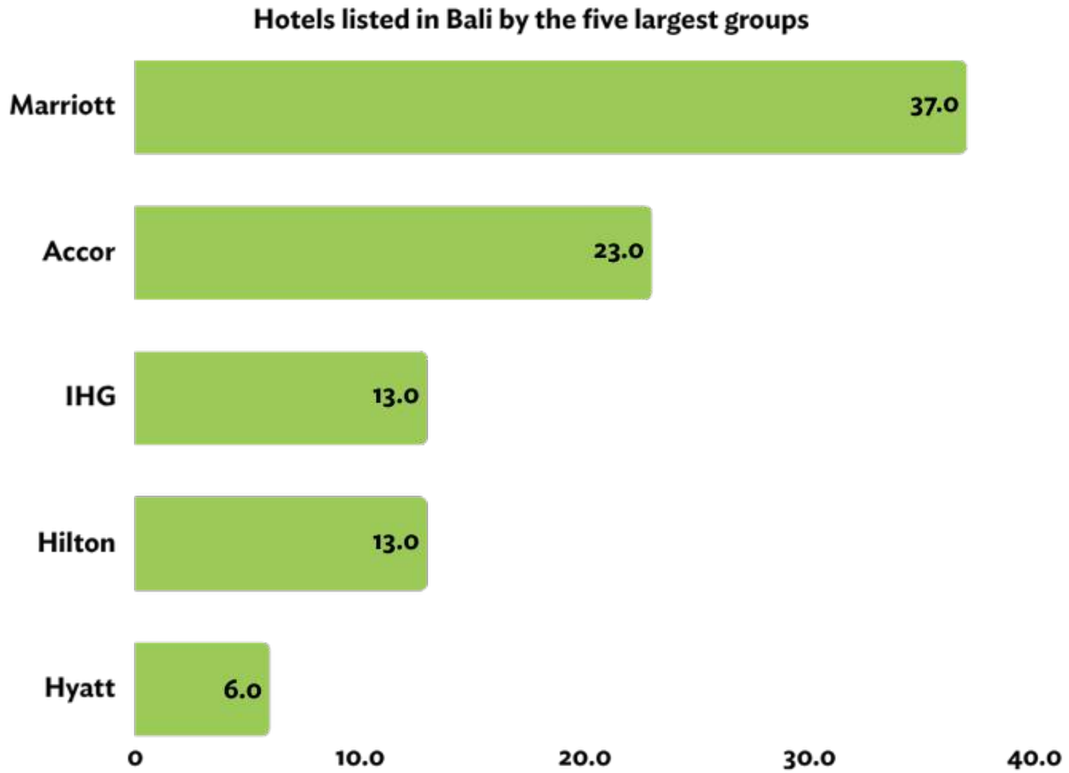
61.02%
star-hotel occupancy in 2025, highest in Indonesia (national 49.30%)

−1.15%
Jan–Sep 2026 (5.24M) vs same period of 2025: growth has paused

Demand is high but flat in 2026. Bali is competing on quality and spend, not volume.

Source: BPS Bali (2019 and 2025 arrivals, release 2 Feb 2026; Jan–Sep 2026, release 2 Nov 2026); BPS (national 2025 arrivals 15.39M); BPS via Databoks (star-hotel occupancy 2025). Bali share is our calculation.

Every major global hotel group operates in Bali, across luxury to economy



Marriott Ritz-Carlton, Ritz-Carlton Reserve (Mandapa), St. Regis, Bulgari, W, Luxury Collection, Westin, Renaissance, Sheraton, Courtyard, Aloft, Fairfield

Accor Raffles, Sofitel, Banyan Tree, Pullman, Mövenpick, Grand Mercure, Novotel, Mercure, ibis

IHG Six Senses, Regent, InterContinental, Kimpton (opening), Hotel Indigo, voco, Holiday Inn

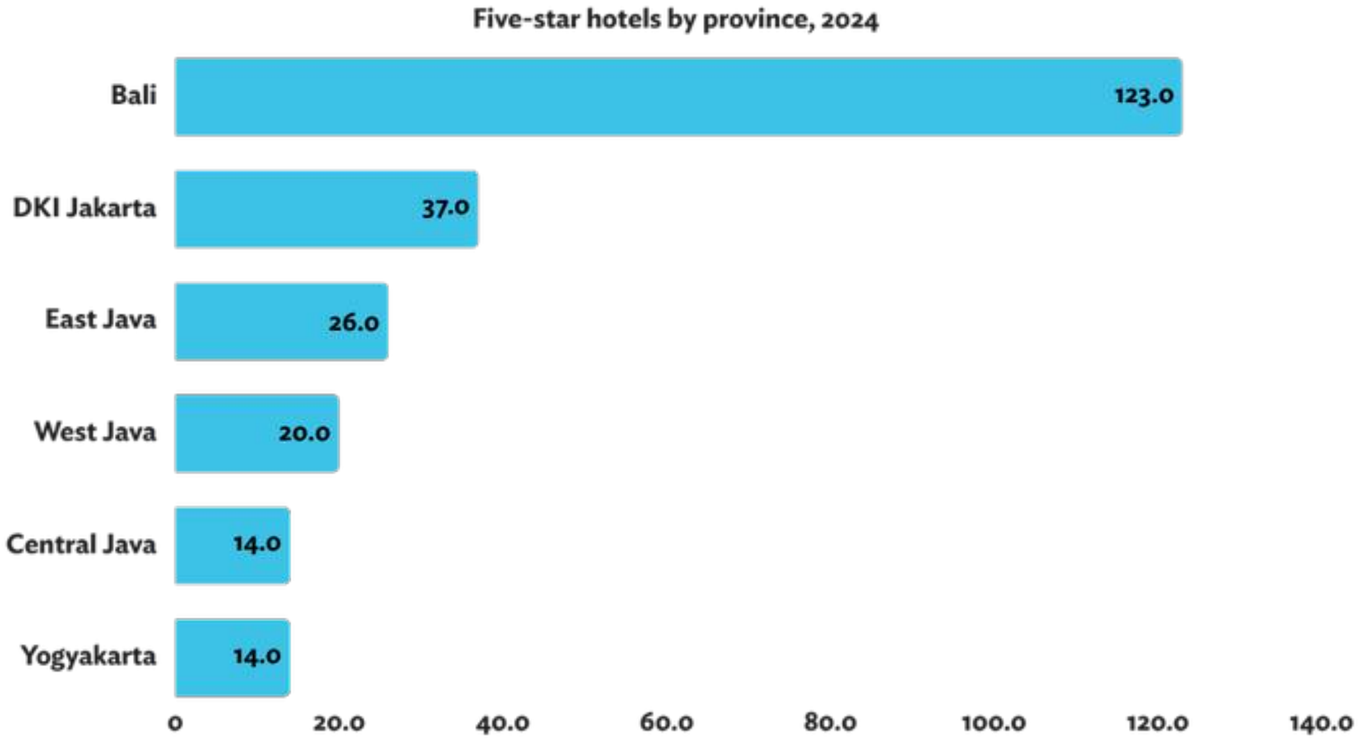
Hilton Conrad, LXR, Hilton, Hilton Garden Inn

Hyatt Alila, Andaz, Grand Hyatt, Hyatt Regency

Independent luxury (selected) Four Seasons, Aman, Capella, Jumeirah, Kempinski, Oberoi, Belmond, COMO; Mandarin Oriental opens 2027

Source: Operator websites, hotels listed for Bali, accessed 6 Nov 2026: marriott.com (37), all.accor.com (23), ihg.com (13 IHG-brand, incl. Kimpton opening soon), hilton.com (13, incl. 8 SLH partner hotels), hyatt.com (6). Counts include soft brands and partners.

Bali holds 42% of Indonesia's five-star hotel, more than the next five provinces combined



123 of 296

Five-star hotels in Indonesia are in Bali (2024)

4,154

Hotels and accommodation in Bali, the most of any province (13% of 31,175)

IDR 13.1M

Average luxury room rate in 2025, up 8%: guests pay for international service

Source: BPS, Hotel and Other Accommodation Statistics 2024, via Databoks (five-star hotels by province; total hotels); Horwath HTL, Bali Hotel & Branded Residences 2026 (2025 rates, surveyed hotels).

The Gap

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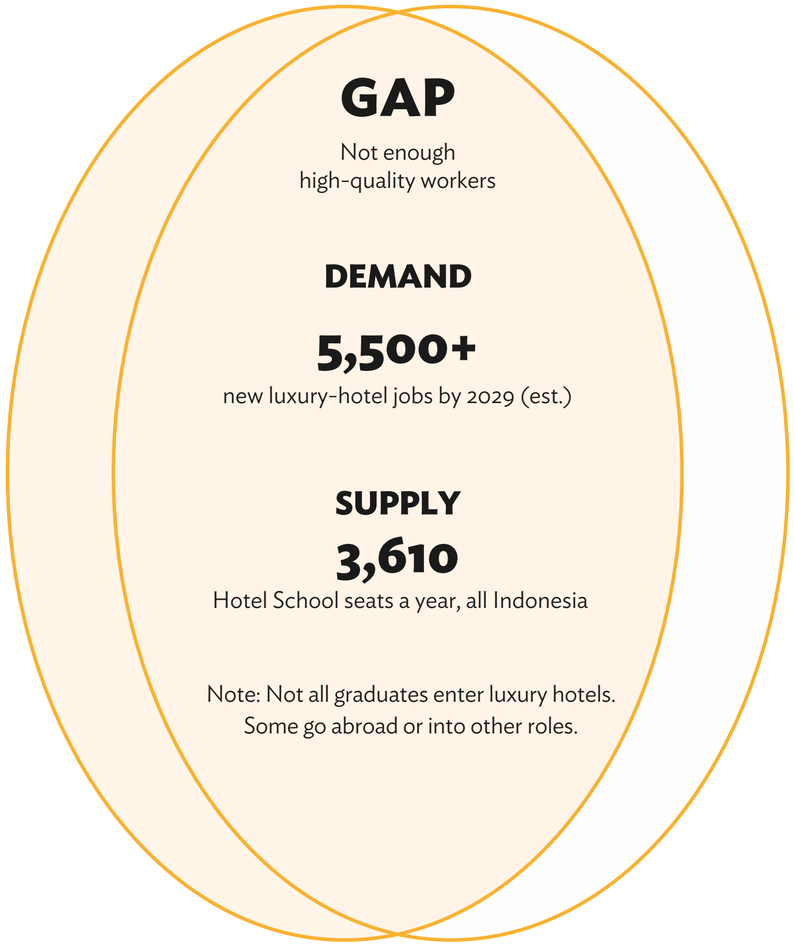
Bali hosts the world's best hotel brands but cannot yet supply the high-quality workers they need

High-end Hotel Brands

~90 hotels from 5 global groups · 123 five-star hotels

Ritz-Carlton	InterContinental
St. Regis	Conrad
Bulgari	Alila
W Hotels	Andaz
Raffles	Four Seasons
Sofitel	Aman
Six Senses	Capella
Regent	Mandarin Oriental*

*opening 2027



High Quality Hotel schools

Only 3,610 state Poltekpar seats a year

- Politeknik Pariwisata NHI Bandung
- Politeknik Internasional Bali
- Politeknik Pariwisata Bali
- Institut Pariwisata Trisakti
- Universitas Pelita Harapan
- BINUS University
- Universitas Udayana
- Politeknik Negeri Bali
- Universitas Gadjah Mada
- Universitas Ciputra
- STP AMPTA Yogyakarta

Executive Hotel Management Program

In Collaboration with The Apurva Kempinski Bali



THE GAP IN THE INDUSTRY

Hospitality Education **Not Yet Aligned** with the **Required Operations Standards** in Luxury Hotel



HOW EDUCATION IS CURRENTLY DELIVERED

1. Learning remains predominantly **classroom-based.**
2. Industry partnerships often stop at **conventional internships.**
3. Hotel exposure emphasizes **routine tasks** rather than **leadership, judgment, and professional character.**
4. Students have **limited opportunities** to navigate **real guests, operational complexity, and high-stakes decisions.**

WHAT LUXURY HOSPITALITY NEEDS

Talent who can perform, adapt, lead, and make sound decisions.

1. Professional Character
1. Leadership Readiness
1. Luxury Service Competence

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EMP IS A BREAKTHROUGH INITIATIVE

Bridging the Gap Through Industry-Integrated Learning

A Learning Model Built Around Real Hotel Operations



Executive Management Program Learning Pathway



Year 1

Classroom Learning
at PIB College



Year 2

Classroom Learning at
The Apurva Kempinski Bali



Year 3

Classroom Learning +
Supervisory Project at The
Apura Kempinski Bali



Year 4

Management Trainee
at The Apurva Kempinski
Bali

Curriculum Convergence

The Apurva Kempinski Bali Learning Management Modules + **PIB College Curriculum** → **EMP Learning Modules**

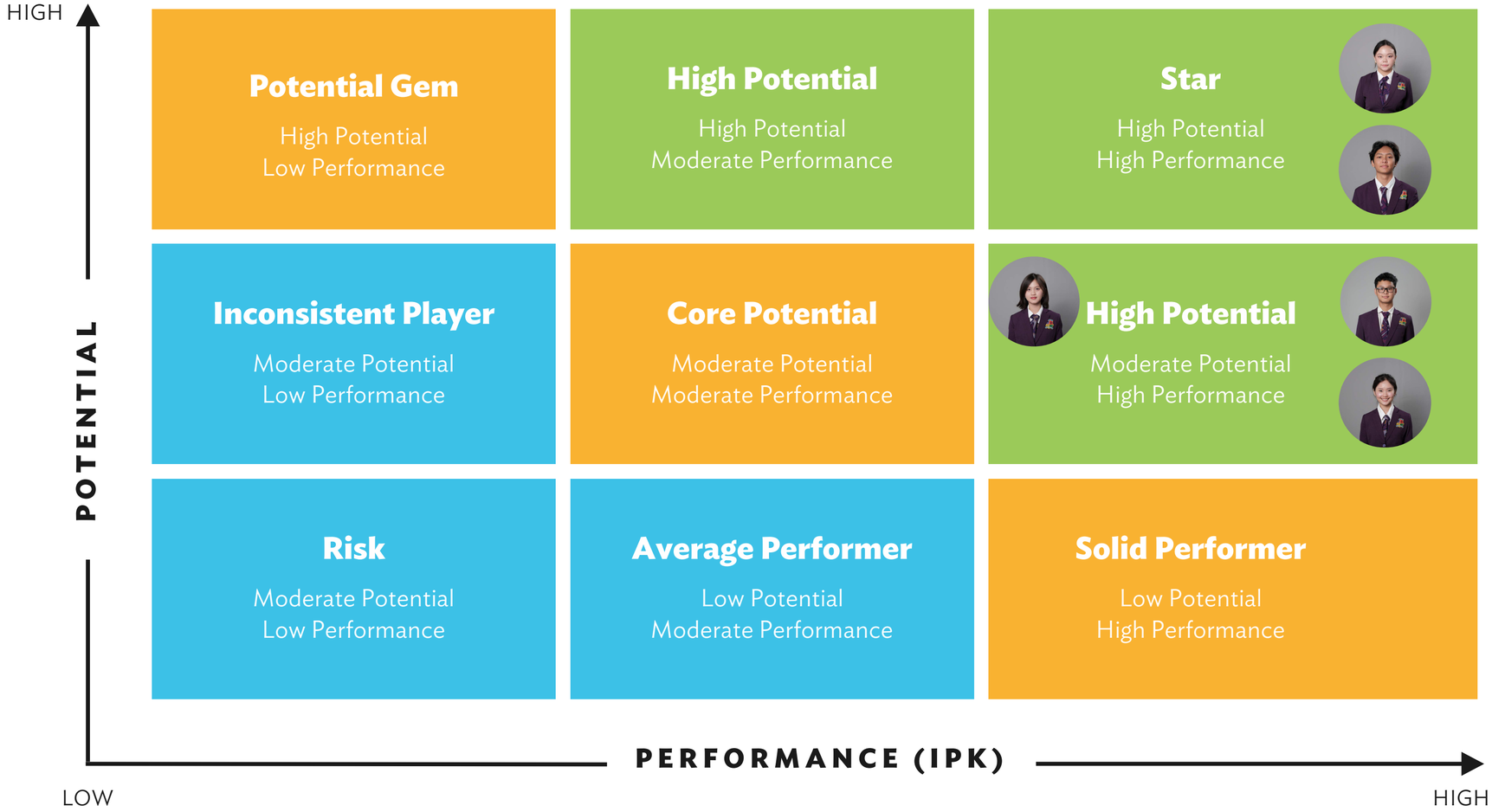


Matrix of Psychological Potential Assessment

1. IQ
2. Customer Service Excellent
3. Self-Control
4. Teamwork
5. Initiative
6. Analytical Thinking
7. Conceptual Thinking
8. Empathy
9. Leadership
10. Concern for Order

Case Study

Result Assessment





TOURISM SHAPES PLACES.
PEOPLE SHAPE ITS FUTURE.

Which digital skill are now core tourism skills?

DIGITAL SKILL ARE NOW TOURISM SKILL

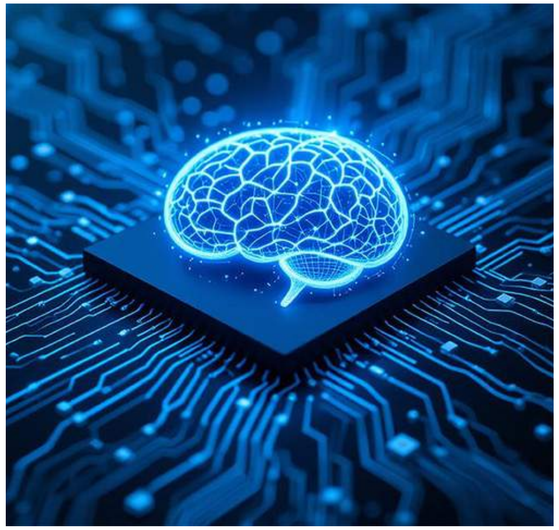
Today’s traveler meets us online first

Searches Online → **Read Reviews** → **Asks AI** → **The meets our team**

If our people can't work online, they can’t serve this traveller

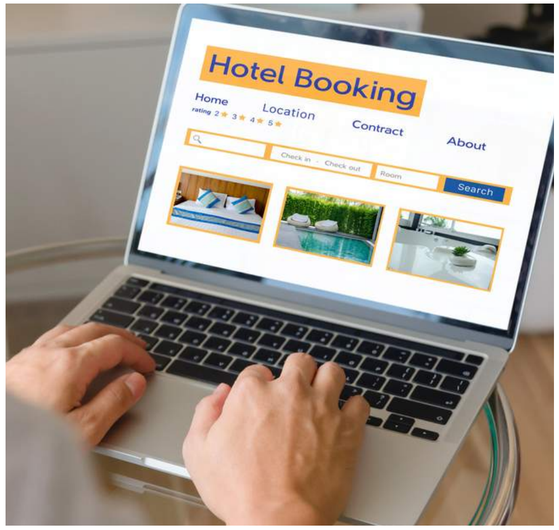
For every role — front office, kitchen, field

4 digital skills every tourism worker needs?



Decode AI

Align operations with GEO and AEO



Master Booking Tech

Optimize with advanced hotel systems



Sentiment Analytics

Use AI to analyze reviews and predict guest needs



Master Guest Data Privacy

Protect Guest PII

Not just for IT people

Everyone in tourism needs these skills?



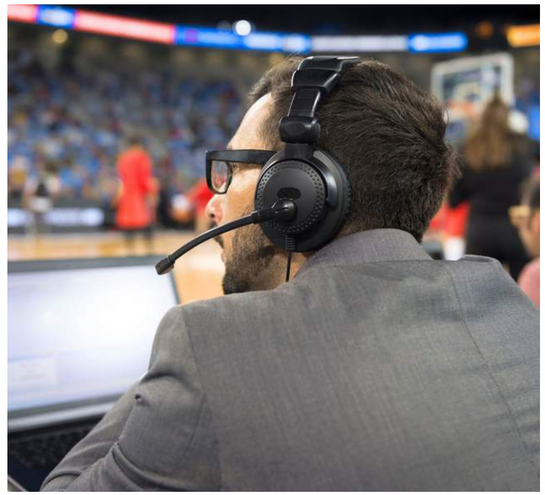
Receptionist



Chef



Tour Guide



Event Coordinator

We teach them hands-on with industry partners, real tools and real situations.

Our principle

Technology does the routine. **People deliver the personal.**

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