

#08

A GROWING INDUSTRY DURING TIMES OF CHANGE

Forecasts for the skills and competences needed in the
hotel and restaurant sector up to the year 2030

SUMMARY



A GROWING INDUSTRY DURING TIMES OF CHANGE

- Forecasts for the skills and competences needed in the hotel and restaurant sector up to the year 2030
- Focus: Automation's impact on future skills
- Initiated: Future Council
(a joint initiative of Visita and HRF)
- Forecast: Kairos Future



THE INDUSTRY AND THE GREATER WORLD AROUND US

TWELVE TRENDS AS WE APPROACH 2030

- Massive large-scale urbanisation continues
- Compact housing accommodations become more common
- Increased travel and tourism
- Increased diversity
- Knowledge about food and drink increases
- Everything becomes an experience



THE INDUSTRY AND THE GREATER WORLD AROUND US

- Premium experiences are increasing
- “Rurbanisation” and longing for the countryside
- Zero friction life is becoming more and more desirable
- Digitalisation and automation are accelerating
- Flexible working life
- “The gig economy” becomes more widespread



TRENDS AND THE SECTOR

- The sector's outlook is good, and this is supported by several trends.
- The sector is becoming diversified into increasingly separate and specialised parts
- Automation will play a major role in the sector's future needs for skills and expertise.



THE SIZE OF THE SECTOR IN 2030 TOTAL CONSUMPTION

EURO 33 BILLION

INCREASE 83 PER
CENT



THE ROLE OF AUTOMATION

Automation affects Swedish hospitality companies to a greater extent than other sectors.

20 per cent of the jobs in the sector could be automated using currently available technology.

Lack of time and a hesitation in taking on large investment costs.



KAIROS'S FOUR SCENARIOS FOR THE FUTURE

1: No further automation

2: McKinsey & Co.

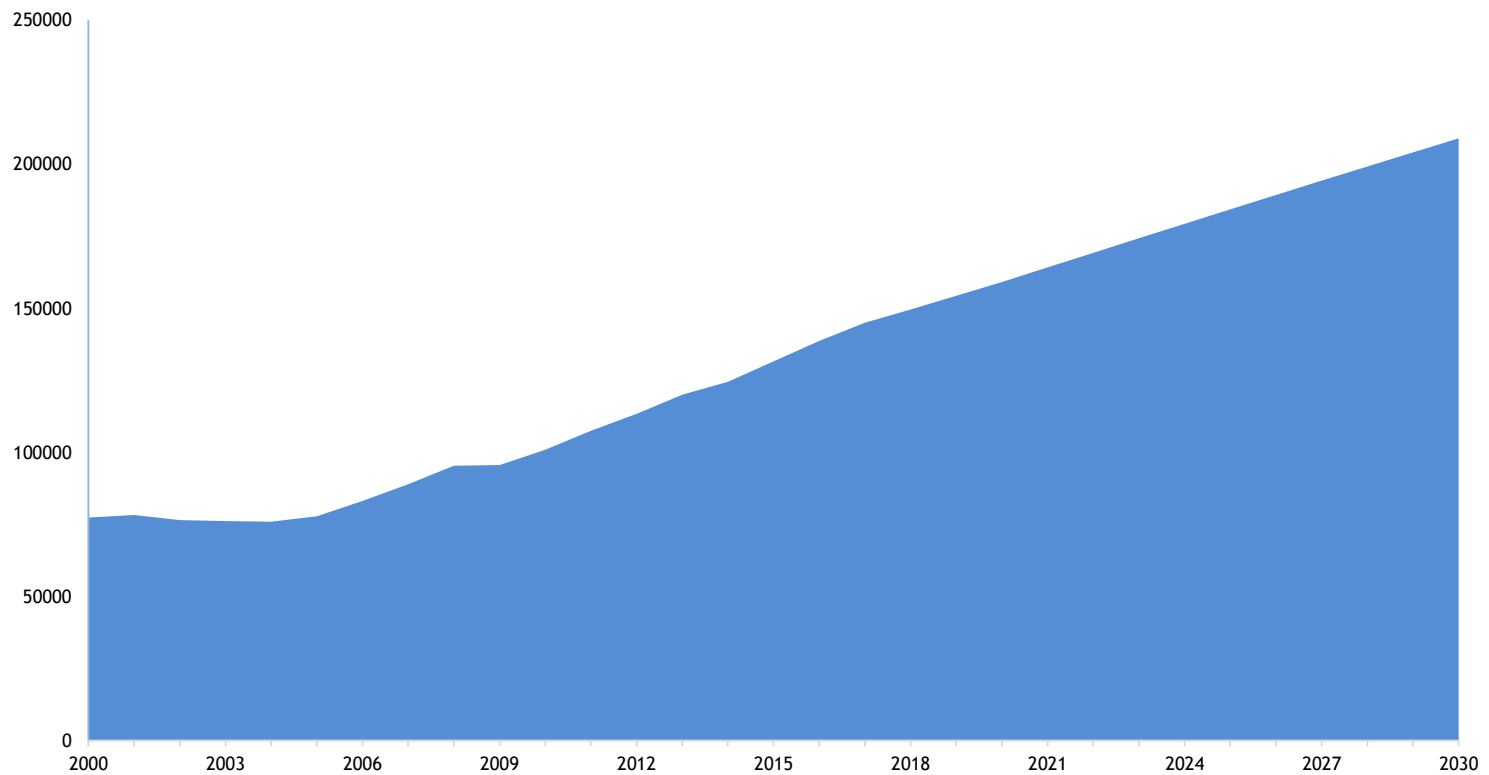
3: The Foundation for Strategic Research

4: Kairos Future's aggregate forecast



SCENARIO 1

No further automation

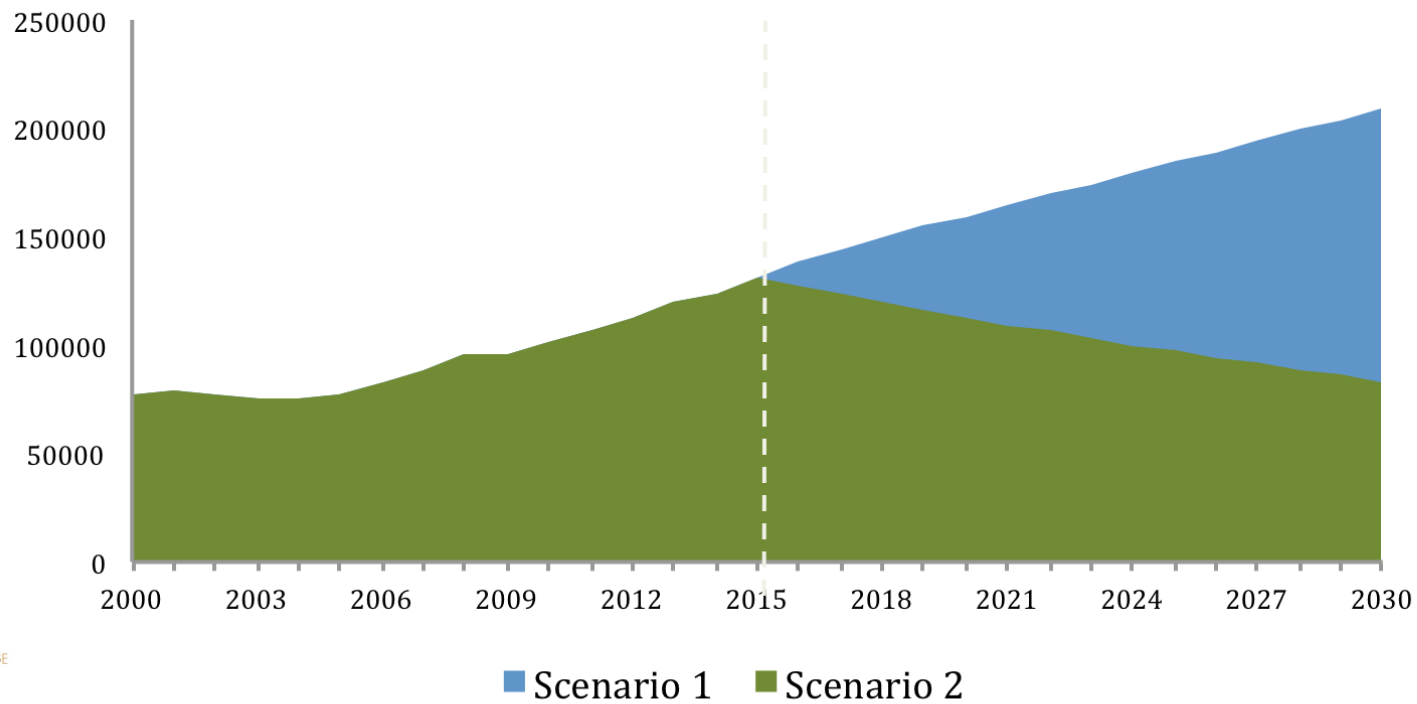


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SCENARIO 2

McKinsey & Co.

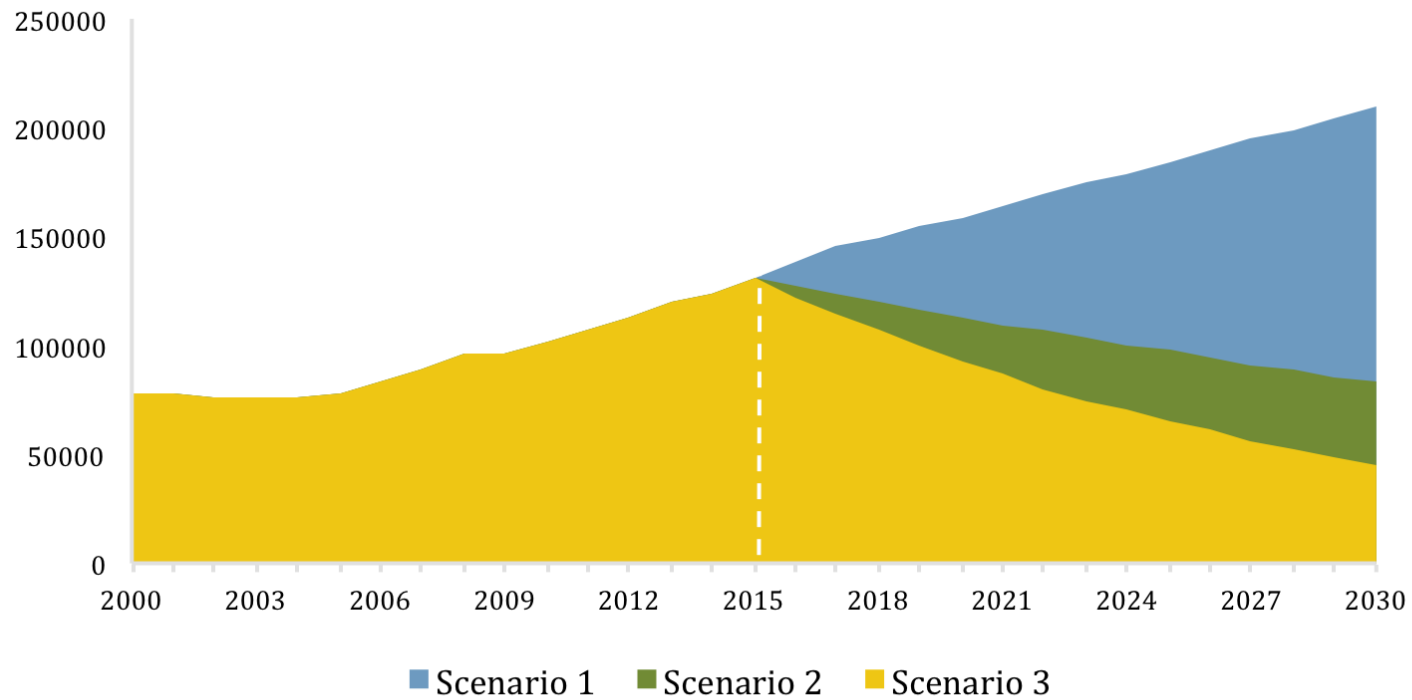


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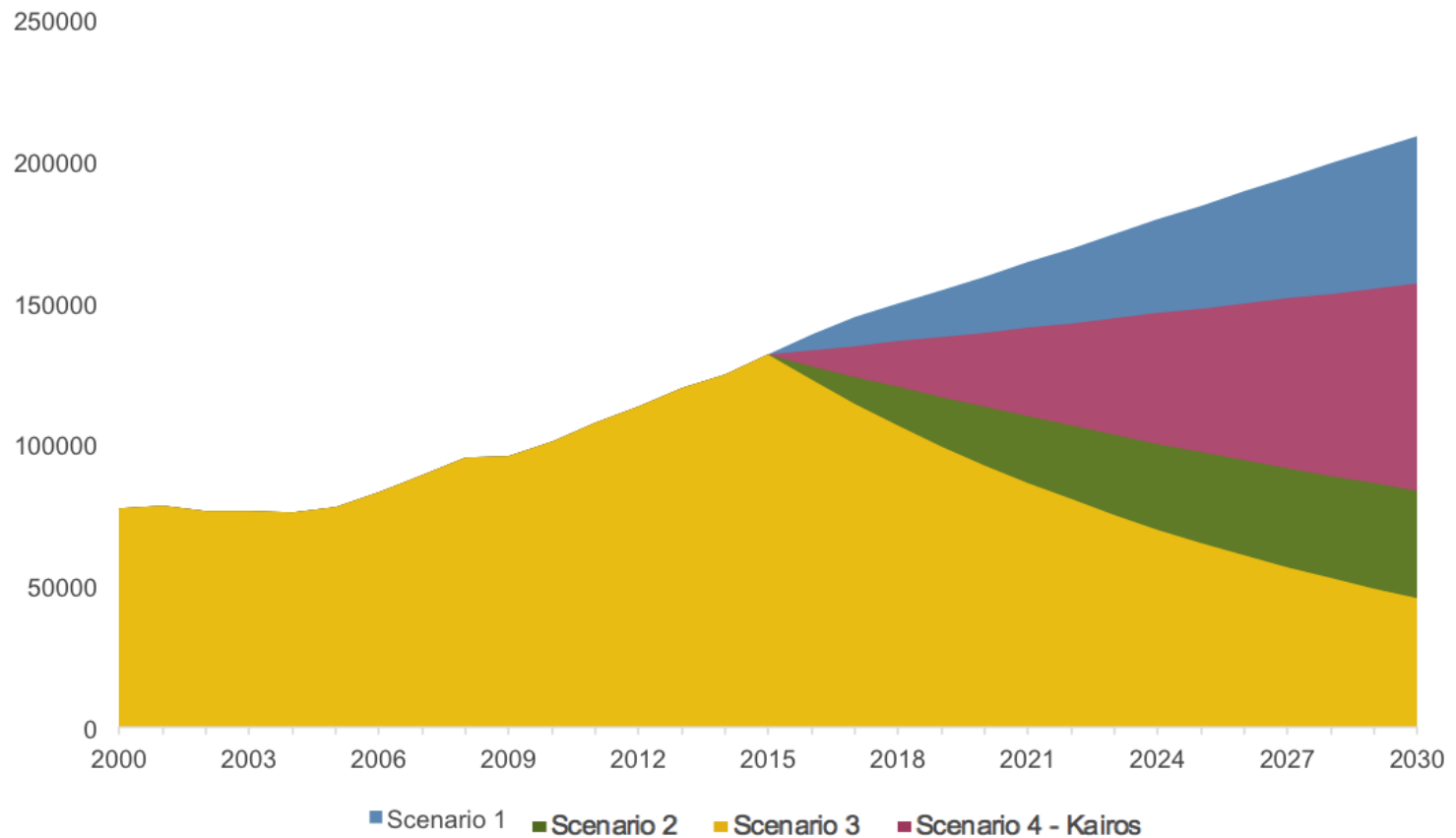
SCENARIO 3

The Foundation for Strategic Research



SCENARIO 4

Kairos Future's aggregate forecast



RECRUITMENT NEEDS BY 2030

Growth and recruitment needs at 25 % automation

| Year | Employees | Growth | Leave the sector | Recruitment Needs |
|------|-----------|--------|------------------|-------------------|
| 2015 | 131,630 | 7,112 | 30,004 | 40,020 |
| 2020 | 139,533 | 1,618 | 34,883 | 36,501 |
| 2025 | 147,911 | 1,715 | 36,978 | 38,693 |
| 2030 | 156,792 | 1,818 | 39,198 | 41,016 |

Growth and recruitment needs at 60 % automation

| Year | Employees | Growth | Leave the sector | Recruitment needs |
|------|-----------|--------|------------------|-------------------|
| 2015 | 131,630 | 7,112 | 30,004 | 40,020 |
| 2020 | 113,152 | 3,475 | 28,288 | 24,812 |
| 2025 | 97,267 | 2,988 | 24,317 | 21,329 |
| 2030 | 83,613 | -2,568 | 20,903 | 18,335 |



AUTOMATION CREATES NEW WORK TASKS

- Purchase of RaaS and SaaS
- Creating personalised customer experiences
- Floor walking, roles for different types of situations that require creativity and perception
- Social media expert
- Superintendent who oversees and ensures the quality assurance of the service
- Technical caretaker who maintains the technology



EFFECTS ON SKILLS AND EDUCATION IN THE FUTURE

- Need for staff with a higher education degree.
- Technology affects the format and method of skills development.
- The content of the training programmes: The need for both technical skills and personal hospitality.



SUMMARY CONCLUSIONS

- Massive urbanisation is a major factor propelling the growth of the sector Branschen växer och blir mer diversifierad
- The industry is growing and becoming increasingly diversified.
- Traditional jobs within the sector are expected to decline.
- New roles and jobs are added.



SUMMARY CONCLUSIONS

- The staff turnover is a greater challenge than that posed by the future growth of automation.
- Individuals with a low level of education and young people in the risk zone.
- Need for an open and flexible educational programme structure.



THANK YOU!

A Growing Industry During Times of Change,
can be downloaded at www.bfuf.se.

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