

Manpower Update Report

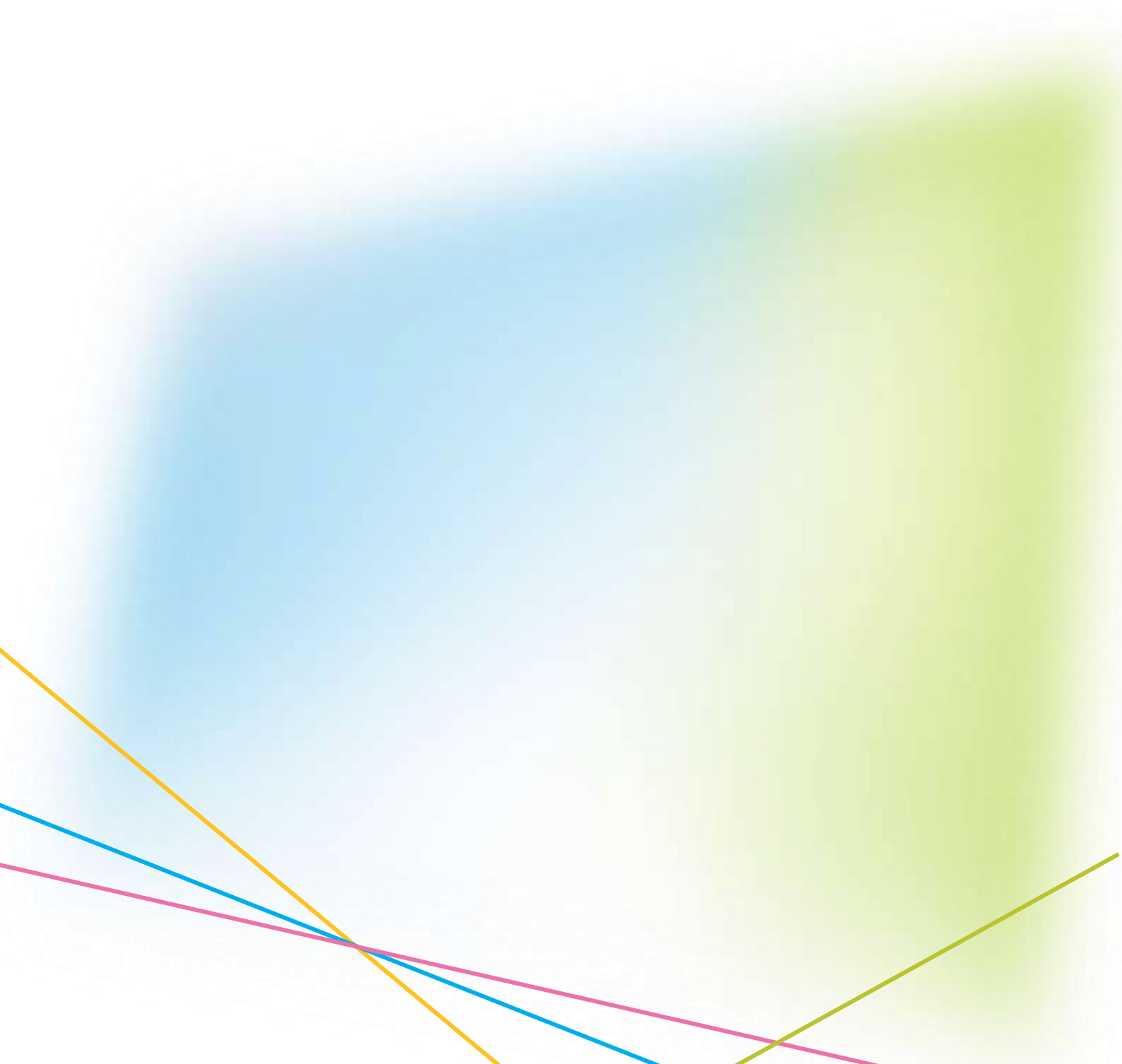
Tourism Industry

2026



ACKNOWLEDGEMENT

The Hotel, Catering and Tourism Training Board (HOTB) would like to express its gratitude to the members of the focus group for their valuable insights on the manpower situation of the tourism industry. The perspectives shared by focus group members, alongside the insights from HOTB members and key recruitment platforms, have been instrumental in shaping the findings presented in this report.



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Introduction

Background

The Hotel, Catering and Tourism Training Board (HOTB) of the Vocational Training Council (VTC) is responsible for determining manpower demand of the industry, assessing whether the manpower supply matches manpower demand, and recommending the development of vocational and professional education and training (VPET) to meet the assessed training needs.

To capture workforce dynamics, HOTB conducts comprehensive manpower surveys every four years, supplemented by periodic manpower updates focusing on qualitative insights. Following the manpower survey of the tourism industry completed in 2023, two manpower updates will be conducted in 2026 and 2027 to reflect the dynamics of the manpower situation in the industry.

This manpower update report consists of:

(a) insights from a focus group meeting held on 29 April 2026 to collect views from industry experts on latest industry developments, workforce demand, recruitment difficulties, training needs, and recommended measures to address the challenges the industry faces; and

(b) desk research and analysis of recruitment information obtained from major recruitment platforms covering the period from April 2025 to March 2026 in the tourism industry.

Objectives

The objectives of this manpower update report of the tourism industry are:

- (i) to examine the latest trends and developments in the industry;
- (ii) to identify the job market situation and training needs;
- (iii) to identify the recruitment challenges; and
- (iv) to recommend measures to meet the training needs.

Methodology

Overview

This manpower update adopts a qualitative approach, combining focus group insights with desk research to capture emerging trends and workforce dynamics in the tourism industry.

Focus Group Meeting

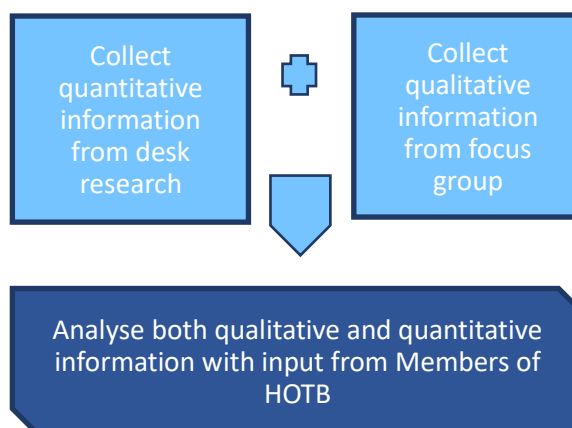
The focus group meeting was conducted on 29 April 2026 and the topics discussed were supported by the Working Party on Manpower Survey of the Tourism Industry under the HOTB. To gather comprehensive industry insights, the focus group comprised seasoned management representatives spanning critical segments of the tourism ecosystem, including professionals from international aviation, major outbound travel agencies, specialised inbound tour operators, and corporate travel specialists. The discussion covered business transformation, manpower demand, training needs, recruitment challenges and technological developments. The discussion provided a robust qualitative basis for analysing the current manpower situation and was recorded and transcribed to facilitate systematic analysis.

Desk Research

Manpower information covering the period between April 2025 and March 2026 was collected through desk research. An employment information system was developed to capture the relevant recruitment data from major online recruitment portals. A total of 3,329 recruitment records of the tourism industry were collected during the research period, serving as indicative information of the job market trends. The list of related companies under the Hong Kong Standard Industrial Classification was mapped to remove duplicated records.

Data Analysis

The analysis consists of three steps:



After the above qualitative and quantitative analysis, the findings and recommendations were augmented and endorsed by the HOTB.

Limitations

Different from the extensive quantitative manpower survey completed in 2023, this update report aims to discover the emerging themes in the manpower development of the industry. The employment trends and behaviour, recruitment difficulties, insights and observations from the stakeholders' experience were captured through this focus group and desk research. While the update report has adopted the qualitative approach of focus group discussion which covered a controlled selection of stakeholders, it might not be generalised to the entire population. Desk research that gathered information of job vacancies from advertisements in major recruitment websites also might not be exhaustive without reference to any historical data, those were used as reference supplementary to the observations of the focus group.

Findings

Factors Affecting the Industry Development

Evolving Business Environment

The tourism industry continues to navigate an environment shaped by evolving travel behaviours, digitalisation, rising service expectations, and increasingly complex regulations. These changes are having a significant impact on business models, staffing arrangements, and long-term workforce stability. In response, companies are actively reshaping their operations to deliver high-quality experiences while managing these emerging market challenges.

Compliance and Licence Requirements

The operational landscape has evolved significantly over recent years. Recent regulations directly affect daily business operations and how staff are assigned. For specific frontline roles, entry into the profession is closely tied to multi-stage certification requirements. The current certification process for certain licensed tourism roles has become fragmented, requiring separate applications for first-aid courses, preparatory classes, and split examinations. This layered approach lengthens the period between initial recruitment and actual deployment,

meaning new entrants cannot immediately become fully operational in their roles. This prolonged transition may reduce their motivation to remain in the industry. Within the inbound segment, daily compliance is increasingly resource intensive. Detailed reporting regarding precise itinerary specifics has added a significant administrative workload to both frontline and back-office staff. Furthermore, maintaining a healthy and equitable business environment is critical. Ensuring consistent compliance and good market practices across service providers is essential to protect the professional image of the tourism sector and to sustain industry confidence in workforce development.

Impact of Technology on Services

Digital platforms, self-service functions, and artificial intelligence (AI) are fundamentally transforming how services are delivered to the public. In aviation operations, self-service technology handles routine tasks such as ticketing, check-in, and luggage processing. This shift has redefined the role of frontline staff, moving them away from simple transactional duties towards exception handling, disruption management, and complex customer

support. In travel-related businesses, generative AI is commonly used to draft correspondence, present visual itineraries, and manage administrative records. While these tools significantly improve efficiency, they cannot replace the fundamental need for human judgement, customer sensitivity, and service recovery capability. Technology highlights the clear distinction between routine automated functions and high-value human interactions that require empathy and cultural awareness.

Changes in Customer Behaviours and Expectations

Travel patterns have moved decisively away from the traditional model of large-scale package tours. Market demand now strongly favours smaller private groups, tailor-made arrangements, in-depth mono-destination itineraries, and experience-led products. Frequent travellers organise their travel independently, relying on intermediaries primarily for niche components, such as specialised local tours, incentive travel, and access to permit-restricted areas.

The availability of comprehensive travel information through online platforms has significantly changed customer behaviour. Travellers easily gain access to destination insights and real-time updates, narrowing the informational advantage previously held by service providers. Customers often approach agents with comprehensive knowledge, expecting

highly personalised support rather than basic transactional advice.

Correspondingly, service expectations have become increasingly high. Quality is increasingly measured by a practitioner's initiative and ability to provide distinct "emotional value". Clients now expect proactive support in documenting their experiences, whether through photographs or short videos. The ability to deliver this kind of human-centred service with professionalism and warmth is key to sustaining the industry's competitiveness.

Manpower Demand

Persistent Manpower Shortage

The tourism industry continues to navigate a structurally imbalanced workforce. A pronounced concern is the limited return of mid-career personnel who transitioned to other industries during the pandemic. This has created a noticeable talent gap in the middle layer of the workforce, significantly reducing the pool of individuals available for supervisory or mentoring functions. As a result, the workforce has become increasingly polarised, characterised by a thinning middle tier, a senior cohort of highly experienced practitioners, and a general reluctance among younger individuals to enter the field. This demographic challenge makes succession planning particularly difficult for established travel operators.

Evolution of Job Duties Across Sectors

A prominent trend across the tourism industry is the extension of job scopes. Nowadays, employees are expected to perform additional duties, such as digital content support, prompt service recovery, and sophisticated customer communication, on top of their standard operational duties. Rather than being confined to specific specialisations, tourism professionals are now expected to react promptly to highly fluid market demands. Since tour operators cannot rely on large-group outbound operations as before, the market has pivoted towards highly customised products, specialised cruises, and small private tours. This strategic evolution requires a team with strong flexibility and customer service skills to effectively navigate and tailor responses to different customer needs.

On the other hand, inbound operators are facing pressures to work with freelance professionals in managing sophisticated product portfolios that require very strong coordination skills, such as MICE events and industrial tourism. Furthermore, transformations driven by automation are reshaping the aviation industry. While the widespread adoption of self-service technologies has absorbed routine manual tasks, it has also generated strong demand for personnel who can manage service exceptions and respond to operational disruptions effectively.

Reliance on Flexible Workforce Arrangements

The tourism industry relies heavily on flexible employment models, with part-time, freelance, and ad hoc deployment becoming standard operational strategies in areas such as guiding, escorting and operational support. This dynamic is driven by volatile seasonal demands alongside evolving employee preferences, as many individuals now favour portfolio-style employment over rigid corporate structures.

Considering the impending relaxation of the continuous contract requirement under the Employment Ordinance (commonly referred to as the "468" rule), employers are proactively reviewing their human resources strategies. While companies are prepared to offer enhanced statutory benefits by transitioning eligible part-time staff to monthly salaried positions, a noticeable operational paradox emerges: numerous frontline practitioners actively resist this transition to maintain their work autonomy and flexibility. Consequently, employers must carefully balance these statutory developments with the implementation of robust service grading systems, ensuring that investments in employee benefits translate directly into consistent and high-quality service delivery.

Integrated and Multi-Functional Roles

Roles in the tourism industry have become broader in scope. Employees are increasingly expected to combine operational duties with customer communication, digital support, service recovery and experience facilitation. In

certain travel segments, frontline staff may also need to support basic content creation, itinerary presentation, or handle complex customer interactions.

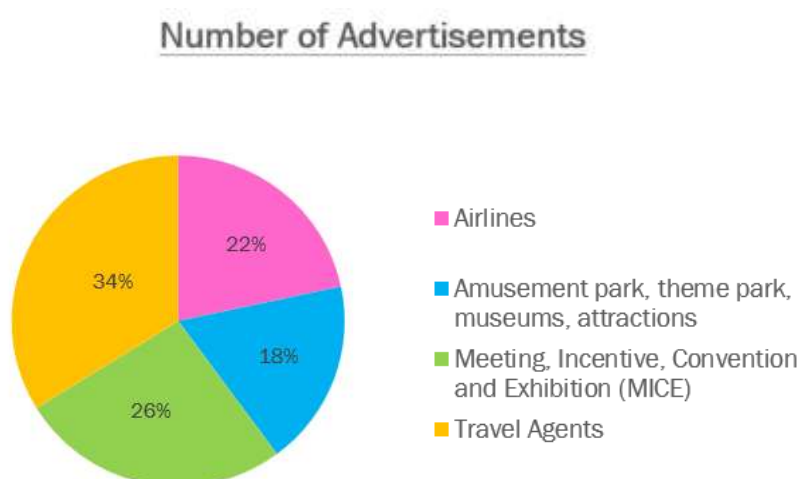
The industry therefore requires a workforce that is highly adaptable, multi-skilled, and capable of managing across functions based on the specific customer needs and business contexts.

Desk Research

Overview of Market Distribution

Desk research conducted between April 2025 and March 2026 captured a total of 3,329 recruitment advertisements across different segments of the tourism industry. The distribution of recruitment advertisements shows that travel agents account for the largest share (34%), followed by the MICE sector (26%), airlines (22%), and attractions (18%).

The distribution of these advertisements serves as an indicator of relative manpower demand across the four principal branches of the tourism industry:



Job Level Analysis and Sector-Specific Observations

Recruitment data, categorised by job level, reveals the underlying manpower structure across different operational branches, as follows:

Job Level	Airline Companies	Travel / Ticket Agents	MICE	Amusement Parks / Attractions	Overall Total
Managerial / Professional	110 (15.3%)	168 (14.9%)	190 (21.7%)	56 (9.2%)	524 (15.7%)
Supervisory / Technical	403 (55.9%)	408 (36.2%)	273 (31.2%)	188 (31.0%)	1,272 (38.2%)
Clerical / Operative	205 (28.4%)	528 (46.9%)	367 (42.0%)	192 (31.6%)	1,292 (38.8%)
Secretarial / Others	3 (0.4%)	22 (2.0%)	45 (5.1%)	171 (28.2%)	241 (7.3%)
Total (across all levels)	721	1,126	875	607	3,329

(Note: Percentages in brackets indicate the proportion of job advertisements within each respective sector branch.)

The quantitative data mirrors the qualitative shifts identified during the focus group discussions:

Strong Demand for Technical Staff in Airlines

The aviation sector exhibits a notable concentration of demand within the Supervisory/Technical tier, accounting for 55.9% of its vacancies. As automated kiosks absorb standard clerical procedures, workforce demand has shifted towards experienced personnel capable of technical troubleshooting, managing service exceptions and handling operational disruptions.

Frontline Customer Service of Travel Agencies

Travel Agents record the highest volume of recruitment activity overall, with a heavy reliance on Clerical/Operative positions (46.9%). Despite the growth of AI, the meticulous arrangement of bespoke itineraries and continuous customer support remains highly labour-intensive, requiring a substantial frontline workforce to deliver proactive service.

Seasoned Talent for MICE Market

The MICE sector shows a relatively higher demand for strategic and managerial capability, with Managerial/Professional roles constituting 21.7% of its vacancies. This reflects the industry's shift towards bespoke and highly customised corporate

arrangements and incentive travel. The segment therefore requires personnel with strong account management capabilities and vendor coordination skills to meet increasingly complex customer expectations.

Training Needs

Customer Service Skills and Communication

A proactive service mindset and advanced interpersonal capabilities are critical for tourism professionals. Employees must be able to comprehend complex customer expectations and respond appropriately in real-time. However, a growing challenge exists regarding the interpersonal readiness of some new entrants, who often exhibit a preference for digital communication over direct engagement. Training must effectively address proactive customer communication, interpersonal awareness, and the ability to confidently provide support to guests.

Language and Communication Skills

Clear communication remains a fundamental requirement across all tourism roles. Practical competence in spoken English, Cantonese, and Putonghua is highly valued, particularly when serving diverse international and regional customer groups. Beyond basic language proficiency, staff must be able to

communicate clearly, professionally, and empathetically during stressful or fast-changing service situations.

Problem Resolution and Adaptability

Staff are expected to handle unexpected situations, equipped with problem-solving skills to professionally manage transport delays, last-minute itinerary changes, and unplanned incidents. This creates a strong need for practical, scenario-based training in complaint handling and service recovery. Classroom theory alone is not sufficient to prepare students for the unpredictable emotional demands of the sector; simulations of practical scenarios focusing on disruption management are essential to equip staff for managing their daily work.

Digital Content Creation Skills

The extensive use of online experience-sharing communities has created a new role for frontline staff in enhancing the customer experience throughout their journey. Customers frequently expect guides to be familiar with smartphone photography and short video production to help boost their social media presence during the trip. To remain competitive and meet customer expectations, training should incorporate the effective use of digital tools and social platforms as core components of today's service delivery.

Safe and Accurate Application of AI Tools

AI is being integrated into day-to-day administrative operations. However, training programmes must go beyond basic technical application and equip staff with the necessary judgement and verification capabilities. Staff should be able to assess and verify AI outputs, particularly concerning factual accuracy, such as visa requirements and travel advisories. Furthermore, rigorous training on data privacy and the proper handling of sensitive company and customer information when using external AI platforms is essential to mitigate security risks.

ESG and Sustainability Awareness

Environmental, social, and governance (ESG) considerations vary significantly by business model. For aviation and large corporate groups, ESG requires stringent compliance, involving sustainability reporting and comprehensive research. Conversely, for many travel agencies, ESG implementation is most effective when focused on practical operational initiatives, such as office recycling, rather than complex corporate metrics that are less applicable to daily operations.

Recruitment Challenges

Industry Perception and Competition

The tourism sector faces a constrained talent pipeline, heavily impacted by perceptions of the industry in recent years as being vulnerable to social and economic fluctuations. Furthermore, employers face competition from sectors offering more predictable working conditions and standard office hours. In aviation operations, recruiting for physically demanding roles—such as baggage logistics—remains particularly challenging. While the Labour Importation Scheme provides vital capacity, its fixed-term nature presents strategic hurdles for long-term workforce stabilisation.

Differences in Work Expectations

A significant mismatch exists between employment expectations and the nature of daily service roles in the tourism industry. Tourism work often involves irregular shift hours, demanding customers, and the need for immediate responses outside of standard office hours. These inherent characteristics frequently conflict with the expectations of younger generations, who aspire to work-life balance and schedule autonomy, placing strain on both recruitment and retention.

Licence Application Processes and Staff Retention

For licensed roles, the transition from initial recruitment to active deployment poses a significant retention risk. New entrants are often frustrated by the extended timeline of required courses, first-aid certificates, and staggered exams, not to mention the direct impact this has on their income. This systemic delay frequently leads to early-stage attrition before candidates can fully engage in their roles.

Broadening Talent Sources

As the traditional pipeline of young graduates narrows, employers must adapt their recruitment strategies and expand their outreach to non-traditional candidates, in particular mature career changers, recognising that academic qualifications are not always the primary consideration for frontline operations. This presents a challenge for human resources in adjusting standard hiring criteria to identify and attract entrants from other sectors, including individuals with prior law enforcement or corporate management experience. These mature career changers often possess strong problem-solving skills, greater discipline, and service-oriented resilience — qualities that are essential for managing high-pressure tourism environments.

Recommendations

Government and Relevant Authorities

Streamlined Professional Certification

Relevant authorities may consider reviewing the operational efficiency of the certification arrangements for tourism frontline roles. Exploring ways to consolidate and streamline the pathways would significantly reduce delays between recruitment and deployment, without compromising professional standards. A smoother transition would make tourism roles more accessible and financially viable for new entrants, thereby mitigating pre-employment attrition.

Promotion of Fair Market Practices

To enhance industry confidence, maintaining a healthy and equitable business environment is paramount. Fostering a transparent and consistent regulatory landscape, where all market participants uphold the required professional standards, supports fair competition. This safeguards the professional image of the tourism sector and gives stakeholders greater confidence to invest in long-term workforce development.

Support for Industry Image and Career Awareness

Continued effort is necessary to elevate public understanding of tourism as a diversified profession and a field offering viable and sustainable career prospects. Career promotion should showcase the strategic breadth of the industry—including roles in MICE, aviation support, and customised travel design—rather than focusing purely on operational and front-line roles. The potential for career advancement should also be highlighted.

Holistic Support via the Development Blueprint

The industry eagerly anticipates the positive impact of the rollout of the Development Blueprint for Hong Kong's Tourism Industry 2.0, which provides substantial value through its associated training schemes and development funds. These resources provide strong support for inbound tourism and local tour operations. It would be beneficial for the industry if the outbound travel sector could also enjoy similar benefits, by expanding the scope of these initiatives to maximise the Blueprint's overall impact. A holistic framework that extends proportional support across all segments would foster balanced industry growth, encouraging both the inbound and outbound operators to invest in updated technologies and

upskill their workforce in tandem with business growth and emerging opportunities.

Industry Exposure Through Mega Events

Large-scale international events, mega-concerts, and new touristic attractions serve as exceptional platforms for students' applied learning. Relevant authorities are encouraged to increase student participation, allowing learners to gain a deeper understanding of the vast opportunities available in the industry through dynamic, practical industry settings. Closer coordination between event organisers, government authorities and industry stakeholders may also facilitate more effective manpower planning for major events. Improved forecasting of visitor flows and workforce requirements would support the deployment of guides, escorts, event personnel and operational support staff during peak demand periods, thereby enhancing service quality and operational readiness.

Industry

Updating the Tourism Career Narrative

Employers should continually adapt their career narratives to resonate with workforce expectations. Highlighting opportunities for creative product development, emphasising the value of

creating meaningful customer experiences, and demonstrating clear progression pathways can help reshape industry perceptions and elevate the public image of the sector.

Provision of Better Support for New Joiners

Given the risk of early attrition during the certification phases, employers may consider implementing structured onboarding through mentorship and induction programmes. Clear role expectation management and robust support during the licensing stage will help improve early retention rates, particularly for career changers. Employers may also strengthen leadership and supervisory capabilities to support communication across different generations of employees. Improving mutual understanding of career expectations, work preferences and communication styles can help strengthen employee engagement and support workforce retention.

Effective Management of a Flexible Workforce

As flexible manpower arrangements are essential to address today's operational needs, employers must implement stronger administrative systems for quality control. Robust service grading and refined deployment coordination will help maintain consistent brand and professional standards while effectively utilising a part-time or freelance workforce.

Investment in Service Capability

Employers should continue to invest in structured training and capability development, including advanced complaint handling and real-time service recovery. In an environment where customers are highly demanding, empowering staff to make prompt and sound judgements is essential.

Technology Utilisation for Better Service

Digital tools and AI should be strategically deployed to enhance backend efficiency and reduce repetitive administrative tasks. Employers should guide the adoption of technology in a way that enables staff to focus on delivering more personalised support and differentiated, human-centric services.

Education and Training Providers

Alignment of Educational Pathways

Education and training providers should aim for closer alignment between academic tourism programmes and the statutory entry requirements of the industry. Integrating recognised preparatory components for relevant certifications directly into the curriculum would help shorten the transition from graduation to employment, thereby enhancing the immediate work-readiness of graduates and potential candidates.

Facilitation of Cross-Sector Collaboration

Education and training providers should leverage their networks to facilitate cross-sector knowledge exchange, such as sharing best practices between airlines and mass transit operators. This can broaden practitioners' operational perspectives, particularly in areas such as crowd management, safety protocols, and customer service resilience.

Emphasis on Applied Learning and Voluntary Placements

The industry depends on professionals who can perform effectively in dynamic, operational environments. Training providers should therefore strengthen work-integrated learning and incorporate real-case simulations into their programmes. In addition, offering structured placements and voluntary industry attachments can help motivated students align with suitable operational roles, maximising value for both learners and employers while optimising resource utilisation. Industry projects, competitions and event-based learning opportunities may also provide students with platforms to demonstrate their talents and gain exposure to different tourism career pathways prior to full-time employment.

Cultivation of Service Attitude and Interpersonal Readiness

Service attitude, responsiveness, and interpersonal awareness are fundamental educational outcomes. These essential qualities should be developed alongside technical competencies through practical training, professional feedback, and industry exposure, ensuring graduates are well prepared for frontline service roles.

Incorporation of Digital, AI and Communication Capabilities

Curricula must keep pace with evolving workforce requirements by incorporating digital content creation, multi-platform engagement, and AI-enabled workflows. At the same time, students should be equipped with the ability to critically evaluate AI-generated information and uphold rigorous data privacy standards when applying these tools in commercial settings.

Provision of ESG Awareness

Training providers may design targeted ESG learning modules that reflect the varied operating contexts across the industry. For instance, aviation and corporate sectors may require a stronger focus on regulatory compliance, while general travel and tourism programmes should emphasise practical, operational sustainability. This differentiated approach ensures that learning outcomes are directly relevant and applicable to students' day-to-day working environments.