



TRAVEL & TOURISM:
DRIVING WOMEN'S SUCCESS
MARCH 2019



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HIGHLIGHTS

- Increasing female employment plays a role in reducing poverty, sustaining economic growth, and supporting women's empowerment and independence. Within the workplace, having more female employees at different levels contributes to diversity, innovation and could lead to improved corporate governance and financial performance.
- Travel & Tourism has almost twice as many female employers than other sectors. The sector provides women with more opportunities for workforce participation, leadership, entrepreneurship and empowerment than many other sectors, particularly in developing countries.
- The female share in Travel & Tourism's employment is greater than that of the overall economy in eleven of the nineteen G20 countries in this study. Across the G20, women account on average for 46.4% of Travel Tourism's employment compared with 43.3% employment in the economy as a whole.
 - Russia ranks first for the female share of T&T employment, followed by South Africa and South Korea
 - Women's share of Travel & Tourism employment among the G20 is lowest in Turkey, India and Saudi Arabia
 - In the USA and China, the two largest Travel & Tourism economies, the female share of employment in the sector is broadly in line with the share of female employment in their overall economies.
- Countries which have experienced particularly strong growth in Travel & Tourism GDP over the years 2007 to 2017, have also witnessed a significant improvement in the share of women's employment in the sector. This has been the case particularly in Turkey, Indonesia and Iran, but also in China and Mexico.
- Women's share of T&T's employment has grown the most in emerging economies over the last ten years, demonstrating the sector's potential as a tool for empowerment in these countries.
- Despite the progress made so far towards gender equality, many challenges persist. Policies best aimed at increasing women's employment generally, and in Travel & Tourism, are those that help ensure women have access to skills and talent development to enter the labour force and that sufficiently address inequalities in the workplace.

1. INTRODUCTION

Increasing female employment plays a role in reducing poverty, sustaining economic growth, and supporting women's empowerment and independence¹. Increasing female labour force participation and hours worked by women are proven primary drivers of incremental GDP for the G7 economies. Indeed, there could be an 11% increase in global GDP if every country achieved the fastest rate of progress in its region on closing the three key gender gaps of workforce participation, the mix of full time and part time employment and productivity².

Within organisations, having more female employees at different levels contributes to diversity, innovation and could lead to improved corporate governance³. The presence of women in corporate leadership positions improves the company's performance in all areas of operations including innovation, work environment and values, leadership, accountability and external orientation. Not only do companies in the top quartile for female representation on executive committees have on average 47% higher return on equity than those with no women on the boards, but those same progressive companies have a 55% premium in their EBIT margin⁴.

Travel & Tourism is one of the world's largest employers and a key job creator. One in ten jobs in the world is supported by Travel & Tourism, with the sector creating one in every five new jobs in 2017. In many countries across the world, Travel & Tourism employs more women than most other sectors and as such, the sector's role in providing opportunities to women particularly in developing and emerging countries should not be underestimated.

To better understand the scale and importance of female employment in Travel & Tourism, WTTC conducted analysis of its economic impact data for the sector, comparing female employment relative to the overall economy. Our research focuses on the G20 countries and four additional countries – Egypt, Iran, Jordan and Tunisia. These four countries have been chosen both due to data availability and to highlight impact among countries with some of the lowest female labour force participation rates in the world.

2. CHALLENGES FOR WOMEN IN THE LABOUR MARKET

While many countries have made significant strides towards gender parity across education, health, economic and political dimensions, there remains much to be done to reach full equality⁵. Despite the progress made so far, women's prospects in the world of work are far from being equal to men's. Overall, women's employment is still more likely to be concentrated in lower status and lower paid jobs and in jobs that fall outside of labour legislation/protection, social security regulations and collective agreements.

Corporate culture is also a key driver for women's confidence and equality in the workplace. Indeed, women in most countries earn, on average, only 60 to 75 per cent of men's wages⁶. Moreover, far fewer women than men reach the top-level positions. According to the World Economic Forum, women hold only 34% of managerial positions, and on average, just 18% of government Ministers are women⁷. While women are gradually gaining representation among Executive Committees in Fortune Global 100 companies, they are still in the minority - in 2017, women accounted for 22% of Executive Committee roles in the Americas, 15% in Europe, and only 4% in Asia⁸.

While there are wide variations in gender equality by region, socio-economic class, ethnicity and age, women's labour force participation rates are gradually approaching those of men in many developed countries, supported by public policies including family support, rights to paid leave, and affordable childcare services for working mothers. Women also have some of the highest rates of participation in developing countries, reflecting economic necessity.

1 See more from Goal 5 of the UN Sustainable Development Goals
2 McKinsey & Company, 2018. Women's Forum for Economy and Society – Progress through Commitment and Collaboration, Toronto, May 2018
3 <https://www.bloomberg.com/news/articles/2018-12-30/fund-manager-in-korea-wants-to-prove-gender-equality-can-pay-off>
4 McKinsey & Company, 2018
5 World Economic Forum, 2018: The Global Gender Gap Report
6 UN Women: www.unwomen.org
7 WEF, 2018: The Global Gender Gap Report
8 <https://www.catalyst.org/knowledge/women-workforce-global> and <https://20-first.com/thinking/>

In contrast, gender gaps in labour market participation are wide in many emerging economies, particularly in the Arab countries, North Africa and Southern Asia, often as a result of restrictive gender and cultural norms (for more detailed country-level data, please see Appendix). In the Middle East and North Africa (MENA) region, female underrepresentation in business leadership is particularly acute. According to the World Bank, for example, only 5% of Travel & Tourism firms have a female managing director and only 4% have female majority ownership⁹.

3. TRAVEL & TOURISM PROVIDES GREAT OPPORTUNITIES FOR WOMEN'S EMPLOYMENT

Travel & Tourism can provide women with more opportunities for workforce participation, leadership, entrepreneurship and empowerment than many other sectors, particularly in developing countries and as such it can have a tremendous effect on poverty reduction in rural communities¹⁰.

At the macro level, a stronger representation of women in Travel & Tourism relative to other areas of economy is due to the sector's unique characteristics: often less emphasis on formal education and training, greater emphasis on personal and hospitality skills, flexible working opportunities, and increased options for entrepreneurship that do not require heavy start-up financing¹¹.

Across the world, Travel & Tourism has almost twice as many female employers than other sectors, proving that significant opportunities exist in the sector for women to run their own businesses. Latin America is a leader with more than half of tourism enterprises run by women, more than double the proportion in other sectors. Remarkably, in Panama and Nicaragua, more than 70% of tourism business owners are women, compared to 20% in other sectors. Across Asia, the standout countries include Indonesia, Malaysia, the Philippines, and Thailand, where more than half of tourism enterprises are run by women¹².

Travel & Tourism has also opened up opportunities to women through the sharing economy, particularly through the online platforms such as Airbnb and Uber. It is estimated that more than one million women host on Airbnb, making up 55% of the global Airbnb community¹³.

Further, Travel & Tourism offers women opportunities for advancement to higher paying and fulfilling careers. In the UK, the share of women in the upper middle quartile pay band in Travel & Tourism companies with more than 500 employees is 52.1% compared with 45.7% for all UK companies¹⁴. The proportion of women in Travel & Tourism companies in the top quartile pay band is 42.0% compared with 39.2% for all companies combined¹⁵.

9 World Bank, 2017: Tourism for Development, Women and Tourism: Designing for Inclusion
10 UNWTO and UN Women, 2010: Global Report on Women in Tourism
11 World Bank, 2017: Tourism for Development, Women and Tourism: Designing for Inclusion
12 World Bank, 2017: Tourism for Development, Women and Tourism: Designing for Inclusion
13 World Bank, 2017: Tourism for Development, Women and Tourism: Designing for Inclusion and Airbnb, 2017: Women Hosts and Airbnb: Building a Global Community
14 In the UK, employers with 250 or more employees are legally required to publish gender pay gap data
15 Gender Pay Gap Service, 2018: <https://gender-pay-gap.service.gov.uk/>

4. WOMEN’S EMPLOYMENT IN TRAVEL & TOURISM

The female share in Travel & Tourism’s employment is greater than that of the overall economy in eleven G20 countries and across the G20, women account on average for 46.4% of Travel Tourism’s employment compared with 43.3% employment in the economy as a whole.

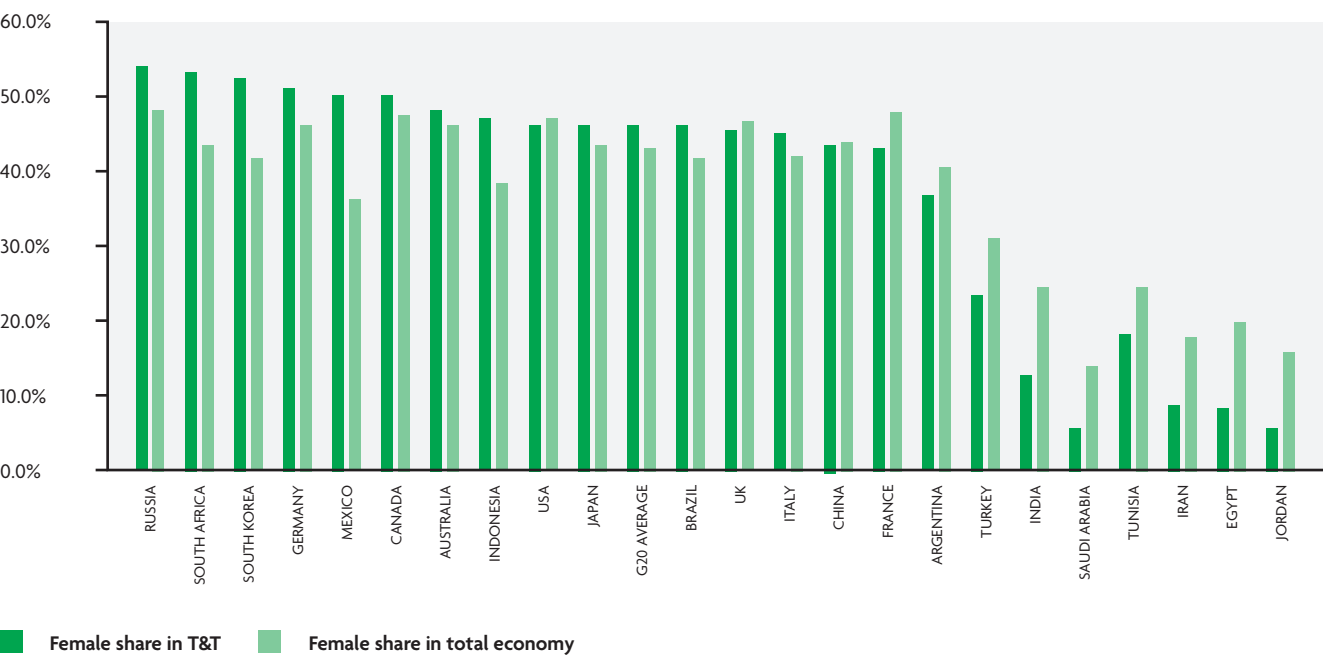
The difference between the female share of employment in Travel & Tourism and the overall economy is highest in Mexico (50.8% v. 36.4%), followed by South Korea (53.0% v. 42.0%) and South Africa (53.6% v. 43.7%).

Meanwhile, women’s share in the sector’s employment is in line with the overall economy in two of the world’s largest T&T powerhouses, the USA (46.4% v. 46.9%) and China (43.6% v. 43.9%). This contrasts with India, Saudi Arabia and Turkey, where the female share of employment in tourism significantly trails that of the total economy, by 12.1%, 8.5% and 7.9%, respectively.

Outside of the G20 countries, the female share of Travel & Tourism’s employment is significantly behind that of the overall economy in Egypt, Jordan, Iran and Tunisia – filling roles for less than 10% of the sector’s employment.

Among the 23 countries analysed, women account for more than half of Travel & Tourism’s employment in six countries. The share is highest in Russia where women account for 54.3% of Travel & Tourism’s jobs. This is followed by South Africa and South Korea with 53.6% and 53.0%, respectively. Women represent more than half of Travel & Tourism’s employment also in Germany, Mexico and Canada.

Chart 1: Female share of Travel & Tourism and overall economy employment - G20 and additional countries, 2017



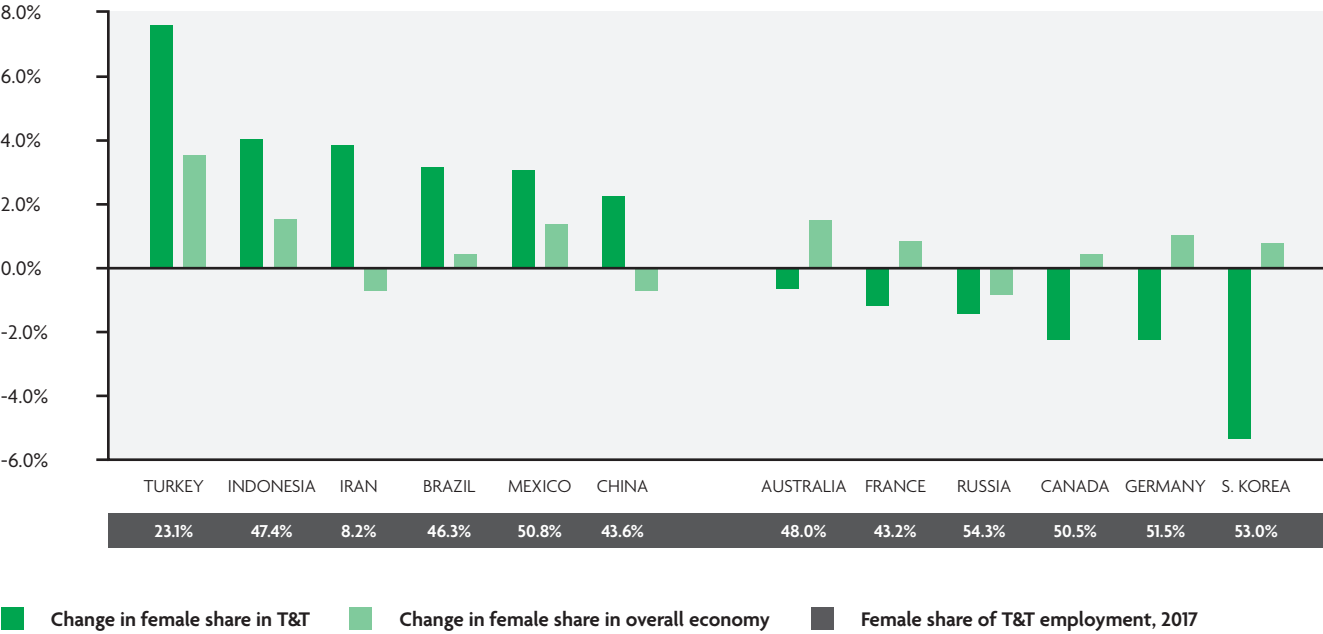
Over the last decade (2007-17), women’s share of T&T’s employment has grown the most in emerging economies, demonstrating the sector’s potential as a tool for empowerment in these countries (see countries on the left in Chart 2 below).

- The largest increase was witnessed in Turkey where the female employment share rose by 7.5 percentage points (pp), to reach 23.1% of Travel & Tourism’s employment in 2017. This compares with a 3.4pp increase for the overall economy of Turkey during the same period.
- Indonesia follows with a 4pp increase in women’s share of Travel & Tourism’s employment, Iran 3.9pp and Brazil 3.1pp.
- Mexico and China round up the top six, growing their shares by 3pp and 2.4pp respectively.

- The rate of increase in women’s share of Travel & Tourism’s employment is more than double that of the overall economy in all six countries.

In contrast, women’s share of employment in Travel & Tourism has fallen to be more in line with the economy average of female employment in some developed countries (see countries on the right in Chart 2 below). The largest decrease over the last decade was witnessed in South Korea, where women now account for 5.2pp fewer Travel & Tourism jobs than in 2007, but still represent 53% of the jobs in the sector.

Chart 2: Change in female share of Travel & Tourism and total economy employment (2007-17)¹⁶



Our research has shown that some countries which have experienced strong growth in Travel & Tourism GDP over the years 2007 to 2017, have also witnessed a significant improvement in the share of women’s employment in the sector. In particular, Turkey, Indonesia and Iran, but also China and Mexico have seen strong growth in Travel & Tourism’s GDP matched by a significant improvement in women’s share of the sector’s employment.

5. POLICIES TO SUPPORT WOMEN’S EMPLOYMENT IN TRAVEL & TOURISM

The policies best aimed at increasing women’s employment in Travel & Tourism are those that support employment in the sector by encouraging women to join the labour force and by addressing inequalities at the workplace. These policies are often enacted through pro-active government initiatives or a national legislative process and thus can support women working in all economic sectors.

To facilitate women’s participation in the labour force and to address inequalities in employment, countries and companies should adopt family-friendly policies and conditions, increase the representation of women in decision-making positions, eliminate discriminatory wage gaps and pay attention to women from disadvantaged minority groups including migrant women¹⁷. Within the workplace specifically, this action can require setting company-wide goals and the measuring and monitoring of progress. Strengthening corporate policies in this regard is also a must.

¹⁶ Turkey change in share is calculated between 2009-2017 due to data availability

¹⁷ OECD, 2017: Report on the Implementation of the OECD Gender Recommendations

The most effective policies are those that:

- Improve women's access to better quality jobs and promote equal access to opportunities
- Promote women's education and training
- Ensure women earn the same as men for equivalent work and commit to reduce the gender pay gap
- Promote women's leadership
- Provide attractive childcare, tax, social benefits, maternity protection, and incentives to return to work
- Increase flexible work arrangements
- Combat unconscious bias
- Inform/educate employers about the benefits of employing women
- Promote women's entrepreneurship and facilitate the equal access to start-up grants

IMPROVE WOMEN'S ACCESS TO LABOUR FORCE AND QUALITY JOBS

Travel & Tourism can improve women's access to quality jobs by providing on-the-job training or honing entrepreneurial skills that then provide opportunities to create products and services that can be sold directly to the market.

In Botswana, the government has initiated a community-based cultural tourism policy, providing opportunities for women to become leaders and entrepreneurs. The policy has helped women to progress from passive involvement to active participation in culture-related tourism activities. Women also experienced vocational education while men have been seen as facilitators and partners in women's involvement in tourism. The new policy was found to have contributed significantly to a sense of women's empowerment and opportunities in terms of freedom from economic dependency on men and society¹⁸.

As countries in the Middle East continue to recognise the substantial contribution that Travel & Tourism makes to their economies, they also begin to appreciate that this can only happen to its full extent if women are thoroughly integrated in the sector. Cultural and religious norms have up until now made this contribution difficult, but this is beginning to change due to the proliferation of gender-focussed projects. To maximise the impact, the co-operation between international organisations and governments is a key. For instance, TUI partnered with EconoWin, the regional programme for the Economic Integration of Women in the MENA region supported by the German Ministry for Economic Cooperation and Development, to launch the initiative called “TUI/GIZ Open the Doors for Tunisian Women to the Tourism Sector” in 2011. The objective of the joint initiative is the promotion of Tunisian tourism through the economic integration of women, the improvement of women's work opportunities and working conditions¹⁹.

The World Bank has developed a project which supports community-based tourism along the historic Abraham Path, spanning across Turkey, Jordan, Israel and the West Bank. A 1,000 km walking trail provides visitors with a unique regional experience by taking them through local communities and important cultural, historical and ecological sites. The project's aim was not only to generate tourism revenue and jobs, but also to improve training, and economic and social opportunities for women. While 57% of jobs generated have gone to women, the benefits go beyond employment. Women have stated that they have begun engaging in decision-making in traditionally male-dominated venues and are slowly feeling more empowered²⁰.

Tour operators, working closely with local governments and councils, can also impact lives of local community and improve women's access to better jobs. This includes Global Himalayan Expedition (GHE), winners of WTTC's Tourism for Tomorrow Community Award in 2018. GHE's mission is to provide travellers with an experience to travel to remote communities of the Himalayas and electrify villages. This not only provides communities with social infrastructure but also empowers them with future growth opportunities. In addition to solar electrification, GHE helps local communities to create livelihood opportunities through setup of “Mountain Homestays”, run by local village women. This has helped women to engage in the economic activities and achieve financial independence. In partnership with Barefoot College, women have also been trained

18 Naomi Moswete, Gary Lacey, 2014: “Women cannot lead”: Empowering women through cultural tourism in Botswana
19 <https://www.giz.de/en/downloads/giz2013-en-torismussektor-tui-tunesien.pdf>
20 World Bank, 2017: Empowering Women Through Tourism: <http://blogs.worldbank.org/psd/ic4d/empowering-women-through-tourism-0>

to become solar engineers. As such, they are great influencers and inspiration for these communities about the potential of women and their role in the society.

PROMOTE WOMEN'S EDUCATION AND TRAINING

Historical, practical, and societal norms have often made training, education and therefore, certain occupations the realm of men. Training programmes that empower women with certifications and practical experience can change the lives of the women who take part and bring significant wider benefits to their families and communities.

In Jordan, the Minister of Tourism & Antiquities outlined the initiatives which opened the door of Travel & Tourism to Jordanian women, and promote women's education and training in the sector, including²¹:

- Fully-funded Travel & Tourism study scholarships for female students
- Secondary school tourism and hospitality training centres – Fundukia Programme: Ministry of Education opened the first programme for women in Aqaba in 2011
- Structured internships and training programmes for women graduating from college
- Support of female teachers and counsellors to support the transition of females into all-male education centres

One of the goals of Tunisia's “TUI/GIZ Open the Doors for Tunisian Women to the Tourism Sector” has been to improve women's access to professional training in the sector and their qualifications. This includes advanced vocational training initiatives and re-definition of educational content in hotel management schools.

The Youth Career Initiative (YCI), hotel industry's global solution to youth unemployment, ensures that young people have the same opportunities for education and employment regardless of their background. It harnesses the potential that Travel & Tourism provides both in terms of employment opportunities and in the ability to transfer a wealth of education and skills from its managers and staff to disadvantaged youth. YCI has a strong mentoring component where senior hotel staff serve not only as teachers but also as role models and career guides. Where hotels find it challenging to recruit local talent, the YCI helps young people in that local community to skill-up and meet recruitment needs. With young women making up a significant proportion of disadvantaged youth, the YCI's potential to address women's education challenges is unparalleled²².

COMMITMENT TO REDUCE THE PAY GAP

Many developed countries have achieved significant milestones towards gender equality and encouraging women to undertake employment. Some OECD (Organisation for Economic Co-operation and Development) countries have recently shown the commitment to reduce the pay gap within the public sector. For instance, in Canada, the government introduced a legislative reform in 2016 towards a “Proactive pay equity” in federal public service and federally regulated private sector. This policy encourages employers to examine their own pay practices, identify possible gender wage discrimination, and adjust wages accordingly²³.

In 2017, the UK became one of the first countries to introduce a mandatory requirement for public bodies (with over 250 employees) to undertake gender pay gap reporting. Mandatory reporting gives HR teams an important reason to put gender equality on the radar of their senior leadership teams. By identifying and tackling gender pay gaps, companies can enhance their reputation as fair and progressive, helping them to attract a wider talent pool and address skill shortages²⁴.

21 H.E Dr. Haifa Abu Ghazaleh, Minister of Tourism & Antiquities, Jordan, 2011: From Vision to Reality: Politics and Gender in Jordan's Tourism Sector: <https://www.wilsoncenter.org/sites/default/files/9-23%20Abu-Ghazaleh%20PowerPoint.pdf>
22 <https://www.youthcareerinitiative.org/>
23 OECD, 2017: Report on the Implementation of the OECD Gender Recommendations
24 PwC and Korn Ferry: Women in Hospitality, Travel, and Leisure 2020 WiH2020 Review

PROMOTING GENDER BALANCE IN SENIOR MANAGEMENT

Policies that promote gender balance in senior management have been initiated in several OECD countries. According to the OECD, as of 2016, nine countries (Austria, Belgium, France, Germany, Greece, Iceland, Italy, Israel and Norway) have introduced mandatory quotas for women’s representation on boards of Public Limited Companies (PLCs) and/or State-Owned Enterprises (SOEs). While quotas have increased the number of women on boards, the gains have not yet filtered down to women below the board level²⁵.

In Travel & Tourism, a number of private sector companies have implemented strategies to encourage women’s employment and career progression to top level roles. For instance, Hilton’s Women in Leadership strategy includes initiatives such as a women’s leadership development program, an executive committee networking scheme, and a women’s mentoring program. Women represent 45% of global management roles at Hilton, while the company has set three-year diversity goals targeting women and minority groups²⁶.

At Marriott International, women comprise 55% of its US workforce and 41% of executive officers. Key schemes for women’s empowerment to senior management roles include the Emerging Leader Program, Diversity & Inclusion councils and women’s networking groups²⁷.

IMPROVING AFFORDABILITY OF CHILDCARE AND RETURN TO WORK SCHEMES

South Korea provides an example of one of the most extensive efforts to improve affordability of childcare costs to parents. The country has established a programme of free childcare for all children up to age six regardless of background or family income level. These policies have been supported by significant public investment and led to extensive increases in participation rates. According to the OECD, the proportion of young children (aged 0-2) using centre-based childcare services has more than tripled from 9% in 2005 to 34% in 2014.

Many women face significant barriers when they try to resume their careers following the career breaks for caring reasons. One of the biggest challenges is the bias from employers against candidates without up-to-date skills and experience. As a result, many women returners decide that they will never be able to pick up their previous career and take a lower level role or decide to retrain. This also exacerbates the gender pay gap. In response to this, the returner programmes have grown rapidly around the world since 2014. This includes the introduction of “returnships”, higher-level paid internships tailored to create a supported route back to mid-to-senior level roles. The majority of participants are women who have taken a break for childcare reasons, however programmes are open to anyone who has taken a long career break. While the “returnships” have not yet been fully embraced by companies in Travel & Tourism, their success across other sectors demonstrates that they can be a powerful tool to enable experienced women to return to work²⁸.

25 OECD, 2017: Report on the Implementation of the OECD Gender Recommendations
26 Diversity & Inclusion At Hilton: [https://newsroom.hilton.com/assets/HWW/docs/2018/2018_Internal_Diversity_and_Inclusion_Brochure\[2\].pdf](https://newsroom.hilton.com/assets/HWW/docs/2018/2018_Internal_Diversity_and_Inclusion_Brochure[2].pdf)
27 World Bank, 2017: Tourism for Development, Women and Tourism: Designing for Inclusion
28 PwC and Korn Ferry: Women in Hospitality, Travel, and Leisure 2020 WiH2020 Review

6. APPENDIX: SELECT LABOUR MARKET INDICATORS FOR THE MAIN COUNTRIES, 2018 DATA³⁰

COUNTRY	OVERALL LABOUR FORCE (15-64) PARTICIPATION RATE (%)	LABOUR FORCE PARTICIPATION RATE - MALE (15-64), %	LABOUR FORCE PARTICIPATION RATE - FEMALE (15-64), %
ARGENTINA	67.7	80.1	55.3
AUSTRALIA	77.2	82.5	72.0
BRAZIL	69.9	80.4	59.7
CANADA	78.3	81.8	74.8
CHINA	75.9	82.8	68.6
COLOMBIA	75.2	86.6	64.2
EGYPT	51.4	77.8	24.2
FRANCE	71.7	75.5	67.8
GERMANY	78.2	82.4	74.0
INDIA	56.1	81.8	28.5
INDONESIA	68.4	83.6	52.9
IRAN	46.4	75.1	17.7
ITALY	64.7	74.4	55.0
JAMAICA	73.2	82.6	64.0
JAPAN	77.3	85.5	68.7
JORDAN	41.3	66.9	15.0
MALAYSIA	68.5	81.0	55.0
MEXICO	65.0	82.5	47.6
NETHERLANDS	79.9	84.3	75.5
PERU	79.9	87.1	72.7
PHILIPPINES	64.4	77.0	51.7
RUSSIA	74.3	79.9	69.0
SAUDI ARABIA	58.3	81.9	23.5
SINGAPORE	76.1	83.5	68.9
SOUTH AFRICA	58.8	65.3	52.4
SOUTH KOREA	68.8	78.3	58.8
SPAIN	74.1	78.9	69.2
THAILAND	75.5	83.3	68.0
TUNISIA	51.5	76.6	27.1
TURKEY	56.5	77.3	36.1
UNITED ARAB EMIRATES	80.0	92.5	41.3
UNITED KINGDOM	77.4	82.4	72.4
UNITED STATES	71.8	77.4	66.1
VIETNAM	83.3	87.2	79.4
WORLD	67.4	80.6	53.7

31 Source: World Bank Database and ILO



THE AUTHORITY ON WORLD TRAVEL & TOURISM

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