



# **Mapping and performance check of the supply side of tourism education and training**

Final Report

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Services

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## **EXECUTIVE SUMMARY**

### ***Introduction***

The aim of this study has been to determine whether tourism education and training systems are fit for purpose in providing the necessary labour market skills for employers currently and in light of future anticipated market developments. In doing so, the education and training framework and qualifications have been assessed against key criteria in the context of the current key occupations in the sector. Gaps in skills provision have been identified and good practice has been highlighted. The study was completed through desk research and consultations at European level, as well as in each of the 28 Member States. Various research organisations and independent researchers supported CSES in the research at national level.

### ***Tourism employment and skills***

For the purposes of this study, we particularly focus on the accommodation for visitors, travel agencies and tour operators sectors. Eurostat data show that nearly 2.8m people are employed in more than 0.3m enterprises within these sectors. Of these, 85% of employees and 80% of enterprises are in the Accommodation for visitors sector (NACE I55).

Employment in the tourism sector (particularly in accommodation) is disproportionately accounted for by jobs that are temporary, seasonal and part-time. These jobs can prove particularly useful for young people with a low level of education, students and migrants either as an accessible entry point into the labour market or as a lifestyle choice (e.g. providing the opportunity to travel or fit employment around studies) or to women who may prefer to work part-time.

At the same time, temporary, seasonal and part-time jobs in tourism are often low-paid and may involve unsociable working hours and/or poor working conditions. They also do not lend themselves to the provision of training and work-based learning.

The level of education of employees in the largest part of the tourism sector – accommodation – varies widely across the 28 EU Member States but is consistently lower than in the economy as a whole: more employees do not have a basic level of education and fewer employees have a high level of education than in the wider economy.

In some of the southern Member States (Greece, Italy, Malta Portugal and Spain), it would appear that the very poor performance of the school education system leads to a high proportion of employees in the accommodation sector having very low levels of education. In these countries, the challenge is to improve attainment within the school system and provide opportunities for second-chance education for those in employment. Growth in the tourism sector is creating generalised shortages of skills and recruitment difficulties for employers. Recruitment of suitably-skilled candidates, particularly graduates, is hindered by poor perceptions of pay, working conditions and career development opportunities in the tourism sector.

Developments in ICT are substantially changing the way that much of the tourism sector operates. Many roles are becoming redundant (particularly administrative and support functions), whilst new occupations are emerging. There is a need for the education to provide the skills for these new occupations and also to raise the overall level of digital skills of tourism employees in general.

There is a need for the education and training system to meet the demand for skills, knowledge and awareness related to accessible tourism. There is a need for more and better training for specialist roles related to accessibility but also for tourism employees in general, particularly front-line staff.

The drive to make tourism more sustainable is increasing the demand for green skills. The education and training system needs to respond to provide skills for new occupations, as well as skills for changing occupations.

### **Tourism education and training systems**

In all Member States, there is recognition of the need for education and training provision to respond to current and anticipated labour market demand. This creates a role for tourism stakeholders (tourist bodies, public authorities, employers, employer representatives, trade unions) in the planning, design, delivery and evaluation of such provision, particularly for education and training relating to occupations.

Forecasting skill needs, strategy development and planning of provision can be hindered by the development of tourism policy and education policy in different "policy silos". There is therefore a need for different mechanisms to integrate, or at least better co-ordinate, strategic development of tourism and of skills.

The efficiency of feedback mechanisms decides whether findings from research and forecasting are taken into account. For example, although data on graduate transition and employability in their early careers are collected in many countries, very few of them actually use the data to inform VET provision.

Forecasting of skill needs and planning of skills provision should take place at different levels in different ways. There is a role for forecasting and planning at a strategic (national or regional) level through different mechanisms that bring together key stakeholders that can take a wide view of the sector or sub-sectors thereof. There is also a role for forecasting and planning at local level, whereby individual education providers operate closely with employers, groups of employers and representatives of employees.

Strategy development and planning can sometimes be done effectively through existing mechanisms for social dialogue. However, such mechanisms may need an expansion of their remit to ensure that sufficient consideration is given to skills development.

In other cases, it may be most appropriate to develop specific new mechanisms, networks or bodies to facilitate forecasting, strategy development and planning. The precise nature of such mechanisms will vary from country to country in line with the governance context, the education system and tourism sector.

### **Provision of tourism education and training**

The diversity of tourism occupations and skills requirements makes it necessary to look at education at all levels, i.e. higher education, vocational education and training, adult education and lifelong learning, and schools education.

The overall view is that sufficient graduates in tourism and related subjects are being provided and there may even be over-provision, especially for the short-term needs of the industry.

In fact there is no general shortage of provision, except in the area of adult or continuing education. Rather, the concern is whether provision of the right kind of courses at both higher education and VET levels is sufficient to meet emerging needs.

Degree-level education and especially post-graduate provision is important for developing a more sophisticated and diverse service offer, but it is more difficult to do this systematically in Higher Education and more difficult to achieve the necessary interaction and dialogue between HE institutions and the industry

To a certain extent the objectives of HE institutions and the industry diverge - for legitimate reasons, but these issues need more open debate and interaction and, in many countries, more investment from both sides in improving the quality of work placement. This is not a matter peculiar to the tourism industry, but the industry often presents a clear example of where action is needed.

The recent economic difficulties for the sector have revealed in many countries the need for the improvement of generic management and service skills (including IT skills) in existing tourism enterprises, especially in SMEs. This underlines the importance of adult and continuing education, especially as the sector develops more rapidly.

While adult and continuing education can have great flexibility and can respond well to employers' needs, it is difficult to organise systematically and in most countries does not have the level of coherent attention on the part of the public authorities and the industry that is devoted to initial VET.

In some countries, the school system plays an important part in delivering VET, but has its own issues in ensuring relevant and up-to-date provision.

It is difficult to anticipate the precise skills and related qualifications needed for a professional profile. Considerable importance should therefore be attached to the capacity of education and training systems to adapt quickly to new qualification needs.

European initiatives, especially through Erasmus+ and the European Social Fund are making significant contributions, especially in promoting strategic developments in the industry and its training provision.

### ***Skills provision for tourism occupations***

The research has led to number of research findings about the performance of Europe's education and training systems, in terms of providing the skills needed for specific tourism occupations.

### **Key findings about specific occupations**

#### **Commercial manager occupations**

Key trends / skill gaps	<ul style="list-style-type: none"> <li>Demand is continuing to rise in line with the growth of the tourism sector.</li> <li>Demand from SMEs is increasing in line with the need for all tourism businesses to offer more professional service, have an on-line presence and digitise their operations.</li> <li>Most entrants have degrees in finance, economics, business management, marketing or IT</li> <li>Degrees in tourism management can be an entry route but such graduates usually require additional training once in employment, e.g. in finance, IT, marketing</li> <li>Many large employers (e.g. hotel groups) have created internal career paths into/within these occupations</li> <li>New skills needs and new niche occupations are emerging, particularly relating to on-line marketing and sales, promotion via social media, customer self-service, etc.</li> </ul>
Performance of the system	<ul style="list-style-type: none"> <li>There is no particular shortage of graduates with the necessary commercial and business management skills.</li> <li>Tourism sector struggles to attract and retain such graduates due to the (perception or reality) of low salaries and/or poor working conditions.</li> <li>Some Member States suffer from the out-migration of recent graduates with relevant degrees and/or young people that move abroad to study these subjects.</li> <li>Employers tend to report that "traditional" tourism degrees are overly-theoretical at the expense of practical training and real-life experience.</li> <li>Tourism degrees (particularly those in Tourism Management) are increasingly including modules that provide the necessary business/management skills for graduates to enter these occupations.</li> <li>More degree programmes need to incorporate specialist modules relevant to emerging skills needs for these occupations, such as e-business, e-tourism, quality management in tourism, strategic hotel management.</li> <li>There is a need for more provision of continuing professional development for those in employment, particularly relating to these emerging skills needs.</li> </ul>

#### **Accommodation managers and operative occupations**

Key trends / skill gaps	<ul style="list-style-type: none"> <li>Few positions require the applicant to have a degree (mostly only senior management roles and/or in large hotel chains).</li> <li>Internal progression into management is the norm; this mostly requires learning on-the-job but can be enhanced by work-based learning and continuing professional development.</li> <li>Managers (particularly in SMEs) require a diverse skillset, as they often undertake a range of roles – often going beyond the skillset provided by any initial (occupation-specific) training.</li> <li>Growth in demand for skills, knowledge and awareness related to accessible tourism: reflects growth in the market for accessible tourism and legislation/public policy</li> <li>Most accommodation operatives do not need qualifications in advance of recruitment; employers prioritise soft skills, flexibility and aptitude.</li> <li>Levels of education of accommodation employees are lower than in other sectors in nearly all EU Member States.</li> </ul>
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### **Key findings about specific occupations**

Performance of the system	<ul style="list-style-type: none"> <li>• Temporary and seasonal employment limits the acquisition of skills for many accommodation employees.</li> <li>• In some countries, the poor performance of the school education system means that accommodation employees (particularly operatives) have a very low level of education. This means that remedial action is often needed for such employees to progress in their careers and/or for the sector to improve its quality and productivity.</li> <li>• The VET system is generally effective in providing the professional and practical skills required. Where such skills are not provided by formal education, employers are usually able to provide them on the job.</li> <li>• Education and training systems are generally effective in providing qualifications for regulated professions.</li> <li>• A challenge for education and training systems is to incorporate the development of soft skills (interpersonal, communication professional ethos and customer service) into relevant curricula.</li> <li>• There is a need to expand the provision of continuing professional development and work-based learning in order to create more structured career pathways into/within management positions.</li> <li>• There is a need for more innovative and flexible provision of continuing professional development and work-based learning, particularly for SMEs and seasonal or temporary workers.</li> <li>• Need for greater provision of training in accessible tourism within tourism degrees or vocational training courses</li> <li>• Need for greater in-house provision of introductory-level training in accessible tourism for frontline staff and managers</li> </ul>
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### **MICE occupations**

Key trends / skill gaps	<ul style="list-style-type: none"> <li>• Significant growth in demand in recent years, which is expected to continue across Europe.</li> <li>• Demand for MICE occupations is unevenly spread across Europe, with the sector undeveloped in some countries or regions.</li> <li>• Emergence of increasingly specialised occupations, e.g. event technician, incentive and event manager</li> </ul>
Performance of the system	<ul style="list-style-type: none"> <li>• Limited provision of education and training course specifically focussed on preparing people for these occupations (in many countries).</li> <li>• Entry and progression is very often based on practical experience combined with (often limited) on-the-job training.</li> <li>• Formal and structured training mostly exists only where occupational profiles are regulated.</li> <li>• Entry into steward(ess) roles is often via agencies, which does not facilitate the provision of training.</li> <li>• Training for steward(ess) roles is typically provided on the job (if at all) and is not usually certified.</li> </ul>

### **Destination management occupations**

Key trends / skill gaps	<ul style="list-style-type: none"> <li>• Destination management is a relatively recent concept but demand for skills is growing as destinations seek to raise the quality and diversity of their tourist offer</li> <li>• Uneven demand, with some (potential) destinations not yet acting strategically (and thus expressing lower demand for these occupations)</li> </ul>
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<b>Key findings about specific occupations</b>	
Performance of the system	<ul style="list-style-type: none"> <li>• Emergence of new occupations, including niches</li> <li>• Sustainability Manager roles remain uncommon but are growing in importance and skill gaps are evident</li> <li>• Trend in some countries towards deregulation of Tour Guide as a profession</li> </ul>
<b>Tour operator and travel agency occupations</b>	
Key trends / skill gaps	<ul style="list-style-type: none"> <li>• Blurring of boundaries between different types of operators, e.g. travel agencies and tour operators</li> <li>• Increased demand for IT skill reflecting increase in on-line sales and customer self-service</li> <li>• Emergence of new occupations/skills, e.g. Web-marketing managers, Social media managers</li> <li>• Many operative occupations becoming redundant, particularly support and administrative roles</li> <li>• Increasing demand for interpersonal and customer service skills, as customers demand higher level of quality and personal service</li> <li>• Growth in demand for skills, knowledge and awareness related to accessible tourism: reflects growth in the market for accessible tourism and legislation/public policy</li> </ul>
Performance of the system	<ul style="list-style-type: none"> <li>• Increased demand for skills/skilled employees</li> <li>• High level of unfilled vacancies, particularly in management roles</li> <li>• Sufficient provision of higher education courses relevant to entry into tour operator/travel agency management positions</li> <li>• Tour operators and travel agencies struggle to attract and retain graduates with relevant degrees due to the (perception or reality) of low salaries and/or poor working conditions</li> <li>• Main skill gaps/shortages for management positions are specialist, technical and language skills</li> <li>• More in-house training is needed to bring lesser-skilled candidates up to the required level</li> <li>• A wider range of work-experience, internship and work-based learning opportunities are needed to attract and retain young people</li> <li>• Companies need to develop stronger long-term human resource development strategies</li> <li>• Tourism degrees or vocational training courses should provide skills and knowledge related to accessible tourism</li> <li>• Need for greater in-house provision of introductory-level training in accessible tourism for frontline staff and managers</li> </ul>

<b>Key findings about specific occupations</b>	
<b>Cultural, sports &amp; recreational activities occupations</b>	
Key trends / skill gaps	<ul style="list-style-type: none"> <li>• Growth in demand for the “experience economy”</li> <li>• Growth in demand for specialist skills and occupations, particularly within adventure tourism, maritime tourism, cultural tourism</li> <li>• Occupations increasingly require a wider skillset, including business management, marketing and IT skills</li> </ul>
Performance of the system	<ul style="list-style-type: none"> <li>• Increased provision of higher education degrees for specialist occupations in the experience economy</li> <li>• Increased integration of business management, marketing and IT modules into specialist degree courses</li> <li>• Increased integration of tourism and customer service modules into professional/vocational training for cultural, sports and recreational occupations</li> <li>• Well-established provision of technical/professional qualifications for regulated professions</li> </ul>

### ***Conclusions***

1. The main challenge is not to create better tourism education and training “systems”. Instead, it is to create better educational pathways into and within tourism occupations.
2. A key determinant of the performance of tourism education and training is the overall effectiveness of the national (or regional) education and training system.
3. Improvements in skill levels of employees in tourism occupations are largely dependent on the wider drive to improve the performance of the tourism sector.
4. Meeting challenges related to quality, adaptability and diversification is hindered by skill shortages and difficulties in recruitment.
5. The accommodation sector accounts for some of the most pressing skills challenges in the tourism sector.
6. The main skill gaps and shortages reported by employers relate to soft skills, language skills, interpersonal skills and ICT skills rather than to tourism-specific skills.
7. There will be an increasing need for education and training systems to respond to developments in technology by providing new skills and preparing people for new occupations.
8. Forecasting skill needs, strategy development and planning of provision can be hindered by the development of tourism policy and education policy in different “policy silos”.
9. Recent years have seen a considerable increase in the volume and diversity of higher education in tourism at undergraduate and postgraduate level. Whilst this is providing a large number of graduates, there is a continual need to ensure that such graduates are well-placed to fill the skill needs of employers.
10. The VET system is successful in training large numbers of people for occupations in the tourism sector. The challenge remains to ensure that VET courses remain relevant to rapidly-changing employer’s needs – but there is a diversity of solutions.

11. There is a need for innovative and flexible forms of education and training to meet the skill needs of SMEs and family-run businesses.
12. The EU provides the necessary policy tools to support the development of tourism and the development of education and training. The challenge for Member States and other stakeholders is to apply those tools to the development of skills in the tourist sector.

***Recommendations***

1. In any revision of the political framework for tourism in Europe, the Commission should set an objective that relates specifically to the development of skills.
2. Any revision of the political framework should also include a more comprehensive list of actions related to skills development.
3. The Commission could consider launching a "Tourism Skills Network".
4. The Commission should promote information about skills needs and effective approaches to skills development in the tourism sector through relevant existing mechanisms.
5. The Commission should undertake further research to identify the extent to which and the ways in which ESF is supporting the development of skills for tourism occupations in the current programming period. The results of such research, including any success factors, lessons learned and good practice examples, should then be disseminated.
6. Similarly, the Commission could undertake and disseminate further research into the extent to which and the ways in which Erasmus+ is supporting the tourism sector.
7. The Commission could specifically encourage tourism stakeholders to make pledges in support of its "Grand Coalition for Digital Jobs".

## **1.0 INTRODUCTION**

### **1.1 Purpose of the study**

The European Commission DG Internal Market, Industry, Entrepreneurship and SMEs (Unit F4: Tourism, Emerging and Creative Industries) appointed the Centre for Strategy and Evaluation Services (CSES) together with the Network of European Regions for a Sustainable & Competitive Tourism (NECSTouR) to undertake a study on Mapping and performance check of the supply side of tourism education and training.

The aim of the study has been to determine whether tourism education and training systems are fit for purpose in providing the necessary labour market skills for employers currently and in light of future anticipated market developments. In doing so, the education and training framework and qualifications have been assessed against key criteria in the context of the current key occupations in the sector. On this basis, gaps in skills provision have been identified and good practice has been highlighted.

The study was completed through desk research and consultations at European level, as well as in each of the 28 Member States. Various research organisations and independent researchers supported CSES in the research at national level.

This document presents findings from the research. It is complemented by country profiles for each of the 28 Member States. Results from the research were also presented at a conference in Brussels on 21 October 2015.

### **1.2 Focus of the study**

The scope of the study has inevitably been very broad, i.e. covering all forms of education and training relevant to tourism across 28 Member States. In order to bring some focus and in order to be consistent with the sectors represented by the "Hospitality and Tourism" Sectoral Reference Group (SREF), the study has mostly focussed on the following sectors:

- "Mainly tourism" sectors, within which many or most occupations will be those considered as tourism occupations, e.g. Accommodation for visitors, Travel agencies & other reservation services activities
- "Partial tourism" sectors, within which some occupations will be those considered as tourism occupations, e.g. Food and beverage serving activities, Cultural, sports and recreational activities

In terms of occupations that have been considered by the study, we have been guided by the European Classification of Skills/Competences, Occupations and Qualifications (ESCO). Under ESCO, the "Hospitality and Tourism" Sectoral Reference Group (SREF) has defined a list of occupations that are mostly within NACE sections I (Accommodation and Food Service Activities) and N79 (Travel agency, tour operator reservation service and related activities). The ESCO list has been modified in order to include some new occupations not yet captured by ESCO and to include only occupations that require skills gained through formal education or training, that are specific to tourism, that have a "tourist-facing" dimension, that are "products" of the tourism education and training system and that account for a certain volume of employment.

### 1.3 Content of the report

The main contents of this report are as follows:

- Section 2 summarises the **EU policy context** for the study. It considers the objectives and actions of EU policy and their relevance to tourism education in three areas, namely tourism policy, education and training policy and cohesion policy.
- Section 3 presents the **definitions of tourism sectors and tourism occupations** that were used by the study. These definitions have been useful in bringing focus and coherence to the research, given the wide of the tourism sector and of tourism occupations. They can also inform future strategy-making in this area, by identifying those sectors and occupations for which tourism education and training is particularly important.
- Section 4 presents an **overview of trends in employment and skills** in the EU's tourist sector. This overview sets the scene for the mapping of the education and training offer and also forms an important part of the performance check.
- Section 5 analyses the different elements of **tourism education and training systems**, i.e. the ways in which and the extent to which stakeholders come together to identify and predict demand for skills, set objectives, plan provision and consider impact.
- Section 6 maps and analyses the **provision of tourism education and training**. It considers the main sectors of education and training, namely higher education, vocational education and training, other education and training for adults, and school education.
- Section 7 identifies the skills required and the educational pathways into the main **tourism occupations**, as well as any strengths, weaknesses and gaps in provision. It also presents illustrative examples of education and training for those occupations.
- Section 8 provides the **conclusions** of the study, as well as **recommendations** and an **action plan** for the European Commission.

A number of annexes are attached to the report:

- Eurostat definition of tourism sectors
- ECSCO Hospitality and Tourism Sectoral Reference Group definition of tourism occupations
- Terms of Reference for the study

The report is also complemented by country profiles for the 28 Member States.

## 2.0 EU POLICY FOR TOURISM EDUCATION AND TRAINING

In order to set the context for the study, we summarise the main relevant areas of EU policy. A crucial point to note is that there is no specific EU policy for tourism education and training as such. There are, instead, three different areas of policy that are relevant:

- **EU tourism policy** is primarily concerned with the competitiveness and sustainability of Europe's tourism sector; this naturally highlights the need for effective skills development, although the EU's policy tools in this area are not primarily focussed on education and training.
- **EU education and training policy** aims to raise Europe's educational performance and thus, amongst other things, provide the skills needed in the labour market. EU action is not specifically focused on tourism education and training. But by supporting reforms of national (and regional) systems and by helping to address common challenges, it ultimately does influence the performance of tourism education and training "systems".
- **EU cohesion policy** aims to promote more balanced, more sustainable 'territorial development' and thus contribute to 'reducing disparities between the various regions and the backwardness of the least-favoured regions'. This naturally has a skills dimension, which is primarily supported by the European Social Fund.

In the rest of this section, we introduce these three areas of policy. In section 8, we then formulate conclusions and recommendations for EU action that relate to all three areas and the interaction between them.

### 2.1 EU tourism policy

The EU's competence for tourism is largely based on Article 195 of the Treaty, which states that the EU shall complement the action of Member States, in particular by promoting competitiveness. Article 195 allows for actions to help create a favourable environment for tourism develop and to promote co-operation between Member States. Harmonisation of the laws and regulations of the Member States in this field is explicitly ruled out.

In line with this, the Commission issued in 2010 a **Communication on 'Europe, the world's No 1 tourist destination'** – a new political framework for tourism in Europe.<sup>1</sup> In a number of respects, this document built on the policy orientations and objectives established in earlier years, but, in particular, it took account of the new reality for the EU tourism policy as a result of the entry into force of the Lisbon Treaty (TFEU), where on the basis of article 195, a small but significant expansion of competence in the area of tourism allows the European Union to carry out actions to support, coordinate or supplement the actions of the Member States to achieve the wider objectives of the Treaty.

The 2010 Communication developed a new action framework for EU policy that aimed to make European tourism competitive, modern, sustainable and responsible with important links with the action framework established by the 'Europe 2020' economic strategy and EU Flagship Initiatives.

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<sup>1</sup> Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe, COM (2010) 352 final of 30.06.2010

The four axes set for the new EU policy action were:

- Stimulate competitiveness in the European tourism sector;
- Promote the development of sustainable, responsible and high quality tourism;
- Consolidate the image and profile of Europe as home to sustainable and high quality destinations; and
- Maximise the potential of EU policies and financial instruments.

These axes will be of major significance as background for the current project and, in particular, it should be noted that under the first axis, '**Improving professional skills'** is set alongside a series of other objectives that are important for stimulating the competitiveness of the European tourism sector:

- Promoting diversification of the supply of tourist services
- Developing innovation (and ICT) in the tourism industry
- Encouraging an extension of the tourist season
- Consolidating the socioeconomic knowledge base for tourism

One action taken by the European Commission to support the competitiveness of the tourism sector has been the creation of the **Tourism Business Portal**.<sup>2</sup> The Portal provides information and tools to improve the management of companies in the tourism sector. This includes information related to "Managing human resources" which covers "Workers' training", "Work environment and motivation" and "Orientation programmes and staff development in tourism companies". With regard to workers' training, specific consideration is given to methodological models in the training of human resources, multimedia formats in training programmes and training content for tourism professionals. On-line tutorials are available, including those related to "How to choose the right employee in the tourism industry" and "How to develop the best employee training through e-learning".

Another initiative is the **Virtual Tourism Observatory** (VTO).<sup>3</sup> This aims to support policy makers and businesses develop better strategies for a more competitive European tourism sector. The VTO provides access to information, data and analysis on trends in the tourism sector, such as volumes, economic and environmental impact, and the origin and profile of tourists. This includes country profiles, which provide data on the economy, arrivals/nights spent at tourist accommodation establishments, trips made, tourism intensity and expenditure and receipts.

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<sup>2</sup> [http://ec.europa.eu/growth/tools-databases/tourism-business-portal/index\\_en.htm](http://ec.europa.eu/growth/tools-databases/tourism-business-portal/index_en.htm)  
<sup>3</sup> <https://ec.europa.eu/growth/tools-databases/vto/>

## 2.2 EU education and training policy

### 2.2.1 Education and Training 2020

Whilst each EU Member State is responsible for its own education and training systems, EU policy supports national action and addresses common challenges, such as ageing societies, skills deficits in the workforce, technological developments and global competition. EU action in this area takes place within the overall framework for cooperation in education and training: **Education and training 2020** ("ET 2020").<sup>4</sup>

ET2020 sets the primary goal of European co-operation as being to support the further development of education and training systems in the Member States which are aimed at ensuring:

- the personal, social and professional fulfilment of all citizens; and
- sustainable economic prosperity and employability, whilst promoting democratic values, social cohesion, active citizenship, and intercultural dialogue.

This goal is pursued through action against four strategic objectives, namely:

- Making lifelong learning and mobility a reality;
- Improving the quality and efficiency of education and training;
- Promoting equity, social cohesion and active citizenship; and
- Enhancing creativity and innovation, including entrepreneurship.

Given that Member States have the main competence for education and training, ET2020 is primarily implemented through the Open Method of Co-ordination. Specific tools implemented at EU level include:

- Setting reference levels of European average performance ("European benchmarks") towards which Member States agree to work. European benchmarks relate to adult participation in lifelong learning, achievement of basic skills, tertiary educational attainment, early school leaving and early childhood education.
- Common reference tools and approaches
- Peer learning and the exchange of good practice;
- Period monitoring and reporting.

Within the framework of ET2020, two particular processes should be highlighted:

- The **Bologna Process**, which aims to set up a "European higher education area by modernising national systems of higher education and making them more compatible. The main focus is on: introduction of the three cycle system (bachelor/master/doctorate); strengthened quality assurance and easier recognition of qualifications and periods of study.
- The **Copenhagen process**, which aims to improve the performance, quality and attractiveness of vocational education and training (VET) through enhanced co-operation at European level. The main focus is on improving the quality of training; improving the quality of teachers, trainers and other professionals in the sector; and making courses more relevant to the labour market.

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<sup>4</sup> Council conclusions of 12 May 2009 on a strategic framework for European cooperation in education and training (ET 2020)

### **2.2.2 Erasmus+**

To support the achievement of the objectives of ET2020 and of Member States' policies, the EU provides funding through a range of funding programmes. Of these, the most significant is **Erasmus+** which aims to boost skills and employability, as well as modernising education, training, and youth work. A budget of €14.7 billion is available of the period 2014-2020. Erasmus+ combines previous EU support schemes in the area of education, training and youth which operated in the 2007-13 period, i.e. Lifelong Learning Programme, Youth in Action, Erasmus Mundus, Tempus, Alfa, Edulink and programmes of cooperation with industrialised countries in the field of higher education.

Erasmus+ provides opportunities for individuals to study, train, gain work experience and volunteer abroad. It also supports transnational partnerships between education, training, and youth institutions and organisation and supports national efforts to modernise education, training, and youth systems.

Within Erasmus+, the actions eligible for funding in the tourism sector can be divided in two broad categories:

- Actions aiming at increasing learning opportunities and mobility of individuals, through the mobility projects for both higher education and vocational education and training learners and staff
- Actions aimed at enhancing the cooperation in the education sector at different levels mainly through joint Master's degrees, strategic partnerships, knowledge alliances and sector skills alliances.

Although Erasmus+ does not specifically prioritise support for tourism education and training, a number of successful project applications relate to tourism. A number of these have been considered by the research undertaken for this study and have therefore informed our research findings, particularly in section 6.

### **2.2.3 Grand Coalition for Digital Jobs**

The **Grand Coalition for Digital Jobs** is a European Commission initiative to tackle a shortage of digital skills in Europe and to fill ICT-related vacancies across all sectors. It is part of the Digital Agenda for Europe, which is one of the seven pillars of the Europe 2020 Strategy. Although not formally within the framework of ET2020, the Coalition contributes progress to the four strategic objectives of ET2020.<sup>5</sup>

The Grand Coalition is a multi-stakeholder partnership that facilitates collaboration between business and education providers, public and private actors in order to attract young people into ICT education and to retrain unemployed people. The purpose of such collaboration is to offer more ICT training co-designed with industry; implement job placement programmes; provide more digitally-aligned degrees and curricula at all levels and types of training and education; and motivate young people to study ICT and pursue related careers.

All types of stakeholder are encouraged to make "pledges" to reduce digital skills gaps and 80 such pledges have been made to date. Stakeholders are also encouraged to form National or Local Coalitions for Digital Jobs and these have been launched in 13 countries to date.

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<sup>5</sup> <http://ec.europa.eu/digital-agenda/en/grand-coalition-digital-jobs-0>

#### **2.2.4 EURES skills passport**

Another EU skills initiative is the EURES skills passport, although, like the Grand Coalition for Digital Jobs, this is not formally within the framework of ET2020.

EURES is the European jobseeker mobility network, implemented through a cooperation network between the European Commission and the public employment services of the EU Member States, plus Norway, Iceland, Liechtenstein and Switzerland. The network facilitates cooperation among its stakeholders in order to promote the free movement of workers. EURES operates a network of employment officers which provide information, guidance and support to jobseekers wishing to work in other Member States and employers looking to recruit suitable candidates from other Member States. It also operates the EURES portal which provides information about job vacancies and mobility in Europe.

A specific initiative of EURES has been the "**Skills passport in Hospitality and Tourism**".<sup>6</sup> This was developed by EURES and the European Commission in association with HOTREC, the umbrella association representing hotels, restaurants, cafés and similar establishments in Europe, and the European Federation of Trade Unions in the Food, Agriculture and Tourism sectors (EFFAT). Users can record their work experience in the skills passport and request previous employers to endorse skills that have been gained on the job.

### **2.3 EU cohesion policy**

EU cohesion policy is comprised of five funds, which together are known as the European Structural and Investment (ESI) Funds. One of these, the **European Social Fund** (ESF), is the EU's main instrument for supporting Member States' policies for employment, skills development, mobility of workers and inclusion in the labour market. ESF provides funding for projects that train people and help them find work (particularly young people and disadvantaged people). It also supports Member States' efforts to improve the quality of public administration and governance and so support their structural reforms by giving them the necessary administrative and institutional capacities. ESF is particularly focussed on "less-developed regions" (with GDP per capita of less than 75% of the EU27 average) and, to a lesser extent, on "transition regions" with GDP per capita of 75-90% of the EU27 average).

The ESF Regulation does not specifically prioritise support for tourism education and training.<sup>7</sup> However, most, if not all, Member States are using ESF to increase the volume, scope and quality of tourism education and training in some way. This can arise in several different ways:

- Some of the less-developed regions (which receive most support) are significant tourist destinations, such as in Croatia, Portugal, parts of Greece, southern Italy and Cornwall (UK).
- Some ESF operational programmes prioritise support for projects related to tourism education and training, for example, through specific calls for proposals or through prioritising tourism-related projects in the scoring process;
- Many ESF applicants submit projects that focus on tourism education and training, even if this is not a stated priority of the operational programme;
- ESF supports reforms of national education and training systems, including those to make the system more responsive to labour market needs; such

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<sup>6</sup> [https://ec.europa.eu/esco/portal/escopedia/Skills\\_passport#Skills\\_passport\\_in\\_Hospitality\\_and\\_Tourism](https://ec.europa.eu/esco/portal/escopedia/Skills_passport#Skills_passport_in_Hospitality_and_Tourism)

<sup>7</sup> Regulation (EU) No 1304/2013 of the European Parliament and of the Council of 17 December 2013 on the European Social Fund and repealing Council Regulation (EC) No 1081/2006

reforms will strengthen skills development for the tourism sector, as for other sectors.

Research in the 28 Member States has identified instances of ESF supporting tourism education and training. Some of these are referred to in section 6 of the report.

The European Commission has previously commissioned research into the extent, nature and effects of ESF support for culture and tourism during the 2000-06 and 2007-13 periods.<sup>8</sup> This research found that:

- Within most ESF operational programmes, there were no measures or priority axes that focussed exclusively on tourism or culture. However, projects in support of these sectors were eligible for support – and were supported in practice – under many different measures or priority axes.
- Across the two programming periods (i.e. from 2000-13), some 354 projects in 17 Member States were identified as supporting the tourism sector;
- Most of the measures financing activities for tourism in 2000-2006 period were aimed at improving vocational education and training;
- These activities were diverse in nature: 28% supported adaptability, 23% supported partnership and networks, 11% supported self-employment or new businesses, 11% supported lifelong learning and education and 10% supported active labour market policies;
- There were nearly 48,000 participations in interventions addressing tourism in 2000-06;
- Finland was the Member State with the most initiatives supporting tourism (180). These were mainly to reinforce the adaptability of workers and enterprises, such as training courses for tourism professionals such as guides, travel agents or marketing managers in tourism; partnership network initiatives to develop tourism in different areas of the country; activities to promote cultural heritage tourism in the most historical regions of Finland and natural, rural and environmental tourism
- Estonia allocated funding of €2.7m to an initiative entitled “Tourism awareness and training”
- ESF investments in Malta tended to prioritise Research, Technological Development and Innovation in the tourist sector;
- The operational programme for Galicia (Spain) prioritised local employment initiatives that create pathways into employment for young people who have not finished secondary education, people aged over 45 years, ethnic minorities or other socially excluded people;
- Romania prioritised support for tourism in rural areas, with a particular focus on training people that had previously been reliant on subsistence agriculture.

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<sup>8</sup> European Commission (2010), The European Social Fund: Culture and Tourism

### **3.0 DEFINING TOURISM OCCUPATIONS**

In order to map the EU's education and training offer for the tourism sector and assess its performance, it has been necessary to define the sector and the occupations that are served by tourism education and training systems. This process of definition has been important for two reasons: first, the wide scope of the tourism sector requires us to focus our efforts on those areas that are of most interest; second, in order to inform future strategy-making in this area, it is helpful to identify those sectors and occupations for which tourism education and training is particularly important.

With that in mind, we present here the definitions of the tourism sector and of tourism occupations that have been used in the study. These include those sectors and occupations served by tourism education and training rather than encompassing the entirety of the tourism sector.

#### **3.1 Defining the tourism sector**

Annex One presents a list of "tourism characteristic activities" defined by Eurostat according to NACE codes and in line with UN definitions set out in the publication "International Recommendations for Tourism Statistics 2008".<sup>9</sup> Whilst this list encompasses very nearly all activities that have tourism characteristics, Eurostat acknowledges the need to distinguish between sectors that are "Mainly tourism" and "Partial tourism". Using Structural Business Statistics (SBS), which describe the structure, main characteristics and performance of economic activities, Eurostat makes this distinction, except for those sectors not covered by SBS (Cultural activities, Sports and recreational activities and Country-specific tourism goods and activities).

On the basis of the classification by Eurostat and after consultation with various stakeholders, we suggest three broad categories of sectors that will be served by the tourism education and training system in different ways and to different extents. This categorisation is also consistent with the sectors represented by the "Hospitality and Tourism" Sectoral Reference Group (SREF). Of the sectors covered by the group, two would be considered as "Mainly tourism", namely Accommodation (I55) and Travel agency, tour operator reservation service and related activities (N79), and the other would be considered as "Partial tourism", namely Food and beverage service activities (I56).

Our proposed definition of sub-sectors which will need to be served by tourism education and training "systems" is as follows:

- "Mainly tourism" sectors, within which many or most occupations can be considered as "tourism occupations", e.g. Accommodation for visitors, Travel agencies & other reservation services activities;
- "Partial tourism" sectors, within which some occupations can be considered as tourism occupations, e.g. Food and beverage serving activities, Cultural, sports and recreational activities; and
- "Non-tourism" sectors which may include a small number of tourism occupations, e.g. government bodies, educational institutions.

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<sup>9</sup> <https://ec.europa.eu/esco/portal/home>

<sup>9</sup> Eurostat (2013), Statistics in focus 32/2013

<sup>9</sup> In this section, country "size" is based on total population, using Eurostat data

The table below provides the full list of sectors.<sup>10</sup>

**Table 3.1 Sectors providing the main focus of the study**

NACE Division	Tourism characteristic activities	NACE Class	Description (NACE Rev.2)
<b>"Mainly" tourism activities</b>			
55	Accommodation for visitors	5510	Hotels & similar accommodation
		5520	Holiday & other short-stay accommodation
		5530	Camping grounds, recreational vehicle parks and trailer parks
79	Travel agencies & other reservation services activities	7911	Travel agency activities
		7912	Tour operator activities
<b>"Partial tourism" activities</b>			
56	Food and beverage serving activities	5610	Restaurants and other mobile food service activities
		5629	Other food service activities
		5630	Beverage serving activities
50	Water passenger transport	5010	Sea and coastal passenger water transport
		5030	Inland passenger water transport
51	Air passenger transport	5110	Passenger air transport
77	Transport equipment rental	7711	Renting and leasing of cars and light motor vehicles
90-93	Arts, entertainment and recreation	9004	Operation of arts facilities
		9102	Museums activities
		9103	Operation of historical sites and buildings and similar visitor attractions
		9104	Botanical and zoological gardens and nature reserves activities
		9200	Gambling and betting activities
		9311	Operation of sports facilities
		9313	Fitness facilities
		9321	Activities of amusement parks and theme parks
		9329	Other amusement and recreation activities
n/a	Retail trade of country-specific tourism characteristic goods	-	-
n/a	Other country-specific tourism characteristic activities	-	-

NACE Division	Tourism characteristic activities	NACE Class	Description (NACE Rev.2)
<b>"Non-tourism" activities featuring some tourism occupations</b>			
58	Publishing activities	581	Books, periodicals and other
70	Activities of head offices, management consultancy activities	7021	Public relations and communications activities
		7022	Business and other management consultancy
73	Advertising and market research	7311	Advertising agencies
		7320	Market research and public opinion polling
84	Public administration	8411	General public administration activities
		8413	Regulation of and contribution to more efficient operation of businesses
85	Education	8532	Technical and vocational secondary education
		8541	Post-secondary non-tertiary education
		8542	Tertiary education
		855	Other education
94	Activities of membership organisations	9411	Business and employers membership organisations
		9412	Professional membership organisations

### 3.2 Defining tourism occupations

In defining the occupations to be covered by the study, we have been guided by existing work supported by the European Commission in this area. Of particular importance has been the work of the European Classification of Skills/Competences, Occupations and Qualifications (ESCO). ESCO identifies and categorises skills, competences, qualifications and occupations relevant for the EU labour market and education and training. It can be accessed via the ESCO portal.<sup>11</sup>

ESCO provides a multilingual and standardised terminology for identifying and categorising skills, competences, qualifications and occupations in a standard way. It is composed of three inter-related pillars covering:

- occupations;
- skills/competences; and
- qualifications.

A key aim of ESCO is to link the three pillars in a way that will show the relationships between occupations, skills/competences and qualifications and their importance. For example: which main skills/competences are most frequently used in a particular occupation; how do qualifications relate to occupational profiles and to skills/competences etc. Each ESCO pillar has its own structure. While a hierarchical structure already exists for the occupations pillar, the main challenge has been to develop structures for the skills/competences and qualifications pillars.

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<sup>11</sup> <https://ec.europa.eu/esco/portal/home>

It is understood this framework has been informed by DISCO27 (the European Dictionary of Skills and Competences) which is an online thesaurus that currently covers more than 104,000 skills and competence terms and approximately 36,000 example phrases.

A specific "Hospitality and Tourism" Sectoral Reference Group (SREF) has been working within the auspices of ESCO to develop a list of tourist occupations and identify the skills needed for those occupations. This SREF represents NACE sections I (Accommodation and Food Service Activities) and N79 (Travel agency, tour operator reservation service and related activities). The list of 54 occupations developed by the SREF is presented in Annex One.

Taking this list as a starting point, a final list of occupations was defined for the study according to the following principles.

First, there are several **new occupations not yet captured by ESCO**. This particularly reflects the growth in on-line services, which is breaking down traditional boundaries between different sectors and occupations and which also reflects the greater demand for services customised to the needs of the individual tourist.

Second, the occupations should **require skills that are gained through some kind of formal education or training**, rather than only being acquired on the job. Of course, many occupations mostly require skills that are gained through experience, but these would be excluded since the purpose of the study is to assess the performance of the education and training system(s) for tourism. We have, however, taken into account formal work-based learning which is delivered in a structured way.

Third, the occupations should be **specific to the tourism sector**. For example, tourism employers require generic occupations such as accountants, cleaners, human resource managers; these are not included.

Fourth, they are "**products**" of the tourism education and training system. Discussions with stakeholders have suggested that the education and training system for hospitality, in particular, should be considered as distinct from the system for tourism. This would suggest that food and beverage service occupations should not form the main focus of the study.

Fifth, **occupations with a "tourist-facing" dimension** should be included. For example, occupations within the culture, heritage preservation, entertainment and leisure sectors that relate to visitor-experience and/or marketing should be considered by the study. However, occupations related to, for example, heritage preservation and restoration, artistic creation, etc. would not be included.

Last, we should focus mostly on those **occupations that account for a certain volume of employment** and thus require an education and training "system" in all or most Member States. This would limit the focus on very specialist or niche occupations in which few people are employed and for which only small volumes of education and training provision is required. For example, we would give limited consideration to travel writers and journalists, since the education and training system is not required to "produce" them in large numbers.

The final list of occupations is presented in the table that follows.

**Table 3.2 Tourism Occupations of main interest to the study**

Occupations
<b>1. Commercial managers (all sectors)</b>
1.1 Revenue manager
1.2 Sales manager
1.3 Marketing manager
1.4 Web-marketing manager
1.5 Yield manager
1.6 Distribution manager
1.7 Pricing manager
1.8 Promotion/Communication manager
1.9 Travel manager (corporate customer)
1.10 Travel buyer (corporate customer)
<b>2. Accommodation management and operatives</b>
2.1. Camping ground manager
2.2. Customer experience manager
2.3. Entertainment manager
2.4. Executive housekeeper
2.5. Hospitality establishment manager
2.6. Rooms division manager
2.7. Conference and banqueting manager
2.8. Commercial managers (see above)
2.9. Concierge
2.10. Entertainment officer
2.11. Housekeeping supervisor
2.12. Night auditor
2.13. Receptionist
<b>3. Meetings, incentives, conferences and exhibitions</b>
3.1. Events Manager
3.2. Project Manager Events
3.3. Steward/stewardess
<b>4. Destination management</b>
4.1. Destination manager
4.2. Tourism promotion/communication agent
4.3. Tourism promotion/communication manager
4.4. Tourist information agent
4.5. Tourist guide
4.6. Tourism development officer
4.7. Sustainability manager
<b>5. Tour operators and travel agencies</b>
5.1. Tour operator manager/CEO
5.2. Tourism contract negotiator/buyer
5.3. Tourism product manager
5.4. Tour/Holiday representative
5.5. Travel agency manager/CEO
5.6. Tourism product manager
5.7. Travel adviser/consultant
5.8. Commercial managers (see above)

### Occupations

#### **6. Cultural, sports and recreational activities**

- 6.1. Customer experience manager
- 6.2. Guide / instructor
- 6.3. Communication/promotion manager
- 6.4. Product manager
- 6.5. Sustainability manager

The figure that follows maps these occupations on to the sectors categorised earlier as "Mainly tourism", "Partial tourism" and "Non-tourism".

**Figure 3.1 Mapping of tourism occupations by sector**

ATTRACTI0NS & ACTIVITIES	ACCOMMODATION	TRAVEL & TOURS	DESTINATION MANAGEMENT
<p><b>Sectors</b></p> <ul style="list-style-type: none"><li>• Arts facilities</li><li>• Museums, cultural activities</li><li>• Historical sites and similar</li><li>• Botanical / zoological gardens &amp; nature reserves</li><li>• Gambling and betting</li><li>• Sports &amp; fitness facilities</li><li>• Amusement / theme parks</li><li>• Other amusement and recreation</li><li>• Meetings, incentives, conferences, exhibitions</li></ul> <p><b>Occupations</b></p> <ul style="list-style-type: none"><li>• Customer experience manager</li><li>• Guide / instructor</li><li>• Communication / promotion agent</li><li>• Product manager</li><li>• Sustainability manager</li><li>• Events manager</li><li>• Project manager events</li><li>• Steward / Stewardess</li></ul>	<p><b>Sectors</b></p> <ul style="list-style-type: none"><li>• Hotels &amp; similar</li><li>• Holiday &amp; other short-stay</li><li>• Camping grounds, recreational vehicle parks and trailer parks</li></ul> <p><b>Occupations</b></p> <ul style="list-style-type: none"><li>• Camping ground manager</li><li>• Customer experience manager</li><li>• Entertainment manager</li><li>• Executive housekeeper</li><li>• Establishment manager</li><li>• Rooms division manager</li><li>• Concierge</li><li>• Entertainment officer</li><li>• Housekeeping supervisor</li><li>• Night auditor</li><li>• Receptionist</li><li>• Revenue manager</li><li>• Sales manager</li><li>• Marketing manager</li><li>• Web-marketing manager</li><li>• Yield manager</li><li>• Pricing manager</li><li>• Promotion / Communication manager</li></ul>	<p><b>Sectors</b></p> <ul style="list-style-type: none"><li>• Tour operators</li><li>• Travel agencies</li><li>• Passenger transport</li></ul> <p><b>Occupations</b></p> <ul style="list-style-type: none"><li>• Manager / CEO</li><li>• Tourism contract negotiator/buyer</li><li>• Product manager</li><li>• Tour / Holiday representative</li><li>• Travel adviser/consultant</li><li>• Revenue manager</li><li>• Sales manager</li><li>• Marketing manager</li><li>• Web-marketing manager</li><li>• Yield manager</li><li>• Distribution manager</li><li>• Pricing manager</li><li>• Promotion / Communication manager</li><li>• Travel manager / Buyer (corporate customer)</li><li>• Travel buyer (corporate customer)</li></ul>	<p><b>Sectors</b></p> <ul style="list-style-type: none"><li>• Public administration</li><li>• Membership organisations</li><li>• Public relations and communications</li><li>• Advertising and market research</li></ul> <p><b>Occupations</b></p> <ul style="list-style-type: none"><li>• Destination manager</li><li>• Tourism promotion / communication agent</li><li>• Tourism promotion / communication manager</li><li>• Tourist information agent</li><li>• Tourist guide</li><li>• Tourism development officer</li><li>• Sustainability manager</li></ul>

## 4.0 TOURISM EMPLOYMENT AND SKILLS

In this section, we present an overview of trends in employment and skills in the EU's tourism sector. This overview is based on analysis of quantitative data available at EU level (notably Eurostat), consultation of stakeholders and analysis of published research. The overview is complemented by additional analysis at national level, which is summarised in the country profiles.

### 4.1 Level of employment in the tourism sector

As we have seen in section 3, the tourism sector is broad and definitions vary. In later sections of the report, we take a fairly broad view of the sector based on the occupations identified in section 3.2. However, in order to give an idea of its scale, we present here aggregate data on the level of employment and the number of enterprises in the tourism sector. To do so, it is necessary to adopt a narrower definition of the sector, given the statistical limitations and unavailability of data on the broader sector and occupations therein. For that reason, the analysis in this section mostly relates to accommodation and, to a lesser extent, to travel agencies and tour operators. In any case, these sub-sectors account for the overwhelming majority of employment and economic activity within the tourism sector.<sup>12</sup>

Tables 4.1 and 4.2 below present data on the number of enterprises and the number of persons employed in the accommodation for visitors, travel agencies and tour operators sector. From the tables, we can see that nearly 2.8m people are employed in more than 0.3m enterprises. **Of these, 85% of employees and 80% of enterprises are in the Accommodation for visitors sector (NACE I55).**

**Table 4.1 Number of enterprises 2013**

NACE Rev.2	Description	Size of enterprise (number of employees)				
		TOTAL	0-9	10-49	50-249	>250
I551	Hotels & similar accommodation	150,280	110,691	33,166	5,880	544
I552	Holiday & other short-stay accommodation	100,610	103,032	2,815	227	61
I553	Camping grounds, recreational vehicle parks & trailer parks	16,102	14,597	1,367	126	13
N791	Travel agency & tour operator activities	70,144	64,550	4,764	680	151
<b>TOTALS</b>		<b>337,136</b>	<b>292,870</b>	<b>42,112</b>	<b>6,913</b>	<b>769</b>

Source: Eurostat Structural Business Statistics: Services by employment size class (NACE Rev. 2, H-N, S95) [sbs\_sc\_1b\_se\_r2]

<sup>12</sup> The OECD takes a similar approach in its analysis of skill levels in the tourism sector, by using "accommodation and food services" as a proxy. See OECD(2015), Supporting quality jobs in tourism.

**Table 4.2 Number of persons employed 2013**

<b>NACE Rev.2</b>	<b>Description</b>	<b>TOTAL</b>
I551	Hotels & similar accommodation	2,008,172
I552	Holiday & other short-stay accommodation	260,093
I553	Camping grounds, recreational vehicle parks & trailer parks	90,727
N7911	Travel agency operator activities	279,186
N7912	Tour operator activities	145,851
	<b>TOTAL</b>	<b>2,784,029</b>

Source: Eurostat Structural Business Statistics: Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs\_na\_1a\_se\_r2]

The tables that follow offer a breakdown of these aggregate EU figures at country level. As would be expected, the number of enterprises is very much dependent on the size of the country. However, there is still considerable variation in the number of enterprises and employees, even in countries of similar population size, as we now explain.<sup>13</sup>

Regarding the number of enterprises in the Accommodation for visitors sector:

- The number of enterprises in the accommodation for visitors sector in Italy and France is large in absolute terms and relative to their size. This no doubt reflects their importance as destinations for different forms of tourism, e.g. beach/coastal, ski, adventure, city breaks, culture, business, etc.
- The number of enterprises in the accommodation for visitors sector in Germany is large in absolute terms but broadly in line with the EU average relative to size.
- Three medium-sized countries - Austria, Greece, Portugal – have a large number of enterprises in the accommodation for visitors sector relative to their size.
- Romania, Finland, Slovakia, UK, Denmark, Belgium, Poland, Hungary and Latvia have few enterprises relative to the size of their population.
- Enterprises are less likely to be micro-enterprises (<10 employees) and more likely to be small (10-49) or medium-sized (50-249) than in the Travel agency and tour operator activities.

Regarding the number of employees in the Accommodation for visitors sector:

- Cyprus, Malta, Austria, Ireland, Croatia, Germany, UK, Greece and Luxembourg employ many people relative to their size.
- The UK stands out here as a country with few enterprises but many employees relative to its size. This suggests that its Accommodation sector is characterised by larger enterprises, such as hotel groups.
- Finland, Poland, Belgium, Romania, Slovakia, Lithuania, Hungary, Czech, Denmark, France, Latvia employ few people relative to their size. Most (except, for example, France) also have few enterprises relative to their size, which suggests that they are less important tourist destinations relative to other countries.
- France would seem to be a special case of a country with many enterprises but few employees relative to its size. This might suggest that its Accommodation for visitors sector is important in scale but with different characteristics to many other countries.

<sup>13</sup> In this section, country "size" is based on total population, using Eurostat data.

**Table 4.3 Number of enterprises 2013 (I5510, I5520, I5530)**

	Accommodation for visitors				
	TOTAL	0-9	10-49	50-249	>250
EU28	272,508	228,320	37,338	6,233	618
BE	3,257	2,564	357	57	6
BG	3,667	2,867	563	157	12
CZ	5,911	8,278	577	101	8
DK	1,482	1,115	307	57	3
DE	43,236	30,473	11,323	1,354	85
EE	650	553	71	23	3
IE	2,074	1,340	342	368	23
EL	18,078	16,977	1,136	204	10
ES	21,936	17,851	3,242	752	92
FR	45,263	42,392	2,551	273	50
HR	2,372	2,012	253	86	21
IT	46,585	40,650	5,887	333	34
CY	518	295	115	92	9
LV	770	642	106	21	2
LT	1,937	1,781	126	29	1
LU	299	201	84	14	0
HU	2,826	2,426	335	63	5
MT	182	99	38	0	0
NL	7,593	6,754	699	121	19
AT	15,653	13,085	2,293	261	14
PL	12,402	11,425	805	158	14
PT	7,746	6,801	738	187	20
RO	3,400	2,539	717	132	12
SI	2,189	2,096	60	26	7
SK	1,257	858	140	40	0
FI	1,084	933	126	20	5
SE	5,611	4,809	659	135	8
UK	14,595	9,444	4,119	1,120	152

Source: Eurostat Structural Business Statistics: Services by employment size class (NACE Rev. 2, H-N, S95) [sbs\_sc\_1b\_se\_r2]

NB: the data from Eurostat features some gaps where data is unreliable, confidential or unavailable. In those instances, we have included data from previous years. However, year-on-year differences in this dataset tend to be insignificant.

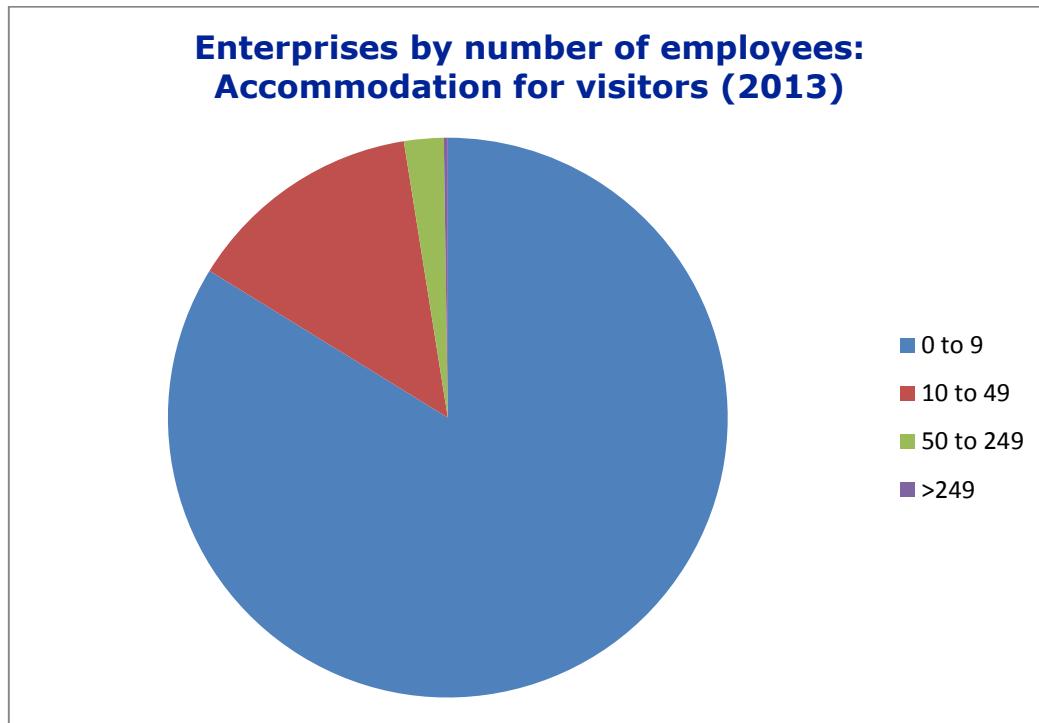
**Table 4.4 Number of persons employed 2013 (Accommodation for visitors)**

	<b>Hotels and similar accommodation</b>	<b>Holiday and other short-stay accommodation</b>	<b>Camping grounds, recreational vehicle parks &amp; trailer parks</b>
	<b>I551</b>	<b>I552</b>	<b>I553</b>
EU28	2,008,172	260,093	90,727
BE	16,246	2,896	686
BG	37,876	1,069	66
CZ	27,618	2,083	297
DK	14,971	867	848
DE	474,939	41,102	9,586
EE	5,191	839	10
IE	45,127	:	:
EL	54,460	13,950	836
ES	208,858	27,540	6,839
FR	150,276	36,429	11,017
HR	27,221	2,884	973
IT	189,322	42,362	7,753
CY	16,805	455	20
LV	5,099	930	99
LT	5,740	1,104	41
LU	2,927	110	188
HU	21,266	1,645	374
MT	7,071	213	0
NL	55,174	11,773	8,607
AT	100,721	7,486	985
PL	47,112	18,618	358
PT	46,704	5,014	1,413
RO	36,418	3,396	301
SI	8,112	1,920	70
SK	9,461	2,487	28
FI	8,298	371	230
SE	40,992	2,510	2,334
UK	344,167	30,040	36,778

Source: Eurostat Structural Business Statistics: Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs\_na\_1a\_se\_r2]

NB: the data from Eurostat features some gaps where data is unreliable, confidential or unavailable. In those instances, we have included data from previous years. However, year-on-year differences in this dataset tend to be insignificant.

**Figure 4.1 Enterprises by number of employees (Accommodation for visitors)**



Source: Eurostat Structural Business Statistics: Services by employment size class (NACE Rev. 2, H-N, S95) [sbs\_sc\_1b\_se\_r2]

Regarding the number of enterprises in the Travel agency and tour operator activities:

- Malta, Cyprus, Czech Republic, Croatia, Latvia, Greece, Slovenia, Sweden in particular, but also Estonia, Bulgaria, Spain, Slovakia, Italy and the Netherlands, have very many enterprises relative to their size;
- France, Finland, the UK, Ireland and Denmark have relatively few enterprises;
- Enterprises are more likely to be micro-enterprises (<10 employees) and less likely to be small (10-49) or medium-sized (50-249) than in the Accommodation for visitors sector.

Regarding the number of employees in the Travel agency and tour operator sector:

- The UK, Denmark, Austria, Germany, Luxembourg and France employ many people relative to their size. This perhaps reflects the fact that these countries are important sources of "outgoing" tourism.
- In some countries, notably the UK, Denmark and France, it would seem that the sector is particularly characterised by large enterprises, since with few enterprises but many employees relative to their size.
- Slovakia, Latvia, Slovenia, Croatia, Poland, Bulgaria, Romania, Italy, Hungary and Malta employ few people relative to their size. This finding might suggest that these countries are less important sources of "outgoing" tourism.
- Countries such as Slovakia, Latvia, Slovenia, Croatia, Bulgaria, Italy, Malta have relatively few employees but very many enterprises. This would suggest that the sector is characterised by SMEs (perhaps by micro and small enterprises). These countries may have a weak presence of large travel agencies serving outgoing tourists and a predominance of small enterprises serving incoming tourists.

**Table 4.5 Number of enterprises 2013 (N791)**

N791	Travel agency and tour operator activities				
	TOTAL	0-9	10-49	50-249	>250
EU28	70,144	64,550	4,764	680	151
BE	1,281	1175	72	11	7
BG	1,475	1,375	92	8	0
CZ	4,281	:	:	:	:
DK	435	338	75	21	1
DE	9,461	8,170	1133	126	32
EE	282	261	17	4	0
IE	339	:	:	:	:
EL	2,579	2628	207	10	0
ES	8,146	7,731	335	71	18
FR	4,530	4,098	366	57	:
HR	1,517	1,432	76	8	1
IT	10,555	10,029	466	53	7
CY	337	310	24	3	0
LV	632	604	27	2	0
LT	410	360	47	3	0
LU	71	61	7	3	0
HU	1,200	1,121	:	11	0
MT	300	273	24	3	0
NL	3,687	3,505	139	30	13
AT	1,040	846	160	31	3
PL	3,958	3,825	110	17	6
PT	1,501	1,361	128	9	3
RO	2,465	2,312	143	10	0
SI	460	434	22	4	0
SK	984	951	27	6	0
FI	390	354	27	8	1
SE	2,093	1,970	99	17	7
UK	5,751	4,907	661	150	36

Source: Eurostat Structural Business Statistics: Services by employment size class (NACE Rev. 2, H-N, S95) [sbs\_sc\_1b\_se\_r2]

NB: the data from Eurostat features some gaps where data is unreliable, confidential or unavailable. In those instances, we have included data from previous years. However, year-on-year differences in this dataset tend to be insignificant.

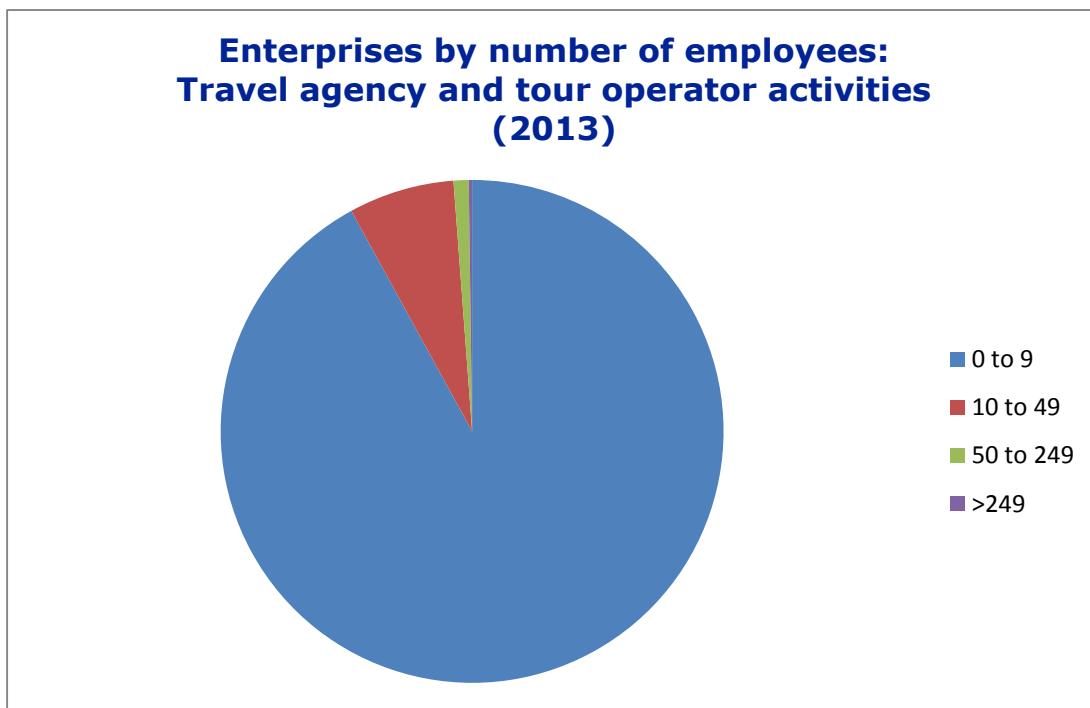
**Table 4.6 Number of persons employed 2013 (Travel agency and tour operator activities)**

	Travel agency activities	Tour operator activities	TOTAL
	N7911	N7912	
EU28	266,347	147,086	413,433
BE	6,534	1,500	8,034
BG	1,185	4,199	5,384
CZ	:	:	:
DK	2,500	2,831	5,331
DE	54,688	32,413	87,101
EE	694	538	1,232
IE	:	:	:
EL	8,260	3,273	11,533
ES	38,716	4,522	43,238
FR	17,714	14,879	32,593
HR	4,570	783	5,353
IT	16,553	22,303	38,856
CY	1,436	39	1,475
LV	1,047	690	1,737
LT	2,003	356	2,359
LU	510	88	598
HU	771	4,038	4,809
MT	1006	258	1,264
NL	12,205	7,345	19,550
AT	9,009	1,376	10,385
PL	5,412	8,960	14,372
PT	7,340	437	7,777
RO	4,821	4,272	9,093
SI	615	837	1,452
SK	980	1,565	2,545
FI	1,848	884	2,732
SE	5,340	5,526	10,866
UK	60,590	23,174	83,764

Source: Eurostat Structural Business Statistics: Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs\_na\_1a\_se\_r2]

NB: the data from Eurostat features some gaps where data is unreliable, confidential or unavailable. In those instances, we have included data from previous years. However, year-on-year differences in this dataset tend to be insignificant.

**Figure 4.2 Enterprises by number of employees (Travel agency and tour operators)**



Source: Eurostat Structural Business Statistics: Services by employment size class (NACE Rev. 2, H-N, S95) [sbs\_sc\_1b\_se\_r2]

## 4.2 Nature of employment in the tourism sector

A recent Eurostat article presents recent statistics on employment in the tourism industry.<sup>14</sup> Table 4.7 below offers a selection of the statistics from the Eurostat article, which allows a comparison of the two main tourism sub-sectors (accommodation and travel agency and tour operators) to the rest of the service sector and to the wider economy. The statistics allow us to highlight some of the characteristics of employment in these sectors. In particular, the statistics show that it is necessary to differentiate between the nature of employment in the accommodation sector and in the travel agency and tour operator sector.<sup>15</sup>

First, **the accommodation and travel agency and tour operator sectors feature a relatively high proportion of female and part-time employees.** The proportion of female employment in these sectors is much higher than the rest of the service sector and the economy as whole. The extent of part-time employment is higher than in the economy in general, but broadly similar to the rest of the service sector. Research by the OECD has suggested that part-time jobs in the accommodation sector often involve unsocial and irregular working hours.<sup>16</sup> For some workers, part-time employment may be a personal preference, since it can fit comfortably with family responsibilities.

<sup>14</sup> [http://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism\\_industries\\_-\\_employment](http://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism_industries_-_employment)

<sup>15</sup> The Eurostat data also shows that the nature of employment in the Air Transport sector (which Eurostat also describes as an industry which is “mainly tourism”) is very different to the nature of employment in the accommodation sector and in the travel agency and tour operator sector.

<sup>16</sup> OECD (2015), Supporting quality jobs in tourism

However, other workers may be forced to work part-time because there is a shortage of full-time employment opportunities; this may often be the case in territories dependent on tourism.

Second, **the nature of employment in the travel agency and tour operator sector is broadly similar to the rest of the service sector** in many respects, i.e. extent of part-time working, employment of young people and foreign persons, temporary contracts and short tenure.

Third, **the travel agency and tour operator sector tends to have fewer low-skilled jobs than the rest of the service sector**. Indeed, the share of the workforce with a low level of educational attainment is less than one half of the share in the service sector in general and less than one third of the share in the accommodation sector.

Last, a relatively high proportion of **the workforce in the accommodation sector is likely to be young, with a low level of education, foreign, employed on a temporary contract and having had their job for less than one year**. Many jobs in this sector do not require a high level of skills or extensive experience. They therefore provide an accessible entry point into employment for young people and sometimes the potential to up-skill and move up the value chain. Moreover, the seasonal nature of employment and the opportunity for mobility is often more appealing to young people than to those aged over 24 years. Clearly, the experience of workers might vary; for some young people, employment in the accommodation sector provides an exciting opportunity to live and work abroad, perhaps between periods of study. But for others, low-paid, short-term, seasonal work abroad may be a necessity rather than a lifestyle choice.

**Table 4.7 Characteristics of tourism employment in EU28 (2014)**

% of persons employed	Non-financial business economy <sup>1</sup>	Services <sup>2</sup>	Accommodation <sup>3</sup>	Travel agency & Tour operator <sup>4</sup>
Female	35.8	40.8	60.2	63.9
Part-time	16.7	21.9	25.5	23.1
Aged 15-24 years	9.3	9.1	14.9	8.9
Lower educational attainment level	20.4	18.6	24.8	7.8
Foreign persons employed	7.9	9.9	17.2	8.1
Temporary contract	13.5	14.9	25.5	14.0
Having had their job for less than one year	15.2	18.0	26.9	16.7

(<sup>1</sup>) NACE sections: B-N\_S95\_X\_K (Total business economy; repair of computers, personal and household goods; except financial and insurance activities)

(<sup>2</sup>) NACE sections: H-J, L-N and NACE division S95

(<sup>5</sup>) NACE division I55

(<sup>6</sup>) NACE division N79

Source: Eurostat (online data code: Ifsa\_epgan2, Ifsa\_egan22d, Ifsa\_egaed, Ifsa\_egan, Ifsa\_epgan2, Ifsa\_egdn2). Figures for tourism industries are based on customised data extractions, not available online

### 4.3 Level of education of employees in the tourism sector

The tourism occupations listed in Table 3.2 are very diverse in terms of the level and type of skills required; for example, commercial managers clearly require a higher level of formal education and professional qualifications than do accommodation operatives. It is therefore impossible to generalise about the overall skill level of employees in the tourism sector. Moreover, detailed data at EU level on skill levels of employees in different occupations is largely unavailable because: i) some tourism occupations account for a small volume of employment; ii) many of those occupations feature in sectors defined by Eurostat "partial tourism" or even non-tourism. However, since the Accommodation sector accounts for the vast majority of employment in tourism, it is useful to give consideration to the educational level of employees in this sector.<sup>17</sup> Eurostat offers from the Labour Force Survey regarding the number of employees in the Accommodation Sector (I55) by level of education attained.<sup>18</sup> The table below provides a summary at EU level. From the table, we can see that employees in the Accommodation Sector generally have lower levels of education than in the wider economy: of the 2.4m employees in this sector, around one in four has been educated only to lower secondary level or below (Level 0-2), whilst only one in five has achieved a tertiary level of education (Level 5-8).

**Table 4.8 Employed persons in Accommodation by level of education 2013 (EU level)**

	Less than primary, primary and lower secondary education (levels 0-2)		Upper secondary and post-secondary non-tertiary education (levels 3 and 4)		Tertiary education (levels 5-8)	
	No.	%	No.	%	No.	%
Accommodation	615,700	25.5	1,302,700	54.0	481,400	20.0
All sectors	41,583	19.2	105,084,500	48.5	69,023,300	31.9

Source: Eurostat (NACE Rev. 2) [tour\_ifs3r2]

This picture at EU level, however, hides significant variations between different Member States. The table below compares the level of education attained by employees in the Accommodation sector to those in all sectors for each of the 28 Member States. From this data, a number of findings emerge.

First, **the level of education varies widely between Member States**. In Poland, Slovakia, Estonia, Czech Republic and Romania, fewer than 10% of employees in accommodation had a level of education at lower secondary level or below. In contrast, more than 30% of employees did in Portugal, Malta, Spain, Luxembourg, Denmark and Italy. Fewer than 10% of employees had reached tertiary level in Germany and Austria, whilst more than 30% had in Ireland, Cyprus and Poland.

Second, **a higher proportion of employees has a low level of education in the Accommodation sector than in the wider economy**. In all but five countries (Bulgaria, Estonia, Poland, Portugal, Romania), a higher percentage of employees in the sector has a low level of education (levels 0-2) than in all sectors. The difference is particularly pronounced in Denmark, Germany, Luxembourg, Spain and Sweden.

<sup>17</sup> It is worth noting that the OECD takes a similar approach in its analysis of skill levels in the tourism sector, by using "accommodation and food services" as a proxy measure. See OECD(2015), Supporting quality jobs in tourism.

<sup>18</sup> Eurostat does not provide data for other tourism sectors.

Third, **a lower proportion of employees has a high level of education in the Accommodation sector than in the wider economy.** In all Member States, a lower percentage of employees in the Accommodation sector have a tertiary level of education than the average across all sectors. However, the difference is particularly pronounced in Denmark, Germany, Greece, Luxembourg, the Netherlands and Sweden; these countries have above-average levels of tertiary education in general, but below-average levels in the Accommodation sector.

Fourth, **the level of education within accommodation is very dependent on the general level of education of each Member State.** In most Member States, the percentage of employees in the Accommodation sector with low education tends to be close to the percentage of employees in all sectors. In this respect, the 28 Member States fall into three main groups with different educational challenges:

- Countries where few employees in accommodation or the wider economy have low levels of education – the ex-Yugoslav and former communist countries (except Romania); in these countries, the school education system is performing well and the challenge is raise more employees from medium (levels 3-4) to high levels (levels 5-8) of education
- Countries where attainment of secondary education is reasonable in general but accommodation employees are more likely to have a lower level of education – mostly the northern, central and western countries within EU15, plus Cyprus; in these countries, the challenge is to raise the quality of tourism jobs and provide opportunities for lifelong learning.
- Countries with poor performance of the school system – the southern Member States (Greece, Italy, Malta, Portugal, Spain); in these countries, the challenge is to improve attainment within the school system and provide opportunities for second-chance education for those in employment.

Portugal, Malta and Spain, in particular, exhibit very low levels of education in general; in the case of Spain, this reflects a high rate of early low-school leaving. In these countries, there is no doubt a need for “second-chance” education provision for all employees, including those in Accommodation. However, in some countries, the percentage of Accommodation sector employees with low levels of education is very different to the wider economy:

- Denmark, Germany, Luxembourg, Sweden are close to or below the EU average across all sectors, but significantly above it in the Accommodation sector;
- Spain has a high percentage of employees (35.6%) with low education in all sectors but a particularly high percentage in Accommodation (47.5%);
- Romania is the only country in which much fewer Accommodation employees (9.0%) have a low level of education than employees in general (22.4%), although the sector employs relatively few people compared to the EU28 average.

**Table 4.9 Employed persons in Accommodation by level of education 2013 (Member State level)**

	Less than primary, primary and lower secondary education (levels 0-2)		Upper secondary and post-secondary non-tertiary education (levels 3-4)		Tertiary education (levels 5-8)	
	All NACE	Accommodation	All NACE	Accommodation	All NACE	Accommodation
EU28	19.2	25.5	48.5	54.0	31.9	20.0
BE	18.6	24.5	40.1	47.5	41.3	28.1
BG	10.4	10.2	59.3	66.2	30.2	23.4
CZ	4.2	8.7	73.5	77.0	22.3	14.1
DK	21.4	36.6	42.2	37.2	33.2	14.7
DE	12.5	23.5	57.9	66.5	29.4	9.7
EE	8.3	5.0	51.5	65.4	40.1	29.6
IE	16.7	17.7	35.2	45.0	45.6	32.7
EL	27.7	29.6	39.0	55.3	33.4	15.1
ES	35.6	47.5	23.2	26.2	41.2	26.3
FR	18.8	23.8	44.5	47.8	36.6	28.5
HR	12.6	13.1	62.6	66.3	24.3	20.3
IT	33.3	33.9	47.0	53.4	19.7	12.7
CY	17.6	24.3	39.2	44.3	43.2	31.3
LV	8.1	n/a	56.6	60.5	35.2	n/a
LT	4.0	n/a	55.0	n/a	41.0	n/a
LU	16.9	38.9	37.9	38.9	43.9	22.2
HU	10.5	11.6	62.9	63.0	26.5	25.3
MT	44.5	46.1	30.9	42.7	24.6	12.4
NL	22.4	28.0	42.2	55.5	33.7	14.2
AT	15.0	24.9	63.9	65.3	21.2	9.8
PL	6.3	3.5	62.6	66.3	31.1	30.2
PT	55.9	51.3	22.8	32.6	21.3	16.1
RO	22.4	9.0	59.2	77.1	18.4	13.9
SI	10.6	18.3	57.8	64.2	31.6	17.4
SK	3.9	4.7	73.9	83.2	22.2	12.1
FI	12.3	14.7	46.8	61.8	40.9	23.5
SE	14.3	23.5	48.9	57.3	36.7	19.1
UK	16.3	18.1	41.8	52.0	40.7	28.6

Source: Eurostat (NACE Rev. 2) [tour\_lfs3r2]

## 4.4 Specific skill challenges

Research at the European level has identified a number of specific skill challenges:

- Recruitment difficulties
- “Core” skills for tourism
- ICT skills
- Skills for accessibility
- Skills for sustainability

We explore those challenges in the sub-sections that follow.

### 4.4.1 Recruitment difficulties

Recent research by the World Travel & Tourism Council (WTTC) suggests that difficulties in recruitment are hindering the ability of employers to satisfy their need for skills.<sup>19</sup> Based on a survey of senior Human Resource (HR) managers in WTTC member companies in 25 countries, the research found that:

- Recruiting staff has become more difficult in the past two years (62% of companies) and will become more difficult over the next five years (66% of companies). This reflects both strong projected growth in demand for tourism services and weak projected growth in the supply of skills.<sup>20</sup>
- Recruitment is particularly difficult amongst higher skilled and more professional roles. Moreover, evidence from the UK suggests that additional recruitment will be particularly needed in management roles that demand a broad range of high level skills critical to business success and profitability.<sup>21</sup>
- Whilst there are plenty of applicants for roles, the most important barriers to recruitment are the pay demanded by applicants (53% of companies), lack of specialist, technical or language skills (50% of companies), low number of applicants with the required skills (44%) and lack of relevant experience (41%).
- In contrast, barriers related to shift work or unsociable hours (9%) or seasonal/part-time work (6%) were much less important.
- One specific barrier to the recruitment of graduates is that of perceptions. According to the WTTC, perceptions of graduates are adversely affected by scarce information and misconceptions about skills, roles, career opportunities and working conditions in the industry.
- Recruitment and staffing difficulties affect the whole organisation. The main difficulty resulting from unfilled vacancies is the increased workload for other staff (73% of employers).
- Adapting to human resource challenges requires new approaches to recruitment and training; this includes accepting lesser-skilled candidates and training them to the required level (44% of companies); investing more in the brand (28% of companies) and offering work experience, internships or education and training programmes specifically to attract young people (nearly all companies);
- Only 29% of companies have long term HR strategies in place. Moreover, it is rare for companies to offer career pathway plans and salary benchmarks.

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<sup>19</sup> World Travel & Tourism Council (2014), Talent Challenges in Travel & Tourism

<sup>20</sup> World Travel & Tourism Council (2014), The Future of Travel & Tourism Talent

<sup>21</sup> People 1st (2013), State of the Nation Report: An analysis of labour market trends, skills, education and training within the UK hospitality and tourism industries

Evidence from the UK suggests that the occurrence of staff training is closely linked to business planning; employers with a business plan are significantly more likely to have trained staff in the last 12 months (57%) compared to those without one (27%).

#### **4.4.2 "Core" skills for tourism**

As the research from the World Travel & Tourism Council shows, the projected growth in the supply of skills for tourism is not expected to keep up with the growth in demand. A key issue identified by the research is that the skills of new entrants to the sector often do not match employer requirements. Whilst the specific skill needs vary from occupation to occupation, the evidence suggests that there is a set of "core" skills for tourism for which the demand of employers is likely to exceed the supply. Indeed, the OECD highlights the skills for which there are reported to be shortages in the tourism sector and that could be considered as core skills:

- **Soft skills** crucial for service delivery, including language, customer service, cultural awareness and cross-cultural skills, service quality and communication skills.
- **Problem-solving skills** needed for working in a technology rich environment, notably those related to social media, e-marketing and e-commerce.
- **Small business management skills** (finance, human resources etc.), along with leadership, entrepreneurship and innovation skills.<sup>22</sup>

Comprehensive statistical data is not available (e.g. from Eurostat or national statistical offices) about the extent and distribution of such skill shortages across the 28 Member States. However, the research and consultations undertaken by this study identified evidence (albeit partial, often qualitative and sometimes anecdotal) which tended to support the OECD's findings about shortages of such skills.

Looking ahead, the OECD also highlights areas of **emerging skills** needs, including environmental awareness and ethical behaviour, creative and innovative thinking and data management and analysis.

#### **4.4.3 ICT skills**

As noted by the Commission Communication, developments in ICT have changed the relationship between the tourism industry and its customer base. Indeed, it was reported as long ago as 2006 that the tourist sector was "in the vanguard" in the development e-marketing and online sales.<sup>23</sup>

Data from Eurostat shows that across the EU more and more customers are booking travel and holiday accommodation over the internet. Whilst more than one quarter did so in 2014, there remain considerable differences between Member States. In general, the percentage of people booking online is higher in the northern and north-western Member States (plus Germany and Austria) than in the eastern and southern Member States (mostly EU12, but also including Portugal, Italy and Greece). Estonia has the highest level out of the EU12 (at 25%), being close to the EU28 average (28%), perhaps reflecting greater use of ICT in general in that country compared to the other EU12 countries. Levels of online booking are particularly low (i.e. <10%) in Greece, Poland, Croatia, Lithuania, Bulgaria and Romania.

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<sup>22</sup> OECD(2015), Supporting quality jobs in tourism.

<sup>23</sup> European Commission DG Enterprise and Industry (2006), ICT and e-Business in the Tourism Industry: ICT adoption and e-business activity in 2006

Overall, these data demonstrate that online booking is not only important but very likely to growth further. For example, Poland – the Member State with the sixth largest population – has a rate of only 7%. This has very significant implications for the skills that will be needed in the tourism sector and may well imply considerable changes in the nature of occupations. For example, much of the demand for “traditional” high street travel agents is being replaced by demand for online services; those services are very often provided by new or recent entrants rather than existing players.

**Table 4.10 Percentage of individuals who booked travel and holiday accommodation over the internet in the last year**

	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
EU28	:	:	13	14	18	20	22	24	25	27	27
BE	:	7	8	8	16	17	19	23	21	27	26
BG	:	0	0	0	1	1	2	3	4	5	6
CZ	1	3	4	3	4	7	8	5	9	11	11
DK	18	26	27	30	41	46	49	52	56	55	57
DE	10	21	23	22	27	29	33	33	37	38	36
EE	2	1	3	3	6	7	10	9	10	25	36
IE	10	18	20	21	29	28	33	34	32	35	33
EL	0	1	2	2	4	4	9	8	8	8	7
ES	5	9	11	12	14	15	17	20	19	24	27
FR	:	8	14	18	26	33	32	33	35	36	34
HR	:	:	1	1	1	2	2	5	6	6	7
IT	2	3	3	4	6	7	8	8	9	11	11
CY	1	2	4	3	6	9	11	12	14	16	12
LV	1	1	2	3	5	5	6	8	9	10	8
LT	0	1	1	2	2	2	3	4	6	6	6
LU	17	21	24	27	38	44	47	48	45	53	48
HU	2	2	3	3	4	6	7	9	10	11	15
MT	2	3	5	4	10	13	16	15	16	21	25
NL	15	21	25	26	35	38	40	39	44	47	45
AT	3	7	8	11	13	17	24	27	29	28	32
PL	1	1	:	2	4	6	5	5	6	7	7
PT	1	2	3	4	6	6	8	11	11	13	17
RO	:	0	0	1	1	1	2	2	2	2	2
SI	:	3	3	5	8	10	12	14	16	16	10
SK	2	3	3	4	7	7	8	12	13	11	14
FI	10	12	26	31	33	40	41	45	45	47	49
SE	16	18	28	27	36	38	45	56	54	57	49
UK	24	23	24	27	35	37	38	45	44	49	51

Source: Eurostat - Internet purchases by individuals [isoc\_ec\_ibuy]

The new possibilities offered by ICT and the change in customer create a need for new and/or updated skills within the tourism sector. For example, the WTTC has reported that HR Managers in travel and tourism companies believe that technology will mainly only replace support and administrative roles in the industry. This will particularly result from the increase in customer self-service, not least in the booking process. Introduction of new technologies will continue to create a need for training for which companies should plan over the short and medium terms.<sup>24</sup> Amongst other things, training will need to facilitate the deployment of improved ICT infrastructure and the adoption of e-integrated business processes.<sup>25</sup> In recent years, the use of social media has become increasingly important as a new way for businesses to engage with customers. However, evidence from the UK suggests that attitudes to social media vary; some 29% of tourism businesses expected social media to be a growth driver, whilst 11% saw it as a barrier to business growth.

#### **4.4.4 Skills for accessibility**

The Commission Communication highlights the fact that an increasing number of potential tourists are aged over 65 years and/or have reduced mobility. Making tourism accessible to this segment of the population is thus seen as a question of social equality and also as one of competitiveness.

Recent research has illustrated the size and nature of this market:<sup>26</sup>

- The total gross turnover of accessible tourism was estimated to be €352bn between mid-2012 and mid-2013.
- More than half of individuals with disabilities in the EU travelled during the 12 months from mid-2012 to mid-2013. This demonstrates that there is significant existing market for accessible tourism, as well as the potential for growth – particularly if the EU's tourism industry can be made more accessible.
- People with special access needs took nearly 783 million trips within the EU, including day trips and overnight visits, whether within their own country or to another Member State.
- On average, each person with special access needs travelled with 2 companions. Those with disabilities tend to travel with more companions than do elderly people.
- The total number of trips within the EU made by people with special access needs is estimated to reach 862 million per year by 2020.
- The EU received some 17.6 million visitors with special access needs from non-Member States in 2012. The most important source for these visitors was the USA, Switzerland and Russia.
- The total number of trips into the EU made by people with special access needs is estimated to reach 21 million per year by 2020.
- Making buildings, hotels and restaurants accessible and providing various accessible services has the potential to generate nearly twice the increase in tourist trips by 2020 that would otherwise occur.<sup>27</sup>
- Barriers most often referred to by those with special access needs include the additional price of accessible trips, limited accessibility of locations, lack of information about accessibility, limited availability of medical help (or limited information about such availability) and attitudes of tourism staff.

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<sup>24</sup> World Travel & Tourism Council (2014), Talent Challenges in Travel & Tourism

<sup>25</sup> European Commission DG Enterprise and Industry (2006), ICT and e-Business in the Tourism Industry: ICT adoption and e-business activity in 2006

<sup>26</sup> European Commission, DG Enterprise and Industry (2014), Economic Impact and Travel Patterns of Accessible Tourism in Europe

<sup>27</sup> Estimated growth of 43.6% compared to estimated growth of 24.2% in a scenario in which the EU only offers partial accessibility of buildings, hotels, restaurants and museums, with no additional accessible services.

Building on this research, a subsequent study has offered findings regarding the skills and training needed to improve accessibility in tourism services.<sup>28</sup>

- The content of training should include:
  - Knowledge of disabilities/types of disability and access requirements;
  - Barriers to accessibility & Design for All;
  - Strategic development of accessibility in business;
  - Principles of effective customer service;
  - Proper etiquette for serving people with disabilities;
  - Recognising and responding appropriately to people using personal supports;
  - Service animals and assistive technology.
- Accessibility training must be customised for different occupations in different contexts. Training must also take into account the individual's existing level of qualifications, skills, knowledge and experience.
- Training is predominantly in the form of continuing vocational education or training. It is most often provided by non-governmental organisations (NGOs) through a mix of on-line and classroom-based learning. However, most training does not lead to academic credits.
- Most training provides introductory-level skills for frontline staff, although there is also a need for managers to be trained.
- Tourism service providers lack the level of awareness and qualifications necessary to serve the needs of people with special access needs.
- SMEs tend to demand informal and on-the-job training rather than formal provision, given their limited resources.
- The maturity of a tourism destination does not have any bearing on the availability or take-up of accessibility training.
- Government policy and legislation - when enforced - are key drivers of the availability of appropriate training provision. Tourism boards or individual service providers can also act as "champions" for accessibility training.
- EU-funded pilot projects have raised awareness and established a basic understanding of the target of training initiatives, the staff that need to be trained and appropriate tools, methods and curricula. However, these projects have suffered from low transferability and weak dissemination. They have not been sufficiently embedded within tourism institutions.

#### **4.4.5 Skills for sustainability**

As noted by the Commission's Communication, the competitiveness of the tourism sector is closely linked to its sustainability, as the quality of tourist destinations is strongly influenced by their natural and cultural environment. With that in mind, the Commission has previously encouraged tourism stakeholders to integrate sustainability concerns into their activities as a way of protecting the competitive advantage of tourist destinations. Action is needed including sustainable conservation and management of natural and cultural resources (including marine and coastal ecosystems), minimising resource use and pollution, managing change in the interests of the community, reducing the seasonality of demand and addressing the environmental impact of transport.<sup>29</sup>

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<sup>28</sup> European Commission, DG Enterprise and Industry, Mapping skills and training needs to improve accessibility in tourism services

<sup>29</sup> COM(2007) 621, Communication from the Commission: Agenda for a sustainable and competitive European tourism

To that end, the European strategy on coastal and maritime tourism provides for specific actions to address pressures of tourism on marine environment and ecosystems, such as higher water use, waste generation and accumulated emissions from air, road and sea transport.<sup>30</sup>

An important part of addressing these challenges is to provide “green skills” for those working in the tourism sector. Cedefop defines green skills as “the knowledge, abilities, values and attitudes to live in, develop and support a sustainable resource-efficient society”.<sup>31</sup> Such skills will be increasingly in demand as action to “green” all sectors of the economy becomes ever more important. According to Cedefop, this greening of the economy will affect skills need in three ways:

- **shifts between industries:** structural changes lead to increased demand for some occupations and skill profiles and decreased demand for others;
- **development of new occupations:** new economic activities generate entirely new occupations that require the provision of appropriate training courses and the adaptation of qualification and training systems to green new and emerging occupations;
- **changing skill profiles within occupations:** the greening of existing occupations leads to significant changes in the tasks and skills required of workers, which requires a revision of curricula, qualification standards and training programmes.

It is also worth noting that the EU’s Erasmus+ programme prioritises support for “Sector Skills Alliances” that focus on the development of green skills. These are transnational projects that identify or draw on existing and emerging skills needs in a specific economic sector and/or translate these needs into vocational curricula to respond to those needs. The Lot 1 scoring criteria prioritise investigations into the needs of green skills. Under Lot 2, the scoring criteria prioritise the integration of green skills into the training content for professional profiles.<sup>32</sup>

Whilst these trends affect all sectors of the economy, the integral link between the competitiveness of the tourism sector and its sustainability mean that meeting the green skills challenge is all the more important. In terms of structural changes, recent years have seen the growth in niche areas of the tourism sector, such as eco-tourism or heritage tourism. New tourism occupations have emerged including sustainability managers that may be employed by public authorities, tourism associations or large hotel groups. Skill profiles within existing occupations have also changed; for example, destination management occupations are increasingly requiring green skills, given the importance of environmental sustainability to the attractiveness of tourist destinations. As the later sections of the report show, the education and training systems of the Member States are responding to this increased demand for green skills in different ways, but there remains a general need to increase the scale and diversity of provision.

#### **4.5 Overall considerations**

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<sup>30</sup> COM(2014) 86 final, Communication from the Commission: A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism

<sup>31</sup> Cedefop (2010a), Skills for green jobs: European synthesis report

<sup>32</sup> European Commission (2015), Erasmus+ Programme Guide

A series of points have emerged from this summary of employment and skills in the tourism sector. The main ones are summarised below:

- Tourism accounts for a significant part of the EU economy and businesses from a diversity of sectors comprise the "tourism industry". However, it is the accommodation sector that accounts for the bulk of employment, enterprises and turnover in tourism.
- Employment in the tourism sector (particularly in accommodation) is disproportionately accounted for by jobs that are temporary, seasonal and part-time. These jobs can prove particularly useful for young people with a low level of education, students and migrants either as an accessible entry point into the labour market or as a lifestyle choice (e.g. providing the opportunity to travel or fit employment around studies) or to women who may prefer to work part-time.
- At the same time, temporary, seasonal and part-time jobs in tourism are often low-paid and may involve unsociable working hours and/or poor working conditions. They also do not lend themselves to the provision of training and work-based learning.
- The level of education of employees in the largest part of the tourism sector – accommodation – varies widely across the 28 EU Member States but is consistently lower than in the economy as a whole: more employees do not have a basic level of education and fewer employees have a high level of education than in the wider economy.
- In some of the southern Member States (Greece, Italy, Malta Portugal and Spain), it would appear that the very poor performance of the school education system leads to a high proportion of employees in the accommodation sector having very low levels of education. In these countries, the challenge is to improve attainment within the school system and provide opportunities for second-chance education for those in employment.
- Growth in the tourism sector is creating generalised shortages of skills and recruitment difficulties for employers. Recruitment of suitably-skilled candidates, particularly graduates, is hindered by poor perceptions of pay, working conditions and career development opportunities in the tourism sector.
- Developments in ICT are substantially changing the way that much of the tourism sector operates. Many roles are becoming redundant (particularly administrative and support functions), whilst new occupations are emerging. There is a need for the education to provide the skills for these new occupations and also to raise the overall level of digital skills of tourism employees in general.
- There is a need for the education and training system to meet the demand for skills, knowledge and awareness related to accessible tourism. There is a need for more and better training for specialist roles related to accessibility but also for tourism employees in general, particularly front-line staff.
- The drive to make tourism more sustainable is increasing the demand for green skills. The education and training system needs to respond to provide skills for new occupations, as well as skills for changing occupations.

## 5.0 TOURISM EDUCATION AND TRAINING SYSTEMS

In all Member States, there is recognition of the need for education and training provision to respond to current and anticipated labour market demand. This creates a role for tourism stakeholders (tourist bodies, public authorities, employers, employer representatives, trade unions) in the planning, design, delivery and evaluation of such provision, particularly for education and training relating to occupations.

The research has therefore explored the extent to which stakeholders come together to identify and predict demand for skills, set objectives, plan provision and consider impact. In this section, we thus summarise the different ways in which tourism education and training “systems” operate. This summary will set the scene for our consideration of the different types of tourism education and training provided (higher education, vocational education and training, other education and training for adults and school education in section 6).

### 5.1 Forecasting skill needs in the tourism sector

Most, if not all, Member States have some kind of mechanism for forecasting future skill needs in the economy. The results of this research are used by policy makers for the development of strategies and policies in education, training and lifelong learning. Such forecasting plays a crucial role in informing policymakers and helping them to plan and provide appropriate education and training. However, the question remains as to whether centralised forecasting provides sufficient focus on the skill needs of the tourism sector.

In many cases, this task is performed by a **centralised body** on behalf of the government and/or the social partners. Such bodies identify and forecast the skill needs of tourism occupations as part of a wider analysis of skill needs across the labour market as a whole. For example:

**Cyprus:** the Human Resources Development Authority (HRDA) is responsible for developing employment forecasts and identifying skills shortages. The HRDA collects data from industry stakeholders and provides 10-year employment forecasts every 2-3 years, covering 46 sectors and around 200 occupations, including many in the tourism sector. The most recent report covers the period 2014-2024.

**Hungary:** for the economy as a whole, data collection and forecasts are carried out by the Institute for Economic and Enterprise Research of the Hungarian Chamber of Commerce (Gazdaság- és Vállalkozáskutató Intézet, Magyar Kereskedelmi és Iparkamara) in co-operation with the Ministry for National Economy. Since 2004, forecasts have been made once a year, for a period of one and a quarter years. The forecasts are based on a stratified sample of companies, representative for sector and size. They provide information about prospective lay-offs and future demand – in general and specifically for career starters - in particular occupations. Labour centres of county government offices also regularly prepare quarterly surveys of prospective layoffs and opening positions planned by companies in the following 3 and 12 months, but these are not based on representative samples.

**Spain:** the Observatory of the Employment Public Services and the National Institute of Qualifications periodically conduct analysis and observations of the labour market. These studies tend to cover the labour market as a whole, rather than specific sectors. Previous research has highlighted the need for sector-based mechanism, such as an observatory, to identify the education and training needs of the tourism sector.<sup>33</sup>

Some countries have created **specific networks or mechanisms** that identify skill needs for tourism occupations:

**Bulgaria:** the Bulgarian Chamber of Commerce prepares an annual observation and analysis of the skill needs in tourism. This analysis identifies the extent of skill needs for specific occupations. These occupations are only those which are specific and inherent to the sector and tourism activities within the meaning of the Tourism Act (2013) – i.e. only the activities "hotels and restaurants" and "Tourist Agency activity". This clarification is important because in many cases, some new occupations are not specifically classified as tourism occupations by the Act - mainly those related to new technologies. Activities of other sectors of the economy (by CEA-2008), are not taken into account.

**Ireland:** the Expert Group on Future Skills Needs advises the Government on current and future skills needs of the economy and on other labour market issues that impact on Ireland's enterprise and employment growth. It is currently undertaking a study on the skills requirements of the hospitality sector, which has involved extensive consultation with the industry, through surveys and stakeholder workshops.

**Cyprus:** the HRDA conducts annual studies for the identification of skill needs with the contribution of the social partners, providing annual estimates for the number of persons required for particular occupations. In the tourism sector, the occupations include:

- Hotel managers
- Hotel receptionists
- Tourist guides
- Tour escorts
- Travel consultants and clerks

The results of the HRDA's studies on anticipation of skill needs are used by policy-makers for the development of strategies and policies in education, training and lifelong learning. Furthermore, HRDA uses these estimates to plan the multi-enterprise training programmes. They are also used for the development of programmes of study in education, including the programmes of study of Technical Schools and the Post-Secondary Institutes of Vocational Education and Training of the Ministry of Education and Culture. As part of these studies, the views of employers' organisations, trade unions, district labour offices of the MLWSI and the Cyprus Tourism Organisation are collected and analysed through a specially-designed questionnaire.

**Spain:** the Tourism Commission (Mesa de Turismo) is a working group that brings together stakeholders from the tourism sector, particularly representatives of private enterprise. Its main function is the analysis, coordination and dissemination of information about the role of tourism role in the economy and as a key factor for social and economic development.

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<sup>33</sup> Confederación Española de Organizaciones Empresariales (2007), La formación en el sector turístico.

The National Agency of Evaluation of Quality and Accreditation (ANECA) also contributes to the forecasting and analysis of skills needs in the tourism sector, in addition to its role in quality recognition. Skill needs, once identified, are then taken into account in the development of the "White Book of the Tourism Degree", which defines the required content of BA degrees based in part on the opinions expressed by employers and in line with the requirements of the EU's Bologna process.

**Sweden:** The Swedish Agency for Economic and Regional Growth administers the Foundation for knowledge promotion within tourism (Stiftelsen för kunskapsfrämjande inom turism). This is an independent foundation made up of industry and academic stakeholders who aim to support the furthering of knowledge within the industry. The Agency, which is a national governmental agency, also oversees the production and development of information and knowledge about the development of tourism and the travel and tourism industry in Sweden are among its most important responsibilities. The Agency collects data (statistics published biannually) with the aim of:

- Providing companies and organisations in the tourism industry with relevant information and statistics
- Increasing the visibility of the travel and tourism industry by presenting it in economic terms in the same way as other industries.
- Bringing attention to the effects of the travel and tourism industry on the Swedish economy.

In a number of countries, **ad hoc studies** have been undertaken to identify and/or forecast the skill needs of the tourism sector and the ability of the education and training system to meet those needs. Such studies are very often commissioned by the tourism sector itself, in part as a means to draw the attention of the government and the education to its skill needs. Some examples are as follows.

**Sweden:** The Swedish Agency for Economic and Regional Growth commissioned a mapping of tourist educations in the country in 2012. This concludes amongst other things that the opportunities for Swedish students to move between education providers were not ideal (variations in intake and quality assurance leading to changes in courses costing time and money for students), despite work undertaken to implement the European Qualification Framework.<sup>34</sup>

**Germany:** The Federal Ministry for Economic Affairs and Energy (Bundesministerium für Wirtschaft und Energie –BMWI) in dialogue with the economic players of the tourism industry is also working to resolve the issues of bottlenecks, risks and weak points within as well as promote the development of the tourism industry. It initiated a project on "Professionals for Tourism" in order to address these challenges as well as a study in 2014 regarding the lack of professionals within the economy.

However, in some countries, the research identified no instances of strategic mechanisms at national level that specifically focus on forecasting skill needs for tourism. For example, in Greece there appears to be no established and systematic planning process for forecasting future volume & type of skills that will be needed in the tourism sector. In Hungary, future skill needs in the tourism sector are mostly forecasted by the sector itself on a voluntary basis. In the Czech Republic, it was reported that there is no forecasting of future needs within the sector carried out national level by the government or any sector bodies.

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<sup>34</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

Instead, the Ministry of Education, Youth and Sports recommends that the educational institutions (at all levels) analyse information on the requirements of the labour market for graduates from different levels and branches of education (MŠMT, 2014).

In addition to any systematic forecasting of skill needs for tourism at the national level, it is very often the case that forecasting is done by the individual **educational institutions** themselves. Such forecasting would typically relate more to regional and local labour market needs and can thus respond more directly to the needs of employers.

**Germany:** Universities for applied science and vocational academies are very closely connected with industry (co-operation, lecturers from it, projects with it). Some of them have an advisory council with representatives from industry and industry associations, which consult them on topics concerning the modernisation of the curricula. Often representatives from renowned national universities for applied science actively contribute to steering committees or central associations. Thus a constant dialogue with the tourism industry and its representatives is assured, so they can align their studies to match the demands of the tourism market and also stay abreast of and orient itself to current and future requirements.

## 5.2 Strategies for tourism education and training

As we have noted earlier, tourism education and training operates within the wider education and training system of the Member State. The nature of those systems therefore determines, for the most part, the way that tourism education and training is planned and provided. Within that context, the current study has examined the extent to which any specific measures are taken to customise the planning of education and training more closely to the needs of the tourism sector. Evidence from the research suggests a diversity of approaches to the strategic planning of tourism education and training provision.

A key point to note is that skills strategies are often developed in isolation to wider strategies for the development of tourism. This in part reflects the fact the relative responsibilities of different government ministries. Responsibility for tourism development is typically the responsibility of the Ministry of Economy (or equivalent) or sometimes a dedicated Ministry for Tourism. These Ministries consult the relevant tourist bodies and their primary concern is often around marketing, destination management and the creation of tourist "infrastructure". At the same time, the work of Ministries of Education is usually structured around different forms of education, i.e. higher education, VET, etc. This does not preclude a focus on a strategic approach to developing skills for different industrial sectors. However, the fact of different policy "silos" means that the research did not uncover examples of **national strategies focussed on tourism skills**.

Of course, most Member States have a **strategic planning document for tourism** in general and several include a focus on identifying and providing for skill needs in the sector. However, since these are usually "owned" by the ministries responsible for tourism or by national tourism bodies, any focus on skills development is often about how tourism policymakers and other tourism players can engage with the education system to encourage, facilitate and improve the provision of appropriate education and training; these strategic priorities are not necessarily "owned" by the education and training sector itself. Some of those examples are as follows.

**Bulgaria:** The National Strategy for Sustainable Development of Tourism in Bulgaria 2014-2030 pays special attention to human resources development and identifies skills shortages with regards to tourism staff.

**Netherlands:** "Gastvrij Nederland" is the National Council for tourism, recreation, hotel & catering, and the leisure industry whose members include the most important hospitality organisations are members of this council (for a list see annex B). The council published a 'sector or industry vision' in which it emphasises the importance of the industry for the labour market. It also emphasises that the quality of the service level within the industry can still be improved. There is a need for a future-proof labour market and education policy especially in the light of the forthcoming rejuvenation and ageing of this labour market. It furthermore states that although the industry invests a lot of time and energy on collaboration with education institutes, the various (levels of) education still lack a satisfactorily connection with the industry/labour market (Nederland & Nationale Raad toerisme, 2011). In the subsequent report (Gastvrijheidseconomie, 2014) the executive board of this Council published the need for a Human Capital agenda focussing on lifelong learning in the industry. The planning for 2015 foresees the setting up of such a programme (personal communication with one of the Topteam members). The Centre of Expertise Tourism & Leisure will be in the lead of this programme. Other participating stakeholders are:

- Education institutes at middle and higher vocational level (MBO and HBO);
- Industry associations;
- Employers;
- Employees; and
- Trade unions.

**Slovakia:** Slovakia does not have a specific strategy for tourism education and training. However, the "Strategy for tourism development to 2020" includes a focus on the development of human resources in tourism: Measure VI "Education and human resources in tourism support for research, development and innovation in tourism".

In some cases, national tourism strategies give little or no consideration to the need for skills development. For example, in Hungary the National Tourism Development Concept (2014-2024) was reported to lack employment and education/training related objectives and to focus more on the overall tourism offer of Hungary. Similarly, the Strategy for Development of Tourism in Slovenia 2012-2016 states a general need for further development of tourism education and training, but does not elaborate this further. In Lithuania, the national tourism development programme 2014-2020 determines development goals and objectives of the tourism sector, including the identification of competitive tourism products and services, tourism services and infrastructure development, tourism improving the business environment, etc. There are some measures related to the improvement of the administrative capacities of the specialists, but forecasting future skill needs across the tourism sector, sub-sectors and different occupations is not the object of the programme. Most of the tourism sector's detailed planning documents (territorial development plans) are at the municipal level, but these tend to give limited consideration to forecasting the need for tourism professionals and planning their training.

### 5.3 Social partners' involvement in strategy and planning

Employers are obviously crucial players in tourism education – they express demand for skilled workers, experience skill needs and provide employment in tourism occupations. Similarly, employees' representatives also play a key role in articulating the needs and aspirations of their members regarding skills development. The research has found that employers and employees' representatives are involved in different ways across the different EU Member States with varying degrees of impact. In this sub-section, we explore how they are involved in strategy development and planning, usually at national or regional level.

Several countries have **formal mechanisms for co-operation** between government, education and tourism stakeholders regarding strategy development and planning of tourism education. In some cases, this is part of a wider, formal process of **social dialogue** mechanisms covering all or most occupations in the labour market. However, in some countries, these fora do not necessarily give sufficient and appropriate consideration to the planning of education and training for the tourism sector. For example, this was reported to be the case in Hungary. In other countries, there may be consultation of and co-operation with the tourism sector through mechanisms other than formal social dialogue processes.

**Latvia:** Sectoral Expert Councils have been established through a project supported by ESF: "Development of the Sectoral Qualification system and increasing the effectiveness and quality of VET" ("Nozaru kvalifikācijas sistēmas izveide un profesionālās izglītības efektivitātes un kvalitātes paaugstināšana"). The ESF project aimed to contribute to reform of the VET system to make it more responsive labour market needs by involving social partners in strategy development and planning.

The tripartite Sectoral Expert Councils bring together representatives from employers, trade unions and state institutions (ministries, agencies, VET schools) to discuss strategic planning of VET, for example, the strategic development plans of VET institutions, investments in infrastructure development of VET institutions, planning enrolment etc. Of the twelve Sectoral Expert Councils, one covers the tourism, hospitality and beauty industry.

As in the other sectors, the Council for the tourism, hospitality and beauty industry has carried out research into education and the employment situation and the necessary improvements in VET. The resulting report has informed the development of a sectoral qualification system by the Sectoral Expert Council as well as strategic planning of the VET system for this sector. The Sectoral Expert Councils also participated in updating and developing new occupational standards and new educational programmes, based in modules. These activities were carried out within the abovementioned project as the part of VET reform.

**Luxembourg:** Tourism education and training is forecasted, planned, discussed and assessed according to the consultation model called "concertation à la Luxembourgeoise". The economy is represented within five professional chambers (chamber of employees, chamber of civil servants, chamber of agriculture, chamber of commerce and chamber of occupations), which have to be consulted each time the government plans to create or modify laws affecting the working population. The chambers have also the right to propose modifications or law within their responsibility.<sup>35</sup> This system of systematic social dialogue involves a large spectrum of stakeholders in the planning, development and analysis of education and training.

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<sup>35</sup> Chambres Professionnelles, Le portail de l'actualité gouvernementale.

At the same time, it tends to create a separation between education/training issues and business-related issues.

Within the social dialogue process, two main stakeholders represent social partners in the tourism sector. First, on the employer side, HORESCA is the official representative of hotels, restaurants and cafés in discussions administrative, policy and state institutions. In this role, HORESCA participates in various fora related to strategy development and planning of tourism education:

- Curriculum team and National Accommodation/Catering Training Commission;
- Assessment Commissions of Exams of Accommodation/Catering Training and education; and
- Commission for the Recognition of Work Outcomes (VAE) concerning Accommodation and Catering sector.

Second, on the employee side is the Union Luxembourgeoise des Agences de Voyages (ULAV) which was created in January 2015 through merger between several trade unions covering travel agencies, tour operators and travel assistance. ULAV participates in the following fora:

- Curriculum team and National Tourism/travel Training Commission;
- Assessment Commissions of Exams of travel and tourism Training and education; and
- Commission for the Recognition of Work Outcomes (VAE) concerning Travel sector.

**Germany:** the “system” for tourism education and training in Germany is very complex and there is no single institution or national office/agency responsible for the entire planning of the training and education. Rather, tourism education and training are arranged according to the type of education and/or by sub-sector.

In order to strengthen vocational education, the Federal Ministry for Economic Affairs and Energy (Bundesministerium für Wirtschaft und Energie), along with business and union representatives and states, formed a new alliance for further education and training and training programmes in December 2014. This new alliance replaces the national pact for training and specialisation for young adults programmes that expired at the end of the year 2014. The common objective of the alliance partners is to further improve the dual vocational training programmes in Germany and their image as well as emphasise the opportunities for careers and qualified employment. Economic associations, business, trade unions, federal states and districts all actively strive through this alliance to promote and support the dual vocational training programmes to make and keep them future-ready while also targeting and recruiting young people and parents in schools and universities and in general.

In some countries, the planning of skills provision – at least for some forms of education, if not for all - is overseen or facilitated by a **specific body**, whether a public body, private company or civil society organisation.

**UK:** unlike many EU Member States, the UK does not have formal mechanisms of social dialogue and its education and training system is "characterised by choice and competition with sectorally-variable employer involvement".<sup>36</sup> To help make education and training more relevant to labour market needs, Sector Skills Councils (SSCs) have been established to cover specific industries. These employer-led organisations develop an understanding of the future skills needs in their industry, and contribute to the development of National Occupational Standards, the design and approval of apprenticeship frameworks and the New Apprenticeship Standards and the formulation of Sector Qualification Strategies. They are licensed by the government through the UK Commission for Employment and Skills (UKCES).

The SSC for employers in the hospitality, tourism, leisure, travel, passenger transport and retail industries is a charity called "People 1<sup>st</sup>". It identifies employers' needs and works in partnership with them to develop solutions that increase performance through better-skilled staff. For example, People 1st has created new qualifications for these sectors, whilst also simplifying the overall range of qualifications available. The intention has been to create clearer career paths into and within the sector.

As well as – or instead of – these formal processes for involving employers and employees, there are various forms of **informal co-operation, dialogue and consultation** that involve employers and employees in strategy development and planning related to tourism education. Very often, the views of employers are articulated via employer's bodies or industry associations and the view of employees are articulated by trade unions. In other cases, employers or employees articulate their needs informally and directly to education providers.

**Hungary:** strategic planning is mostly the responsibility of the Chamber of Commerce and Industry and the Ministry of National Economy and the wider involvement of industrial partners is managed on an informal and ad hoc basis. The Chamber of Commerce, National Association of Employers in the Tourism and Catering Industry, employers and higher education institutions work with each other in different informal partnerships and networks. These networks alert the government on an ad hoc basis, if and when certain issues arise in relation to (unmet) skill needs. Employers tend to co-operate with the government and with higher education institutions to alert them to future skills needs in their own fields.

Employers also offer feedback on the adequacy, quality and relevance of provision to educational providers directly, to the government through industrial associations as well as through the forums of the Hungarian Chamber of Commerce and Industry if and when they are invited for a discussion.

**Cyprus:** industry representatives report that the discussion and co-operation with public education providers is mainly informal, through personal contacts. These complement the formal consultation mechanisms. For example, the Higher Hotel Institute indicated that the tourism sector had been consulted during the development of the new education programmes in 2012.

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<sup>36</sup> ECOTEC Research and Consulting (2012), Beyond the Maastricht Communiqué: developments in the opening up of VET pathways and the role of VET in labour market integration.

**Lithuania:** whilst Lithuania does not have formal mechanisms devoted to planning tourism education and training, individual providers of higher education or VET mostly undertake their own analysis of the labour market and young people's intentions. Based on this, they draw up a proposal for the study or training programmes to be offered the following year. Before this proposal is given to the Ministry of Education and Science, it is discussed and approved by employer representatives. It is also possible to plan the necessary resources for training through this proposal. The plan is not always fully comprehensive, because it primarily focuses on labour market needs, which often do not fully correspond to young peoples' intentions. If a mismatch happens, the school can partially change the numbers of students that are enrolled. Information on such changes must be forwarded to the Ministry.

In some countries, there appears to be **no strategic mechanism or forum** whereby the government, education system and tourism stakeholders come together to plan, design, deliver and evaluate education and training provision.

**Greece:** the research did not identify a specific public entity that has overall responsibility for the provision of tourism education and training. There does not appear to be an established and systematic planning process for forecasting future. Instead, the planning of provision seems to take place in an informal way and on an ad hoc basis. Individual institutions adjust their programme offer to needs of the market, as they perceive them.

**Romania:** planning of long-term government strategies on tourism and tourism education were reported to be hindered by the shifting administrative structure of the tourism authorities and the political (and not technical) appointment of leadership in tourism administrative structures. These changes tend to hinder the planning of education and continuity of strategy.

**Lithuania:** the involvement of tourism employers in strategy development and planning of tourism education was reported to be hindered by the predominance of small, often family-owned, businesses with few employees. Such employers have not traditionally organised themselves into associations and thus struggle to articulate their views to government and to the education sector. The situation has improved in recent years with the establishment of the Chamber of Tourism of the Republic of Lithuania in 2011. The Chamber has set up eight business associations representing different sectors of tourism: National Tourism Business Association, Lithuanian Association of castles and manor houses, Lithuanian Resort Association, the National SPA Association, Lithuania Camping Association, the Association of Lithuanian Private Healthcare institutions, Lithuanian Rural Tourism Association, Lithuanian Hotel and Restaurant Association. These associations, as are invited to take part in tourism sector development planning or at least to provide comments and suggestions on planning documents, which are being prepared at the national or municipal level.

## **5.4 Overall considerations on tourism education and training systems**

A number of points have emerged from this summary of tourism education and training systems. The main ones are summarised below:

- Forecasting skill needs, strategy development and planning of provision can be hindered by the development of tourism policy and education policy in different “policy silos”. There is therefore a need for different mechanisms to integrate, or at least better co-ordinate, strategic development of tourism and of skills.
- The efficiency of feedback mechanisms decides whether findings from research and forecasting are taken into account. For example, although data on graduate transition and employability in their early careers are collected in many countries, very few of them actually use the data to inform VET provision.
- Forecasting of skill needs and planning of skills provision should take place at different levels in different ways. There is a role for forecasting and planning at a strategic (national or regional) level through different mechanisms that bring together key stakeholders that can take a wide view of the sector or sub-sectors thereof. There is also a role for forecasting and planning at local level, whereby individual education providers operate closely with employers, groups of employers and representatives of employees.
- Strategy development and planning can sometimes be done effectively through existing mechanisms for social dialogue. However, such mechanisms may need an expansion of their remit to ensure that sufficient consideration is given to skills development.
- In other cases, it may be most appropriate to develop specific new mechanisms, networks or bodies to facilitate forecasting, strategy development and planning. The precise nature of such mechanisms will vary from country to country in line with the governance context, the education system and tourism sector.

## **6.0 PROVISION OF TOURISM EDUCATION AND TRAINING**

### **6.1 Overview**

The diversity of tourism occupations and skills requirements makes it necessary to look at education at all levels, i.e. higher education, vocational education and training, adult education and lifelong learning, and schools education. This section of the report systematically presents the findings of the study in relation to provision at each of these levels.

In some countries, the skills required for certain occupations will mostly be provided by one form of education – particularly in countries, such as Germany where the system plays a key role in stratifying individuals into occupations before they fully enter the labour market. However, in other countries there is a diversity of routes into some occupations, with the necessary skills being provided either by higher education institutions and VET providers or by adult learning providers. In these latter situations in particular, continuing education and in-house training can play an important role, helping individuals to move up the career ladder, but even in countries with more formal structures, this type of provision provides additional flexibility and the ability to respond quickly to new and emerging requirements.

In general, the provision of vocational education and training and, where relevant in schools, is more structured and systematic than either in Higher Education or with adult learning. In Higher Education, universities and other institutions tend to have greater freedom to determine their own course structure and content than in either VET or in schools, while the flexibility with which adult education is provided also leads to a much greater variability in content and coverage. In Slovenia, for example, higher professional schools and universities plan and develop their educational programmes themselves, while in Germany, ‘academic freedom’ traditions result in considerable diversity and in Ireland, while Quality and Qualifications Ireland (QQI), is responsible for developing and maintaining the National Qualifications Framework (NFQ) and for the quality standards of VET provision, these matters are devolved to the institutions in the case of Higher Education courses.

There is also a major issue in that in many countries recruitment into the industry is on the basis of generic business qualifications, such as accountancy or marketing, rather than of tourism-specific qualifications and increasingly in new areas of tourism development, such as green tourism or activity tourism, there is a need for particular qualifications in areas such as environmental science or sports and physical activity, where again particular skills and knowledge are more important than tourism qualifications. To this extent, by specifically covering the provision of ‘tourism’ education and training, this section only presents a partial picture, although the issue will be considered again in the section on occupations.

Finally, it should be said that there are distinct differences across Europe in the extent to which qualifications are expected to lead to employment in corresponding professions. In the UK and Ireland, in particular, especially at degree level, there is a strong belief in the generic skills acquired by degree-level study and it is common for graduates to seek employment in areas that hardly relate at all to the subject studied at university.

## 6.2 Higher education

### 6.2.1 Provision of courses

It has to be recognised that there is a tension, especially in Higher Education provision, between the aim of the institutions to equip graduates with knowledge and skills that can support perhaps a lifetime's career in the industry and the expectations of employers that graduates should be able to make a practical contribution, as soon as they are employed. It is often expected that including practical experience or a period of work placement in the degree programme will help to resolve this dilemma, but this element of the course needs careful planning and co-operation between institutions and employers, if it is to be fruitful and again there were comments from a number of countries that this relationship had not been developed as much as is necessary.

A related issue is the need for follow-up to degree courses in the provision of continuing education and in-house training to support career development and adjustment to new developments. This issue will be raised again in the section on adult learning.

Whilst entry into the tourism occupations does not always require a degree in Tourism or Tourism Management, such degrees are one possible entry route – and one that is becoming increasingly common. Based on the research in the 28 Member States, it appears that there are two main BA degree courses that are specific to tourism and that are provided at any significant scale - Tourism or Tourism Management. Entrants into tourism occupations at graduate level have therefore typically completed one of these degrees or another degree that is relevant but generic to all/many sectors, e.g. Economics and Management.

**Tourism degrees are relatively new**, having grown in importance in the late 20<sup>th</sup> century in line with the growth in mass tourism. For example, it was only in 2009 that Spain introduced a BA in Tourism. However, there is evidence that BAs in Tourism or Tourism Management are **one of the most popular programmes** in higher education. For example, in Hungary, the BA in Tourism attracted the highest (2010) or the second highest (2011) number of applications to all higher education courses.

Tourism degrees are typically **multidisciplinary in nature**, being based on several of the social sciences. Many are based on business-related subjects, although in recent years the trend has been to broaden the curriculum to include other areas, e.g. related to the environment or ethical issues. Looking across the 28 Member States, BA degrees in Tourism are very often of three broad types that would make them more relevant for some occupations than others:

- Economics-focussed Tourism degrees, typically offered by faculties of economics; such degrees offer a focus on strategic subjects such as economic planning, tourism management or marketing;
- Business or management-focused degrees, typically offered by faculties of business or 'applied economics'; these degrees tend to cover a wider range of management disciplines than the pure economics degrees, including accounting, marketing and human resource management;
- Geography-focussed Tourism degrees, typically offered by faculties of geography; such degrees offer a focus on subjects such as natural resources, sustainable development or territorial planning.

Even within these broad types, there can be considerable diversity in the courses available. Indeed, a growing trend in recent years has been the possibility to study niche subjects and/or to specialise in subjects that are directly relevant to specific tourism occupations. For example,

- Romania: the BA in Tourism typically includes modules in Tourism Management, Hotel and Restaurant Technology, Eco-tourism, Rural Tourism, Sustainable Development and Tourism Marketing.
- Hungary: the BA in Tourism offers the opportunity to specialise in Hotel Management, Catering Management, Tour Operation, Event Management and Destination Management.
- Spain: the BA in Tourism offers modules in Hospitality Management and Events Management amongst other things.
- Malta: the University of Malta provides a MA degree in Cultural Sustainability and Tourism.
- Romania: one university offers a BA degree in Cultural Tourism, whilst some theological faculties offer a MA in Management of Religious Tourism.
- Portugal: while there are 27 degrees in 'Tourism', there are also specialised courses leading to degrees in Tourism and Leisure, Sustainable Tourism, 'Tourism, Leisure and Heritage', Ecotourism and Event Management.

This diversity is offering considerable choice for students and enabling many to gain knowledge and expertise that is very directly relevant to certain occupations. At the same time, the diversity of content within tourism/tourism management creates the risk that employers feel unsure that graduates have a certain body of knowledge that they deem desirable. However, growth in the number and variety of higher education courses is a common theme, reflecting the growing diversity of the industry itself.

- In Germany, whereas 25 years ago, there were only four public universities of applied science, a vocational academy and a university in Germany that provided training in tourism management, now there are over 50 bachelor's and master's programmes being offered in a variety of universities, universities of applied science and private educational providers, involving many forms of tourism across a wide spectrum of industry-relevant sectors of tourism management.
- In France, eight specialisations from 173 recognised by the Law relate to tourism in courses leading to a 'licence professionnelle', but more than 40 others could be used to train students on an occupation or a subsector of tourism, in economy, law, territorial planning, events, real estate, distribution, commercialization, culture, transport, marketing, heritage etc.. Licences Professionnelles show very complex specialisations, often covering more than two subsectors and including geographical or sector specificities

**Specialised institutions** often account for the highest number of applications and the largest share of provision. For example, in Hungary 3 of the 15 institutions providing the BA Tourism accounted for around 50% of all applications. In Ireland, the Dublin Institute of Technology (DIT) accounts for around half of the country's enrolled Honours degree students in 'travel, tourism and leisure' and nearly 70% in 'hotel, restaurant and catering' studies.

In some countries, provision for part-time enrolment allows students to combine study with employment and in a number of countries, there is a growing provision by private universities. In Poland, for instance, there is now a greater provision of tourism and recreational studies courses in private Higher Education institutions than in public ones.

In a number of countries it is also possible to take **tourism modules** within a broader degree course, so that, for instance, a specialism in tourism is possible within general business studies or economics courses. In the UK, there are 443 degree courses that have some element of travel and tourism

There is increasing **provision at post-graduate level**. Sometimes, as in Poland, this can take the form of non-degree diplomas, which provide a more specialised and vocational orientation to supplement more academic first degrees. In Italy, however, there can also be consecutive programmes: a three-year first- level degree (6th EQF level), which offers a course in the "Science of Tourism" (in 14 universities), followed by a two-year second level degree entitled "Degree in the Planning and Management of Tourist Systems" (7th EQF level), offered by 26 universities.

On other occasions, the courses lead to Masters degrees or doctorates, where issues relating to more complex aspects of the developing tourism economy can be researched. In Denmark, for instance, it is possible to take a Master's degree in the Experience Economy. Such courses are often a necessary requirement for university posts in tourism or can lead to positions in public administrations relating to tourism or tourism associations or organisations involved in developing destination management. However, the picture is somewhat complicated by the fact that in some countries it is usual to continue studies up to masters level. In France, for instance, 44 university courses lead to a Master in Tourism qualification.

In general, however, the scale of such provision is more restricted than for undergraduate studies:

- In Ireland, while in 2014 there were 668 enrolments in Bachelors Honours Degrees in Travel, tourism and leisure and 931 enrolments in Ordinary Bachelor's Degree courses, there were only 42 full-time postgraduate enrolments in the area and 9 part-time.
- In the Netherlands, only three universities offer masters courses geared to hospitality.

Tourism **employers express a number of concerns**, during the course of the research, about the provision of BA Tourism degrees. As indicated, a key concern is that some courses are overly-theoretical. For example, employers in Hungary considered that insufficient attention was given to the development of soft skills and foreign language skills and to the acquisition of practical knowledge. For that reason, work placements in the context of Tourism degrees are essential; in Hungary, a one-semester placement is compulsory. BA Tourism degrees in Romania typically include around 35 days of work-based learning. However, it is important that work placements offer experience that is relevant and of a high quality.

The provision of **work-based learning and work experience** for students of tourism does appear problematic in many cases. In Romania, employers reported difficulties related to cost (time and effort involved in hosting students, as well as the absence of payment for training providers and students), short duration which prevents placements from being meaningful, and students' other work commitments.

The **progression of Tourism graduates into employment** in tourism occupations appears to be problematic in some cases. There appear to be three reasons for this poor progression.

First, there is an '**over-supply' of graduates** in tourism in many countries in the sense that the number of tourism graduates exceeds labour market demand in the tourism sector for qualifications at degree level. This results in graduates entering non-graduate jobs in the tourism sector or seeking employment in other sectors. For example, research in Spain has found that 50% of Tourism graduates were over-qualified for the jobs that they held. In Hungary, it was reported that 22% of Tourism graduates were not intending to enter occupations in the tourism sector.

Second, employers report that too many graduates are not "work-ready" and graduates very often have poor perceptions of the industry.

Third, there is considerable regional variation in demand, which reflects the geographical concentration of the sector; tourism graduates from universities in non-tourism regions therefore very often face the choice to move to another region or to enter a non-tourism occupation.

### **6.2.2 EU support for tourism higher education**

In higher education, activities carried out within the tourism sector for individuals are mainly related to mobility projects for higher education of students, including work placements abroad. Activities under the Erasmus+ also promote broadening experience of students through a loan guarantee scheme to support Master's degrees and finance their studies abroad. With regard to projects and activities to enhance transnational cooperation across Member States, the most interesting activities in higher education are integrated international study programmes. These can take the form of Joint Master's degrees, such as the Erasmus Mundus European Master in Tourism Management involving 3 universities situated in Denmark, Slovenia and Spain respectively and leading to a joint Master of Science (MSc) degree issued by all 3 institutions, or shorter cooperation based on strategic partnerships.

**Support for developments in tourism education and training at a European level** are notably provided currently through the Erasmus+ Programme that has brought together earlier education and training programmes at different levels in a single framework. At the higher education level, there are significant opportunities for students and staff to study and gain experience in other Member States, notably through Erasmus exchanges. These can be quite extensive. The Faculty of Tourism and Geography at the Universitat Rovira I Vigili in Tarragona, for instance, has 16 partner universities in 11 Member States in an Erasmus programme for its degree in Tourism.

Interventions under Erasmus+, however, also promote strategic developments as well as broadening the experience of students. The Erasmus Mundus European Master in Tourism Management (EMTM) is a two-year joint master programme involving 3 universities situated in Denmark, Slovenia and Spain and leading to a joint Master of Science (MSc) degree issued by all 3 institutions. The EMTM was established as an Erasmus Mundus master course in 2010 as part of a scheme to establish European master and doctoral programmes of excellence.

### **Erasmus Mundus European Master in Tourism Management**

The European Master in Tourism Management (EMTM) is a two-year joint master programme promoted by three university partners in Denmark, Slovenia and Spain. Since 2010 the EMTM is supported by the European Commission through the European master and doctoral programmes of excellence within the Erasmus Mundus joint Master's programme.

The main objective of the EMTM is to prepare future professionals working in the tourism sector to make sustainable and effective decisions. In addition, the transnational nature of the master programme aims at providing an integrated knowledge of the tourism industry developments and train future researchers in the field of tourism management.

The activities implemented during the Joint Master's degree are based on a mandatory mobility scheme which allows the participants to understand the main characteristics of the tourism sector in three different countries. The mandatory scheme adopted requires students to move each semester to a new university: the first semester is spent at University of Southern Denmark, followed by a second semester at University of Ljubljana in Slovenia and a third semester at University of Girona in Catalonia, Spain. The last semester is dedicated exclusively to writing the master thesis. During the Master's degree students are trained in a variety of subjects, ranging from tourism development to innovation processes and tourism products.

Approximately 30 students every year enrol in the programme which leads to a Joint Master of Science degree issued by all 3 institutions.

### **ECVET-Tour for tourism and mobility**

The tourism training is characterised by diverse route into some occupations partially affected by the difficulty to recognise competences across Member States. This is particularly true in the tourism sector where occupations and skills requirement across countries vary widely. In this respect the ECVET- tour for tourism and mobility project aimed at enhancing transparency and acceptance of competences and qualifications acquired in educational and further educational programmes in the tourism sector across Member States. The project was supported by the European Community within the lifelong learning program (Leonardo da Vinci) in the field of tourism in vocational education and training and was implemented by organisations from 4 Member States (Austria, Germany, Poland and Spain).

The project partners developed a competence matrix based on the Vocational Education Transfer System model. The model was based on the analysis of key competences required in two specific job profiles (cook, hotel and restaurant assistant). This activity led to the definition of a set of competences for each job profile broken down between central areas of competence, VET opportunities across Member States and new potential areas of development. The information used to define the key areas of competence was collected through secondary analysis, qualitative interviews, surveys, workshops and several meetings with project partners. Finally the key areas of competences identified informed the development of a competence matrix for each professional profile.

Subsequently the competence matrix was tested through the organisation of a workshop with experts and stakeholders in the tourism sector and used to create organisational profiles and assigning ECVET-points.

In terms of outputs, the competence matrix developed and the use of ECVET-credit points defined the competences and qualifications needed for each job profile and were ready to be field-tested in a mobility programme.

## 6.3 Vocational education and training

### 6.3.1 Provision of courses

In some countries, vocational education and training (VET) is the main form of training provision for the tourism sector.

- In Estonia, there are around 100-150 students per year in tourism-related courses in higher education and about 12,500 in the VET system. The vast majority of those students are involved in accommodation and catering studies (around 50% of all).

In all countries, the VET system is responsible for delivering training for a large proportion of the workforce in the industry, often to enable staff to perform particular tasks more efficiently and effectively. The **diversity of the provision** is therefore one of its main characteristics at this level.

Furthermore, support for this type of training among employers is reported as growing in some countries (for example, the Czech Republic), sometimes associated with EU provision through ESF.

There are considerable differences across Europe in the way that VET is delivered. As will be seen in a following sub-section, much of it begins with the introduction of a greater vocational element for teenagers within the school system, especially when this involves the choice of a vocational as opposed to an academic career path by attending separate and distinctive kinds of school. In other countries, VET is mainly provided, post compulsory education, in particular institutions that have a clear vocational orientation, sometimes specifically specialising in tourism, but more often offering a range of courses, which include courses for tourism and related subjects. The Technical colleges in the UK and Ireland would be an example of this kind of institutional provision.

In contrast to higher education, **courses of vocational education and training (VET) often relate very specifically to tourism occupations**, albeit at lower levels of entry. In some countries, there are also more generic VET courses in Tourism or Tourism Management.

- Ireland: VET programmes are available in Tourism with Business but also in Event Management, Travel Management and Airport Passenger Services.
- Spain: Advanced level VET programmes are available that relate to specific tourism occupations, including Travel agencies and Event Management, Tourism Entertainment, Tourism Information and Commercialisation, Tourism Hospitality Management.

In some cases, VET programmes also relate very **specifically to sub-sets of tourism occupations** and sometimes even to very niche occupations. This diversity of provision is very often driven by demand, as articulated by employers and taken into account by the relevant national and regional educational authorities responsible for planning provision. In many cases, the involvement of employers as providers of education ensures that provision is both diverse and very focussed on specific occupations.

- Ireland: VET programmes are available in Guiding in general and also for very specific occupations, including Dublin Tourist Guiding, Regional and Local Guiding, Coastal Guiding and five types of Angling Guiding (e.g. Boat, Shore, Coarse).

Provision of VET is essential for those tourism occupations that are "**regulated professions**" in certain Member States. Typically, a standard training course must be undertaken before entry into a regulated profession and very often additional training courses must be undertaken once in employment.

- Cyprus: the School of Tourist Guides, supervised by the Cypriot Tourism Organisation in co-operation with the University of Cyprus, offers a 1-year programmes leading to certification as a Tourist Guide. The school also organises seminars and training programmes to further develop the skills and knowledge of tourist guides. All licenced Tourist Guides in Cyprus are required to participate in these seminars.

VET courses can extend the experience of their students by taking advantage of provisions in **Erasmus+** at this level. The Institute of Tourism Studies in Malta, for instance, has several exchange agreements with organisations and institutions throughout Europe under the Erasmus+ Programme. Students following a course leading to a Higher National Diploma or similar qualifications are offered the opportunity of studying abroad or training in a foreign enterprise, under the Erasmus+ Mobility Programme, while students following a Vocational Educational Course are also offered the chance of training abroad.

In some countries, it appears that **concerns have been raised about VET and its usefulness in meeting the skill needs of employers**. These concerns include:

- The institutional arrangements for VET courses, which are often full-time and taught according to a fixed national curriculum, mean that it is often difficult to achieve flexibility in provision and there can be problems in responding to new requirements in the industry.
- Perceived limited relevance to the labour market. This can be because of difficulties in ensuring that VET courses include work placements and/or work-based learning. This can create a vicious circle where employers lack the capacity or the willingness to host VET trainees and the training then becomes less relevant to their needs. The example of Romania highlights some of the reasons for this situation (see the box below).
- Limited value placed on VET courses by young people in some cases;
- Out-migration: in some countries, many qualified young people find work abroad, therefore worsening difficulties that local employers face in meeting skill needs.

## Romania

A report by the World Tourism Organisation found that vocational training in the hospitality sector in Romania tended to be too academic and did not correspond well with employers' needs.<sup>37</sup> As a result, it can often be the case that up to half of all training places on some VET courses remains unfilled. Interviews carried out of stakeholders during the course of this study confirmed that finding and suggested three main reasons.

First, the co-operation between VET schools and employers is not always well-founded; agreements tend to be made on a fairly ad hoc basis between individual schools and businesses, rather than on any systematic basis; moreover, these agreements often only require a voluntary contribution from employers and employers sometimes receive weak guidance from the VET schools.

Second, whilst the tutors are usually well-qualified, the VET schools often have poor infrastructure and lack modern laboratories, equipment, appliances etc. Where premises have been refurbished or new ones established, sufficient space is not always made available to provide the practical training necessary for hospitality occupations.

Third, employers are often the only source of practical training and work-based learning but may lack the capacity to provide such training effectively; for example, students are often used as a source of cheap unskilled labour and are expected to perform tasks that do not help them develop their skills. There is often an inadequate allocation of human resources to the task of providing practical training and overseeing work-based learning.

Nonetheless, it is generally the case that VET provision is more systematically planned than that for Higher Education and frequently involves the government and/or state agencies having an active role in determining the nature and extent of provision. In addition, although the relationship could be improved in many instances, the involvement of employers in helping to determine what is to be delivered and how is also much more routine.

A key determinant of the effectiveness of VET (for all sectors) is the extent and nature of **work-based learning** that is provided. Indeed, the 2010 Bruges Communiqué represented a commitment on the part of the Member States and the social partners to work towards including work-based learning in all initial VET courses.<sup>38</sup> In response, the European Commission published a policy handbook, which identified three main models of work-based learning.<sup>39</sup> Research undertaken for this study has identified examples of VET for tourism which illustrate each of the models from the Commission's handbook:

- “Alternance schemes” or “apprenticeships”, also known in Austria and Germany as the “dual system”; in this form of work-based learning, the apprentice is usually employed (and therefore paid) by a company. The employer offers training leading to a qualification and thus also entry into a specific occupation.

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<sup>37</sup> World Tourism Organisation (2007), Romania National Tourism Development Master Plan 2007-26

<sup>38</sup> The Bruges Communiqué on enhanced European Cooperation in Vocational Education and Training for the period 2011-2020; Communiqué of the European Ministers for Vocational Education and Training, the European Social Partners and the European Commission, meeting in Bruges on 7 December 2010 to review the strategic approach and priorities of the Copenhagen process for 2011-2020

<sup>39</sup> European Commission, Work-Based Learning in Europe: Practices and policy pointers

During the same period (either in parallel or in "alternating" periods), a VET school provides classroom-based learning, enabling the acquisition of general and occupation-related knowledge. Social partners might take responsibility for the quality of the company-based training. Whilst apprenticeships have long been a prominent feature of the tourism education landscape in Austria and Germany, there is renewed interest from the tourist sector in Ireland and the UK.

- "School-based VET which includes on-the-job training periods in companies"; these typically involve internships, work placements or traineeships either as a compulsory or an optional element of VET programmes leading to formal qualifications. The periods of on-the-job training vary in duration but typically account for around 25-30% or less of the total training programme.
- "Work-based learning within a school-based programme" and which create "real life" work environments, for example, through on-site, workshops, kitchens, restaurants, practice firms, simulations or real business/industry project assignments. For example, VET providers in Ireland are making more efficient and intensive use of training facilities, which can often involve the use of expensive equipment or dedicated space (for catering or hotel management courses, for example). This can be achieved by sharing the facilities with other institutions and schools. Romania provides another example (in the box below).

### Romania

"Exercise firms" in Romania provide alternative learning methods which integrate competencies from different disciplines, in order to create entrepreneurial skills in tourism (as well as in other areas). The exercise firms provide all the experience of a conventional firm, but operate through simulations. Exercise firms are part of the VET system. Students gain a first-hand experience on how to run a tourism business, in a guided and protected environment.

### **6.3.2 EU support for tourism vocational education and training**

The Leonardo Programme offers considerable support for VET focussed on skills for the tourism sector.<sup>40</sup> The Leonardo Portal lists approximately 332 projects linked to tourism related training. These projects typically develop innovative transfer practices through transnational partnerships and mainly focus on:

- **Developing transparent and comparable competences to facilitate mobility** across Member States and enhance the quality of VET education. In this context, several projects have developed tools and transnational strategic partnerships to enhance the recognition of learning outcomes and education and training activities in VET. An example is the project entitled "ECVET-Tour" carried out in Austria. The project has developed a competence matrix to enhance transparency and comparability of competences acquired during formal education across Member States.
- **Interventions to develop tools and systems to support the transparency and recognition of qualification and to improve the quality of training.** In Iceland, key stakeholders of the hospitality and catering sector have developed quality indicators to support workplace learning and improve the performance of the trainers in the food and catering sector through a project entitled "Guidance for Educators, mentors and students". Other projects have developed working models for the validation of skills among Member States or to improve formal

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<sup>40</sup> The programme used to be part of the European education and training programme "Life-long Learning" and focuses on initial and further vocational education and training.

and informal training processes in tourism within vocational education and training.

- Another set of common activities carried out in projects funded in the training sector focuses on **new skills required and skills shortages** in the tourism sector. Projects implementing these activities usually develop transnational approaches to identify the new skills needs in the sector and implement related training activities. These approaches require strengthening the cooperation between VET organisations and companies working within the tourism. In Finland, a project entitled "Enwolve" has developed an approach to increase the attractiveness of VET by fostering the cooperation between VET organisations and micro-enterprises to identify good practices in this area.

The boxes below present examples of VET projects funded under Erasmus+ and one of its predecessor programmes, Leonardo.

### **Guidance for Educators, mentors and students (GEMS)**

The Guidance for Educators, mentors and students was supported by the European Commission through the Leonardo programme and aimed at developing a process for quality improvement in workplace learning in the hospitality and food sectors across Europe. Since workplace training has been usually measured through quantitative indicators, the project addressed workplace training in qualitative terms: it identified general quality indicators for vocational education which enabled to develop a set of specific quality indicators for the workplace learning community. The project was carried out by partners from industry and education sectors in five partner countries (Iceland, Belgium, Poland, Sweden and United Kingdom) to create and evaluate a common set of tools in order to address quality and transparency.

The process followed several steps. Initially the main existing workplace learning practices were established. This was followed by the creation of quality indicators and the organisation of a training programme for trainers.

The activities implemented allowed to produce two main tools: "A Guide for Coordinators and Mentors" in work-based learning in five languages and a "student Logbook" in 5 languages, which has been implemented in an adapted form in the hospitality and food sectors in VET schools in Iceland as well as in the partner countries. In addition both tools have been adapted and transferred to new countries through a Leonardo partnership project and the guidebooks resulted being used by 30 restaurants across Europe. In addition culinary and hospitality students on mobility grants also use the logbooks during training abroad.

### **Nature Based Entrepreneurs and Vocational Education Training Providers Learning and Working Together (Enwolve)**

Increasing and diversifying cooperation between enterprises and vocational training is continuously enhanced in various EU and national policies. However enterprise and VET organisation cooperation best practices have usually been developed for larger companies while less information is available for SMEs and micro-enterprises. The overall objective of the Enwolve project aimed at closing this gap by enhancing the attractiveness of VET as a result of the cooperation between VET and micro enterprises. It was a two-year transnational project financed in part by the European Commission in the context of Leonardo Da Vinci's Lifelong Learning Programme and was implemented by a consortium of lifelong learning institutions, organisations working in the rural development sectors and nature based entrepreneurs from Finland, Estonia, Italy, Norway and United Kingdom.

The project identified innovative practices of cooperation and “success stories” from both nature-based entrepreneurs and VET providers and from previous EU funded initiatives, such as the NEMO project (New models of co-operation; school-enterprise partnership in vocational education). Subsequently, best practice examples have been adapted to SMEs and micro-enterprises and practical cooperation models were developed in the partner countries. Based on pilot results, long-term development plans were prepared for each partner country.

In addition to the initiatives implemented in the project, a European Handbook for successful VET and small/micro enterprise co-operation for nature based entrepreneurs was published and made publicly available across Europe.

Building on the experience of Leonardo in 2007-13, the European Commission has funded pilot projects to form Sector Skills Alliances (SSAs) to promote cooperation between VET providers and researchers, sector stakeholders (i.e. VET beneficiaries), and VET authorities and decision-making bodies. One of the SSAs funded under Leonardo related to the management of small hotels and restaurants, whilst one of the 2012 pilots has been in the field of tourism and catering (see box below).

### **RESPONSible Skills Alliance for Sustainable Management of Small Hotels and Restaurants (RESPONS)<sup>41</sup>**

The RESPONSible Skills Alliance brought together partners from nine Member States to develop a new professional profile for managers/owners of small hotel and restaurants. This involved identifying the skills needs and qualification requirements for such roles, as well as upgrading the specific competences via a set of criteria and a new joint curriculum for lifelong learning. The aim was to facilitate the provision of work-based non-formal learning by developing alternative modes of access to qualifications beyond full-time VET provisions and new flexible e-tools for non-formal and informal learning.

Provision of new forms of VET was intended to overcome some of the barriers that people in these occupations typically face, particularly pressures on time which make it difficult to access traditional forms of training. The Alliance therefore developed modular training courses comprised of short and self-contained modules, based on needs expressed by the sector, available for free or at low cost and available on-line.

The new profile has been developed with reference to the European Qualifications Framework, which has facilitated comparison between the qualifications systems of the different countries involved in the project. It has been complemented by an e-Handbook for socially responsible management of SMEs in this sector and by a virtual map of innovative management skills.

### **Sector Skills Alliance in Tourism and Catering (SSA-TC)**

The overall aim of the SSA-TC was to develop and design an innovative, mutually recognisable and transparent curriculum/qualification for tourism and catering industry at EQF level 4 and based on the principles of the European Credit System for Vocational Education and Training (ECVET).<sup>42</sup>

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<sup>41</sup> <http://responsalliance.eu/>

<sup>42</sup> <http://ssatc.eu/>

The SSA-TC has prepared a "State of the Art" report based on an analysis of training and skill needs. For each of the partner countries, it provides:

- clarification of most commonly used term Tourism and Hospitality in the European context;
- data on the value of tourism Industry in terms of size, scope and gross value added, employment and potential for future growth;
- a summary of the present status of EU educational tools such as NQF, EQF, ECVET, ECTS and EQAVET; and
- an outline of the main Tourism and Catering qualifications.

The SSA-TC has also developed a strategy paper for the VET Delivery in the Tourism and Catering Sector Across Europe. The paper identifies challenges in the application of EU educational tools and offers recommendations for the future development of VET for the tourism and catering sector.

The initial round of pilots (selected in 2012) has been followed by additional calls for proposals funded under Erasmus+. Another SSA has subsequently been selected via the 2015 call: "A Vocational and Educational Curriculum Design from a Sector Skills Alliance on Tourism", led by the Fondazione per la Ricerca e l'Innovazione in Florence (Italy).<sup>43</sup>

As well as Leonardo, the EU offers support for VET for tourism through the European Social Fund (ESF). In the 2014-2020 period, funding is available under Thematic Objective 10 for "Investing in education, training and vocational training for skills and lifelong learning. The current operational programmes have committed €27bn to this objective.

Within this objective, one investment priority is particularly relevant to VET, namely 10iv which provides support for "Improving the labour market relevance of education and training systems, facilitation transition from education to work, and strengthening vocational education and training systems and their quality, including through mechanisms of skills anticipation, adaptation of curricula and the establishment and development of work-based learning systems, including dual learning systems and apprenticeships schemes". The current operational programmes have committed €7bn to this priority.

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<sup>43</sup> [www.fondazionericerca.unifi.it](http://www.fondazionericerca.unifi.it)

## 6.4 Other education and training for adults

Adult education is a highly important element in the overall training provision of most countries, although the way that it is organised probably diverges more across countries than any of the other forms covered in this section. It has a number of advantages in that it can be organised relatively flexibly in terms of course length and location, it can be provided in response to new and emerging issues, often as a 'top-up' to standard degree-level or VET provision, it can be more responsive to employers' requirements and more immediately relevant to labour market requirements. In some countries, for example Ireland, it was reported to be important in allowing training to address the needs arising from the stresses of the recession or in strengthening the basic business and management skills of tourism enterprises. On the other hand, it tends to be less systematic, often relying on ad hoc responses from the target audience, although since this form also includes in-house provision by larger companies in tourism and related sectors, this is by no means always the case. Sometimes employers are said to be reluctant to encourage their staff to acquire further qualifications, since they perceive that this will lead to higher wage demands.

- In the Netherlands, although education institutes at middle and higher vocational level do offer adult education and training, a lot of the provision of continuing education is by employers' and industry associations often in collaboration with private suppliers of education and training.

Adult learning programmes can be offered at many different levels. They can provide vocational top-up elements for graduates in the form of non-degree (Diploma) postgraduate programmes. In Poland, for instance, these can include courses in: Tourism management, Economic Analysis of the Tourism Business, Business Coaching in Tourism, Human Resources Management in the Tourism Economy etc. Equally, adult learning programmes can cover relatively basic skills, although these are often important in keeping up-to-date or in getting on top of new developments, in, for instance, social media marketing or in new computer booking programmes. Frequently only relatively short courses or training sessions are needed to address these requirements.

- In Ireland, an initiative that has allowed employers to play an active part in developing provision in response to their needs has been the Travel Professionals Skillnet, developed under the Training Networks Programme (TNP). This was initiated by the Irish Travel Agents Association, but has since involved other industry associations, including tour operators, hotels and some transport bodies. The courses provided are mostly short, generally lasting only a few days, sometimes delivered in-house and particularly (though not exclusively) addressing needs for various forms of marketing, supervisory skills and IT training. Employers have a direct input into designing the course, which is nonetheless supported by public funds.

The extent to which there is **systematic provision of adult and continuing education** varies considerably across Europe. The general picture is that this form of provision is very under-developed, but in Denmark, for instance, which is one of the countries with the highest participation rates in adult education in Europe, the provision of 'AMU' courses (Arbejdsmarkedsuddannelser) is very strong. Investment, both private and public, in developing new qualifications and competences is also among the highest in Europe. Collective agreements between the social partners provide an important basis for this, since they include an obligation for enterprises to provide competence development and educational planning for employees. AMU courses are provided through vocational schools and AMU centres across the country and provide training for current employees, but also unemployed and self-employed persons. Some courses only last a day but others are for several weeks.

Italy too has recently defined a national system for lifelong learning, building on the experience of upper secondary schools that provide evening courses and local adult education centres to establish Centres for Adult Education at a provincial level. Again, in this case, the provision will build on agreements between the social partners, in the form of training plans agreed at individual, company and sector levels.

Provision of **in-house training**, often involving the use of private training firms, is also a significant feature of overall provision for adult and continuing education and is especially characteristic of larger companies in the industry. It is clearly more difficult for SMEs to help develop their staff and keep them up to date in the same way, though arrangements through industry associations or sectoral groups is one way of addressing the issue.

Adult learning programmes also allow experience gained in work to be validated and recognised. In Poland, a vocational education reform effective from Sept 2012 allows adults to take extramural exams in vocational fields, and to obtain a certificate or a diploma confirming vocational qualifications with no need to follow any school-based programme. Sometimes, however, employers are reluctant to encourage their staff to acquire further qualifications, since they perceive that this will lead to higher wage demands.

Provision for various forms of adult and continuing education through projects supported by the **European Social Fund** are also a significant element in this area in many countries, helping to up-grade skills and bring the previously unemployed into the industry. In some cases, ESF projects are having a major impact on tourism provision. The successful 'Advance: Training Tourism Leaders' projects in Malta, for instance, is open to either senior managers or middle management and supervisors in the tourism sector (in separate courses) and has had a clear impact on the industry at a strategic level.

Elsewhere, ESF projects have addressed employment problems aiming to equip participants to contribute to new developments in the industry. The 'Paths of Training and Employment in Alternative Tourism project in Romania has increased access to the labour market for unemployed people in fields like health spas, sports, and agro-and eco-tourism.

Given the variety of provision across the area of adult and continuing education, it is not surprising that quality is said to vary quite considerably.

Adult learning is particularly needs driven, whether that be the need for personal development and career progression on the part of individuals or the needs of employers to up-date the skills of their staff or respond to developments within the industry. The challenge is to make an appropriate provision in a systematic way or at least to have **arrangements that can respond systematically to the needs expressed by individuals or employers**. It is clear that this is not being done in anything like the way that provision of VET for young people has been developed.

## 6.5 School education

In general, schools provide a broad education for children rather than preparing them specifically for a career in occupations whether in tourism or other sectors. However, **in some Member States vocational education is mainly delivered via the school system**, especially through vocational schools that pupils can attend e.g. post-14 or post-16 years old, as an alternative from following a more academic route. There are also examples of a tourist dimension to the general education provision.

- Latvia: VET education is mainly school-based in Latvia, and often includes practical training through placements.
- Poland: a large number of technical upper secondary schools (technikum) provide education for hotel industry technicians and others for tourist services technicians. 105 schools educate room service auxiliary staff.
- Slovenia: Tourism education and training is offered in secondary vocational schools, higher vocational schools (2 year course) and higher professional schools (3 year course) as well as in higher education.
- Spain: specific projects have promoted an interest in tourism in schools. For example, the "Carabelas" project enables school students to undertake a real-life tourism promotional project in their locality.
- Ireland: an optional one-year school programme, known as the 'Transition Year' is available in Ireland (usually for pupils around the age of 15). This is a broad educational experience assisting the transition to work and consisting both education and work experience. Tourism modules are offered as part the provision. Approximately 75% of second-level schools offer the programme and in some schools, the transition year is compulsory.

In a few cases, schools offer **specific educational pathways related to tourism** occupations, within the general school system:

- Malta: secondary school students can opt to study the BTEC Hospitality as an optional subject from Form III, as a foundation for further study in this area.
- Spain: Initial Professional Qualification Programmes (PCPIs) are provided for young people that have not graduated from secondary school. They provide an introduction to the workplace and the opportunity to gain qualifications. PCPIs are available in the area of Cleaning Service Operator in Tourism Accommodation and Cuisine Service Operator, amongst other areas.

In general, the issues that face special schools providing vocational education and training are those that have been pointed to in the section on VET, although comments were made in some countries, suggesting that difficulties in engaging employers both in determining course content and in offering training placements of high quality were more pronounced for school-based VET than when there is post-school provision. There may also be a bigger problem in attracting teaching staff with good experience in the sector or in keeping their knowledge and skills up-to-date.

Otherwise, initiatives to provide a feel for the industry within the school system as part of the general curriculum are welcomed, but must be regarded as a useful addition to the standard forms of education and training needed by the industry.

## **6.6 Overall considerations on provision**

A series of points have emerged from the consideration of the different forms of education and training provision. The main ones are summarised below:

- The overall view is that sufficient graduates in tourism and related subjects are being provided and there may even be over-provision, especially for the short-term needs of the industry
- In fact there is no general shortage of provision, except in the area of adult or continuing education. Rather, the concern is whether provision of the right kind of courses at both higher education and VET levels is sufficient to meet emerging needs.
- Degree level education and especially post-graduate provision is important for developing a more sophisticated and diverse service offer, but it is more difficult to do this systematically in Higher Education and more difficult to achieve the necessary interaction and dialogue between HE institutions and the industry
- To a certain extent the objectives of HE institutions and the industry diverge - for legitimate reasons, but these issues need more open debate and interaction and, in many countries, more investment from both sides in improving the quality of work placement. This is not a matter peculiar to the tourism industry, but the industry often presents a clear example of where action is needed.
- The recent economic difficulties for the sector have revealed in many countries the need for the improvement of generic management and service skills (including IT skills) in existing tourism enterprises, especially in SMEs. This underlines the importance of adult and continuing education, especially as the sector develops more rapidly.
- While adult and continuing education can have great flexibility and can respond well to employers' needs, it is difficult to organise systematically and in most countries does not have the level of coherent attention on the part of the public authorities and the industry that is devoted to initial VET.
- In some countries, the school system plays an important part in delivering VET, but has its own issues in ensuring relevant and up-to-date provision.
- It is difficult to anticipate the precise skills and related qualifications needed for a professional profile. It is therefore very important for the capacity of education and training systems to adapt quickly to new qualification needs.
- European initiatives, especially through Erasmus+ and the European Social Fund are making significant contributions, especially in promoting strategic developments in the industry and its training provision.

## 7.0 SKILLS PROVISION FOR TOURISM OCCUPATIONS

### 7.1 Introduction

In section 6, we have analysed the provision of education and training which specifically relates to tourism. Such education and training is an important source of knowledge and skills for many entrants into tourism occupations. In this section, we now look at those occupations in order to identify the skills required and the routes into such occupations, in terms of education and training that is relevant. This analysis enables us to draw a number of conclusions about the performance of Europe's education and training systems, in terms of providing the skills needed for tourism occupations. Our analysis is based around six main occupational groups.

### 7.2 Commercial managers

#### Commercial manager occupations

- Revenue manager
- Sales manager
- Marketing manager
- Web-marketing manager
- Yield manager
- Distribution manager
- Pricing manager
- Promotion / Communication manager
- Travel manager/buyer (for a corporate customer)

#### 7.2.1 Skill needs and provision

Commercial managers are employed in all parts of the tourism sector, although most are employed by tour operators and travel agencies, as well as medium or large businesses within the accommodation sector (e.g. hotel chains). However, travel managers/buyers can be employed in any sector, particularly by businesses.

Like other sectors, the tourism sector requires managers to fulfil various commercial responsibilities and transactions. However, recent years have seen an increase in the diversity of these roles: some generic roles have become more specialised, particularly where new business models and pricing strategies are needed (e.g. yield manager, distribution manager, pricing manager). In addition, the development of e-commerce has led to the emergence of new occupations, such as web-marketing manager.

The research evidence suggests that three main areas of skills and competences are required:

- Professional and business skills: finance, IT, marketing, sales, management, etc.
- Soft skills, multicultural skills, language skills (particularly English but also German in some regions, e.g. west Slovakia), etc.
- Knowledge of the tourism sector.

Given these skill requirements, commercial manager occupations usually require a certain level of post-secondary formal education – usually at a higher level – together with at least 1 years' work experience. It should be noted that there are often possibilities to enter these occupations both through higher education and through vocational education and training. In some countries, some of these occupations are regulated professions, meaning that only those having undertaken specific training and with specific professional qualifications are able to enter.

In terms of the performance of education and training systems, the evidence suggests a number of findings.

First, many, perhaps the majority, of entrants into these occupations have undertaken professional education and training in "generic" fields, such finance, economics, business management, marketing or IT. Entrants via this route are typically required to have a relevant university degree. For progressions within employment, some entrants might then gain a Master's degree with a more specific focus on tourism.

Second, degrees in tourism/tourism management can be a route into such occupations but such graduates are usually required by their employers to undertake additional training once in employment. Indeed, it was commonly reported that employers find some such degrees to be overly-focussed on theoretical knowledge at the expense of practical training and internships (which are provided as part of some degree programmes, but not in others). In particular, some specific skills are not widely taught in higher education courses, such as yield management, revenue management and web-marketing. For example, in Hungary it was reported that BA degrees in tourism were sufficient for entry into occupations such as revenue manager or sales manager but that employers would then provide further, specialised training in-house post-recruitment. In the case of an international hotel chain, this included two types of training in revenue management: level one, for all hotel managers; and level two for those managing multiple hotels and involved in strategic planning.

Third, many of the large employers have created internal career paths that employees can follow leading to these occupations.

Fourth, in many countries (e.g. Estonia, Latvia) it was reported that there is no particular shortage of graduates completing courses of education that provide the necessary commercial and business management skills. However, the tourism sector often struggles to attract such graduates into commercial manager occupations, in part due to the perceptions of low salaries and/or poor working conditions.

Fifth, there is a growing trend to provide graduates that have both the necessary commercial management skills and knowledge of the tourism sector. Indeed, there are now many more courses of higher education that are specifically focussed on business management in the tourism sector. Such courses provide the necessary professional skills, as well as good knowledge of tourism. For example, some university tourism programmes in Italy (classes L15 and L49) specifically prepare graduates for occupations in "specialists in the marketing of goods and services". Similarly, in Bulgaria, there are ten accredited universities that offer MA programmes in Management and Marketing of Tourism. In Slovenia, the University of Primorska's Faculty of Tourism Studies has made commercial management the central part of its Bachelors' degree in Tourism Enterprise Management and its Masters' degree in Tourism. In France, it was reported that some private institutions of higher education in business or tourism were best placed to provide education aligned to the needs of employers; this was because they were more likely than public institutions to provide internships and periods of work experience abroad, better tuition in foreign languages, better financial and human management skills and a better alumni network.

Last, there are some areas of new and emerging skill needs which are often best met by short training courses for those in employment, rather than through degree programmes. This includes know-how in online positioning and strategic marketing, use of new technologies, communication of organisational identities and ability to edit texts for social media. However, there are many instances of degree programmes (e.g. in Slovenia) incorporating modules in skills such as e-business, e-tourism and global networks, quality management in tourism, and strategic hotel management.

The boxes below offer some examples of the routes into commercial manager occupations in different Member States.

### **Austria**

Within Austria, occupational profiles based on labour market requirements specify the knowledge and skills that have to be provided by any apprenticeship and without which the individual cannot enter the stated occupation. Several of the commercial manager occupations are the subject of occupational profiles.

For example, the occupation of "Tourism commercial clerk" requires entrants to complete a state-regulated course of vocational education at a VET college. This requires either 3 years of vocational education at a middle vocational college and training with practice unit or 5 years of vocational education at a higher vocational college and training with practice unit.

### **Czech Republic**

Hotel chains, tour operators and travel agencies enable their commercial managers to update their skills by making use of training provided by the Czech Association of Hotels and Restaurants or the Czech Association of Travel Agencies, provided that they are members of those bodies.

### **Finland**

Polytechnic degrees, such as Bachelor and Master of Hospitality Management (Polytechnic), provide a large set of competences in commercial management. At Polytechnic level, students can study hotel and restaurant sector, business management of hotels and restaurants, business management in tourism as well as production and management of tourist services. Polytechnic Degrees include a compulsory work-related learning, e.g. on-the-job training or project work commissioned by employers.

### **France**

In general, commercial manager occupations in the tourism industry positions require at least a level 5 degree plus +1 years' experience in the field. There are several paths to enter these occupations, starting either with a VET qualification or a higher education qualification, such as:

- Business school / Tourism Business School / Hotel business school / University with specialisation in revenue, sales, marketing, communication - undertakes internships in the tourism sector to acquire the market knowledge facilitating the recruitment.
- After several years of experiences and short courses on the job, progression towards commercial manger positions

Once in post, commercial managers usually require initial professional training, in generic business techniques and sector-related knowledge, an important part of which is dedicated to implementation of techniques or use business instruments.

### **Germany**

The German Chamber of Commerce and Industry (DIHK), through its training provider DIHK Education Ltd. (DIHK Bildungs-GmbH) offers certificated courses for certain specialist commercial manager occupations including:

- E-tourism manager
- Specialist for business travel management
- Specialist for business travel organisation

### **Hungary**

Marketing Manager is a regulated profession and the regulation requires at least a secondary-level vocational qualification. However industry representatives report that the entry requirement into this occupation is mostly linked to a higher education BA degree in business, management, economics or tourism.

### **Romania**

"Manager in Tourism Activity" is a classified occupation and a regulated profession for which there are specific training requirements. These include: higher education degree, knowledge of English language, training in "management of tourism activity" (level 3 qualification requiring 240 hours of theoretical training and 480 of practical experience). Two years of work experience are also required.

### **United Kingdom**

The Institute of Travel Management's training for members to better their companies and develop their own careers. With innovative, industry-leading education programmes, ITM and GBTA Europe (Global Business Travel Association) equip business travel and meetings professionals with the know-how they need.

One of the core aims of ITM Education is to invest in the future of the business travel industry. ITM collaborates with Brighton University to provide students with a degree in Travel Management including an industry placement with ITM's key members. The newly created GBTA Academy offers education programs to advance personal and professional growth. The Fundamentals of Business Travel Management is GBTA Europe's starter course on the basics of business travel management. GBTA Europe also offers the Global Leadership Programme (GLP) in partnership with the Wharton School (University of Pennsylvania, USA).

### **7.2.2 Summary**

The table below summarises the main skills required of commercial managers, the relevant qualifications for entry into the occupations, key skill trends and skill gaps, and the performance of the system in providing the skills needed for these occupations. Where possible, information is related to ISCO/ESCO.

<b>Commercial manager occupations</b>	
Occupations	<ul style="list-style-type: none"> <li>• Revenue manager</li> <li>• Sales manager</li> <li>• Marketing manager</li> <li>• Web-marketing manager</li> <li>• Yield manager</li> <li>• Distribution manager</li> <li>• Pricing manager</li> <li>• Promotion / Communication manager</li> <li>• Travel manager/buyer (for a corporate customer)</li> </ul>
Main skills demanded by employers	<ul style="list-style-type: none"> <li>• Professional and business skills: finance, marketing, sales, management</li> <li>• Digital skills</li> <li>• Soft skills: multicultural skills, interpersonal skills</li> <li>• Language skills: particularly English, but other languages in certain regions/countries</li> <li>• Knowledge of the tourism sector</li> </ul>
Relevant education or qualifications	<ul style="list-style-type: none"> <li>• Either: Degree in finance, economics, business management, marketing or IT</li> <li>• Or: Tourism management degrees (with modules in finance, business management, marketing, etc.)</li> </ul>
Key trends / skill gaps	<ul style="list-style-type: none"> <li>• Demand is continuing to rise in line with the growth of the tourism sector.</li> <li>• Demand from SMEs is increasing in line with the need for all tourism businesses to offer more professional service, have an on-line presence and digitise their operations.</li> <li>• Most entrants have degrees in finance, economics, business management, marketing or IT</li> <li>• Degrees in tourism management can be an entry route but such graduates usually require additional training once in employment, e.g. in finance, IT, marketing</li> <li>• Many large employers (e.g. hotel groups) have created internal career paths into/within these occupations</li> <li>• New skills needs and new niche occupations are emerging, particularly relating to on-line marketing and sales, promotion via social media, customer self-service, etc.</li> </ul>
Performance of the system	<ul style="list-style-type: none"> <li>• There is no particular shortage of graduates with the necessary commercial and business management skills.</li> <li>• Tourism sector struggles to attract and retain such graduates due to the (perception or reality) of low salaries and/or poor working conditions.</li> <li>• Some Member States suffer from the out-migration of recent graduates with relevant degrees and/or young people that move abroad to study these subjects.</li> <li>• Employers tend to report that "traditional" tourism degrees are overly-theoretical at the expense of practical training and real-life experience.</li> <li>• Tourism degrees (particularly those in Tourism Management) are increasingly including modules that provide the necessary business/management skills for graduates to enter these</li> </ul>

### **Commercial manager occupations**

occupations.

- More degree programmes need to incorporate specialist modules relevant to emerging skills needs for these occupations, such as e-business, e-tourism, quality management in tourism, strategic hotel management.
- There is a need for more provision of continuing professional development for those in employment, particularly relating to these emerging skills needs.

## **7.3 Accommodation managers and operatives**

### **Accommodation managers and operative occupations**

- Camping ground manager
- Customer experience manager
- Entertainment manager
- Executive housekeeper
- Hospitality establishment manager
- Rooms division manager
- Conference and banqueting manager
- Concierge
- Entertainment officer
- Housekeeping supervisor
- Night auditor
- Receptionist

#### **7.3.1 Skill needs and provision**

As noted earlier, employees in the accommodation sector generally have lower levels of education than employees in other sectors.

The nature of the work in this sector means that vocational training tends to be most important in terms of providing employers with a stream of skilled recruits. Across the Member States, training for management positions is more typically provided by specialist hotel schools or colleges of tourism and hospitality, than by business schools. Moreover, vocational qualifications can often be sufficient for individuals to reach management level, provided that the necessary experience is gained. For example, Slovenia offers a national vocational qualification in "Manager of a Small Hotel". The UK's Institute of Hospitality provides another example (see the box below).

## United Kingdom

The Institute of Hospitality has developed a unique set of qualifications which provide industry-focused training in management and leadership for the UK hospitality and tourism industries. The qualifications provide flexible units of Continuing Professional Development (CPD) which build up into nationally-accredited qualifications. The qualifications form part of the Sector Qualifications Strategy for People 1st. The Institute has developed two vocational qualifications which in England, Wales and Northern Ireland have been accredited by Ofqual with reference to the National Qualifications Framework (NQF). The two qualifications are:

- Level 3 Diploma in Hospitality and Tourism Management; and
- Level 4 Diploma in Advanced Hospitality and Tourism Management.

It was reported in several Member States (e.g. Czech Republic, Estonia, Greece) that the education and training system is generally effective in providing the professional and practical skills required of accommodation occupations. Where such skills are not provided by formal education system, employers are generally able to provide them on-the-job. A greater concern for employers is often the lack of soft skills, such as interpersonal and communication skills, professional ethos and customer service skills, as well as language skills; a continuing challenge for education and training systems is to incorporate the development of such skills into the relevant curricula.

There tend to be relatively few positions that require the applicant to have a degree. This is in part because the sector is dominated by small enterprises that are often family-run. In such enterprises, many managers will undertake a range of roles, requiring both high and low levels of skills.

Moreover, there is evidence that having a degree, even in a subject related to accommodation and catering, is often of limited benefit to an individual's career progression. For example, a study by the French Hotel Industry Federation (FAFIH)<sup>44</sup> has found that 62% of students with a diploma in accommodation or catering at levels 6 or 7 do not work in the sector. The same research has found that there are very limited salary differentials between graduates and other employees and between those with a diploma in accommodation or catering and those with diplomas in other subjects. In Italy, Master's degrees in subjects such as Hospitality Management or Residential Tourism Management can provide access to management occupations. However, it is equally possible to reach such positions by completing a tourism course in an upper secondary school (i.e. Professional or Technical School for Tourism) followed by employment in lower-level occupations with additional learning on-the-job.

Internal progression into management positions is often the norm. Such progression would typically take place from operational positions after several years of experience, as well as training on-the-job or continuing professional development. However, it was reported in the UK and elsewhere that there is a need for more structured development pathways into senior management positions; as a result, the UK has faced skill shortages, which have often been filled by recruitment from other countries.<sup>45</sup> In some countries, there may also be a need for new forms of training provision that are more accessible to SMEs and family-run businesses. This need has been recognised in Italy, where new courses have been developed that serve establishments such as "albergo diffuso" – a form of accommodation in which rooms are spread over an entire village or town.

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<sup>44</sup> Organisme paritaire collecteur agréé du tourisme, de l'hôtellerie, de la restauration et des activités de loisirs

<sup>45</sup> People 1<sup>st</sup> (2013), State of the Nation.

Most graduate positions tend to be with large hotel chains. Such companies will often recruit many of their staff directly from specialist schools of hotel and tourism. These same chains would typically also offer in-house training for managers in order to facilitate their progression within the company.

In only a few countries do any accommodation occupations have the status of regulated profession or require regulated courses of training to be undertaken. "Hotel and restaurant managers" is a regulated profession in Lithuania. In Austria, two accommodation occupations require regulated vocational education to be undertaken: "Tourism commercial clerk" requires a state-regulated course of three years of vocational education to be undertaken at a middle vocational college as well as training with a practice unit; "Operational services commercial clerk" requires a three-year dual vocational training apprenticeship to be undertaken with a focus on the hotel and hospitality sector (of which 20% in a vocational school and 80% in a company), which is regulated by the Austrian Chamber of Economy (WKO).

Managers might also need a licence to operate the hotel in some countries, such as Romania and Cyprus (see the boxes below). However, Greece has recently relaxed the requirement which made the approval of hotel licences dependent on the hotel manager holding certain qualifications.

### Cyprus

The role of hotel manager is one of the few occupations for which certain minimum requirements apply in Cyprus, even if it is not a regulated profession. In order to obtain a license for operation of a hotel, a hotel manager needs to be appointed who, depending on the size and category, should have a minimum number of years of professional experience together with a degree in hospitality management. Managers of 2-5 star hotels need to hold, as a minimum, a diploma or degree at a post-secondary level. This may be from a higher education institute or from one of the public or private post-secondary professional training programmes. For 1-star hotels, a general secondary level degree and two years' experience are sufficient. Knowledge of one foreign language is also mandatory.<sup>46</sup>

### Romania

According to the Law<sup>47</sup>, the operational management of tourism accommodation (and travel agencies) must be provided by an individual who holds a licence in the field of tourism ("Brevet de turism") or a certificate of completion of a training course in management, issued by an authorised training provider or a Bachelor's or Master's degree in Tourism.

The licence is a public certificate attesting to professional competences in the area of tourism. It can be issued upon request to: (i) any person graduating from an accredited faculty that includes a training course on hotel management and holds a foreign language competency certificate; (ii) any person graduating from a high school with a *baccalaureate* diploma, who has passed a course on hotel management and holds a foreign language competency certificate. There are several short-term formal courses of training leading to the issuing of the tourism licence.

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<sup>46</sup> Hotel and other tourist accommodation operation (Λειτουργία Ξενοδοχείων και άλλων Τουριστικών Καταλυμάτων):

<http://www.businessincyprus.gov.cy/mcit/psc/psc.nsf/All/7A9C056C69C462A6C2257A8C002D21E7?OpenDocument>

<sup>47</sup> HG 1866/2010.

There are no specific educational requirements for the occupation of Camping ground manager in any Member State, except in Romania. Depending on the responsibilities, employers may require entrants to hold a higher education degree if the job involves commercial/professional management responsibilities. In other cases, completion of a course of vocational training in a related area may be considered sufficient. In Romania, the occupation of Camping ground director is regulated in regard to professional qualifications and has specific training requirements; the "Camping ground director" certificate can be gained after a course of education at level 3. The seasonal nature of campsite accommodation means that employment is often temporary, which does not lend itself to training the workforce. However, France has piloted an approach that combines permanent employment with periods of training for staff of campsites.

### France

Due to the seasonality of campsites, seasonal workers represent an important part of the labour force in these establishments. In order to secure the employment of those seasonal workers and increase their qualifications, the mechanism "Employment-training permanent contract" (Contrat à durée indéterminée Emploi-Formation) was tested during 2012-2014 in four regions before being included in the national professional branch contract of the camp sites in 2015.<sup>48</sup> This mechanism enables the employers to hire a seasonal worker on a permanent contract with a threshold of 1607 hours a year, divided into training period and working periods. The training periods must be around 1000 hours over 5 years. As an example, working period from March to October, training in November, holidays in December, and training/holidays in January/February. The training periods aim mainly at obtaining the Professional Qualification Certificates of the Branch, such as "qualified maintenance worker" or "resort executive manager".<sup>49</sup> The Authorised joint Collection Body of the Branch, Agefos-pme" finances an important part of the training periods, with the contribution of public authorities and the establishments.

In general, accommodation operative roles tend not to require the individual to acquire qualifications in advance of commencing employment. At most, a level 5 qualification may be required, although many employers do not even require that. For example, research in France has found that 64% of recruits did not receive any initial training specific for their position.<sup>50</sup> In those cases, employers prioritise soft skills, flexibility and aptitude, rather than formal qualifications and learning is provided on-the-job. Very often, individuals will be recruited into apprenticeship positions which combine employment with learning on-the-job and classroom-based training. In many Member States, the VET system is effective in training large numbers of individual in accommodation operative roles. Evidence from the same research in France suggests that work-based learning (i.e. apprenticeships or block-release training) is more effective than class-room based learning in enabling trainees to develop a career in the sector.

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48 Accord IDCC 1631 - Accord du 18 janvier 2012 relatif à la pérennisation de l'emploi et à la formation professionnelle.

49 Signature des premiers CDI Emploi-Formation dans la branche de l'Hôtellerie de plein air, Agefos PME, 26/11/2013

50 Insertion des jeunes dans l'hôtellerie restauration, Rapport d'études, Fafih, 2010, p.28.

Member States vary in the extent to which they have defined occupational standards for accommodation operative roles have been defined in a number of Member States. Those that have include Estonia, as well as Austria where entry into the role of "Hotel and Hospitality Assistant" requires education and training that is regulated by the Austrian Chamber of Economy. Greece has also developed specific occupational profiles which describe the main skills and competences required of accommodation operatives (see box below).

### **Greece**

EOPPEP (National Organisation for the Certification of Qualifications and Vocational Guidance) has developed occupational profiles which describe the main skills and competences required of accommodation operatives, such as hotel receptionists<sup>51</sup>, housekeeping supervisors<sup>52</sup> or linen room and laundry attendants.<sup>53</sup> The profiles identify possible entry routes into these occupations based on a combination of training courses and on-the-job experience. They specify the skills required for key functions (including reading and writing, foreign languages, basic computer literacy, marketing, accounting, management). Routes into the occupations include a tourism-related qualification from a secondary or post-secondary vocational training institute, together with practical experience in relation to key skills considered as a key for the specific occupation. A general level of education in combination with practical experience that leads to the acquisition of the relevant skills is also a possible route to the professions. There is also a large number of vocational training programmes – particularly in the private sector – that lead to certifications in relation to some of the accommodation operatives occupations (e.g. hotel receptionist, housekeeper).

### **7.3.2 Summary**

The table below summarises the main skills required of accommodation managers and operatives, the relevant qualifications for entry into the occupations, key skill trends and skill gaps, and the performance of the system in providing the skills needed for these occupations. Where possible, information is related to ISCO/ESCO.

<b>Accommodation managers and operative occupations</b>	
Occupations (ESCO Sectoral Reference Group Hospitality and Tourism)	<ul style="list-style-type: none"> <li>• Camping ground manager</li> <li>• Customer experience manager</li> <li>• Entertainment manager</li> <li>• Executive housekeeper</li> <li>• Hospitality establishment manager</li> <li>• Rooms division manager</li> <li>• Conference and banqueting manager</li> <li>• Concierge</li> <li>• Entertainment officer</li> <li>• Housekeeping supervisor</li> <li>• Night auditor</li> <li>• Receptionist</li> </ul>
Main skills demanded by employers	<ul style="list-style-type: none"> <li>• Hotel management</li> <li>• Business administration</li> <li>• People management</li> </ul>

<sup>51</sup> EKEPIS, Certified professional profile, Hotel Receptionist: [www.eoppep.gr/images/EP/EP\\_52.pdf](http://www.eoppep.gr/images/EP/EP_52.pdf)

<sup>52</sup> EKEPIS, Certified professional profile, Housekeeping Supervisor: [www.eoppep.gr/images/EP/EP\\_20.pdf](http://www.eoppep.gr/images/EP/EP_20.pdf)

<sup>53</sup> EKEPIS, Certified professional profile, Linen Room & Laundry Attendants, [www.eoppep.gr/images/EP/EP129.pdf](http://www.eoppep.gr/images/EP/EP129.pdf)

<b>Accommodation managers and operative occupations</b>	
	<ul style="list-style-type: none"> <li>• Customer service/customer relations</li> <li>• Interpersonal skills, intercultural skills</li> <li>• Foreign language skills</li> </ul>
Relevant education qualifications or	<ul style="list-style-type: none"> <li>• Degree in hotel / tourism management (only for senior positions, e.g. hotel manager)</li> <li>• Vocational training in the field of hospitality, e.g. 2-3 years (customer experience manager, entertainment manager, conference and banqueting manager)</li> <li>• Further education in business administration specialist in hotel management (junior management positions)</li> <li>• Basic vocational training, e.g. 1-year (concierge, housekeeping supervisor, night auditor, receptionist)</li> <li>• In-house/on-the-job training (often sufficient for some occupations, e.g. some camping ground managers)</li> <li>• A few occupations in some countries are regulated professions and thus have clearly defined qualification and entry requirements.</li> </ul>
Key trends / skill gaps	<ul style="list-style-type: none"> <li>• Few positions require the applicant to have a degree (mostly only senior management roles and/or in large hotel chains).</li> <li>• Internal progression into management is the norm; this mostly requires learning on-the-job but can be enhanced by work-based learning and continuing professional development.</li> <li>• Managers (particularly in SMEs) require a diverse skillset, as they often undertake a range of roles – often going beyond the skillset provided by any initial (occupation-specific) training.</li> <li>• Growth in demand for skills, knowledge and awareness related to accessible tourism: reflects growth in the market for accessible tourism and legislation/public policy</li> <li>• Most accommodation operatives do not need qualifications in advance of recruitment; employers prioritise soft skills, flexibility and aptitude.</li> <li>• Levels of education of accommodation employees are lower than in other sectors in nearly all EU Member States.</li> <li>• Temporary and seasonal employment limits the acquisition of skills for many accommodation employees.</li> </ul>
Performance of the system	<ul style="list-style-type: none"> <li>• In some countries, the poor performance of the school education system means that accommodation employees (particularly operatives) have a very low level of education. This means that remedial action is often needed for such employees to progress in their careers and/or for the sector to improve its quality and productivity.</li> <li>• The VET system is generally effective in providing the professional and practical skills required. Where such skills are not provided by formal education, employers are usually able to provide them on the job.</li> <li>• Education and training systems are generally effective in providing qualifications for regulated professions.</li> <li>• A challenge for education and training systems is to incorporate the development of soft skills (interpersonal, communication professional ethos and customer service) into relevant curricula.</li> <li>• There is a need to expand the provision of continuing professional development and work-based learning in order to create more structured career pathways into/within management positions.</li> <li>• There is a need for more innovative and flexible provision of</li> </ul>

### **Accommodation managers and operative occupations**

- continuing professional development and work-based learning, particularly for SMEs and seasonal or temporary workers.
- Need for greater provision of training in accessible tourism within tourism degrees or vocational training courses
  - Need for greater in-house provision of introductory-level training in accessible tourism for frontline staff and managers

## **7.4 Meetings, incentives, conferences, exhibitions**

### **Meetings, incentives, conferences and exhibitions (MICE) occupations**

- Events Manager
- Project Manager Events
- Steward/stewardess

#### **7.4.1 Skill needs and provision**

Trade fairs, conferences, congresses and events have been a significant growth industry across the EU within the last decade. As a result, specific occupations in the area of event management are recognised in some countries and thus also by the education and training system. However, demand is unevenly spread, with the sector remaining undeveloped in some countries or regions. As a result, there is wide variety in the entry routes – and thus also in the education and training required - for these occupations.

In some countries (e.g. Belgium, Croatia, Finland), there are no formal requirements in terms of education, qualifications and experience. In these countries, a common entry route is via degrees in related subjects, such as service management (Finland).

By contrast, there is a clear entry route into some MICE occupations in other countries, through regulated courses of professional training. For example, both Austria and Germany require entrants into various event management roles to have undertaken formal training courses of three years or more that combine vocational training with practical work experience (see boxes below).

In some countries, there is quite limited provision of education and training courses specifically focussed on preparing people for careers in these occupations. This reflects the fact that in some countries (e.g. Czech Republic, Greece) the MICE industry, although growing, lacks the critical mass necessary to sustain specialised education and training. In these countries, entry into and progression within MICE occupations is very often based on practical experience combined with (often limited) on-the-job training.

Those working in steward/stewardess roles for MICE businesses are very often recruited on a temporary and part-time basis, particularly where demand for their services is uneven. Entrants are thus very often recruited through agencies or may be university students working part-time. In those instances, training is often provided on -the-job and is not certified. In some cases, no training is provided at all. Unlike event management occupations, which are regulated in some countries (e.g. Austria, Germany), the role of steward/stewardess is not regulated in any country.

The boxes below offer some examples of the routes into event management occupations in different Member States.

### Austria

The occupation of "Event technician" is an occupation for which education and training is regulated by the Austrian Chamber of Commerce. Entry into this occupation is via a 3-year dual vocational training apprenticeship undertaken in a vocational school (20%) and a company (80%).<sup>54</sup>

### Cyprus

Relevant training for MICE occupations is available at different levels. At the tertiary level, degrees in Hotel, Tourism and Event Management (European University) or in Tourism, Leisure and Events Management (Nicosia University) include specific training in event management. Relevant courses are also provided in most other hospitality management programmes, including the programme of the Higher Hospitality Institute. In addition, specific training is provided in the context of the adult education and work-based training programmes (multi-enterprise or single-enterprise).

### Germany

Entry into a number of occupations in this field is regulated either by the state or by the Chamber of Commerce.

"Incentive and event manager" is regulated by the Chamber of Commerce. It requires basic vocational training in the field of events, which is provided either by a 3-year dual vocational training apprenticeship in a vocational school and company or by a 3-year training programme in vocational college with practical work experience or by a Bachelors' degree (including either one semester of work experience or 50% of study undertaken within a company). It also requires advanced training certified by the Chamber of Commerce and Industry and specific to the occupation of "incentive and event manager".

"Tourism and event manager assistant" is regulated by vocational colleges which provide 3-year training programmes with practical work experience.

The occupation of "Event clerk" is an occupation for which education and training is regulated by the Chamber of Commerce. Entry into this occupation is via a 3-year dual vocational training apprenticeship undertaken in a vocational school and a company.

There is the possibility for event clerks to progress into the occupation of "Commercial clerk for events". This too is an occupation for which education and training is regulated by the Chamber of Commerce. In addition to the event clerk qualification, it is necessary to undertake advanced professional education/training. Employees with relevant vocational training and appropriate experience can complete a professional certification course (this is not mandatory) to take the commercial clerk exam leading to the qualification necessary to working in this occupation.

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<sup>54</sup> For a description of the Austrian apprenticeship system, see Federal Ministry of Economy, Family and Youth (2012), Apprenticeship Dual Vocational Education and Training in Austria, Modern Training With a Future

## Greece

While there are few specific programmes for the MICE sector, graduates of the public sector higher education tourism administration/studies programmes have in most cases received some theoretical training relevant to the specific occupation. Relevant training is also provided by the vocational training institutes (post-secondary level) as part of the specialisation "Tourism Management and Economics Executive". Related short-term training courses are also available through the adult/continuous education courses on "meetings/conferences organisation" that are offered by a number of private sector training providers.

### **7.4.2 Summary**

The table below summarises the main skills required of MICE occupations, the relevant qualifications for entry into those occupations, key skill trends and skill gaps, and the performance of the system in providing the skills needed for these occupations. Where possible, information is related to ISCO/ESCO.

<b>MICE occupations</b>	
Occupations	<ul style="list-style-type: none"> <li>• Events Manager</li> <li>• Project Manager Events</li> <li>• Steward/stewardess</li> </ul>
Main skills demanded by employers	<ul style="list-style-type: none"> <li>• Business management and administration</li> <li>• Logistics/Event management</li> <li>• Organisational/Logistics/Event management skills</li> <li>• Customer service</li> <li>• Interpersonal and communication skills</li> <li>• Foreign language skills</li> <li>• Practical experience</li> </ul>
Relevant education qualifications or	<ul style="list-style-type: none"> <li>• In some countries, clear entry routes via regulated courses of vocational training with practical work experience.</li> <li>• In other countries, no formal qualification requirements.</li> <li>• Degrees not usually a formal requirement, although they can facilitate entry into and progression within management roles.</li> <li>• Steward(ess) roles often require no qualifications.</li> </ul>
Key trends / skill gaps	<ul style="list-style-type: none"> <li>• Significant growth in demand in recent years, which is expected to continue across Europe.</li> <li>• Demand for MICE occupations is unevenly spread across Europe, with the sector undeveloped in some countries or regions.</li> <li>• Emergence of increasingly specialised occupations, e.g. event technician, incentive and event manager</li> </ul>
Performance of the system	<ul style="list-style-type: none"> <li>• Limited provision of education and training course specifically focussed on preparing people for these occupations (in many countries).</li> <li>• Entry and progression is very often based on practical experience combined with (often limited) on-the-job training.</li> <li>• Formal and structured training mostly exists only where occupational profiles are regulated.</li> <li>• Entry into steward(ess) roles is often via agencies, which does not facilitate the provision of training.</li> <li>• Training for steward(ess) roles is typically provided on the job (if at all) and is not usually certified.</li> </ul>

## 7.5 Destination management

### Destination management occupations

- Destination manager
- Tourism promotion/communication agent
- Tourism promotion/communication manager
- Tourist information agent
- Tourism development officer
- Sustainability manager
- Tourist guide

#### 7.5.1 Skill needs and provision

Destination management involves strategic planning for tourism in a given locality, which brings together different public and private players around a set of common objectives and co-ordinated activities. The aim is to "transform a set of attractions, activities and services into a cohesive and compelling travel experience, or Destination".<sup>55</sup>

This group of occupations includes destination managers, whose role has been defined by ESCO as to "manage and implement national/regional/local tourism strategies (or policies) for destination development". Destination managers and other occupations within this group might be employed by public bodies, tourist authorities or "destination management companies" (DMCs) which deliver services such as events, activities, tours, transportation, program logistics, often on behalf of tourism businesses and/or tourist authorities. Although the concept of destination management is relatively recent, this group includes several long-established occupations, such as tourist guide. This group includes occupations with quite diverse requirements in terms of skills, knowledge and experience required. As result, the education and training required and the entry routes into these occupations are quite diverse.

There are no specific education and training requirements for destination managers in any of the Member States; requirements tend to vary from employer to employer and/or from country to country. In none of the Member States is the occupation a regulated profession. Even in countries with well-differentiated routes into most skilled occupations, such as Austria and Germany, there is no predetermined or state-regulated educational and training pathway into this occupation. Evidence from across all Member States suggests that employers usually require entrants into destination management jobs to have a university degree plus several years' experience. Degrees or diplomas in Tourism or Tourism Management are a very common route. For example, in France the traditional entry route into destination management roles has been a Level 5 diploma in Tourism, generally the Higher Technician Diploma. However, many entrants have degrees in other relevant disciplines, e.g. related to commercial management, sales or marketing.

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<sup>55</sup> <http://www.solimarinternational.com/tourism-development-consulting/destination-management>

Similarly, in nearly all Member States, none of the occupations related to the promotion, communication and development of tourism are regulated or have any specific educational requirements. Hungary is an exception in that the occupation of tourism promotion manager or tourism information agent ("turisztikai szervező értékesítő") is a regulated profession. In other Member States, information agent roles can typically be entered upon completion of a course of vocational education or training.

A significant development in recent years has been the change in the skills needed – and thus the education and training undertaken – for entrants into management/agent roles related to tourism promotion and communication. Many such roles now require much more sophisticated skills in IT and on-line communications in addition to knowledge of and experience in the tourism sector. In addition, new roles are emerging. The box below provides an example from France.

### **France**

The Aquitaine region in France has defined a new occupation of "Animateur Numérique du territoire (ANT)" ("Local/Regional Digital Promoter"). This was created in 2010 when the region realised that more than 50% of local enterprises did not have an online presence. The role of ANTs is to support enterprises in developing their online activities and communications, including via social media. There is no specific higher education provision for such roles, although vocational training is available for people already in tourism promotion roles and ideally with a level 5 qualification in tourism, e-tourism, e-marketing or ICT. In 2012, more than 500 persons were trained as ANTs, which highlights the growing demand from employers for this role.<sup>56</sup>

The role of Sustainability Manager has emerged in recent years in response to the drive for tourism to become more sustainable. Although growing in importance, the role remains uncommon in many Member States. As a result, specific entry routes – and their associated educational requirements – have not yet emerged. France is an exception in that several university diplomas now prepare students for this occupation. In many Member States, it is more common for a sustainability dimension to be incorporated into other tourism management roles; the necessary education and training may be integrated in tourism degrees and/or provided via additional short courses that are often not accredited. An example from Romania is presented below.

### **Romania**

The Association for Protected Areas (ProPark) organised a short training seminar on 'Rapport with communities regarding the administration of natural protected areas' (2012). It aimed to increase the capacity of custodians and protected area administration staff to communicate with communities. This was the first training session of this kind in Romania. It responded to the need to prepare specialists in assisting local communities to be actively involved in administrating natural protected areas.

Tourist Guide is an occupation that is regulated in several Member States, as shown in the table below. In these countries, entry to this occupation is reserved for individuals

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<sup>56</sup> Carrières Tourisme, Quels métiers choisir?, e-book, Tourmag, septembre 2012 ; p.148

holding specific professional qualifications and having undertaken specific courses of training. In France, tourist guides are not regulated, except the specific case of "Guides-conférenciers", which are professionals that provide guiding services at specific locations of historical or artistic importance.

<b>Member State</b>	<b>Examples of tourist guide as a regulated profession</b>
Croatia	Tourist Guide (Turističkih Vodiča)
France	Conference Guide (Guide-conférencier)
Greece	Tourist Guide (Xenagos)
Hungary	Tourist Guide
Italy	Tourist Guide (Guida turistica)
Italy	Courier/Interpreter-guide (Accompagnatore turistico)
Poland	Tourist Guide (Przewodnik Turystyczny)
Slovenia	Tourist Guide (Turistični vodnik)
Slovenia	Local Tourist Guide in locations of special touristic interest (Turistični vodnik turističnega območja)
Spain	Tourist Guide (Guía de turismo)

Source: CSES (2012), *Providing the inventory of the existing reserves of activities linked to professional qualifications in 13 EU Member States and assessing their economic impact; Report for DG Internal Market and Services, Legal Inventory – Annex H of Final Report*; except Croatia and Hungary (source: CSES research)

In contrast, the occupation of tourist guide (except mountain guides) is not regulated in Denmark, Finland, Germany, the Netherlands and UK, amongst other countries. The profession of tourist guide has been deregulated in some countries. In Portugal, a number of tourist guide occupations were deregulated by Decree-Law No. 92/2011 of 27 July. Access to occupations has been facilitated by the elimination of mandatory training courses, certificates of professional competence and professional identity cards. The deregulated occupations include Regional Tourist Guide, Tourist Escort, Tourist courier and Driver Guide. Similarly, in the Czech Republic the profession of tourist guide became unregulated in 2008, with no professional or language qualification requirements. In Italy, the professions of travel agent, tourist guide and courier/interpreter-guide have been partly deregulated at national level but access to these professions may still be regulated at local/regional level.<sup>57</sup>

The boxes below offer some examples of the routes into destination management occupations in different Member States.

### Bulgaria

The secondary education system offers courses in Manager of Tourist Agency majoring in Rural Tourism (BQF/EQF 3), which enables the acquisition of competences relevant to destination management. The Tourism, Management of Tourism, Management of Cultural Tourism, Management of Agricultural (Rural) Tourism, Management of Alternative Tourism subjects offer opportunities for training of specialists in Destination Management (BQF/EQF7). Another common route into destination management occupations is via degrees in Geography of Tourism.

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<sup>57</sup> CSES (2012), *Providing the inventory of the existing reserves of activities linked to professional qualifications in 13 EU Member States and assessing their economic impact; Report for DG Internal Market and Services, Legal Inventory – Annex H of Final Report*

## **France**

There are several educational paths that offer entry into the profession of "Guide-conférencier", which is regulated under French law relating tourism. They include:

- Level 5 university degrees (Licence Professionnelle) "Guide-conférencier"
- Level 7 university degrees (Masters) with the validation of three compulsory modules for Guide-conférencier
- Recognition of Work experience (VAE)
- Recognition of Higher Education (VES), which provides European recognition and thus transnational mobility

## **Greece**

Tourism development officers, particularly those in the public sector, have traditionally been graduates of the National Centre for Public Administration - Tourism Economy and Development specialisation. Education via this route was intended to prepare people for employment in public administration (national and regional/local level) covering tourism development and planning positions. However, this programme no longer exists. As a result, the most typical route into tourism development officer roles is via an undergraduate degree in tourism studies from the higher education institutes or a post-graduate degree from the universities. Graduates of these programmes have the relevant professional rights to fill such positions.

## **Hungary**

The occupation of turisztikai szervező értékesítő is a regulated profession requiring a professional qualification which is gained via a formal course of training. These courses are mostly vocational secondary-level courses run by training institutions. The training within the school system consists of 2 years or outside the formal school system 960-1440 hours.

## **Italy**

Tour Guide is a regulated profession requiring a professional qualification gained from a formal course of training and for which access is regulated by the Regions or Provinces. The Law 97/2013, as amended by the "Decree culture 2014", made the qualification of tourist guide valid throughout Italy. An exception has been made for some historic, artistic or archaeological sites, identified by ministerial decree, for which a specific further qualification is needed.

The minimum requirements to enter the profession are:

- Being of age
- Diploma of upper secondary education
- Knowledge of at least one foreign language
- Attending a training course for Tour Guides.

The training courses are provided by regional or provincial authorities or by schools or vocational training institutions recognised by the local authority. After the preparatory course there is an exam, which comprises a written and an oral test, designed to assess knowledge of foreign languages and mastery of the fields of art, history, culture and natural resources related to the territorial area. The minimum level of knowledge of a foreign language is the B1 European rating scale.

To become a tourist guide the recommended educational path is grammar school "Liceo Classico", or else a technical school specializing in economics and tourism or a professional school in the service sector. To this must be added taking as exam preparation course and passing the final examination. A person with a degree from the Faculty of Literature with a specialization in art history or archaeology or the equivalent is qualified for the activity of tourist guide, subject to the test of knowledge of a foreign language and the territorial area concerned.

Those who hold a first and second degree in tourism or the equivalent are licensed for the activity of tourist guide if the curriculum includes courses in art history or archaeology (which are regulated differently from Region to Region); otherwise they can have the role of Tour Assistant.

### **UK**

Tourism officers can access training courses and seminars through key professional bodies such as the: the Tourism Management Institute (TMI) and the Tourism Society. Courses cover both general and specialist areas. Professional membership can also provide invaluable networking and other professional development opportunities. Tourism officers who work for local authorities may be able to access council training programmes in areas such as: funding applications; report writing; IT skills; personal development; presentation skills; networking. Private employers may fund training in a specialised area, as required by the demands of a particular project.

Most of a tourism officer's training is however gained on the job - through working with colleagues or by learning from the development of a specific project. Postgraduate tourism qualifications are also available and can help develop a particular career focus. The TMI runs a Postgraduate Certificate in Destination Management, which consists of three modules to be studied online, part-time, over the course of a year.

### **7.5.2 Summary**

The table below summarises the main skills required of destination management occupations, the relevant qualifications for entry into those occupations, key skill trends and skill gaps, and the performance of the system in providing the skills needed for these occupations. Where possible, information is related to ISCO/ESCO.

<b>Destination management occupations</b>	
Occupations (ESCO Sectoral Reference Group Hospitality and Tourism)	<ul style="list-style-type: none"> <li>• Destination manager</li> <li>• Tourism promotion/communication agent</li> <li>• Tourism promotion/communication manager</li> <li>• Tourist information agent</li> <li>• Tourism development officer</li> <li>• Sustainability manager</li> <li>• Tourist guide</li> </ul>
Main skills demanded by employers	<ul style="list-style-type: none"> <li>• Management/implementation of tourism strategies</li> <li>• Logistics/Event management</li> <li>• IT / on-line communication skills</li> <li>• Knowledge of the tourism sector</li> <li>• Local knowledge of tourism destinations</li> </ul>
Relevant education or	<ul style="list-style-type: none"> <li>• Destination managers: no formal entry requirements but a relevant university degree (e.g. tourism) is usually required</li> </ul>

<b>Destination management occupations</b>	
qualifications	<ul style="list-style-type: none"> <li>• Tourism management roles: tourism degrees or level 5 diplomas plus work experience</li> <li>• Tourist agent roles: level 5 diplomas in tourism</li> <li>• Tour Guides: relevant professional qualification (where Tour Guide is a regulated profession)</li> </ul>
Key trends / skill gaps	<ul style="list-style-type: none"> <li>• Destination management is a relatively recent concept but demand for skills is growing as destinations seek to raise the quality and diversity of their tourist offer</li> <li>• Uneven demand, with some (potential) destinations not yet acting strategically (and thus expressing lower demand for these occupations)</li> <li>• Emergence of new occupations, including niches</li> <li>• Sustainability Manager roles remain uncommon but are growing in importance and skill gaps are evident</li> <li>• Trend in some countries towards deregulation of Tour Guide as a profession</li> </ul>
Performance of the system	<ul style="list-style-type: none"> <li>• Opportunity/need for tourism education, particularly degrees, to give greater focus to destination management</li> <li>• Gap in educational provision for entry/progression in emerging and niche occupations, e.g. sustainability managers in the tourism sector, although sustainability is increasingly being offered within tourism degrees</li> <li>• Where Tour Guide is a regulated profession, the education system generally performs well in providing the formal skill requirements</li> <li>• Risk of de-skilling in countries where the profession of Tour Guide has been deregulated</li> <li>• Formal education for Tour Guides needs to be complemented by continuing professional development to assist progression, e.g. into strategic destination management roles</li> </ul>

## 7.6 Tour operators and travel agencies

### Tour operator occupations

- Tour operator manager/CEO
- Tourism contract negotiator/buyer
- Tourism product manager
- Tour/Holiday representative

### Travel agency occupations

- Travel agency manager/CEO
- Tourism product manager
- Travel adviser/consultant

### **7.6.1 Skill needs and provision**

This group of occupations falls within the overall category of service provider defined by Eurostat as "Travel agencies & other reservation services activities". Tour operators organise tourism packages for groups of people. They design, organise, promote, implement and evaluate package tour programmes that are subsequently sold through their network or through tourism/travel agencies. They thus tend to serve incoming tourists. Travel agencies are engaged in selling and arranging transportation, accommodations, tours, and trips for travellers. They thus tend to serve outgoing tourists.

Traditionally, there has been a clear distinction between companies that directly serve outgoing tourists (e.g. travel agencies), for example, by distributing holiday packages, and those that directly serve incoming tourists (e.g. tour operators) by creating tourist products. However, recent years have forced a change in this traditional ways of operating roles: intermediaries are tending to be bypassed, as providers can interact directly with consumers via the internet; ICT is providing new opportunities both for traditional players and (internet-based) newcomers to provide a wider range of services. The result is that the distinction between tour operator and travel agency is becoming increasingly blurred. (There are, however, exceptions, such as the Czech Slovak Republics, where travel agencies can only resell the products of tour operators and cannot develop their own products.) For that reason, the skill requirements and typical entry routes are broadly similar for similar occupations in each type of enterprise.

The changing nature of the industry is leading to changes in demands for skills and occupations. The increase in on-line sales and in customer self-service (e.g. around e-ticketing) is making some roles redundant, particularly support and administrative roles. These trends are creating a demand for new skills and new occupations. ICT skills are particularly in demand, with travel agencies and tour operators being the strongest adopters of ICT and e-business within the sector. Use of social media has become increasingly important as a new way for businesses to engage with customers, which is creating a demand for new occupations, such as web-marketing managers. At the same time, the need for human interaction remains essential in some roles, particularly at the high end of the market where the demand is for customised products and a high level of customer service; this is raising the demand for interpersonal and customer service skills.

The role of travel agency/tour operator manager/CEO usually requires a higher education qualification (often a subject such as tourism management or business administration specialising in tourism) plus some years of experience. In some cases, however, it is possible to follow a vocational training route into senior management positions, provided that sufficient relevant work experience is gained. For example, in Italy, the defined occupation of "imprenditore o responsabile di piccola agenzia di viaggio" (Travel agency manager) can be entered after a course of vocational training provided by a technical and professional school of tourism or a general vocational path in a business and economics school followed by a specialised tourism training programme.

Some Member States, such as Poland or UK, do not require managers to have specific qualifications. However, in others it is necessary for the manager (or another senior member of staff) to be certified. For example:

- Croatia: tour operators that sell directly to customers must possess a tourist officer leader certificate, which requires (at least) secondary education, language skills and at least two years' experience.
- Czech Republic: a licence is required to operate as a tour operator, which is acquired after the completion of specific courses of formal and informal education with concrete specification of possible levels and types of the education and training (Act no. 455/1991 Coll., on Trades (Trade Act), qualification level 4).
- France: the individual requesting certification must be registered with the national tourism agency, Atout France; this requires a qualification in tourism at level 5 or 6 recognised by the National Register for Professional Certifications or professional experience of one year or more in the tourism industry.
- Italy: In order to open a tour operator or a travel agency, a license as 'Technical Director of Travel Agencies' issued by the Province or Region is needed. A Technical Director's license can be attained through an examination and is recognized by FIAVET (Federazione Italiana Agenti di Viaggio e Turismo).
- Slovenia: The Promotion of Tourism Development Act specifies that a CEO of a travel agency or an individual acting as an independent travel agent is required to have a 2-year higher vocational education or higher and 3 years of experience in the field. A suitable level of education for professions in this group is a 3-year higher professional education. Modules related to occupations in this group are a part of almost all higher professional and university undergraduate programmes, and also Masters' degree programmes. There is no programme specifically dedicated to travel agency management or operation.

As well as requiring managers to be certified or licenced, some Member States also treat various operative or agent roles as regulated professions. This means that entry to these occupations is reserved for individuals holding specific professional qualifications and having undertaken specific courses of training. For example:

- Austria: education and training for the occupation of travel agency assistant is regulated by the Austrian Chamber of Economy (WKO).
- Bulgaria: the occupational profiles of some tour operator occupations are defined by law (see box below).
- Estonia: defines a professional standard for "Tour Operator and Travel Consultant/Agent" which requires specific courses of vocational education, professional training or studying on the job; the occupation can be entered at different levels depending on the nature of the education and training undertaken.
- Greece: it is necessary to complete a training course certified by IATA in order to issue air transport tickets.
- Hungary: tour operator/travel agency manager, contract negotiator/buyer, product manager and travel adviser/consultant are regulated professions.
- Latvia: Travel consultant is a regulated profession requiring a formal course of training leading to a professional qualification.

In countries where occupations within tour operators and travel agencies do not have the status of regulated profession, there appears to be considerable variation in the availability of routes into these occupations via vocational education and training. For example, in Malta and the UK, there are clear progression routes from school education via vocational training into tour operator/travel agency occupations (see the boxes below). Similarly in Luxembourg, a Travel Agent Diploma (DAP) provided by the Lycée Bonnevoie and the Luxembourg School of Commerce is the main path to access operative positions within a tour operator or travel agent. In contrast, some countries seem to offer fairly limited entry into tour operator management occupations via vocational training. For example, in Ireland and Latvia, it was reported that there are no training courses leading to specific qualifications specifically for tour operators/travel agents; entry is usually either after a course of higher education or through learning on-the-job provided by the employer.

In most cases, the occupation of Tour/Holiday Representative is not regulated or defined by law. Very often, no specific level or type of education is required, with individuals being recruited on the basis of experience and/or personal aptitude. Employers will typically provide short courses of in-house training or learning on-the-job that is specific to their needs. One exception is Belgium, where some Tour/Holiday Representative occupations have the status of regulated professions.

The tables below offer some examples of the routes into tour operator and travel agency occupations in different Member States. A key point to note, in some examples, is the important role played by employers and/or employer representative bodies in designing, planning and providing education and training for tour operator and travel agency occupations.

### **Bulgaria**

The Chamber of Commerce and Industry conducts regular courses for qualification of tour operators. The tour operators and the tourist agencies conduct training in these occupations through organising courses for improvement of the profile of the occupation. Specialists can continue their education in any of the tourism subjects with the universities in order to receive a Bachelor's or a Master's degree.

An ordinance on the requirements for the education, language qualification and the length of experience of the personnel to be occupied for the implementation of the tourist activity has been developed.<sup>58</sup> Pursuant to this ordinance, the specialists performing functions related to organisation of tourist activity should have a university degree majoring Tourism or any other university education and should have at least one foreign language - or be graduates of secondary education with an acquired occupational qualification in the field of tourism and have at least one foreign language.

### **Croatia**

Tour operators that sell directly to customers must possess a Tourist Officer Leader certificate, which requires (at least) secondary education, language skills and at least two years' experience. A certificate for a Tourist Office Leader is issued by the Ministry of Tourism upon completion of specific training provided by specialist VET schools and certified by the Ministry.

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<sup>58</sup> Regulation on education, language skills and experience of travel agency and tour operators agency staff

## France

The changing nature of skill needs of tour operators and travel agencies is being addressed by the professional body for travel agents, the Syndicat National des Agents de Voyages (SNAV). SNAV has taken several steps including:

- Creation in 2011 of the CFPT, Training Centre of the Travel Professionals (Travelpro formations) with 7 competence axes: Management & Taxation, Client Relation, Marketing, techniques, Management, Personal efficiency, Multimedia and informatics<sup>59</sup>.
- Development of a mechanism to manage and develop the competences (GPEC) with the regional authority of Paris region for a pilot testing. This mechanism supports enterprises in analysing the training needs, providing HR tools, developing work schedule organisation and individual training needs and path of the employees.<sup>60</sup>

## Greece

In relation to the tour operator occupation, EOPPEP (National Organisation for the Certification of Qualifications and Vocational Guidance) has developed a tourist operator occupational profile which describes the main skills and competences.<sup>61</sup> The profile was developed with focus on the middle level occupations (level B) that have a supporting role in the development of the tour programmes and not for those responsible for the above activities by themselves (level A).

The main routes towards the tour operator occupation identified in the occupational profile include:

- secondary level vocational training in a professional school with a specialisation in tourism economy and management followed by a minimum of two years training on the job.
- post-secondary level training in a public or private vocational training institute (tourism office employee programmes) followed by six months of on the job practical training.
- around 400 hours of training in one of the adult/continuous training programmes offered by the centre of vocational training (KEK) followed by minimum two years on the job training.

However, these are only indicative routes based on common practice. A more general education - particularly in the business administration thematic area - combined with practical experience is also a possible route.

## Ireland

Degree courses in Travel & Tourism Management (levels 7 & 8) at the Institute of Technology Tralee include an element on travel agency practice and level 8 degree courses in Tourism Marketing from the Dublin and Waterford Institutes of Technology also prepare students for working in this side of the industry.

A Travel Agency Management course at level 6 is offered by CITAS College in Dublin, though this college attracts a large number of foreign students, and there are courses in tourism and E-travel offered by St Johns Central College and Cork Education & Training Board at levels 5 & 6.

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<sup>59</sup> Panorama de Branche des agences de voyages, SNAV, édition 2012, p.204

<sup>60</sup> Ibid., p.22

<sup>61</sup> EKEPIS, Certified professional profile – tourist operator, [http://www.eoppep.gr/images/EP/EP\\_8.pdf](http://www.eoppep.gr/images/EP/EP_8.pdf), Accessed on 15/4/2015

Other more general tourism courses at levels 5 & 6 provide elements that relate to the work of travel agents and there are also a series of continuing education courses often provided on a part-time basis, though these do not lead to NFQ qualifications. Examples include courses on reservation systems. Short courses on general management skills and on a range of online marketing tools are provided on the initiative of the Irish Travel Agents Association by the Travel Professionals Skillnet under the Training Networks Programme (TNP).

### **Malta**

The Institute of Tourism Studies (ITS), established in 1987, is the main vocational institute in Malta for higher education studies aimed specifically at targeting the changing needs of the Hospitality and Tourism Industry. The main responsibility of the ITS is to provide vocational and 'hands on' courses including a one year international work placement overseas to supply the tourism sector with a flow of skilled recruits. The ITS provides a vocational educational pathway for those wanting to enter into tour operator/travel agency occupations.

- The Certificate in Travel and Tourism is a one-year course that can be accessed by school-leavers and which provides a basic knowledge and understanding of working in a travel-related operation.
- The Diploma in Travel and Tourism Operations follows the Certificate and provides skills, such as travel technology systems, accounts, computerised accounting systems foreign language, introduction to front office and communication skills.
- The Higher National Diploma in Travel & Tourism Management trains individuals who are interested in working in incoming and outgoing operation at a junior management level. It provides skills such as customer relations management, computer reservation systems, e-marketing /e-commerce, tourism & travel law, marketing management, risk management, transport management, and human resources management.

ITS courses integrate practical working experience. Full-time students undertaking the Diploma are required to undertake a 14-week paid work experience in the form of a Local Industrial Trade Practice (LITP) during the summer in local tourist establishments. A twelve (12) months international internship is a compulsory component of some of the Diploma and Higher National Diploma programme of studies.

### **Sweden**

Tour operators and travel agencies (around 260 companies in total) in Sweden organise their own sector-specific education and training through the Travel Academy AB (TRAC or *Diplomerad resekonsult*). This is a trademark higher vocational educational programme owned by the travel industry and where the Association of Swedish Travel Agents and Tour Operators (SRF) is the majority owner.

The education is a free two-year programme on post-secondary level, resulting in an Advanced Diploma in Higher Vocational Education and a TRAC-diploma as Travel Consultant. The course is offered in Gothenburg, Norrtälje, Skellefteå, Stockholm, Uddevalla and Uppsala.

Quality assurance is regulated by the Association's Board of Directors who approves each of the programme organisers. Education is tailored in collaboration with the travel industry and approximately one-third of the education consists of practical training and internship. According to the Association, the majority of the students are employed immediately after graduation.

TRAC/*Diplomerad resekonsult* is well-established in the sector. Normally clients operating in the sector require educated travel consultants in order to sign an agreement with a travel agency.<sup>62</sup>

## UK

The most common way to start as a travel agent is to find work with a travel agency and train on the job, for example, via an apprenticeship. A good standard of school education is however helpful, including some GCSEs (at levels A-C). It is also beneficial to have experience in customer service or sales, and foreign language skills could also be useful for some work. Relevant courses at Levels 1 and 2 of the National Vocational Qualifications Framework include:

- Level 1 Certificate/Diploma Introduction to the Travel and Tourism Industry
- Level 1/2 Certificate in Travel and Tourism
- Level 2 Award in Principles of Customer Service in Hospitality, Leisure, Travel and Tourism
- Level 2 Certificate/Diploma in Travel and Tourism.

Once in post, employees may work towards industry qualifications, such as:

- Level 3 Certificate in Travel, Tourism and Hospitality Management
- Level 3 (Extended) Certificate/Diploma in Travel and Tourism
- Level 4 Certificate/Diploma in Management for Travel and Tourism
- Level 5 Certificate/Diploma in Management for Travel and Tourism.

Continuing professional development can be recognised by applying to join the Accredited Travel Professional Scheme (ATPS). This is co-ordinated by the Association of British Travel Agents (ABTA). Those working in business travel may be able to work towards a qualification offered by the Guild of Travel Management Companies (GTMC) in partnership with the Confederation of Tourism and Hospitality. Qualifications include:

- Consultant Certificate in Business Travel;
- Leadership Certificate in Business Travel; and
- Management Certificate in Business Travel.

### 7.6.2 Summary

The table below summarises the main skills required of tour operator and travel agency occupations, the relevant qualifications for entry into those occupations, key skill trends and skill gaps, and the performance of the system in providing the skills needed for these occupations. Where possible, information is related to ISCO/ESCO.

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<sup>62</sup> [http://www.trac.se/in\\_english](http://www.trac.se/in_english)

<b>Tour operator and travel agency occupations</b>	
Occupations (ESCO Sectoral Reference Group Hospitality and Tourism)	<ul style="list-style-type: none"> <li>• Tour operator manager/CEO</li> <li>• Tourism contract negotiator/buyer</li> <li>• Tourism product manager</li> <li>• Tour/Holiday representative</li> <li>• Travel agency manager/CEO</li> <li>• Tourism product manager</li> <li>• Travel adviser/consultant</li> </ul>
Main skills demanded by employers	<ul style="list-style-type: none"> <li>• Professional and business skills: finance, marketing, sales, management</li> <li>• ICT/digital skills</li> <li>• Customer service skills</li> <li>• Soft skills: multicultural skills, interpersonal skills</li> <li>• Language skills: particularly English, but other languages in certain regions/countries</li> <li>• Accessibility skills, knowledge and awareness</li> <li>• Knowledge of the tourism sector</li> </ul>
Relevant education qualifications or	<ul style="list-style-type: none"> <li>• Degrees in Tourism/Tourism Management or Business, Management or Economics (for managers/CEOs)</li> <li>• Vocational training in Tourism/Tourism Management or Business/Management + work experience/learning on-the-job</li> <li>• Relevant professional/vocational qualifications for regulated professions (in some countries)</li> <li>• State licence to operate as a travel agent (in some countries)</li> <li>• Tour/Holiday representative occupations often require only experience and personal attributes instead of formal education</li> </ul>
Key trends / skill gaps	<ul style="list-style-type: none"> <li>• Blurring of boundaries between different types of operators, e.g. travel agencies and tour operators</li> <li>• Increased demand for IT skill reflecting increase in on-line sales and customer self-service</li> <li>• Emergence of new occupations/skills, e.g. Web-marketing managers, Social media managers</li> <li>• Many operative occupations becoming redundant, particularly support and administrative roles</li> <li>• Increasing demand for interpersonal and customer service skills, as customers demand higher level of quality and personal service</li> <li>• Growth in demand for skills, knowledge and awareness related to accessible tourism: reflects growth in the market for accessible tourism and legislation/public policy</li> </ul>
Performance of the system	<ul style="list-style-type: none"> <li>• Increased demand for skills/skilled employees</li> <li>• High level of unfilled vacancies, particularly in management roles</li> <li>• Sufficient provision of higher education courses relevant to entry into tour operator/travel agency management positions</li> <li>• Tour operators and travel agencies struggle to attract and retain graduates with relevant degrees due to the (perception or reality) of low salaries and/or poor working conditions</li> <li>• Main skill gaps/shortages for management positions are specialist, technical and language skills</li> <li>• More in-house training is needed to bring lesser-skilled candidates up to the required level</li> <li>• A wider range of work-experience, internship and work-based learning opportunities are needed to attract and retain young people</li> <li>• Companies need to develop stronger long-term human resource development strategies</li> </ul>

### **Tour operator and travel agency occupations**

- Tourism degrees or vocational training courses should provide skills and knowledge related to accessible tourism
- Need for greater in-house provision of introductory-level training in accessible tourism for frontline staff and managers

## **7.7 Cultural, sports & recreational activities**

### **Cultural, sports & recreational activity occupations**

- Customer experience manager
- Guide / instructor (e.g. mountain, ski)
- Skilled operator (e.g. yacht skipper)
- Communication/promotion manager
- Product manager
- Sustainability manager

#### **7.7.1 Skill needs and provision**

One important economic trend in recent decades has been the growth in the "experience economy". Within this economy, businesses must orchestrate memorable events for their customers, and that memory itself becomes the product.<sup>63</sup> Of course, in one sense, tourism has always been about the provision of experiences for customers. However, this demand for experiences has become ever more specialised in recent years, such as for "adventure tourism" (e.g. aerial adventure tourism, land adventure tourism, water adventure tourism), "maritime tourism" (e.g. cruising, yachting) and "cultural tourism" (e.g. heritage tourism, cultural events tourism, spiritual tourism).<sup>64</sup>

Until recently, skills for most occupations related to culture, sport and recreation have tended to be provided separately from the "system" for tourism education and training. The emphasis has been on providing learners with the knowledge and technical skills necessary to inform, instruct, perform, curate or create in these fields. In recent years, however, there has been increasing recognition of the potential of these occupations to contribute to the development of tourism. As a result, there is now greater integration of skills development in these fields with skills development for tourism. This includes the integration of tourism modules in education and training for culture, sport and recreation, as well as the creation of entirely new curricula. For example, degrees are available in Bulgaria in "Management of Cultural Tourism", "Management of Alternative Tourism", and "Organisation and Management of Leisure Time" (at levels 6 and 7 BQF/EQF). Similarly, in Slovakia, degrees are available in "Tourism, Hotel Industry and Spa". In the Czech Republic, degrees are available in "Mountain Tourism", "Guiding in Tourism" and "Agritourism". Ireland has a level 8 degree in "Adventure Tourism Management" (see box below).

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<sup>63</sup> Pine, J. and Gilmore, J. (1999), *The Experience Economy*, Harvard Business School Press, Boston, 1999.

<sup>64</sup> Categories of tourism from Ernst & Young (2014), Assisting the integration in EURES of dedicated sections for tourism industry sub-sectors

## Ireland

The Institute of Technology Tralee provides a Bachelor of Arts in Adventure Tourism Management. This degree course aims to provide both the necessary knowledge of the adventure tourism industry and the relevant business and management skills need to operate a business in this field. Skills covered include adventure activity leadership and outdoor learning, the adventure tourism industry, communication and personal development, entrepreneurship and business management and event management. The course is delivered through a mix of classroom-based teaching, work-based learning and practical activities (20% of class time).

Successful completion of the BA also provides external accreditation in a number of areas, namely:

- Mountain Skills Training 1 & 2
- Rescue Emergency Care 3 (First Aid)
- Leave No Trace Trainer Course
- Child Protection Training
- Mountain Skills Assessment & Mountain Leadership Training
- Level 3 proficiency sea kayaking & level 2 kayak instructor training<sup>65</sup>

Health tourism has been growing in importance in recent years, creating a demand for skilled workers. The nature of the work – with its risks to health and safety - means that some Member States regulate entry into these occupations. For example, the occupation of "Health Tourism and Prophylaxis Assistant" is regulated in Germany by the vocational training institutions. However, it does appear that education and training systems are struggling to meet employers' growing demand for skills in this field. For example, industry representatives pointed to shortages of spa therapists and animateurs in Cyprus; yet until recently, there were no specialised courses in spa therapy or spa management. As a result, employers were forced to recruit skilled staff internationally for the busy summer period. The University of Nicosia does now offer a spa management specialisation as part of its Bachelor degree in Business Management.

It is worth noting that entry requirements for certain specialist occupations tend to differ between Member States. This limits cross-border development of the tourism sector and hinders the mobility of workers. As we describe below, occupations such as skiing/snow sports instructors or mountain guides typically require specific professional qualifications (sometimes unique to the Member State) and/or are regulated professions. Similarly, the Commission has pointed out that Member States require different competences for yacht skippers in the leisure boating industry and there is considerable variation in obligations for qualifications and safety equipment.<sup>66</sup> To help address this, the Commission is assessing the need for EU action on qualification requirements for professional yacht captains.<sup>67</sup>

Entry into sports instructor occupations, particularly those related to skiing and snow sports, is typically reserved for individuals holding specific professional qualifications and having undertaken specific courses of training. For example, in Austria, employment as a Snow sport instructor requires a diploma which is the subject of state ski instructor association regulations. Similarly, in Germany, ski instructor is a regulated vocational training occupation.

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<sup>65</sup> <http://www.ittralee.ie>

<sup>66</sup> COM(2014) 86, A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism

<sup>67</sup> [http://ec.europa.eu/growth/sectors/tourism/offer/maritime-coastal/index\\_en.htm](http://ec.europa.eu/growth/sectors/tourism/offer/maritime-coastal/index_en.htm)

Sports instructor is also a regulated profession in Belgium, Hungary and Poland. Romania has specific professional training requirements for a range of guides in the experience economy, as shown below.

### Romania

The occupation 'Specialised tourist guide in specific segments of tourist services' is regulated in terms of professional training. The required level of education for this occupation is level 3 (i.e. high school with Baccalaureate diploma).

The Classification of Occupations in Romania also includes the following related occupations, for which the required level of education is also level 3:

- Sport tourist guide: mountaineering and rock climbing, ski, bob, swimming, boating, sailing, ultra-light flying machines (hang gliding, paragliding)
- Mountaineering guide, mountain hiking
- Art galleries guide / interpreter
- Natural habitat guide
- Flora and fauna ornithological tourist guide
- Cave tour guide
- Equestrian tourist guide
- Mountain guide
- Cultural objective guide
- Tour guide for caves
- Canyoning guide

There are initial training courses for the occupation of Travel guide (level of qualification: 1) which consist of 360 hours: 120 hours theory and 240 hours of practice. The qualification training modules that lead to qualifications of tourist agent-guide (level 3 qualification) consist of 1080 hours: theoretical and practical training). The cycle I of higher education (level 5) provides qualifications for the occupation tourist guide (mountain tourism, intern and extern tourism). Overall, there are 3649 attested Tourist guides.

Previous research by CSES has identified the entry routes into the occupation of Mountain guide. This is a regulated profession in several countries, including Austria, the Czech Republic, Germany, Italy, Slovenia and Poland. Poland also distinguishes between mountain guides (who operate within specific regions) and climbing tourist guides (who are able to operate across Poland). In France, the profession of "guide de haute montagne" is a reserved activity for the provision of guiding services in relation to high mountain ranges. Mountain guide is also a regulated profession in the Bavarian region of Germany.<sup>68</sup>

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<sup>68</sup> CSES (2012), Providing the inventory of the existing reserves of activities linked to professional qualifications in 13 EU Member States and assessing their economic impact; Report for DG Internal Market and Services

## **Germany**

For reasons of safety and customer safety, training for mountain and ski guide is strictly regulated. The training content in the VDBS are discussed together with the Education Committee and agreed. The Education Commission is composed of a body representatives (mountain guides) of the VDBS /IFMGA, the DAV and the Technical University of Munich, which coordinates and supervises the training on behalf of the Ministry of Education and Arts. The training contents are also co-ordinated with the Association (IFMGA) of the International Federation of mountain guides. The Ministry of Education and Art (KuMi) defines the range of different occupational groups such as mountain guide training, instructor training. The KuMi has installed the state training for reasons of customer protection. The implementation and monitoring of the practical training has been given to TU Munich delegates. This in turn presides in the Education Commission (AK) whose members (equally represented by alpine guides from the IFMGA /UIAGM and DAV) train the trainer team. These definitions are laid down in the Bavarian mountain and ski school ordinances.<sup>69</sup>

In contrast to occupations related to health tourism, sports instruction and mountain guiding, occupations related to cultural tourism tend not to be regulated or to have defined occupational profiles. Despite that, there is increasing provision of education and training for specialist tourist occupations in this field. Such education is very often in the form of university degrees at Bachelor's or Master's level. Such degrees typically aim to combine academic knowledge of the subject with skills in business management. (The boxes below provide examples from Malta and Slovenia.) There are also instances of vocational training, such as for specialist guides; an example from Germany is provided below.

## **Malta**

The University of Malta offers an MA degree in Cultural Sustainability and Tourism. The programme aims to provide a deeper understanding of the current themes facing the cultural sector and its connection with tourism, particularly in light of the growth in cultural tourist visits to Malta. Cultural themes that are covered by the programme include built and rural heritage, cities of culture, artistic manifestations, traditions, legislation, Mediterranean culture, religious heritage and cultural tourism. As well as knowledge of those themes, the course also offers training in innovative management techniques, so that students can know how to present and offer cultural products in the best way and also how to offer a better service to tourists.<sup>70</sup>

## **Slovenia**

The Faculty of Tourism Studies in Portorož offers a 3-year Cultural Tourism undergraduate degree programme and is also preparing a Sports Tourism undergraduate degree programme. ERUDIO, College for Sustainable Tourism offers a degree programme in Tourism in Nature and Heritage Tourism. The Faculty of Tourism Studies in Portorož also offers a Master's degree programme in Heritage Tourism, Other faculties also offer Cultural Tourism as a module in their university undergraduate or higher professional programmes.

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<sup>69</sup> Geschäftsführung Verband Deutscher Berg-und Skiführer

<sup>70</sup> <http://www.um.edu.mt/ittc/overview/PMACSRPET4-2014-5-F>

## Germany

Training as a wine guide (Weinerlebnissführer) is offered in Baden-Württemberg by a certified State Training and Research Institute for Vineyards and Orchards. After completing the education and training, the guides are able to design, organise and carry out wine-related guest programmes, wine tours and tastings. All wine guides have completed an exam during their education and training and are qualified as competent partners for wine and region.

### 7.7.2 Summary

The table below summarises the main skills required of cultural, sports & recreational activities occupations, the relevant qualifications for entry into those occupations, key skill trends and skill gaps, and the performance of the system in providing the skills needed for these occupations. Where possible, information is related to ISCO/ESCO.

Cultural, sports & recreational activities occupations	
Occupations	<ul style="list-style-type: none"> <li>Customer experience manager</li> <li>Guide / instructor (e.g. mountain, ski)</li> <li>Skilled operator (e.g. yacht skipper)</li> <li>Communication/promotion manager</li> <li>Product manager</li> <li>Sustainability manager</li> </ul>
Main skills demanded by employers	<ul style="list-style-type: none"> <li>Technical skills and knowledge (e.g. related to skiing, yachting, culture)</li> <li>Customer service skills</li> <li>Interpersonal and communication skills</li> <li>Foreign language skills</li> </ul>
Relevant education qualifications or	<ul style="list-style-type: none"> <li>Technical qualification (e.g. related to skiing, yachting, culture)</li> <li>Qualification requirements linked to status of occupations as regulated professions</li> <li>Tourism degrees (or similar) for Product managers/Sustainability managers</li> </ul>
Key trends / skill gaps	<ul style="list-style-type: none"> <li>Growth in demand for the "experience economy"</li> <li>Growth in demand for specialist skills and occupations, particularly within adventure tourism, maritime tourism, cultural tourism</li> <li>Occupations increasingly require a wider skillset, including business management, marketing and IT skills</li> </ul>
Performance of the system	<ul style="list-style-type: none"> <li>Increased provision of higher education degrees for specialist occupations in the experience economy</li> <li>Increased integration of business management, marketing and IT modules into specialist degree courses</li> <li>Increased integration of tourism and customer service modules into professional/vocational training for cultural, sports and recreational occupations</li> <li>Well-established provision of technical/professional qualifications for regulated professions</li> </ul>

## **8.0 CONCLUSIONS AND RECOMMENDATIONS**

### **8.1 Conclusions**

In this sub-section, we present our conclusions from the mapping and performance check of the supply side of tourism education and training.

**1. The main challenge is not to create better tourism education and training “systems”. Instead, it is to create better educational pathways into and within tourism occupations.**

As the research has shown, Europe’s tourism sector, its occupations and the education and training systems that serve it are very diverse. There is a diversity of provision at different levels: higher education, VET, other education and training for adults, and school education. Those who complete a course of tourism-related education or training do not necessarily enter the sector. Many who do enter tourism occupations may have undertaken education or training that is not particularly related to tourism, particularly in the case of university graduates. In addition, the international mobility of many skilled workers means that the performance of the tourism sector in any territory is not always closely linked to the performance of the education and training system; employers are increasingly meeting their skill needs by recruiting staff from other countries.

For those reasons, it is not possible to talk about a European tourism education and training “system”, or even about national or regional systems. Instead, it is more useful to consider the possible educational pathways into and within tourism occupations and the best way for those pathways to provide the skills need for those occupations.

**2. A key determinant of the performance of tourism education and training is the overall effectiveness of the national (or regional) education and training system.**

Since Member States retain overall competence for education and training, there remains considerable diversity in the nature and the performance of education and training systems. This is reflected, for example, in national performance against the ET2020 benchmarks relating to adult participation in lifelong learning, attainment of basic skills and early school leaving. Indeed, it is clear that some of the most important skill shortages in the tourism sector are caused by general weaknesses in national or regional education systems. For example, a very high proportion of young people in some countries leave the education system having attained no more than a lower secondary level of education, e.g. Malta, Portugal and Spain.

In this context, it becomes clear that the priority for policymakers is to accelerate and complete the wider reforms of education and training systems that have been initiated in recent years and supported by EU policy. To the extent that such reforms are completed successfully, it should follow that many of the weaknesses in skills provision for tourism occupations will be overcome.

**3. Improvements in skill levels of employees in tourism occupations are largely dependent on the wider drive to improve the performance of the tourism sector.**

The Commission's 2010 Communication identified a number of areas in which Europe's tourism sector needs to take action in order to retain and enhance its competitiveness, namely promoting high-quality, sustainable tourism, extending the season, diversifying the supply of tourism services, improving accessibility, promoting adaptability of SMEs and enhancing the use of ICT. Where such action is taken, it is likely to promote the development of skills – either directly or by creating a demand to which education and training providers then respond.

For example, extending the season is likely to create more stable patterns of employment (i.e. year-round, permanent employment), which will facilitate the provision of work-based learning, apprenticeships and other forms of training that the providers are already able to offer. Promoting sustainable tourism will make it more likely for employers and other stakeholders to demand relevant education and training; across Europe, many providers of education and training have demonstrated that they are able to respond to this type of demand, for example, by incorporating sustainability modules into tourism degrees or by creating specialist Master's courses.

**4. Meeting challenges related to quality, adaptability and diversification is hindered by skill shortages and difficulties in recruitment.**

Notwithstanding the previous conclusion, tourism employers tend to report a shortage in applications from individuals with the necessary skills, particularly in relation to higher skilled and professional roles. The reason for these difficulties does not appear to relate to a shortage in the supply of graduates. Instead, the problem appears to be that: i) too many graduates have a poor perception of the sector, with regard to salaries, working conditions and working hours; and ii) many graduates do not appear to be "work-ready", often having undertaken courses that employers consider are too theoretical or lacking practical work experience. There are skill shortages – and often a lack of provision – in emerging areas, notably accessible tourism, which hinders the development of the industry.

**5. The accommodation sector accounts for some of the most pressing skills challenges in the tourism sector.**

Accommodation accounts for around 85% of employment in the "mainly tourism" sectors. Jobs in this sector are more likely to be temporary, seasonal and part-time than are jobs in other parts of the tourism sector and, indeed, the wider economy. They are also more likely to offer (or be perceived to offer) low pay, unsociable working hours and poor working conditions. Whilst the accommodation sector plays an important role in providing employment opportunities for low-skilled people, the nature of employment in this sector does not facilitate the provision of training and work-based learning – and thus improvements in productivity and in the quality of the tourist offer.

**6. The main skill gaps and shortages reported by employers relate to soft skills, language skills, interpersonal skills and ICT skills rather than to tourism-specific skills.**

Education and training systems, particularly VET systems, are generally providing many of the technical skills required to enter tourism occupations, particularly for occupations that have the status of regulated profession. Where they do not, employers are often able to provide such skills on-the-job.

But courses of higher education or VET sometimes struggle to provide these other skills. In some cases, the existence of a fixed national curricula for VET makes it difficult to provide flexibility in provision and respond to employers' requirements. Training providers can also find it difficult arrange placements and work-based learning if employers lack the capacity or the willingness to host trainees.

**7. There will be an increasing need for education and training systems to respond to developments in technology by providing new skills and preparing people for new occupations.**

Developments in ICT have changed the way that tourism services are developed and sold. Many support and administrative roles are disappearing, whilst new occupations (e.g. web-marketing manager) are emerging. Management roles now require much more sophisticated skills in IT and on-line communication. Equally, the demand for higher quality and niche tourism experiences is creating a new demand for specialist skills and specialist occupations. As a result, many tourism courses, particularly those in higher education, are also becoming more specialised and diverse and this trend is likely to continue.

**8. Forecasting skill needs, strategy development and planning of provision can be hindered by the development of tourism policy and education policy in different "policy silos".**

Tourism strategies are often developed in isolation from education and training strategies. Some tourism strategies make little or no reference to skills development. Where they do, their strategic priorities are not necessarily "owned" by the education and training sector itself. There is therefore a need for different mechanisms to integrate, or at least better co-ordinate, strategic development of tourism and of skills.

**9. Recent years have seen a considerable increase in the volume and diversity of higher education in tourism at undergraduate and postgraduate level. Whilst this is providing a large number of graduates, there is a continual need to ensure that such graduates are well-placed to fill the skill needs of employers.**

Whilst employers value the knowledge of tourism that is provided by tourism degrees, their primary concern is often for the professional skills (e.g. finance, business management, IT, sales, marketing) provided by other degree courses. This concern is being addressed by degrees in Tourism Management that often provide such skills or by degrees in finance or business which incorporate modules related to tourism. It is also becoming increasingly important for degrees in tourism/tourism management to include periods of work experience and to ensure the development of soft skills, interpersonal skills and language skills.

**10. The VET system is successful in training large numbers of people for occupations in the tourism sector. The challenge remains to ensure that VET courses remain relevant to rapidly-changing employer's needs – but there is a diversity of solutions.**

VET provision for many tourism occupations is often systematically planned, taught according to a fixed national curriculum and delivered at scale. The VET system is often responsible for delivering to a large proportion of the workforce in the industry, particularly those in regulated professions. However, some employers report that VET courses do not respond well to their needs.

In response, many VET providers have developed new and innovative approaches to work-based learning, including new types of apprenticeship, “exercise” firms that simulate the business environment and employment-training contracts for seasonal workers. EU-funded projects have also helped by developing new tools to recognise learning outcomes, improve the quality of training and support the recognition of qualifications.

**11. There is a need for innovative and flexible forms of education and training to meet the skill needs of SMEs and family-run businesses.**

Unlike large enterprises, such as hotel chains, such businesses do not have the capacity to provide in-house training courses. Moreover, staff often have to fulfil a wide range of duties that go beyond the usual responsibilities of any single occupation. For these businesses, various forms of adult education can be an important complement to higher education and VET. Such education can be provided flexibly in terms of course length and location. It can also involve the validation of experience and competences gained through non-formal and informal learning. However, there may be a need for such education and training to be provided on a wider, more systematic scale, which requires it to be given greater consideration in any strategic planning for the tourism sector.

**12. The EU provides the necessary policy tools to support the development of tourism and the development of education and training. The challenge for Member States and other stakeholders is to apply those tools to the development of skills in the tourist sector.**

EU cohesion policy provides substantial amounts of funding to many regions that are heavily-dependent on tourism. This creates the possibility to pursue some of the priorities of the 2010 Commission Communication, namely promoting high-quality, sustainable tourism, extending the season, diversifying the supply of tourism services, improving accessibility, promoting adaptability of SMEs and enhancing the use of ICT. Such developments will drive the demand for skills in tourism occupations, for which ESF funding is available. Indeed, the current operational programmes commit €27bn to investments in education, training and vocational training for skills and lifelong learning (in all sectors). The EU is also supporting necessary reforms of national (and regional) education and training system, through ESF and through the OMC processes within ET2020. Funding is also available from Erasmus+ to promote learner mobility and enhance transnational co-operation between education providers.

There is, then, no inherent shortfall in the EU policy tools available to support tourism education and training. Such tools support the actions of Member States, reflecting the fact that Member States have the main competences for tourism development and for education and training. The need is not therefore to create additional new tools at EU level, but instead for Member States and other stakeholders to prioritise the development of skills for tourism as and when they make use of these tools. There may also be a role for the Commission to encourage such prioritisation, for example, through its role in facilitating OMC processes and in promoting good practice.

## 8.2 Recommendations

We present here our recommendations for the European Commission. As we have said, there is no inherent shortfall in the EU policy tools available and therefore only limited need to create additional new tools at EU level. Instead, our recommendations mostly relate to using existing tools to promote the development of education and training for tourism occupations.

- 1. In any revision of the political framework for tourism in Europe, the Commission should set an objective that relates specifically to the development of skills.** Within the 2010 Communication, "improving professional skills" is just one sub-objective, within the overall priority of stimulating competitiveness. The nature and scale of the skills challenges identified by this study would suggest that skills development merits greater prioritisation in EU tourism policy.
- 2. Any revision of the political framework should also include a more comprehensive list of actions related to skills development.** At present, just one action is mentioned, i.e. to promote opportunities offered by various EU programmes, such as Leonardo of the Competitiveness and innovation Framework Programme. Other actions related to the ongoing identification and dissemination of best practice could be included, such as those listed in the recommendations that follow.
- 3. The Commission could consider launching a "Tourism Skills Network".** This could follow a similar format and operate in parallel to the recently-launched "Digital Tourism Network". It would thus bring together stakeholders from the tourism and education sectors to discuss ways to improve the EU's performance in providing skills for tourism occupation. The work of the network would inform EU and Member States policies for tourism, education and training, digital agenda and cohesion.
- 4. The Commission should promote information about skills needs and effective approaches to skills development in the tourism sector through relevant existing mechanisms.** For example, dedicated publications could be disseminated through the EU Skills Panorama, such as an "Analytical Highlights" publication (which has been done for other sectors). Eurostat data on skill levels in tourist sectors (notably accommodation) could be added to the "Eurostat statistics" pages and/to the "country profiles" on the Virtual Tourism Observatory webpages.
- 5. The Commission should undertake further research to identify the extent to which and the ways in which ESF is supporting the development of skills for tourism occupations in the current programming period. The results of such research, including any success factors, lessons learned and good practice examples, should then be disseminated.** Such research might in effect serve as a follow-on study to the previous research in 2010,<sup>71</sup> perhaps as part of any wider efforts to research the impact of ESF on different sectors. Dissemination of research findings would take place via the usual ESF dissemination channels.

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<sup>71</sup> European Commission (2010), The European Social Fund: Culture and Tourism

- 6. Similarly, the Commission could undertake and disseminate further research into the extent to which and the ways in which Erasmus+ is supporting the tourism sector.** This would cover all forms of support, including support for mobility, transnational partnerships, co-operation with businesses and co-operation with countries outside the EU.
- 7. The Commission could specifically encourage tourism stakeholders to make pledges in support of its "Grand Coalition for Digital Jobs".** This could also include the creation of a sectoral coalition in the form of a multi-stakeholder partnership to enhance digital skills in the tourism sector across Europe.<sup>72</sup>

### 8.3 Action plan

Based on the conclusions and recommendations above, we offer here an action plan by which the Commission can seek to further deploy and transfer best practice in the provision of tourism education and training.

Action plan	
Tourism skills network (TSN)	
Description	The Tourism Skills Network will bring stakeholders together from the tourism and education sectors to discuss ways to improve the EU's performance in providing skills for tourism occupation. The TSN will be overseen by a Steering Group of 10-15 stakeholders and experts under the close coordination of the Commission. Working Groups will explore specific issues in more depth and identify good practice examples, leading to summary reports. The work of the network will inform EU and Member States policies for tourism, education and training, digital agenda and cohesion. This will include inputs to the European Tourism Day and other events
Stakeholders to involve	<ul style="list-style-type: none"> <li>• European Commission DG GROW, DG EMPL, DG EAC</li> <li>• EACEA</li> <li>• Ministries of Education</li> <li>• Erasmus+ National Agencies</li> <li>• Ministries of Tourism (or equivalent)</li> <li>• Tourism authorities</li> <li>• Tourism associations / employer bodies</li> <li>• Trade unions / employee bodies</li> <li>• Education institutions</li> <li>• Academic and industry experts</li> </ul>
Actions to be taken	<ul style="list-style-type: none"> <li>• Outline proposal</li> <li>• First meeting of the TSN</li> <li>• Form Steering Group</li> <li>• Form Working Groups</li> <li>• Working Group identifies good practice and reports on specific issues</li> <li>• Second meeting of the TSN</li> <li>• Presentations of findings to the European Tourism Day</li> </ul>

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<sup>72</sup> <http://ec.europa.eu/digital-agenda/en/grand-coalition-digital-jobs-0>

<b>Action plan</b>	
<b>Use of existing information mechanisms</b>	
Description	Using the existing information mechanisms of the Commission, information about skills needs and effective approaches to skills development in the tourism sector could be disseminated to a wider audience. For example, dedicated publications could be disseminated through the EU Skills Panorama, such as an "Analytical Highlights" publication (which has been done for other sectors). Eurostat data on skill levels in tourist sectors (notably accommodation) could be added to the "Eurostat statistics" pages and/to the "country profiles" on the Virtual Tourism Observatory webpages
Stakeholders to involve	<ul style="list-style-type: none"> <li>• European Commission DG GROW</li> <li>• Virtual Tourism Observatory</li> <li>• Eurostat</li> </ul>
Actions to be taken	<ul style="list-style-type: none"> <li>• Review European Commission mechanisms for disseminating information about skills and/or tourism</li> <li>• Identify and agree</li> <li>• Produce/procure appropriate written contributions</li> <li>• Publish final versions</li> <li>• Disseminate via EU Skills Panorama</li> <li>• Identify/extract Eurostat data</li> <li>• Upload Eurostat data on the Virtual Tourism Observatory webpages</li> </ul>
<b>Further research into contribution of ESF</b>	
Description	Research would identify the extent to which and the ways in which ESF is supporting the development of skills for tourism occupations in the current programming period. The results of such research, including any success factors, lessons learned and good practice examples, would then be disseminated. Such research might in effect serve as a follow-on study to the previous research in 2010, perhaps as part of any wider efforts to research the impact of ESF on different sectors. The research might also include a database or catalogue of good practice examples. Dissemination of research findings would take place via the usual ESF dissemination channels and in other fora.
Stakeholders to involve	<ul style="list-style-type: none"> <li>• European Commission DG GROW, DG EMPL</li> <li>• Managing Authorities for ESF</li> <li>• ESF Project Promoters/Beneficiaries/Partners</li> <li>• Participants in ESF-funded actions</li> <li>• Researcher/contractors</li> </ul>
Actions to be taken	<ul style="list-style-type: none"> <li>• Develop research specification</li> <li>• Appoint researchers/contractors</li> <li>• Oversee/support research</li> <li>• Publish final outputs</li> <li>• Disseminate via Europa website</li> <li>• Present research findings in appropriate fora, e.g. European Tourism Day, European Week of Regions and Cities</li> </ul>

<b>Action plan</b>	
<b>Further research into contribution of Erasmus+</b>	
Description	Research would identify the extent to which and the ways in which Erasmus+ is supporting the tourism sector. This would cover all forms of support, including support for mobility, transnational partnerships, co-operation with businesses and co-operation with countries outside the EU. Dissemination of research findings would take place via Erasmus communication mechanisms and other channels.
Stakeholders to involve	<ul style="list-style-type: none"> <li>• European Commission DG GROW, DG EAC</li> <li>• EACEA</li> <li>• Ministries of Education</li> <li>• Erasmus+ National Agencies</li> <li>• Erasmus+ Project Promoters/Partners</li> <li>• Researcher/contractors</li> </ul>
Actions to be taken	<ul style="list-style-type: none"> <li>• Develop research specification</li> <li>• Appoint researchers/contractors</li> <li>• Oversee/support research</li> <li>• Publish final outputs</li> <li>• Disseminate via Europa website</li> <li>• Present research findings in appropriate fora, e.g. European Tourism Day, Erasmus+ conferences</li> </ul>

**ANNEX One: EUROSTAT AND ESCO DEFINITIONS****Table A.1 Eurostat list of tourism characteristic activities**

	<b>Tourism characteristic activities</b>	<b>NACE</b>	<b>Description (NACE Rev.2)</b>	<b>Main or partial</b>
1	Accommodation for visitors	5510	Hotels & similar accommodation	Main
		5520	Holiday & other short-stay accommodation	Main
		5530	Camping grounds, recreational vehicle parks and trailer parks	Main
		5590	Other accommodation	Partial
		6810	Buying and selling of own real estate	Partial
		6820	Renting and operating of own or leased real estate	Partial
		6831	Real estate agencies	Partial
		6832	Management of real estate on a fee or contract basis	Partial
		5610	Restaurants and other mobile food service activities	Partial
2	Food and beverage serving activities	5629	Other food service activities	Partial
3	Railway passenger transport	5630	Beverage serving activities	Partial
4	Road passenger transport	4910	Passenger rail transport, interurban	Partial
4	Road passenger transport	4932	Taxi operation	
4	Road passenger transport	4939	Other passenger land transport	Partial
5	Water passenger transport	5010	Sea and coastal passenger water transport	Partial
5	Water passenger transport	5030	Inland passenger water transport	Partial
6	Air passenger transport	5110	Passenger air transport	Main
7	Transport equipment rental	7711	Renting and leasing of cars and light motor vehicles	Partial
7	Transport equipment rental	7712	Renting and leasing of trucks	Partial
8	Travel agencies & other reservation services activities	7911	Travel agency activities	Main
8	Travel agencies & other reservation services activities	7912	Tour operator activities	Main
8	Travel agencies & other reservation services activities	7990	Other reservation service & related activities	Main
9	Cultural activities	9001	Performing arts	n/a
		9002	Support activities to performing arts	n/a
		9003	Artistic creation	n/a
		9004	Operation of arts facilities	n/a
		9102	Museums activities	n/a
		9103	Operation of historical sites and buildings and similar visitor attractions	n/a
10	Sports and recreational activities	9104	Botanical and zoological gardens and nature reserves activities	n/a
		7721	Renting and leasing of recreational and sports goods	n/a
		9200	Gambling and betting activities	n/a
		9311	Operation of sports facilities	n/a

	<b>Tourism characteristic activities</b>	<b>NACE</b>	<b>Description (NACE Rev.2)</b>	<b>Main or partial</b>
		9313	Fitness facilities	n/a
		9321	Activities of amusement parks and theme parks	n/a
		9329	Other amusement and recreation activities	n/a
11	Retail trade of country-specific tourism characteristic goods	-	-	n/a
12	Other country-specific tourism characteristic activities	-	-	n/a

Source: Eurostat Statistics in Focus 32/2013

**Table A.2 ESCO Hospitality and Tourism Occupations**

<b>ESCO Occupations</b>	
<b>1. Food and beverage service operatives</b>	
a.	Barista
b.	Bartender
c.	Cocktail bartender
d.	Restaurant host/ Restaurant hostess
e.	Sommelier
f.	Waiter/Waitress
<b>2. Accommodation management</b>	
a.	Camping ground manager
b.	Customer experience manager
c.	Entertainment manager
d.	Executive housekeeper
e.	Hospitality establishment manager
f.	Hospitality establishment security manager
g.	Hospitality revenue manager
h.	Rooms division manager
<b>3. Accommodation operatives</b>	
a.	Camping ground operative
b.	Concierge
c.	Doorman/Doorwoman
d.	Entertainment officer
e.	Hotel butler
f.	Hotel porter
g.	Housekeeping supervisor
h.	Linen attendant
i.	Night auditor
j.	Receptionist
k.	Room attendant
l.	Steward/Stewardess
<b>4. Food and beverage preparation and production operatives</b>	
a.	Chef
b.	Cook
c.	Food and beverage manager
d.	Kitchen assistant
e.	Kitchen porter
f.	Pastry chef
g.	Pizzaiolo

<b>ESCO Occupations</b>	
h.	Quick service restaurant crew member
<b>5. Food and beverage service management</b>	
a.	Conference and banqueting manager
b.	Head sommelier
c.	Head waiter/Head waitress
d.	Quick service restaurant team leader
<b>6. Destination management</b>	
a.	Destination manager
b.	Tourism promotion agent
c.	Tourist information agent
<b>7. Food and beverage preparation and production management</b>	
a.	Head chef
b.	Head pastry chef
<b>8. Other reservation and related services</b>	
a.	Ticket selling agent
b.	Tourist guide
c.	Tourist information centre manager
<b>9. Tour operators</b>	
a.	Tour manager
b.	Tour operator representative
c.	Tour operators manager
d.	Tourism contract negotiator
e.	Tourism product manager
<b>10. Travel agencies</b>	
a.	Travel agency manager
b.	Travel agent
c.	Travel consultant

Source: ESCO v.1

## **ANNEX Two: METHODOLOGICAL ANNEX**

The study was undertaken through a series of four Work Packages.

### **Work Package A**

Purpose: compiling and completing an overview of skills and competences "sets" required by the different occupations in the sector

<b>Task</b>	<b>Sources / Activities</b>
Definition of tourism sub-sectors	NACE classifications Consultation of sector stakeholders
Definition of tourism occupations	ISCO classifications ESCO classifications Consultation of sector stakeholders
Skills required for tourism occupations	ESCO classifications Consultation of sector stakeholders
Trends in employment and skills	Eurostat data Published research
Summary briefing paper	Stakeholder focus group

### **Work Package B**

Purpose: Defining and analysing the educational systems providing tourism specific education and training in each Member State

<b>Task</b>	<b>Sources / Activities</b>
Scoping	Consultation of European Commission Consultation of experts
Literature review	Policy literature, previous studies, etc.
Internet review	Websites of stakeholders
Stakeholder consultation	Interviews of stakeholders
Data analysis	National data relating to participation, achievement of qualifications, progression into/within employment
Summary country profiles	

### **Work Package C**

Purpose: Analysing the available education and tourism occupations and carrying out a qualitative performance check of its delivery against the skills sets identified for different occupations

<b>Task</b>	<b>Sources / Activities</b>
Scoping	Creating analytical framework
Analysis	Collating information from the national fiches into a single evidence base Cross-analysis Developing research findings
Clarification	Ad hoc internet research or literature review
Research	Commissioning national researchers to investigate good examples in more depth
Verification	E-mail consultation of NECSTouR experts Stakeholder focus group
Reporting	Draft report Client meeting & feedback Final report

<b>Work Package D</b>	
Purpose: Disseminating results, including via a conference	
<b>Task</b>	<b>Sources / Activities</b>
Website	Launch website ( <a href="http://www.eutourismskills.eu">www.eutourismskills.eu</a> ) Upload study documents
Media information	Newsletters Press releases
Social media	LinkedIn group Twitter
Final Conference	The Square, Brussels, 21 October 201



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