



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

[Written by the Centre for Strategy and Evaluation Services]
[October – 2015]



Centre for
**Strategy & Evaluation
Services**

EUROPEAN COMMISSION

Directorate-General for Enterprise and Industry
Directorate E — Service Industries
Unit E2 — Tourism and Cultural Instruments

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Key findings

October 2015

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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 whether it is 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 a summary of key findings from the research. It will be followed by a full Final Report, as well as reports for each of the 28 Member States. The full report will include recommendations for further actions in this area. Results from the research will also be 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.

2.0 Overview of employment and skills

In this section, we present an overview of key trends in employment and skills in the EU's tourist sector based on analysis of quantitative data available at EU level (notably Eurostat), consultation of stakeholders and analysis of published research and online job vacancies.

2.1 Employment in tourism sectors

1. More than one in seven enterprises in the EU's non-financial business economy is in sectors categorised as "tourism characteristic activities". In 2010, this represented 3.4m enterprises employing 15.2m people. They account for 11% of the persons employed in the non-financial business economy and 29% of those employed in the service sector.¹
2. Eurostat categorises 90% of these enterprises as "Partial tourism", whilst only 10% are within the "Mainly tourism" category. **Taking the sectors categorised by Eurostat as "Mainly tourism", around 2.8m people are employed in just over 0.3m enterprises.** These sectors are "Accommodation for visitors" (NACE 55) and "Travel agency activities & Tour operator activities" (NACE 79).
3. 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 suggests that its Accommodation for visitors sector is important in scale but with different characteristics to many other countries.
4. Regarding the **number of employees in the Travel agency and Tour operator sectors:**
 - 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 they are 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 might suggest that these countries are less important sources of "outgoing" tourism.

¹ Eurostat (2013), Statistics in focus 32/2013

- Countries such as Slovakia, Latvia, Slovenia, Croatia, Bulgaria, Italy, and 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).
5. Research by the World Travel & Tourism Council suggests that **women and young people account for a higher proportion of employees in the tourism sector than in the labour market in general.**²

2.2 Skill levels in the accommodation sector

Eurostat offers data from the Labour Force Survey regarding the number of employees in the Accommodation Sector (I55) by level of education attained.³

6. **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).
7. **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 in the accommodation sector had reached tertiary level in Germany and Austria, whilst more than 30% had in Ireland, Cyprus and Poland.
8. **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.
9. **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.
10. **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. 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.

² World Travel & Tourism Council (2014), Talent Challenges in Travel & Tourism

³ Eurostat does not provide data for other tourism sectors.

2.3 “Core” skill sets for tourism

Different tourism occupations naturally require different technical and professional skills: for example, managers require skills in business management, finance, sales, etc.; Tour Guides require specific knowledge; travel agency staff require expertise in using reservation systems. But there are a set of “core” skills that are required across the sector. Research for this study and previously-published research, including by the OECD, highlights where there may be shortages of such core skills.

11. Many, if not most, occupations require staff to have language skills and “soft” skills such as customer-service skills, communication skill and good intercultural skills/knowledge of foreign cultures. Such **soft skills tend to be amongst the skills for which employers report most skill shortages**.
12. Managers particularly require skills of communication, teamwork, problem-solving, initiative and enterprise, planning and organising, self-management, adaptability and IT skills. However, **research by the OECD has suggest that many part of the tourism sector suffer from a lack of such management skills**.⁴
13. The seasonal nature of **many parts of the tourism sector means that many employers rely on migrant labour to satisfy their need for workers**. Whilst this option can help meet short-term needs for labour, it is not an effective way to meet skill shortages in the long-term.⁵

2.4 Trends with skills implications

The European Commission’s Communication on “Europe, the world’s No. 1 tourist destination” highlights a number of trends and challenges facing the sector.⁶ These include the demand for higher quality, extension of the season, diversification of the supply of tourist services, the need for accessibility, the need for sustainability, new developments in ICT and the need for tourism employers (particularly SMEs) to be more adaptable. We explore some of the skills implications of these trends in this section.

2.4.1 Skills gaps and recruitment

14. Recent research by the World Travel & Tourism Council (WTTC) suggests that **meeting the challenges relating to quality, adaptability and diversification are hindered by skills gaps and difficulties in recruitment**.⁷
15. According to the WTTC research, **recruitment of 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.⁸
16. **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.⁹

⁴ OECD(2012), Tourism Trends and Policies

⁵ *ibid*

⁶ COM/2010/0352: Europe, the world's No1 tourist destination: a new political framework for tourism in Europe

⁷ World Travel & Tourism Council (2014), Talent Challenges in Travel & Tourism

⁸ World Travel & Tourism Council (2014), The Future of Travel & Tourism Talent

⁹ 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

17. 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%), according to the WTTC survey of employers.
18. In contrast, barriers related to shift work or unsociable hours (9%) or seasonal/part-time work (6%) were much less important.
19. **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.
20. **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).
21. **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);
22. **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.
23. 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%).

2.4.2 ICT skills

24. **Developments in ICT have changed the relationship between the tourism industry and its customer base.** Travel agents are increasingly providing services on-line in addition to their traditional high street outlets. They are facing increased competition from new entrants who often only operate on-line.
25. **Across the EU more and more customers are booking travel and holiday accommodation over the internet** - more than one quarter of all customers in 2014. This is likely to rise substantially, as countries with low rates of on-line booking gradually "catch up" with other Member States.
26. 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.
27. **Levels of online booking are particularly low (i.e. <10%) in Greece, Poland, Croatia, Lithuania, Bulgaria and Romania** but very likely to growth further. 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.

28. **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.
29. **Introduction of new technologies will continue to create a need for training for which companies should plan over the short and medium terms.**¹⁰ Amongst other things, training will need to facilitate the deployment of improved ICT infrastructure and the adoption of e-integrated business processes.¹¹
30. **Social media have 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.

2.4.3 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. With this in mind, a recent study has offered findings regarding the skills and training needed to improve accessibility in tourism services.¹²

31. **There is a need across all Member States for training in skills for accessibility for those in tourism occupations.** 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.
32. **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.
33. **Training is predominantly in the form of continuing vocational education or training 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.
34. **Most training provides introductory-level skills for frontline staff,** although there is also a need for managers to be trained.
35. **Tourism service providers lack the level of awareness and qualifications necessary** to serve the needs of people with special access needs.

¹⁰ World Travel & Tourism Council (2014), Talent Challenges in Travel & Tourism

¹¹ European Commission DG Enterprise and Industry (2006), ICT and e-Business in the Tourism Industry: ICT adoption and e-business activity in 2006

¹² European Commission, DG Enterprise and Industry, Mapping skills and training needs to improve accessibility in tourism services

36. **SMEs tend to demand informal and on-the-job training** rather than formal provision, given their limited resources.
37. **The maturity of a tourism destination does not have any bearing on the availability or take-up of accessibility training.**
38. **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.
39. **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.

3.0 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. We present summary findings here, which are drawn from analysis of evidence from the 28 Member States.

3.1 Forecasting skill needs in the tourism sector

40. Identifying current and future skill needs plays a crucial role in helping policymakers and other stakeholders to plan and provide appropriate education and training which meets those needs. The research has identified that **there is a diversity of approaches to identifying skill needs in the tourism sector.**
41. **In some countries, there is a reliance on skill forecasts provided by centralised bodies that cover all economic sectors.** In these cases, the risk is that there is little focus on tourism, unless specific additional efforts are made. There is also the risk of relying on a single main source of data, e.g. employer surveys, which might not capture some skill needs, for example, if some new occupations are not classified as tourism occupations.
42. **Some countries have created specific networks or mechanisms that identify skill needs for tourism occupations.** Although these differ from country to country, effective approaches tend to involve all the main stakeholders including employers. They also tend to combine evidence from a mix of sources, which then informs consultation and dialogue amongst the stakeholders.
43. **Ad hoc studies have been undertaken in a number of countries** 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.
44. **In a few countries, there appear to be no strategic mechanisms at national level that specifically focus on forecasting skill needs for tourism.**
45. **Forecasts undertaken by individual educational institutions serve as a crucial complement to forecasting of skill needs for tourism at the national level.** Such forecasting would typically relate more to regional and local labour market needs and can thus respond more directly to the needs of employers.

3.2 Strategies for tourism education and training

46. **Skills strategies for the tourism sector are often developed in isolation to wider strategies for the development of tourism.** The prime concern of

Ministries of Economy or of Tourism is often 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.

47. Some national strategies for tourism 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.**
48. **In some cases, national tourism strategies give little or no consideration to the need for skills development.**

3.3 Employers’ involvement in strategy and planning

49. 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. But in some countries, **social dialogue fora do not necessarily give sufficient and appropriate consideration to the planning of education and training for the tourism sector.**
50. **In other countries, the planning of skills provision is overseen or facilitated by a specific body** – at least for some forms of education, if not for all. Such bodies might be a public agency, a private company or a civil society organisation. One potential advantage of such bodies is that they can allow employers to take the lead in planning and designing training courses that are in line with labour market needs.
51. As well as – or instead of – these formal processes for involving employers, **there are various forms of informal co-operation, dialogue and consultation that involve employers in strategy development and planning related to tourism education.** Very often, the views of employers are articulated via employer’s bodies or industry associations. In other cases, employers articulate their needs informally and directly to education providers.
52. **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.

4.0 Provision of tourism education and training

The diversity of tourism occupations means that the necessary skills can be provided by higher education, vocational education and training (VET), adult education and continuous training, or school education. In this section, we present summary of findings regarding the provision of tourism education and training in general and then for each of the different types of education.

4.1 Overview

53. **In some countries, the skills required for certain occupations will mostly be provided by one form of education.** This is particularly the case in countries where the education system plays a key role in stratifying individuals into occupations before they fully enter the labour market.
54. **In other countries or for other occupations, there is a diversity of routes into employment,** with the necessary skills being provided either by higher education institutions, VET providers or by adult learning providers. 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.
55. **In many countries recruitment into tourism occupations (particularly into senior management roles) is on the basis of generic business qualifications,** such as accountancy or marketing, rather than of tourism-specific qualifications.
56. Across Europe, **there are distinct differences in the extent to which qualifications are expected to lead to employment in corresponding professions.** In some countries, it is common for graduates to seek employment in areas that hardly relate at all to the subject studied at university.

4.2 Higher education

57. Whilst entry into the tourism occupations does not always require a degree in Tourism or Tourism Management, **tourism is becoming one of the most popular degree programmes in many countries.**
58. The drive for raise the quality, sustainability and diversity of Europe's tourism offer is reflected in **increased specialisation in higher education institutions and courses related to tourism.** Such specialisms include cultural tourism, sustainable tourism development and destination management.
59. **There is increasing provision at post-graduate level.** This can take the form of non-degree diplomas or Master's degrees, often in specialist or niche subjects.
60. **Tourism degrees have been reported to lack homogeneity and common orientation and to be very diverse and fragmented.** This reflects the multidisciplinary nature of most tourism degrees. It also reflects the fact that some are primarily focused on economics, others business or management and

others on geography. This lack of homogeneity is being addressed by the Bologna Process which will require all Tourism degrees to conform to minimum levels.

61. **Employers express a number of concerns about tourism degrees; particularly that many graduates are not “work-ready”.** A key concern is that some courses are overly-theoretical and do not include sufficient work experience or give sufficient attention to the development soft skills and foreign language skills and to the acquisition of practical knowledge.
62. **The progression of tourism graduates into employment in the sector can be problematic.** There is an over-supply of tourism graduates in some countries, meaning that many enter other sectors or take up non-graduate jobs. Many graduates also have poor perceptions of the industry, particularly with relation to pay and conditions.
63. **The EU’s Erasmus+ programme plays a crucial role in facilitating the international mobility of higher education students.** Such mobility is particularly important to students of tourism.
64. **Erasmus+ has also promoted strategic developments in higher education, such as transnational joint Master’s programmes in the field of tourism management.**

4.3 Vocational education and training (VET)

65. 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.
66. In contrast to higher education, **courses of 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.
67. **Some VET programmes relate very specifically to sub-sets of tourism occupations or even to niche occupations.** This diversity is often driven by demand, as articulated by employers and taken into account by the educational authorities responsible for planning provision. In many cases, the involvement of employers as providers of education ensures that provision is both diverse and focussed on specific occupations.
68. **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.
69. **VET provision is more systematically planned than higher education.** Both government bodies and employers have an active role in determining the nature and extent of training that is to be provided.
70. 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.**

71. **It remains a challenge to ensure that VET courses are relevant to employers' needs.** Many employers report that VET courses do not respond well to their needs. At the same time, many training providers find it hard to arrange work placements and work-based learning because employers often lack the capacity or the willingness to host VET trainees.
72. **There is a diversity of solutions to the challenge of ensuring that work-based learning or work experience feature in VET courses.** These include a renewed interest in apprenticeships, "exercise firms" that simulate the experience of a conventional firm and more efficient and intensive use of training facilities that feature expensive equipment.
73. **The EU's Erasmus+ programme is playing a key role** in enabling VET courses to extend the experience of their students by offering the chance of training abroad.
74. **Erasmus+ projects have improved the performance of the VET offer for tourism in many different ways.** This includes: development of tools and transnational strategic partnerships to enhance the recognition of learning outcomes and education and training activities in VET; tools and systems to support the transparency and recognition of qualification and to improve the quality of training activities provided; and transnational approaches to identifying the new skills needs in the sector and providing related training activities.

4.4 Adult education and continuous training

75. **Adult education can serve as an important complement to higher education and VET in meeting employers' needs.** It can be organised 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 and it can be more immediately responsive to employers' requirements
76. **Adult education for tourism occupations tends to be provided less systematically across the Member States than does higher education and vocational training.** The extent and scope of provision for tourism tends to rely on the strength of the overall adult education system, the existence of collective agreements between the social partners and the extent to which employers express a demand for it.
77. **An important benefit of adult education for those employed in tourism occupations is the validation of experience gained in the workplace** and through non-formal and informal learning. Given the often unsociable working hours and the seasonality of the tourism sector – and the associated difficulties in attending formal courses of learning - such validation to the successful career progression of those who enter the sector at the lower levels.
78. **Adult education and continuing education have the potential to play a crucial role in raising the skill levels of the many entrants into tourism occupations that have only a low level of education.** Given that skill levels of employees in the accommodation sector are generally lower than those of employees in other sectors, there is very often a need for second chance education to address basic skill needs.

79. **In-house training, often provided by private training companies, accounts for an important part of training provision in the tourism sector.** It is particularly characteristic of large companies, such as hotel chains.
80. **The European Social Fund (ESF) is making a particularly important contribution to the provision of adult education and continuous training in the tourism sector.** ESF projects are helping to upgrade skills for those in tourism occupations and are creating new routes into employment in tourism for unemployed people.

4.5 School education

81. 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, **there are instances in which schools incorporate a tourism dimension to their educational offer.**
82. **In some Member States, vocational education is mainly delivered via the school system,** especially through vocational schools that pupils can choose to attend e.g. post-14 or post-16 years old, as an alternative to an academic route. In these countries, there are opportunities for school children to enter an educational pathway towards employment in the tourism industry.
83. In a few cases, **there are specific educational pathways related to tourism occupations within the general school system.** These are diverse in their approaches, but typically offer a mix of classroom-based learning and work experience in order to facilitate the transition into employment upon the completion of compulsory schooling.
84. **It can be particularly difficult to engage employers in determining course content and in offering training placements of high quality** – even more so than for VET. 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.

5.0 Skills provision for tourism occupations

In this section, we offer summary findings about the skills required and the educational pathways into key tourism occupations. The findings are based on analysis of evidence gathered in the 28 EU Member States.

5.1 Commercial managers in the tourism sector

85. **Recent years have seen an increase in the diversity of commercial manager roles within tourism** (revenue managers, sales managers, marketing managers, etc.). Some generic roles have become more specialised, particularly where new business models and pricing strategies are needed. The development of e-commerce has led to the emergence of new occupations, such as web-marketing manager
86. **Degrees in tourism/tourism management can be a route into such occupations.** Such graduates are usually required by their employers to undertake additional training once in employment, unless their degree included relevant modules in business management, accountancy, sales, etc.
87. **Some specific skills are not widely taught in higher education courses, such as yield management, revenue management and web-marketing.**
88. **Many of the large employers have created internal career paths that graduates can follow leading to these occupations.** Additional in-house training is provided as necessary.
89. In many countries 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.
90. **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.
91. **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.

5.2 Accommodation managers and operatives

92. As noted earlier, **employees in the accommodation sector generally have lower levels of education than employees in other sectors.**
93. 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. Moreover, vocational qualifications can often be sufficient for individuals to reach management level, provided that the necessary experience is gained.

94. **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.
95. **Internal progression into management positions is often the norm.** Such progression would typically take place from operational positions after several years of experience and training on-the-job.
96. **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.
97. **In some countries, certain accommodation occupations have the status of regulated profession** (or similar). These might include Hotel Manager or Hotel Clerk. Managers might also need a licence to operate the hotel in some countries.
98. **Many of the accommodation operative roles have little or no specific educational requirements.** In those cases, employers prioritise soft skills, flexibility and aptitude, rather than formal qualifications.

5.3 Meetings, incentives, conferences, exhibitions (MICE)

99. **There is wide variety in the entry routes – and thus also in the education and training required - for MICE occupations.** This reflects uneven growth of the sector in different countries, as well as different levels of recognition of the need for skills to be provided by the education and training system.
100. **In some countries, the MICE sector 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.
101. **In some countries, 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.
102. **There is a clear entry route into some MICE occupations in other countries, through regulated courses of professional training.** In those countries, entrants into event management roles have to undertake formal training courses of three years or more that combine vocational training with practical work experience.
103. **Those working in steward/stewardess roles are very often recruited on a temporary and part-time basis.** Training is often provided on-the-job and is not certified. In some cases, no training is provided at all.

5.4 Destination management

104. **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.
105. 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.** Information agent roles can typically be entered upon completion of a course of vocational education or training.
106. **Management/agent roles related to tourism promotion and communication roles now require much more sophisticated skills in IT and on-line communications** in addition to knowledge of and experience in the tourism sector. This creates a need for tourism education, particularly degree courses, to respond appropriately.
107. Although growing in importance, **the role of Sustainability Manager remains uncommon in many Member States. As a result, specific entry routes - and their associated educational requirements - have not yet emerged.** Where available, the necessary education and training tends to be integrated into tourism degrees and/or provided via additional short courses.
108. **Tourist Guide is an occupation that is regulated in several Member States** and reserved for individuals holding specific professional qualifications and having undertaken specific courses of training.
109. **There is a trend towards the deregulation of the profession of Tourist Guide** at national level, although access to these professions may still be regulated at local/regional level.

5.5 Tour operators and travel agencies

110. **The distinction between tour operator and travel agency is becoming increasingly blurred.** For that reason, the skill requirements and typical entry routes are broadly similar for similar occupations in each type of enterprise.
111. **The increase in on-line sales and in customer self-service (e.g. e-ticketing) is making some roles redundant, particularly support and administrative roles.** ICT skills are particularly in demand, with travel agencies and tour operators bring the strongest adopters of ICT and e-business within the sector.
112. 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.**
113. 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.**

114. **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.
115. In some cases, **it is possible to follow a vocational training route into senior management positions**, provided that sufficient relevant work experience is gained.
116. **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.
117. **Some Member States classify 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.
118. In countries where occupations within tour operators and travel agencies do not have the status of regulated profession, **there is considerable variation in the availability of routes into these occupations via vocational education and training.** In some countries, there are clear progression routes from school education via vocational training into tour operator/travel agency occupations whilst other countries seem to offer fairly limited entry into tour operator management occupations via vocational training.
119. **In most cases, the occupation of Tour/Holiday Representative is not regulated or defined and 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.

6.0 Conclusions

120. There is a need for the industry and for governments to give greater priority to skills development for tourism occupations. **This will require national policies on tourism to give better consideration to skills development.**
121. 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.**
122. In many instances, there is no general shortage of education and training (higher education and VET) for tourism occupations. Instead, **the need is to adapt existing provision in new and innovative ways** so that it better meets the changing needs of employers.
123. There is also a need for **educational authorities, education providers and employers/employer representatives to collaborate more closely and in new ways** at different levels and for different forms of education.
124. **A key determinant of the performance of tourism education and training is the overall effectiveness of the national (or regional) education and training system.**
125. **Improvements in skill levels of employees in tourism occupations are largely dependent on the wider drive to improve the performance of the tourism sector.**
126. **Meeting challenges related to quality, adaptability and diversification is hindered by skill gaps and difficulties in recruitment.**
127. **The main skill gaps reported by employers relate to soft skills, language skills, interpersonal skills and ICT skills** rather than to technical and professional skills required of specific occupations.
128. **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.
129. **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”.**
130. 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.**
131. 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 needs of employers – but a diversity of solutions is available.**

132. **There is a need for innovative and flexible forms of education and training to meet the skill needs of SMEs and family-run businesses.**
133. **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.



Publications Office

doi:[number]