

# Summary and conclusions

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## 1. Tourism in Europe

Tourism is an important sector in the European economy. It accounts for almost 5% of direct employment and produces 5 % of European GDP (ETC, 2004). The sector is expected to demonstrate stable growth in the next decades with the volume of European tourism doubling and sector employment rising by about 15 % (EC, 2001). The spin-off effects to other economic sectors should not be underestimated: stable growth in tourism can also boost employment in the sectors which benefit indirectly from tourism.

However, European tourism is growing at a lower rate than world tourism on average. Although Europe has been the number one destination in the world, it is – for various reasons, price levels and exchange rates included – expected to lose its position in the future, giving way to China and the US. European tourism remains largely internal with 88.1 % of visitors coming from Europe (WTO, 2004). To retain its unique position in global markets, European tourism has to compete with other world destinations and to attract travellers worldwide. This will not be possible without efficient human resource development policies and practices which would take into account global social and economic trends and their direct effect on the sector. The competitive advantage of European tourism in global markets in the long run cannot be based on the price of labour; it should rather focus on the quality, diversity and unique character of tourism services and travel experiences. The importance of skills and competences speaks for itself.

The main problems in tourism are very similar across countries: low pay, very high demand for staff flexibility and mobility, high staff turnover, high share of informal employment arrangements and persistent skill shortages. The sector also suffers from its highly seasonal character and is very vulnerable to external political and economic factors. Employment in such conditions is insecure. Over 95 % of companies employ fewer than 10 people (ETC, 2004). The specific nature of company size structure in tourism and the fact that the sector is practically non-unionised affect common HRD practices among tourism enterprises. The

continuous complaint from employers in the sector regarding skill gaps and shortages curiously coincides with few training offers among tourism companies.

At the same time, qualifications from tourism are much appreciated by other sectors thanks to many transversal skills in demand across occupations (e.g. customer orientation, interpersonal and intercultural communication). Many qualified employees leave tourism and young school graduates do not wish to enter the sector, preferring more stable and better paid jobs outside their original occupation. Employer recruitment practices often demonstrate a deliberate preference for un- or low qualified workers (normally cheaper) over qualified personnel. The question appears to be, therefore, whether the sector can afford such short-sightedness and waste of resources, and how this vicious circle can be interrupted.

Conversely, qualifications from other sectors are easily employable in tourism (e.g. qualifications in ICTs, finance and management). The logical question, therefore, was raised whether the provision of more general, transversal, qualifications might be a useful solution. The workshop participants looked at a number of issues in the debate and attempted to propose a suitable answer:

- (a) which societal and sectoral trends determine the shape of qualifications and which skills are demanded by the sector?
- (b) which new skills and occupations emerge in the tourism sector?

## **2. Trends determining skill needs in tourism**

Various research attempts to identify skills and qualifications in tourism have demonstrated that the development of this service sector is mainly shaped by social trends such as changes in leisure time preferences, increased individualisation, demographic shifts and raised health awareness. These trends proved to be common for European and other countries (e.g. Canada).

Demographic developments, in particular, offer new challenges since the number of older people is increasing, creating a large target group. It is estimated that the proportion of people over 65 years of age will soon comprise one third of the European population. With the increase of life expectancy another numerous and growing group is people with disabilities and restricted mobility, whose needs are not well reflected in current tourism services. This has a direct impact on the number of staff, specific skills and occupations needed to satisfy the demands of potential clients. Research results from isw, for instance, showed new fields of activity such as travel guides for people with restricted mobility. Other demographic developments, such as the increasing number of lone travellers, also impose specific demands not only on the infrastructure but also on the provision of services (entertainment programme, animation, social insertion, individualised services).

Tourism is no longer seen as a luxury good but is becoming an essential. The number of working hours per week in many European countries is diminishing, and there is more time available for leisure during the weekend, hence more frequent travel to places 'nearby' or easily accessible ('grounded' trips). More frequent travel is accompanied by shorter periods of

stay. Political turmoil and environmental disasters discourage transcontinental travel. Thus, more travel is concentrated inside Europe, inside individual countries (especially in such large countries as Germany or France) and even inside the region.

Although customers look for competitive prices for travel products, the spending per day during travel is increasing, even in countries where the recent economic situation does not encourage the population to spend more (e.g. Germany). In return, customers expect authentic and memorable local experiences. Value-added products for tighter wallets and/or for sophisticated tastes are appreciated. Thus, complex product packages and complex services on offer are expected to be available during travel <sup>(19)</sup>.

The continuous blurring of the boundary between work and leisure imposes value-added customer expectations (e.g. training programmes during vacation, a guided tour or a sports/wellness programme linked to the business trip). Business travel and shortened/more frequent trips cause a boom in the exploration of cultural heritage, urban tourism, event tourism, and in-search-for-nature tourism (ecotourism, ‘back to basics’) <sup>(20)</sup>. Health awareness has penetrated lifestyles. Thus, tourism is expected to offer sports, beauty and healthcare treatments alongside other tourism services.

Tourism is challenged by a growing demand for customer orientation, increasing international competition, volatile markets in an insecure environment, changing customer demands towards individualisation, and a significant potential in various market segments. The expansion of new technologies alters the delivery of services since the presence of the Internet changes distribution and sales practices. Mergers and acquisitions in the sector lead to a growing number of services provided by chains worldwide with a certain standardisation of quality and, hence, competences expected from the personnel.

### **3. Skill requirements and skill gaps**

The knowledge and skills required to provide services shaped by current social trends become highly interdisciplinary. Multiskilling and new hybrid occupations reflect the trend for new types of tourism products and services – more complex and sophisticated in nature – and the growing demand for functional flexibility in the labour force. The debate about the role of qualifications in the tourism sector touched on the problem of losing human resources to other sectors' appreciative of personnel from tourism and employers' failure to attract qualified personnel to the sector. Taking into account the need for qualifications from other sectors (e.g. ICTs), the workshop participants agreed that transversal and hybrid qualifications with a broader general basis might be useful and could lead to new occupational profiles.

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<sup>(19)</sup> See Abicht and Freikamp's contribution to this volume.

<sup>(20)</sup> Even among luxury travellers demand for the ‘barefoot luxury’ is on the rise, also known as ‘no news – no shoes’ (see Gottwik's contribution to this volume).

For example, according to the national survey in France, a number of managers of small establishments stated that their permanent staff took on multiple roles, doing two jobs (e.g. chambermaid and waiter, waiter and cashier, etc.). Such findings are quite common elsewhere, especially when it comes to small enterprises. The question is whether such a combination of skills would become more widespread in future. According to the opinion of the representative of the French trade unions, ‘doing everything will continue, but it could be treated differently. People required to carry out multiple tasks need to have an all-round basic competence in the hotel and catering industry, as cook, waiter, and other skills. This may mean multiskilling in fields that are quite far apart’ <sup>(21)</sup>.

However, multiskilling and growing complexity of tasks is not the only trend in the sector. The process of mergers and acquisitions often leads to creation of chains of hotels and in the catering sector. Such industries do not always require performance of complex tasks. In fact, sometimes the trend is quite the opposite: they require standardised skills with little room for creativity and manoeuvre (e.g. fast food chains). The example of the French comparative research into developments among the same sectors and occupations in another continent, namely in the US, and results of the research on skills requirements for cooks and chefs demonstrated the change of the very nature of the vocational ‘appeal’ (end of ‘gourmet cooking’) <sup>(22)</sup>.

In terms of specific skill requirements, personal and social skills are claimed most frequently across all countries. In addition, skills such as capacity to learn and to work independently are gaining in importance. Knowledge of foreign languages and specific knowledge and skills linked to technological innovation and the information technologies’ penetration to the sector are often listed as lacking.

If we look at particular country examples, the research in Canada demonstrated severe skill gaps in ICT skills, literacy and numeracy, communication/presentation skills, customer handling/service, problem solving and critical analysis, leadership skills, financial management and cost control, as well as project management <sup>(23)</sup>.

According to isw research, the tourism sector in Germany lacks well-trained intermediate-level staff. Insufficient basic knowledge and skills regarding specific tourism products, services and destinations, marketing, sales, customer orientation, electronic data processing, and computerised booking and reservation systems are often-cited weaknesses. Employees also often lack interpersonal skills, particularly when advising and dealing directly with customers <sup>(24)</sup>.

The research in Portugal detected major changes in distribution practices, where there is a growing tendency to separate the design and sales activities of travel products. Such a trend affects the demand for skills among tourism operators (market analysis, and mass and tailored

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<sup>(21)</sup> See Guegnard’s contribution to this volume.

<sup>(22)</sup> See Mériot’s contribution to this volume.

<sup>(23)</sup> See Joppe’s contribution to this volume.

<sup>(24)</sup> See Abicht and Freikamp’s contribution to this volume.

travel product design), and among travel agents (increased skills in customer relations, building customer loyalty and travel organisation). Furthermore, new skills demands were identified in designing entertainment products, particularly in using the suppliers' network and package products design, and in defining and implementing marketing strategies, and their promotion in different contexts (cultural, sports, casinos, hotel units). The Portuguese research also addressed central and local administration authorities and identified skill gaps in facilitation, promotion, territorial marketing, environmental policy, history, culture, handicrafts, gastronomy and other important aspects in the design of tourism products that help boost the regional development (25).

#### **4. New and emerging occupations in tourism**

New social trends demand new occupations. Immediate identification by enterprises is crucial for detecting skills and competences required for new qualification profiles not yet incorporated into the national qualification frameworks.

Barrier-free tourism, resulting from demographic trends and a growing number of people with restricted mobility, became an important field of activity in the sector. It required elaboration of a special training programme in Germany with a syllabus which included such subjects as special needs of disabled people, barrier-free building and planning, programme design, marketing, etc. (26).

Another interesting research example from Germany (isw) uses the so-called 'sector scouting' approach to determine trend qualifications among 'trendsetting' companies. The project identified the following new complex skill packages in the tourism sector:

- (a) travel designer, online travel agent and event designer in holiday booking and design;
- (b) tour guide for people with restricted mobility, amateur and guest relations and travel services representative;
- (c) business travel manager in business trip organisation;
- (d) agency consultant in travel agent support.

The rise of health consciousness among the broad public and better awareness of specific individual needs among clients led to a qualitatively new situation in providing wellness services in tourism. Wellness can no longer only serve as a marketing label for tourism. What we observe in this area nowadays is strong links between tourism, sports and healthcare. Sound knowledge in healthcare (both treatment and prevention) is required among those working in the sector of tourism. But traditional knowledge in hospitality and culture is required at the same time, suggesting qualitatively new, highly interdisciplinary and complex

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(25) See Belezza and Gaspar's contribution to this volume.

(26) See Berthold's contribution to this volume.

qualifications, for which training is still rather exceptional and experiential (e.g. the Sebastian Kneipp School, Health Management University in Germany) <sup>(27)</sup>.

Luxury destinations, such as spas, have a number of qualification requirements and the fundamental decision is whether to take the holistic approach, or a specific one (e.g. plastic-aesthetic surgery on the treatment menu). Alternative medicine and age management are becoming very popular and specialist services are expected. Food and beverages staff need to be trained on dietary options. Awareness and integrity in business ethics also penetrate occupations in luxury accommodation establishments <sup>(28)</sup>.

Penetration of ICTs in the sector implies importance of ICT skills across all occupational levels. But the current shape of travel and tourism value chains also includes Internet-based distribution of information as well as transactions. For successful navigation of the ‘tourism value net’, personnel require skills to identify opportunities for cross-promotion and cross-selling, skills for finding efficient combination of distribution channels, skills for managing sales across several distribution channels, etc. Additionally, traditional skills such as customer service, legal aspects, cross-cultural communication are important parts of the skill base for navigation in the tourism value net. Tourism professionals in revenue management need strong knowledge of marketing, finance management, statistics, customer service principles and distribution trends. Effective revenue management requires skills to combine these knowledge areas consistently and creatively, not only among managers but also among lower occupational categories. ICT courses can no longer be separated from other courses; ICT must be studied in the context of its application, as a part of marketing, customer service, revenue management, etc. <sup>(29)</sup>.

## **5. The transfer of research results to policy and practice**

Detection of new occupations and combinations of skills by studying social trends and by looking at actual developments in the sector and its companies is useful but not sufficient. Elaboration of new qualification profiles and inclusion of the knowledge requirements in training programmes is a separate and very demanding area.

During the workshop we heard about some successful examples of the transfer of research results into policy and practice. Here we mention only some of those.

In Portugal, the Institute for Innovation and Training (Inofor) embarked on the *Tourism sectoral study* which, among others, also incorporated *Skill trends and training needs diagnosis* with subsequent elaboration of the medium to long-term development strategy. The strategy elaboration involved directly all those stakeholders potentially in charge of its

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<sup>(27)</sup> See Ritter’s contribution to this volume.

<sup>(28)</sup> See Gottwik’s contribution to this volume.

<sup>(29)</sup> See Henriksson’s contribution to this volume.

implementation. In the framework of the institutional cooperation that steered this initiative, the key issues identified led to seven *Priority action plans* (PAPs) being drawn up. Coordinators and teams were appointed to elaborate and develop the PAPs, which consisted of operational objectives, actions to be undertaken, and the respective timetables<sup>(30)</sup>. Such concretisation, quite ‘administrative’ on first sight, may assist efficient implementation of the strategy, given that consensus of the stakeholders on the implementation process had been achieved in the development stage.

The Regional Employment and Training Observatory (OREF) of Burgundy has a similar consensus approach which attempts to negotiate research results with public and decision-making bodies, and occupational organisations within a given region, with the aim of achieving a shared diagnosis of future skill needs in the sector. In spite of years of successful experience, OREF points to a long process of persuading institutions that are sometimes in competition (e.g. national objectives versus regional) to pool certain points of view in order to carry out concerted action. Furthermore, such shared diagnosis obviously does not stand still and requires further discussion and evaluation over the years. Achievement of a regular dialogue between the economic and social actors on one side, and experts/researchers on another side, remains a challenge<sup>(31)</sup>.

Development of measurable competence-based standards – such as in the example of Canada<sup>(32)</sup> – not only helps to keep the qualification provision up-to-date but also can support the validation of prior experience and learning. While formal qualifications are not always required in tourism, their existence, and a widely available opportunity to obtain qualifications by an alternative to formal education, may contribute to raising the prestige of the occupation and the sector in general. Taking into account a very high proportion of personnel without formal qualifications but nevertheless often with adequate tacit knowledge and experience in the sector, validation of informal and non-formal learning linked to an efficient system of counselling and retraining may become the HRD solution for the sector. Such a system, however, has to be supported not only by the social partners, whose role in the sector is limited, but also, and perhaps mainly, by the government.

Little time and funds available for training, especially among small companies (i.e. about 95 % of the sector market), can be compensated by efficiently designed and offered distance learning courses. The Internet is a natural medium for many companies in the sector, and to provide access to ICTs is often easier for employers than to provide actual on-site training courses and to pay full-time attendance for the employee. The example from the Czech Republic demonstrated the result of several years’ research which led to the design of modular courses in distance learning in tourism combined with face-to-face consultations and

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<sup>(30)</sup> See Belezza and Gaspar’s contribution to this volume.

<sup>(31)</sup> See Guegnard’s contribution to this volume.

<sup>(32)</sup> See Joppe’s contribution to this volume.

seminars especially targeted at personal development and communication skills, which are highly important for tourism <sup>(33)</sup>.

A number of countries run regular or one-off surveys (e.g. Hungary, Montenegro <sup>(34)</sup>) to help identify the general direction for tourism development in the country and the linked reform process in education and training. A solution to implementing results from such studies into practice is, however, still a task for the future.

As Mériot points out, expectations of changing employment and managerial practice quality, simply by improving training programmes, are limited. Tourism, dominated by micro enterprises and virtually non-unionised, affected by seasonality and informal recruitment practices, often attracts people with no specific qualification in the sector. For them, it is often the first encounter with the sector and the profession with no long-term expectations whatsoever ('the newcomer or unconsolidated worker' in the Spanish/Czech research <sup>(35)</sup>). Bearing in mind that a high proportion of tourism school graduates go to work in other sectors, vocational education and training should provide a broad knowledge basis also in fields other than tourism. This could help prepare them for their future employment (in administration, business and sales, information technology, etc.) <sup>(36)</sup>.

From the point of view of the sector's self-interest however, it is important to establish employment and HRD practices to attract and retain qualified personnel. The promotion of social dialogue at various levels in the sector may help improve the situation.

## 6. What next?

A number of international and European research and analysis activities into identifying skill needs for tourism have already taken place. Activities of such bodies as the World Tourism Organisation, World Training and Tourism Council, International Labour Organisation, Tourism Unit of the Enterprise General Directorate of the European Commission, and European Travel Commission have been very important in shedding some light on which skills and competences will be required by the tourism sector. It is, however, important to bear in mind that for the listed institutions, skills and training issues are not the primary focus of their activities. Research in these subjects is normally linked to broader sector analyses.

The European Commission's High Level Group on Tourism and Employment initiated the creation of five thematic working groups to boost tourism and employment (1998). Working group B, *Improving training in order to upgrade skills in the tourism industry*, came up with some relevant conclusions. The main conclusion was to attract skilled labour and support

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<sup>(33)</sup> See Zelenka's contribution to this volume.

<sup>(34)</sup> See Szabó and Sisevic's contributions to this volume.

<sup>(35)</sup> See Marhuenda et al.'s contribution to this volume.

<sup>(36)</sup> See Mériot's contribution to this volume.

micro-enterprises in tourism. A second proposal consisted of the creation of a permanent observatory on learning, employment and labour environment for tourism. Although this was, and still is, seen as a very valuable idea, this proposal has never been implemented. The development of a *Handbook on learning areas for the European tourism industry* was the third proposal of working group B and has been implemented <sup>(37)</sup>.

Taking into account high and steadily growing mobility in the sector across Europe, it is possible to speak about the emergence of a European tourism sector. Comparison of occupational profiles in various Member States appears useful. Cedefop performed the first of such comparisons in 1994 (Guerra and Peroni, 1994). In 2000, Cedefop produced case studies in selected Member States on changing occupational profiles in the hotel industry (Gatti et al., 2001). Subsequently transparency of qualifications in the tourism sector from the mobility point of view were examined (Richards, 2001). With the creation of Skillsnet – an international network on early identification of skill needs coordinated by Cedefop – a number of new activities can be initiated, if Skillsnet members appear interested in supporting such activities ([www.trainingvillage.gr/etv/Projects\\_Networks/Skillsnet](http://www.trainingvillage.gr/etv/Projects_Networks/Skillsnet)).

In spite of the fact that many research activities into skills issues in tourism are taking place in Europe and worldwide, research in early identification of skill needs in the sector (i.e. with a longer-term perspective) are still exceptionally rare. This has several causes: persistent statistical gaps for this sector; domination of SMEs which are traditionally averse to research; very weak role of social partners, i.e. partners for discussion of research results and their transfer to practice. The numerous research activities are rather isolated, and hence offer limited impact and only partial transfer to policy and practice. The vulnerability of the sector makes it very difficult to cast any predictions and thus imposes additional problems for early identification of skill needs.

Skillsnet therefore proposes to establish a working group for early identification of skill needs in the tourism sector with the following aims:

- (a) exchanging knowledge and experience on methods and tools;
- (b) stocktaking available research results;
- (c) complementing other research and analysis activities on skill needs in tourism;
- (d) generating research and development projects to cover existing gaps in identifying future skill needs in the sector and transferring them into policy and practice.

Such a working group can only be created if clear interest and support is present among Skillsnet members. The working group may be coordinated by one of the partner institutions as a self-managing and self-fundraising activity, and should cooperate very closely with major European and international tourism organisations. The working group should consist of researchers and experts in identifying skill needs and social partners from the tourism sector.

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<sup>(37)</sup> See Jonckers' contribution to this volume.

During the final workshop debate, participants expressed their willingness to invest time and human resources to support Skillsnet to become a useful tool.

Piet Jonckers, European Commission (DG Enterprise), proposed a new cross-country analysis of occupations, with the perspective of a European qualification framework for tourism. Such a task may be implemented in the framework of the proposed working group on tourism and in close collaboration between Cedefop and DG Enterprise – Tourism Unit.

Stavros Stavrou, Cedefop Deputy Director, noted special attention should be paid to an elaboration of vocational profiles for new occupations (e.g. barrier-free tourism, tourism for wellness).

Further ideas in the plenary discussion included an assessment of examples of good practice in identifying skill needs and the subsequent transfer to HRD policy and practice with special attention to success factors. The proposed working group could identify areas of interest and generate projects in early identification of skill needs, as well as disseminating project results through the Skillsnet information platform and membership. The working group could monitor calls for tender and collect information on continuing and completed projects; support (cross)regional identification of skill needs (e.g. Euroregions, geographical enclaves). Finally Skillsnet could be useful in benchmarking various activities related to early identification of skill needs among different sectors.

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