



TOURISM THEMATIC TEAM ANNUAL EVENT

# The Tourism GLOCAL Conference

from **6** to **8**  
**March**  
**2023**  
**Alba**



# Market trends analysis

## Aim

- To map the tourism ecosystem through a Skills gap analysis in order
- to understand the needs of the tourism companies
  - to provide upskilling and learning activities for teachers and students

# Methodology

## *International desk analysis sources*

- World Economic Forum (WEF)
- World Trade Organization (WTO)
- European Travel Commission (ETC)
- World Travel and Tourism Council (WTTC)
- EC (DG Environment, DG Regio, DG Growth, DG Employment)
- IBMT
- Condé Nast Traveller
- The Organisation for Economic Co-operation and Development (OECD)
- Eurostat
- CEDEFOP
- UNESCO
- Professional research / publications
- International Labour Organization (ILO)

## *National desk analysis by TEF partners*

- Italy
- The Netherlands
- Spain
- Portugal
- Greece
- Bosnia and Herzegovina

*Sources:* National tourism boards, statistical bodies, chamber reports, national tourism associations

## *Four themes of interest*

- Future trends
- Skills gaps
- Challenges / obstacles
- Social development

# Statistics

- 5 out of the top 10 destinations in the world are located in the European Union

The direct contribution of tourism is highest in

- Spain 11%
  - Portugal 9%
  - France 7%
  - Italy 6%
  - Austria, Hungary and Greece above 5%
  - Germany, the United Kingdom and the Netherlands about 4%
  - Belgium, Poland and Denmark around 2%
- Tourism is one of the key pillars of the EU strategy for jobs and inclusive growth
  - Tourism generates 10% of GDP and represents 9% of total employment in the EU

# Developments

- Digital transformation
- Sustainable development & sustainability
- Over tourism
- The sharing economy
- Booking flexibility
- Growing influence of social media on decision-making
- Interest in sustainable travel

# Opportunities & Challenges

- Enhancing competitiveness and sustainability of tourism destinations
- To invest and create quality job opportunities
- Find the right human capital base that meets current and future market demands

# Challenges / Obstacles

- Digitalisation (challenge and opportunity)
- Cyber security
- Seasonality
- Labour shortage
- Depreciation of tourism service functions
- Annual employment growth
- Low salaries
- Skills gaps
- Unprecedented international border closures and other travel restrictions

# Trends

- Domestic tourism
- Family tourism vs Business and event tourism vs educational tourism
- Shopping – urban tourism
- Outdoor and nature-based tourism like
  - Wine tourism
  - Agri-tourism
  - Sport-tourism
  - Eco-tourism
  - Wild tourism
  - Adventure tourism
- Medical tourism
- Gastronomic tourism
- Alternative accommodations
- Digital and contactless experiences
  - Such as Virtual tours, Self-guided tours, Mobile ticketing
- Slow travel
  - Such as cultural exchanges, volunteer tourism and wellness retreats
- Peer-to-peer tourism
- Tourism for all (accessible travel)
- Sustainable tourism
  - Tourists seeking eco-friendly accommodations, local experiences and responsible tourism practices.
- Regenerative tourism







# Skills gaps

## Top 10 skills of 2025



-  Analytical thinking and innovation
-  Active learning and learning strategies
-  Complex problem-solving
-  Critical thinking and analysis
-  Creativity, originality and initiative
-  Leadership and social influence
-  Technology use, monitoring and control
-  Technology design and programming
-  Resilience, stress tolerance and flexibility
-  Reasoning, problem-solving and ideation

### Type of skill

-  Problem-solving
-  Self-management
-  Working with people
-  Technology use and development

Source: Future of Jobs Report 2020, World Economic Forum.

- **Skills gap** by Condé Nast Traveller
- Lack of more practical hours in tourism job training.
- Need to continuously update tourism courses towards to more transversal skills, instead of specialisation skills.
- Need to train hospitality managers to create an attractive path for employees.
- Need to train staff on storytelling strategies towards a better customer's experience communication

# Skills gaps

## Employment percentages will change by level of education from 2020 to 2030

- **Food preparation helper**

Medium and high education will raise about 3-6 per cent in 10 years. Occupation for low educated workers will decrease.

- **Cleaners and helpers**

Medium and high education will raise about 5-8 per cent in 10 years. Occupation for low educated workers will decrease.

- **Hospitality retail managers**

High educated workers will see an increase by 5% of employment. Low and medium slightly decreased occupation.

- **Sales workers**

Decrease of 3% employment of low and medium educated workers, increase of high educated workers of 8 %. Overall increased occupation of higher educated workers.

The above mentioned employees also have a high automation risk!

CEDEFOP, 2020

# Skills gaps

## Focus on “Hospitality, retail and other services managers”

- Managing a new generation of workers
- Ageing populations across the EU pose recruitment challenges
- Technological changes
- Knowledge of laws and regulations

## New technologies

- AR/VR technology
- Big data technology
- 5G technology
- Blockchain technology
- LBS technology
- Green and low-carbon technology

# Social Development

- **Tourism** is a major economic activity in the **European Union** with wide-ranging impact on economic growth, employment, and social development.
- It also focuses on the need for an **inclusive, safe, resilient, fair and sustainable human-centred recovery** and **sustainable enterprises**
- And on decent work opportunities and challenges, examining key employment and skills issues, social protection, OSH (occupational safety and health) and conditions of work, and the importance of social dialogue, international labor standards and fundamental principles and rights at work. [\[ILO\]](#)
- **The Tourism sector also can create jobs** for women, young people and men.

# Workshop – 30 minutes

- Do you recognize the **outcome of the deskresearch**?
- Are there developments **specifically for your country** which aren't mentioned?
- Is there **anything else** which should be added?
  
- Discuss the **field survey questionnaire**
- Please **add questions** which you think are relevant