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International Skills Gap Field

Survey analysis National Skills Gap desk analysis

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Action | Strategic Partnerships

Project acronym | TEF

Project title | Tourism Education of the Future

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Project duration | 24 months

Project end date | 31/08/2024

TEF TOURISM
EDUCATION
FUTURE

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1 About TEF project

The project will lead to a better quality of VET provision, to an increased employability of students and professionals, and to an improved quality of the tourism offer in the partners' tourism ecosystems.

The specific objective of the project is to reduce skills gap between schools and tourism industry through three results:

- Improved digital competences of teachers and students;
- Improved soft skills of students;
- Improved professional competences of students and professionals.

The project develops blended upskilling activities for teachers and trainers (courses, masterclasses, workshops, community of practice) and innovative learning activities for students (blended skills competitions and online contests). The partners are going to constantly map the tourism ecosystem needs, setting up CVET courses, micro-credentials and sectoral initiatives (Pact for Skills on tourism) to provide training activities aligned with economy and society.

THE PROJECT PRODUCES THE FOLLOWING RESULTS:

The project's Work packages are:

- WP1: Project management and implementation
- WP2: CPD of teachers
- WP3: Virtual and blended cooperation
- WP4: Skills gap

AIM OF THE WP4

The aim of WP4 is to map the tourism ecosystem needs through a Skills gap analysis in order to understand the needs of the tourism companies and to provide upskilling and learning activities that can be responded effectively to.

The WP4 skills gap analysis consists of 1 desk analysis, (conducted both at national and international level) and 2 field researches. The 2 field analyses together with the Desk analyses and the methodology will form the skill gap analysis toolkit that will be used to monitor the tourism ecosystem.

FIELD SURVEY ANALYSIS METHODOLOGY

International field analysis:

We have identified a number of internationally relevant tourism sectors that can adequately represent the different companies in tourism industry around Europe.

The respondents were approached by the different partners. Participating partners were located in Portugal, Greece, Bosnia Herzegovina, Italy, The Netherlands and in Belgium.

For the 2nd survey, we have 127 respondents in total, sufficient to draw tentative, but not thorough, conclusions.

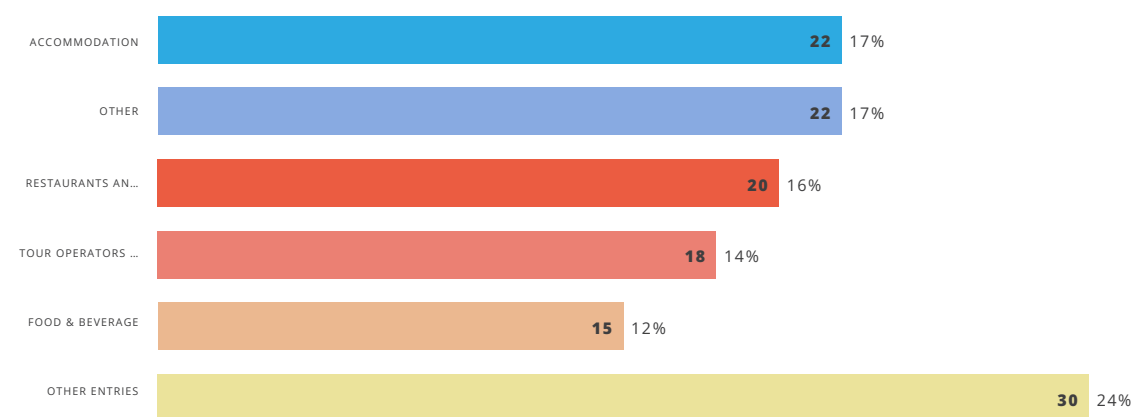
2 International field analysis 2

INTRODUCTION

This second research will expose future trends in the tourism industry; analyse skills shortages and training needs, challenges and consequent changes in tourism.

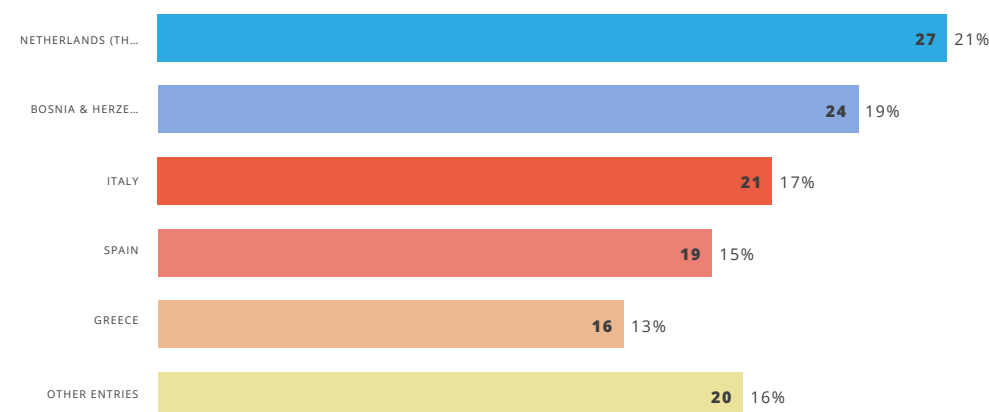
Based upon 127 respondents:

Sectors in which respondents are employed:



- 22 respondents work in sector: Accommodation
- 22 respondents work in sector: Touroperator & Travel Agencies
- 20 respondents work in sector: Restaurants and catering
- 15 respondents work in sector: Food & Beverage
- Other entries' consist mainly of 12 respondents in Events & Leisure and 10 in Education
- 'Other' specified answers of the respondents show a variety of jobs in the Tourism Industry

Countries in which respondents are employed:

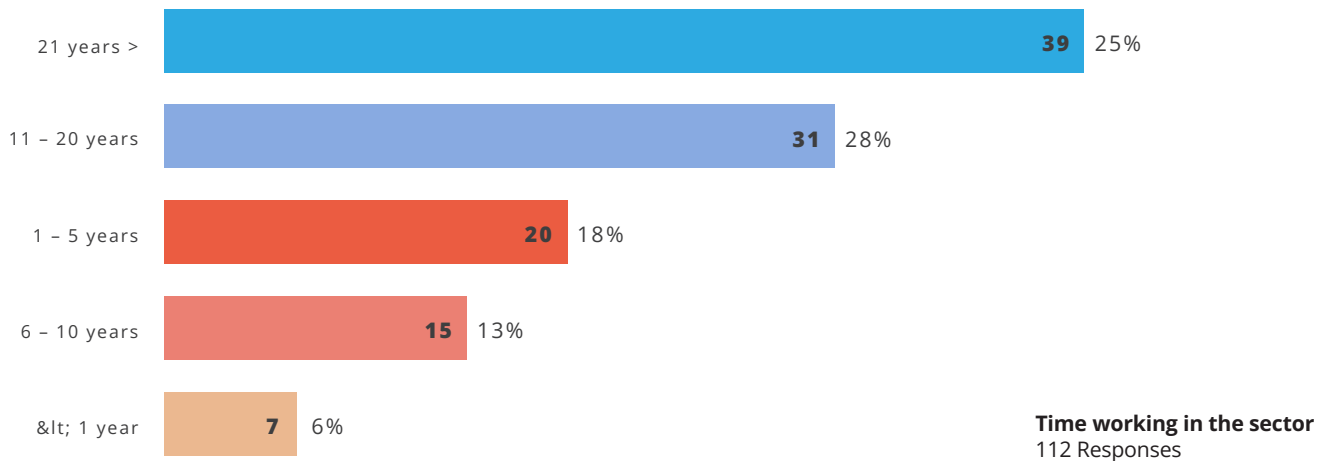


- Other entries: 14 respondents are employed in Greece
- Other entries: 4 respondents are employed in Belgium
- Other entries: 2 respondents are employed in other countries

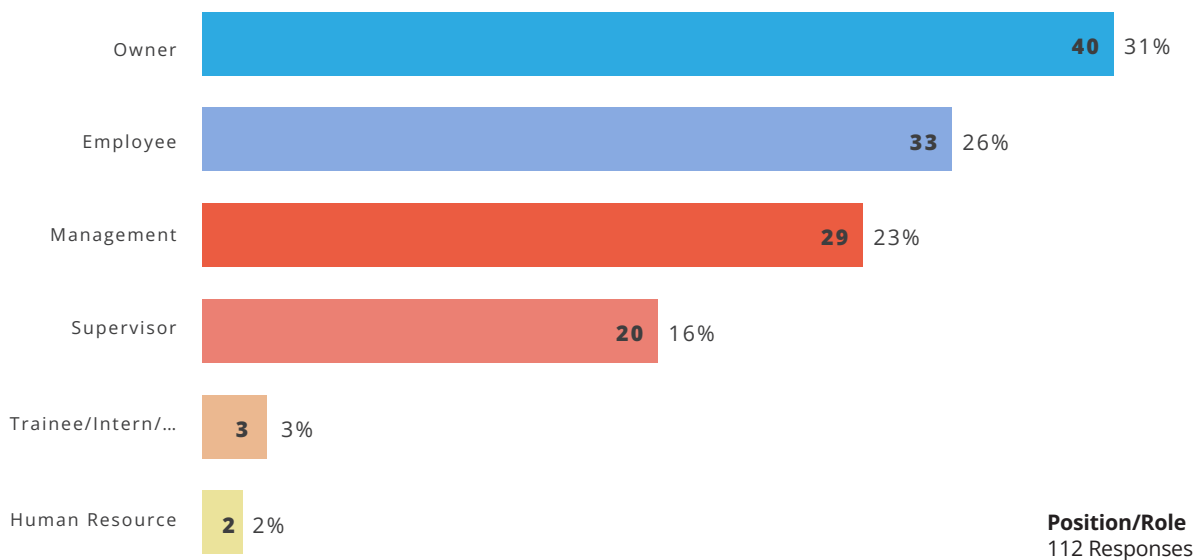
Please find here the number of respondents per sector per country:

Sector you are employed	Belgium	Bosnia & Herzegovina	Greece	Italy	Netherlands (The)	Other Countries	Portugal	Spain	Total
Accommodation	1	3	3	1	4		4	6	22
Booking Agencies		1		1					2
Cultural & Historical Heritage		1		1					2
Destination Managers and Operators			1	1	1				3
Education	3	3	2		1	1			10
Events & Leisure				2	8		1		11
Food & Beverage		1	2	4	2		4	2	15
Other		3	4	5	2	1	1	2	18
Restaurants and Catering				5	4		2	9	20
Tour Operators and Travel Agencies		6	1	4	5		4	2	22
Travel & Transport		1	1						2
Total	4	19	14	24	27	2	16	21	127

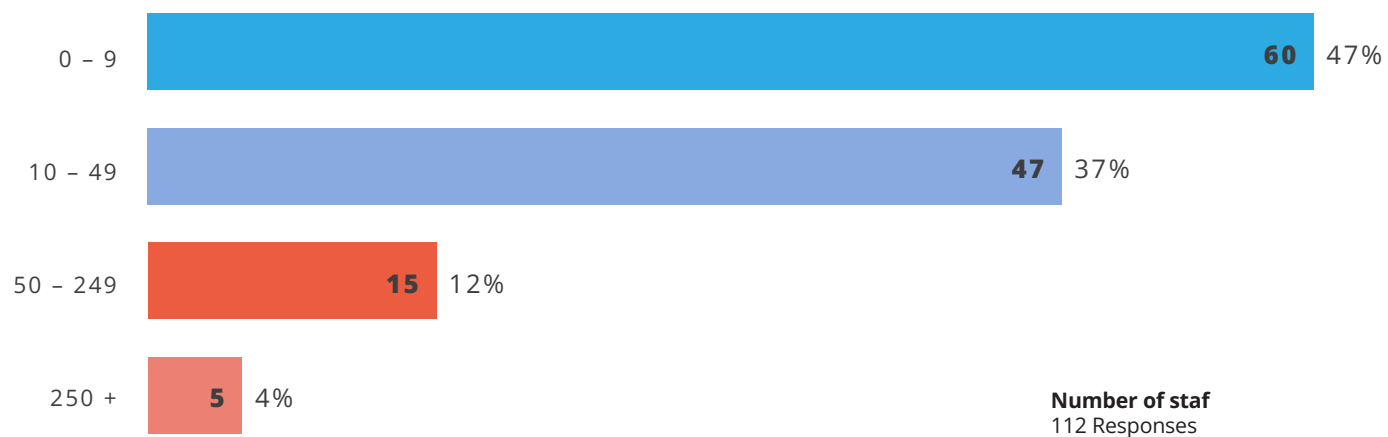
Respondent's experience in Tourism:



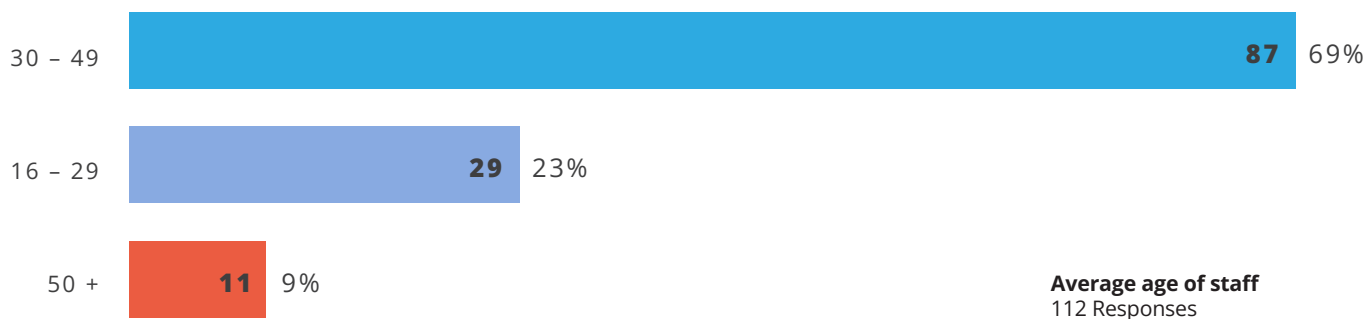
Respondent's position/role:



Number of staff in the company:

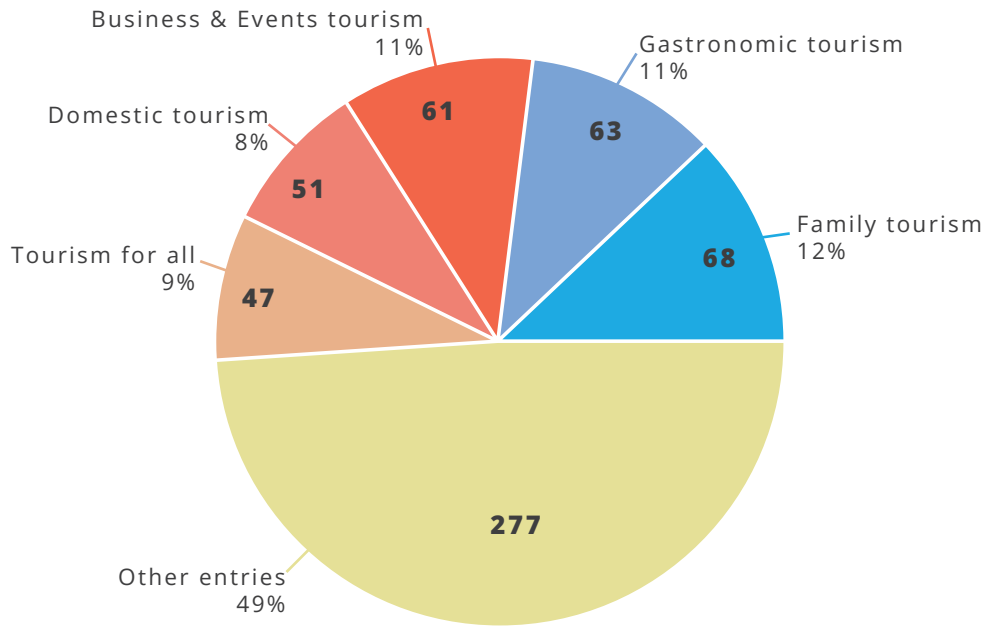


Average age of staff in the company:



3 Trends

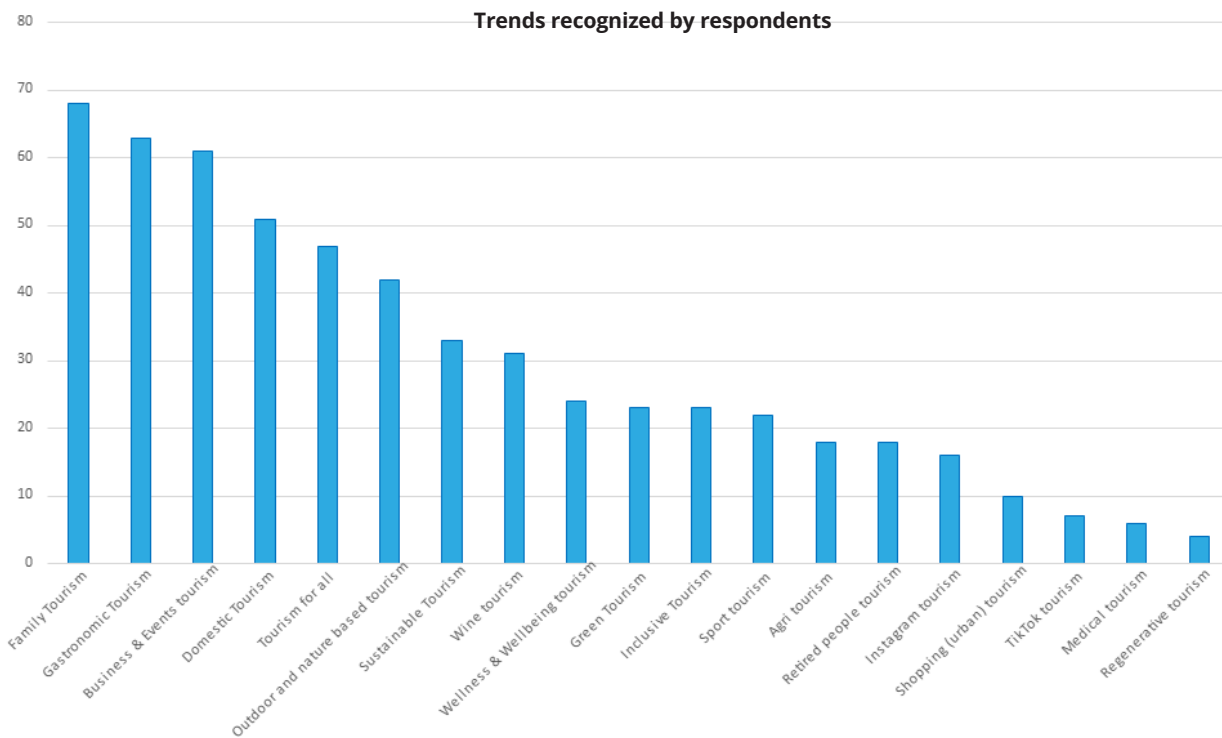
Respondent's position/role:



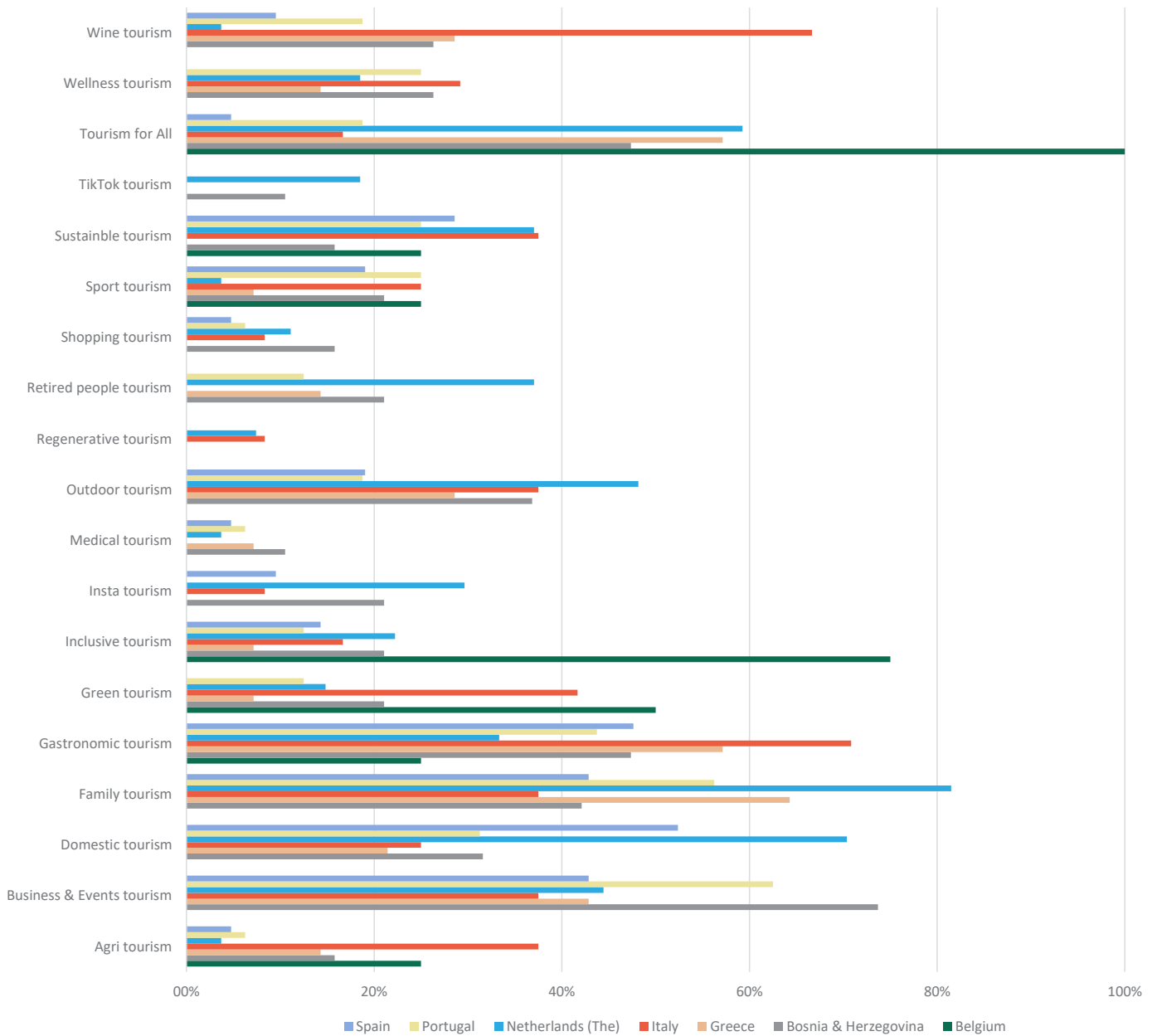
Field research shows a variety of trends are existing within tourism at the moment. Most relevant trends are Family tourism, Gastronomic Tourism, Business and Event tourism and Domestic Tourism. These trends are relevant to almost half of our respondents.

Nearly a third of the respondents noticed the following trends as relevant: Tourism for all, Outdoor -& Nature tourism, Sustainable tourism and Wine Tourism.

Respondent's position/role:



4 Trends per country



Country	Agri tourism	Business & Events tourism	Domestic tourism	Family tourism	Gastronomic tourism	Green tourism	Inclusive tourism	Insta tourism	Medical tourism	Outdoor tourism	Regenerative tourism	Retired people tourism	Shopping tourism	Sport tourism	Sustainable tourism	TikTok tourism	Tourism for All	Wellness tourism	Wine tourism
Bosnia & Herzegovina	15,8%	73,7%	31,6%	42,1%	47,4%	21,1%	21,1%	21,1%	10,5%	36,8%	0,0%	21,1%	15,8%	21,1%	15,8%	10,5%	47,4%	26,3%	26,3%
Greece	14,3%	42,9%	21,4%	64,3%	57,1%	7,1%	7,1%	0,0%	7,1%	28,6%	0,0%	14,3%	0,0%	7,1%	0,0%	0,0%	57,1%	14,3%	28,6%
Italy	37,5%	37,5%	25,0%	37,5%	70,8%	41,7%	16,7%	8,3%	0,0%	37,5%	8,3%	0,0%	8,3%	25,0%	37,5%	0,0%	16,7%	29,2%	66,7%
Netherlands (The)	3,7%	44,4%	70,4%	81,5%	33,3%	14,8%	22,2%	29,6%	3,7%	48,1%	7,4%	37,0%	11,1%	3,7%	37,0%	18,5%	59,3%	18,5%	3,7%
Portugal	6,3%	62,5%	31,3%	56,3%	43,8%	12,5%	12,5%	0,0%	6,3%	18,8%	0,0%	12,5%	6,3%	25,0%	25,0%	0,0%	18,8%	25,0%	18,8%
Spain	4,8%	42,9%	52,4%	42,9%	47,6%	0,0%	14,3%	9,5%	4,8%	19,0%	0,0%	0,0%	4,8%	19,0%	28,6%	0,0%	4,8%	0,0%	9,5%
Belgium	25,0%	0,0%	0,0%	0,0%	25,0%	50,0%	75,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	25,0%	25,0%	0,0%	100,0%	0,0%	0,0%

Most relevant
Least relevant

Business & Events tourism is booming in Bosnia & Herzegovina, Domestic & Family tourism in the Netherlands, while Gastronomic tourism is booming in Italy (booming = > 70% of the respondents mentioned this as a trend). Differences in trends per country are noted. While TikTok and Instagram tourism is mentioned resp. by 18,5% and 29,6% of the respondents in the Netherlands, it's hardly recognized by others, except for the respondents in Bosnia & Herzegovina.

The Netherlands, 27 respondents:

The responses show that domestic tourism and family tourism are the 2 main trends. During the pandemic, outbound tourism was not possible and during that time, Dutch people rediscovered their own country. We also see trends in business and event tourism, tourism for all and sustainable tourism.

Family Tourism (22); Domestic Tourism (19); Business & Event Tourism (12) Tourism for all (15); Sustainable Tourism (10)

Italy, 24 respondents:

Figures show that the main trends in Italy when it comes to tourism are about gastronomy and wine tourism. In addition, family tourism, agri tourism and outdoor and nature-based tourism are also important for the sector.

Gastronomic Tourism (17); Wine Tourism (16); Family Tourism (9); Agri Tourism (9); Outdoor & Nature based Tourism (9)

Spain, 21 respondents:

In Spain, we see that domestic tourism is number one in terms of trends. In addition, Gastronomy tourism and family tourism may also be seen as affecting the tourism sector. Business & Event tourism and sustainable tourism are also gaining ground.

Domestic Tourism (11); Gastronomic Tourism (10); Family Tourism (9); Business & Event Tourism (8); Sustainable Tourism (6)

Bosnie Herzegovina, 19 respondents:

In Bosnia and Herzegovina, Business and Events tourism is trend number one. Gastronomy tourism and Tourism for all are also emerging trends. Family tourism and outdoor and nature-based tourism are the latest trends that can be seen as relevant based on the data.

Business & Events Tourism (14); Gastronomic Tourism (9); Tourism for all (9); Family Tourism (8); Outdoor & Nature based Tourism (7)

Portugal, 16 respondents:

In Portugal, it is notable that Business and Events tourism along with family tourism are the main trends in the sector. Gastronomy tourism is also increasing and domestic tourism is also in demand.

Family Tourism (9); Business & Events Tourism (9); Gastronomic Tourism (7); Domestic Tourism (5)

Greece, 14 respondents:

Respondents from Greece indicated that they see Family Tourism, Gastronomy Tourism and Tourism for all as the most important trends in the tourism sector. Business and events tourism is also mentioned.

Family Tourism (9); Gastronomic Tourism (8); Tourism for all (8); Business & Events Tourism (6)

5 Trends per sector

Sector	Nr of respondents	Agri tourism	Business & Events tourism	Domestic tourism	Family tourism	Gastronomic tourism	Green tourism	Inclusive tourism	Insta tourism	Medical tourism	Outdoor tourism	Regenerative tourism	Retired people tourism	Shopping tourism	Sport tourism	Sustainable tourism	TikTok tourism	Tourism for All	Wellness tourism	Wine tourism
Accommodation	22	5%	50%	32%	64%	32%	5%	23%	18%	5%	36%	0%	18%	5%	23%	32%	9%	32%	27%	5%
Booking Agencies	2	50%	100%	50%	50%	100%	0%	50%	0%	0%	100%	0%	50%	50%	100%	50%	0%	50%	50%	100%
Cultural & Historical Heritage	2	0%	50%	50%	50%	50%	100%	50%	0%	0%	50%	0%	50%	0%	0%	50%	0%	100%	50%	50%
Destination Managers and Operators	3	0%	67%	67%	100%	33%	0%	33%	0%	0%	67%	0%	33%	0%	0%	33%	0%	100%	67%	0%
Education	10	30%	30%	30%	30%	60%	40%	50%	10%	10%	30%	10%	10%	10%	30%	20%	10%	90%	30%	20%
Events & Leisure	11	18%	64%	55%	73%	36%	18%	0%	18%	0%	55%	0%	18%	0%	9%	18%	9%	27%	0%	18%
Food & Beverage	15	7%	27%	40%	33%	80%	7%	0%	7%	13%	27%	0%	20%	13%	13%	0%	0%	27%	13%	40%
Other	18	33%	61%	28%	50%	44%	28%	22%	0%	0%	39%	6%	17%	6%	17%	33%	0%	44%	22%	39%
Restaurants and Catering	20	5%	30%	55%	55%	50%	15%	5%	15%	0%	10%	5%	5%	5%	10%	20%	0%	5%	5%	25%
Tour Operators and Travel Agencies	22	9%	59%	41%	59%	45%	18%	23%	23%	5%	32%	5%	5%	9%	18%	41%	14%	36%	18%	23%
Travel & Transport	2	50%	50%	0%	0%	100%	50%	0%	0%	50%	0%	0%	0%	50%	0%	0%	0%	50%	0%	0%
Total	127	14%	48%	40%	54%	50%	18%	18%	13%	5%	33%	3%	14%	8%	17%	26%	6%	37%	19%	24%

Total 127 18 61 51 68 63 23 23 16 6 42 4 18 10 22 33 7 47 24 31

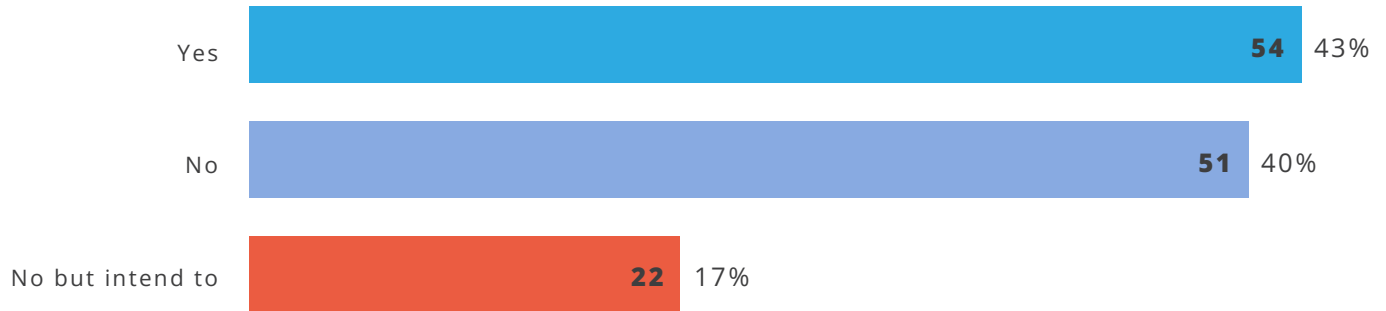
6

APP/VR/Social Media

● *Usage of app / VR / Social-Media by the respondents:*

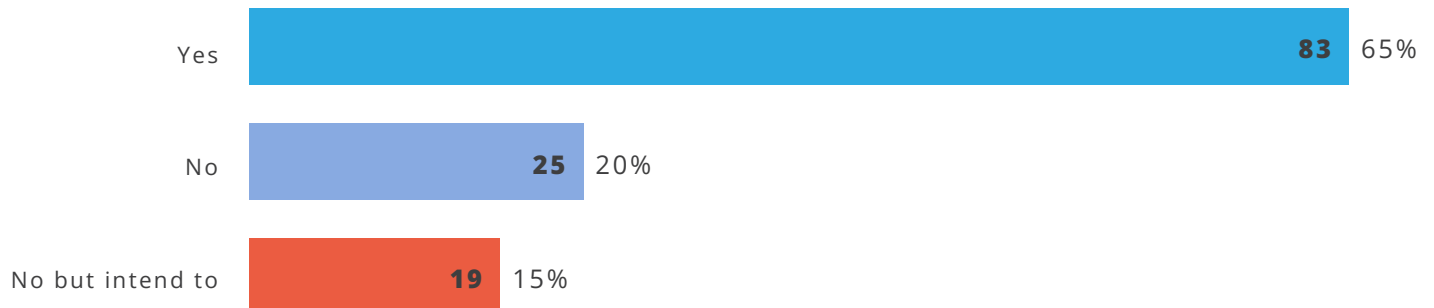
Does your company provide an app for the customers (booking, check-in, ..) ?

127 Responses



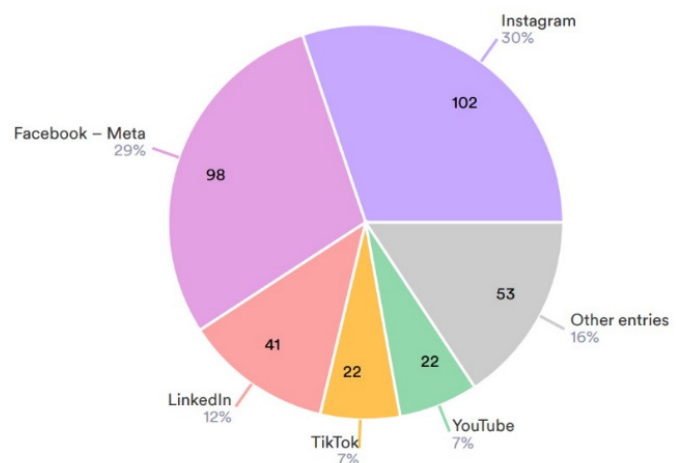
Does your company offer an online VR experience to the customers?

112 Responses



Does your company advertise on Social Media?

338 Responses



Based on the data, we can conclude that a significant number of the respondents are active on social media (54%). Additionally, an overwhelming majority (83%) use an app to communicate with their customers/guests, indicating a high level of technological adoption. However, only 25% of the respondents use VR technology, suggesting that this technology is relatively new to the respondent, or irrelevant for their business.

Other entries include:

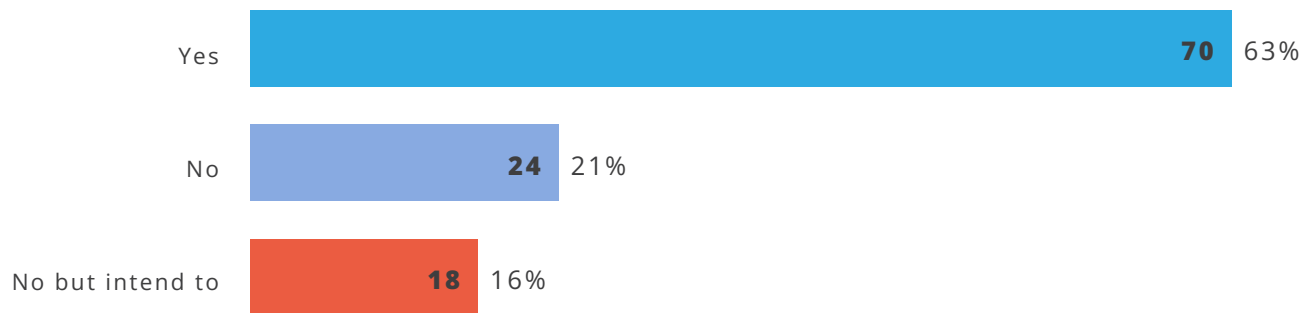
Whatsapp:18 respondents | Pinterest: 4 respondents | X (Twitter): 3 respondents

7

New technology for guests with special needs

Does your company use new technologies for customers with special needs (disabilities)?

112 Responses



Specific explanation 'no but intend to':

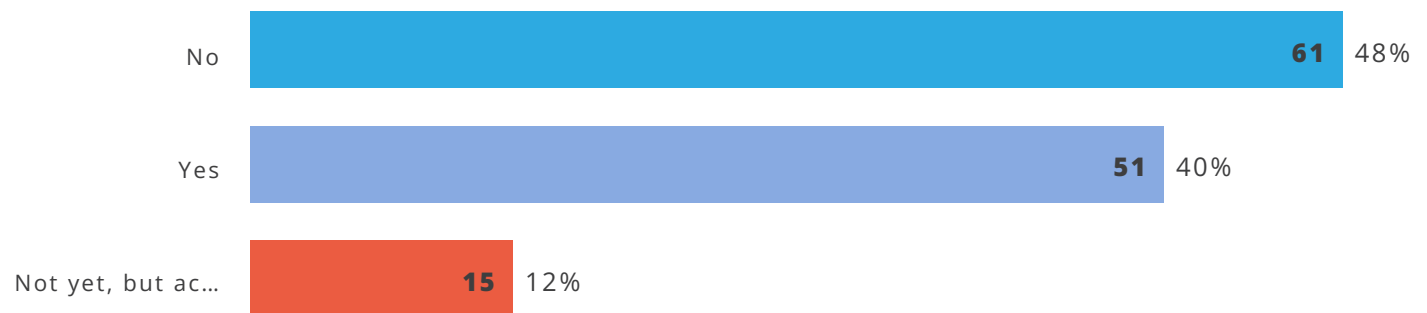
- We are looking for ways to add these technologies to our services.
- We have a wide range of hotels for people with reduced mobility.
- We have all the support and assistance you need for flights and transfers.
- Pedal-assisted handbike x handicapped clients
- We would like to make menus available with audio description for our customers.

8 Sustainability

Number and % of certifications, sustainable or renewable energy sources and other sustainable means within the company:

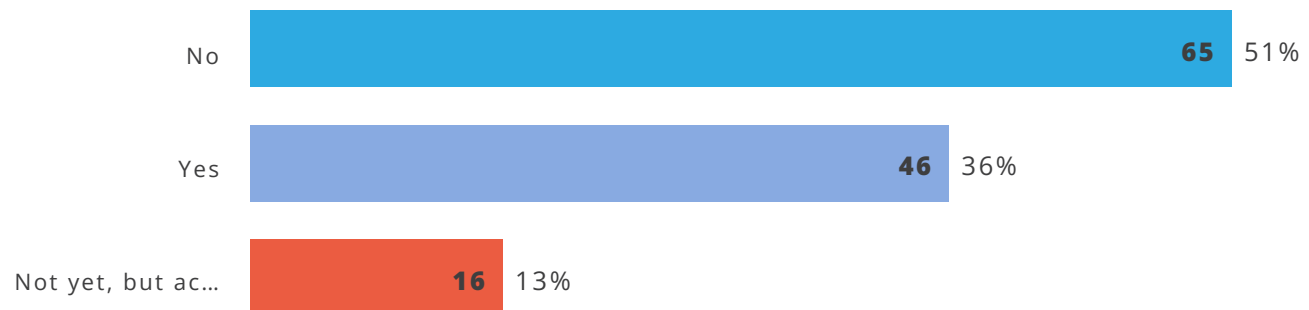
Any (ISO) certification / ecolabel / other

112 Responses



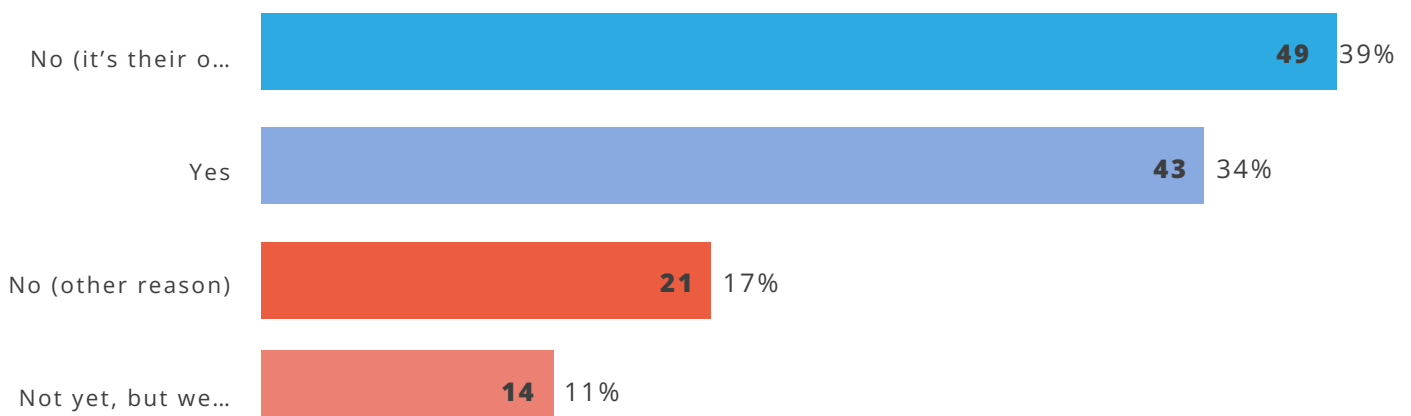
Does your company use energy from sustainable or renewable energy sources?

127 Responses



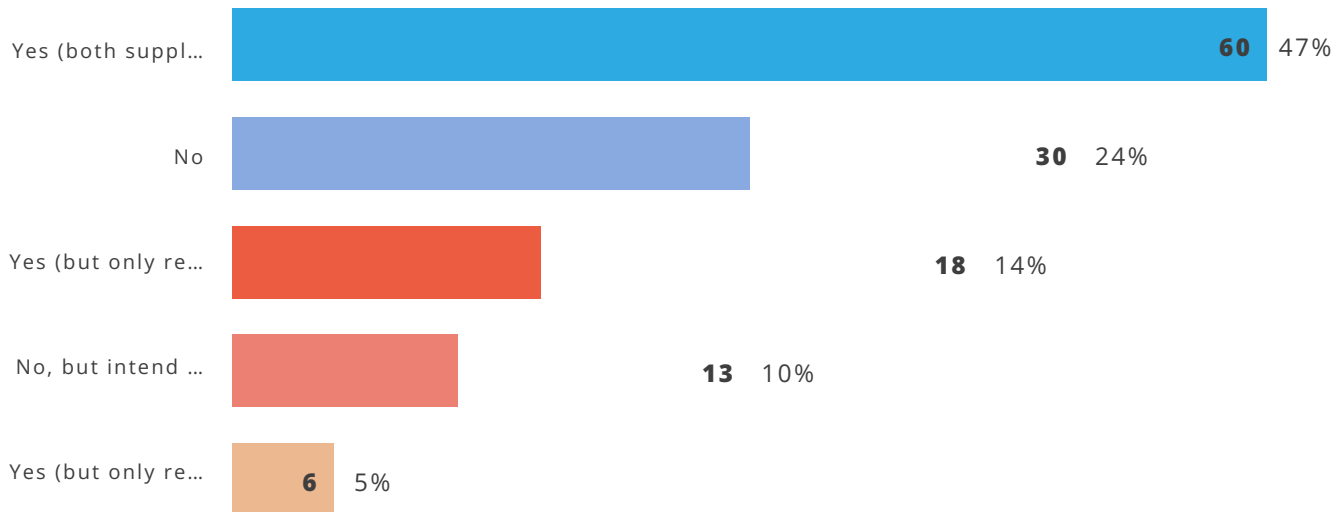
Does your company support sustainable means of transport among staff?

127 Responses



Does your company take sustainability into account when selecting suppliers or staff?

127 Responses



Does your company support waste management?

127 Responses



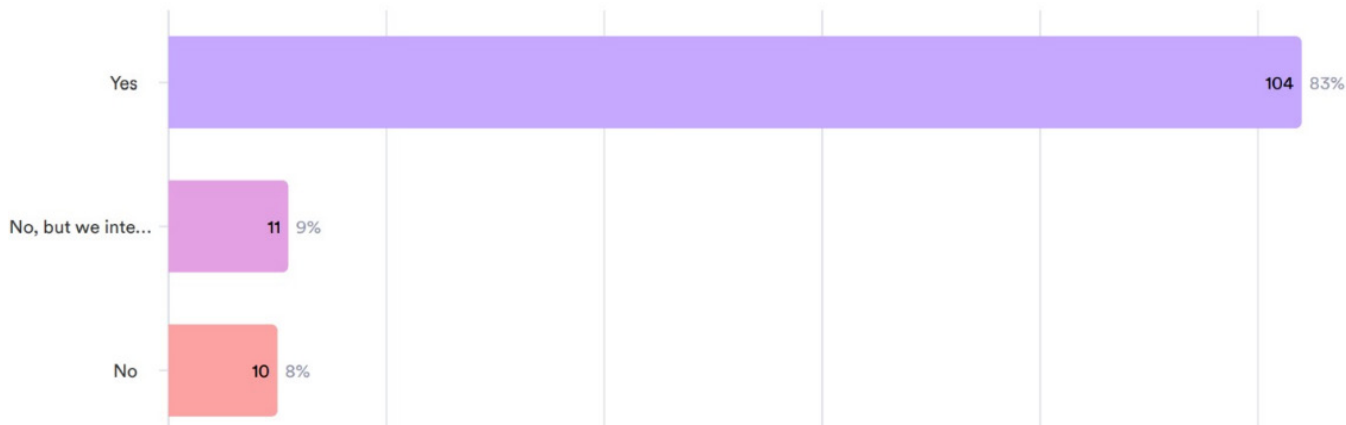
More than half of the respondents consider sustainability when choosing new suppliers or staff. Additionally, 50% of participants possess an ISO certificate or an eco/green label. Impressively, 66% of the companies use green energy. Nearly half of the companies encourage their employees to travel energy-efficiently to and from work, using bicycles, trains, or carpooling. Remarkably, 83% of participants have a policy on waste separation.

9 Training and up-skilling

Numbers and % regarding the need for training and up skilling

Does your company find it necessary to train / upskill current staff?

125 Risposte- 2 Vuoto



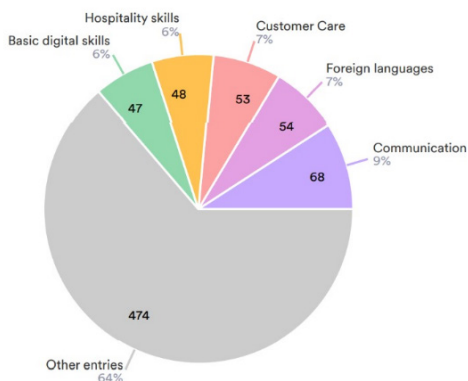
Country	Yes	No, but we intend to	No
Belgium	50,0%	50,0%	0,0%
Bosnia & Herzegovina	68,4%	26,3%	5,3%
Greece	57,1%	21,4%	21,4%
Italy	95,8%	0,0%	4,2%
Netherlands (The)	81,5%	3,7%	14,8%
Portugal	93,8%	6,3%	0,0%
Spain	90,5%	9,5%	0,0%

Conclusion per country in %, based upon the answers of the respondents per country.

Basically the need for training/upskilling is the highest in Italy, closely followed by Portugal and Spain. But overall, respondents agree that training/upskilling is needed.

Select the topic(s) that you think your company staff would need to train / upskill

744 Risposte- 4 Vuoto



Other entries include:

- Catering Skills: 36 respondents
- Creativity, originality & initiative: 35 respondents
- (Digital) Marketing & Social influence: 28 respondents
- Resilience, stress tolerance & flexibility: 26 respondents
- Cyber Security: 17 respondents

Required upskilling per sector in %:

Sector	Number of respondents	Basic digital skills	Catering skills	Communication	(Complex) Problem solving	Creativity, Originality & Initiative	Customer Care	Cybersecurity	(Digital) Marketing & Social influence	F&B Management	Foreign Languages	Hazard Awareness (First Aid / Social Hygiene)	Hospitality skills	Inclusive tourism	Leadership	New technologies (AR, VR etc)	Project Management skills	Resilience, Stress tolerance & Flexibility	Revenue Management	Specific design skills	Sustainability	Teambuilding & Teamwork	Tourism Operator Skills	Treatment of personal data
Accommodation	22	18,2%	18,2%	63,6%	31,8%	31,8%	36,4%	18,2%	18,2%	13,6%	45,5%	27,3%	22,7%	40,9%	22,7%	27,3%	27,3%	18,2%	18,2%	4,5%	31,8%	50,0%	13,6%	13,6%
Booking Agencies	2	50,0%	0,0%	50,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	50,0%	100,0%	50,0%	50,0%	0,0%	0,0%	0,0%	0,0%	0,0%	50,0%	50,0%	0,0%	0,0%
Cultural & Historical Heritage	2	50,0%	50,0%	100,0%	0,0%	100,0%	50,0%	50,0%	0,0%	0,0%	50,0%	50,0%	50,0%	50,0%	0,0%	50,0%	0,0%	0,0%	0,0%	50,0%	50,0%	50,0%	50,0%	50,0%
Destination Managers and Operators	3	66,7%	33,3%	66,7%	0,0%	0,0%	66,7%	33,3%	33,3%	33,3%	33,3%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Education	10	40,0%	30,0%	50,0%	40,0%	0,0%	40,0%	20,0%	10,0%	10,0%	30,0%	10,0%	50,0%	40,0%	10,0%	40,0%	0,0%	40,0%	0,0%	0,0%	20,0%	40,0%	10,0%	30,0%
Events & Leisure	11	18,2%	9,1%	18,2%	18,2%	27,3%	18,2%	18,2%	36,4%	18,2%	45,5%	18,2%	27,3%	18,2%	0,0%	18,2%	27,3%	18,2%	9,1%	0,0%	9,1%	36,4%	36,4%	0,0%
Food & Beverage	15	60,0%	40,0%	60,0%	53,3%	46,7%	53,3%	20,0%	26,7%	20,0%	60,0%	26,7%	53,3%	26,7%	33,3%	40,0%	13,3%	40,0%	13,3%	6,7%	33,3%	40,0%	40,0%	20,0%
Other	18	50,0%	27,8%	72,2%	11,1%	33,3%	55,6%	22,2%	33,3%	22,2%	55,6%	16,7%	33,3%	27,8%	44,4%	22,2%	11,1%	22,2%	27,8%	11,1%	44,4%	16,7%	22,2%	16,7%
Restaurants and Catering	20	25,0%	20,0%	50,0%	20,0%	30,0%	45,0%	5,0%	10,0%	20,0%	20,0%	20,0%	45,0%	0,0%	20,0%	5,0%	10,0%	30,0%	5,0%	5,0%	15,0%	20,0%	5,0%	0,0%
Tour Operators and Travel Agencies	22	40,9%	45,5%	45,5%	18,2%	22,7%	36,4%	13,6%	31,8%	31,8%	50,0%	9,1%	36,4%	13,6%	18,2%	31,8%	4,5%	13,6%	9,1%	13,6%	13,6%	27,3%	18,2%	13,6%
Travel & Transport	2	50,0%	100,0%	0,0%	0,0%	50,0%	50,0%	0,0%	0,0%	50,0%	0,0%	50,0%	50,0%	0,0%	0,0%	50,0%	0,0%	0,0%	0,0%	0,0%	50,0%	50,0%	0,0%	0,0%
Total	127	31,5%	26,8%	39,4%	18,9%	23,6%	33,9%	13,4%	20,5%	19,7%	33,9%	15,0%	33,1%	14,2%	18,1%	19,7%	8,7%	19,7%	10,2%	7,1%	19,7%	22,8%	17,3%	9,4%

Most relevant
Least relevant

In general companies tend to look for upskilling courses and training regarding Communication, Customer Care and Foreign languages, closely followed by Hospitality skills and basis Digital skills. As there were very few responses of companies within the Booking Agencies, Cultural & Historical Heritage, Travel & Transport and Destination Managers and Operators sectors, only the most relevant subject was highlighted.

The size of the company, considering the number of staff has no significant influence on the need for upskilling (250+ = 100%, but represents only 5 respondents), nor has the average age of the staff, although employees in the age of 16-29 have a slightly less %.

Number of staff	No	No, but we intend to	Yes
0 – 9	8,6%	10,3%	81,0%
10 – 49	6,5%	8,7%	84,8%
50 – 249	13,3%	6,7%	80,0%
250+	0,0%	0,0%	100,0%

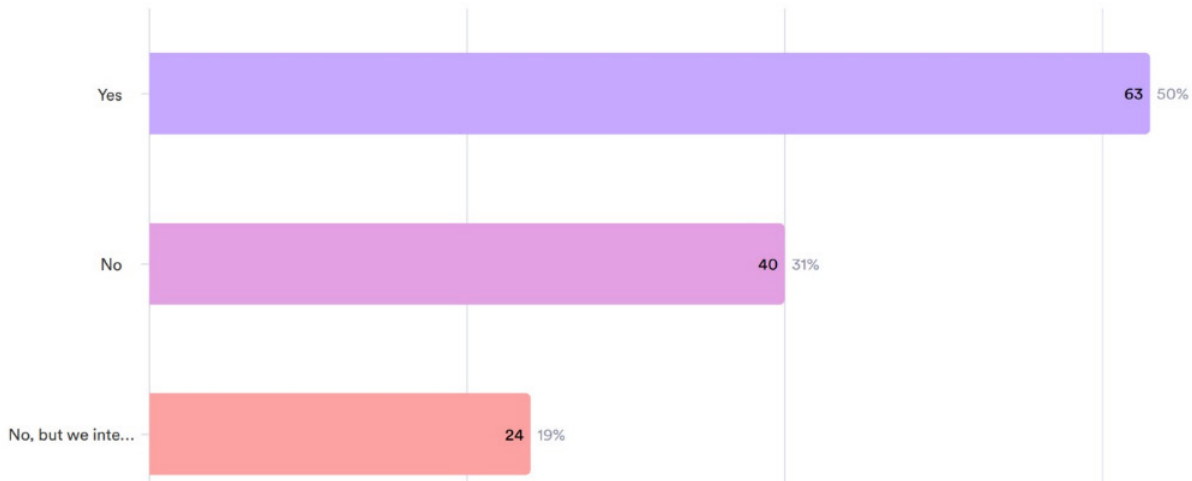
Average age	No	No but we intend to	Yes
16 – 29	17,2%	10,3%	72,4%
30 – 49	5,7%	6,9%	87,4%
50 +	0,0%	18,2%	81,8%

Required upskilling per country per sector in numbers.

Country vs sector vs needs for upskilling	Basic digital skills	Catering skills	Communication (Complex) Problem solving	Creativity, Originality & Initiative	Customer Care	Cybersecurity	(Digital) Marketing & Social influence	F&B Management	Foreign languages	Hazard Awareness (First Aid / Social Hygiene)	Hospitality skills	Inclusive tourism	Leadership	New technologies (AR, VR etc)	Project Management skills	Resilience, Stress tolerance & Flexibility'	Revenue Management	Specific design skills	Sustainability	Teambuilding & Teamwork	Tourism Operator Skills	Treatment of personal data	
Belgium											3	2											
Accommodation											1												
Education											2	2											
Bosnia & Herzegovina	16	10	6	3	9	2	4	6	8	6	9	5	5	3		4	3		4	9	3	3	
Accommodation	3	2	2	1	1	1		2	2	1	1	2	1		2	1		2	2			1	
Booking Agencies										1	1		1							1			
Cultural & Historical Heritage	1	1		1	1	1			1	1	1	1	1	1					1	1	1	1	
Education	3	3	2		2			1	2				1			1				1	1	1	
Food & Beverage	1				1						1		1							1			
Other	3	2			2		1	1			1	1	1				1						
Tour Operators and Travel Agencies	4	2	2		1		3	1	3	2	3	1		1		1	1		1	2	2	1	
Travel & Transport	1			1	1			1		1	1			1						1			
Greece	14	2	11	5	6	13	9	7	1	6	2	4	5	4	6	3	2	2	1	6	8	5	4
Accommodation	3		2	1		3	2	1			1										2		
Destination Managers and Operators	1	1	1		1	1	1	1	1														
Education	2		1		2	2			1	1	2					1			1	1	1	1	
Food & Beverage	2		2	2	2	2	2		1			1	1	2	1		1		2	2	1	1	
Other	4	4	2	3	4	2	3		3		1	3	3	2	1	1	1	1	2	2	2	2	
Tour Operators and Travel Agencies	1		1		1	1					1									1	1		
Travel & Transport	1	1																	1				
Italy	24	9	14	7	11	9	3	7	6	14	7	12	6	4	8	3	3	2	2	7	6	6	4
Accommodation	1			1	1	1			1			1		1	1	1						1	
Booking Agencies	1		1								1	1								1			
Cultural & Historical Heritage	1		1		1														1				
Destination Managers and Operators	1		1		1																		
Events & Leisure	2	1	2	2	2		1	2		2	1	2	2		1		1			2	2		
Food & Beverage	4	1	1	3	2		1	1	2		2	1		3		1	1		1	1	2	1	
Other	5	1	3		1		2	2	1	4	3	4	1	2	2	1		1	1	4	1	1	1
Restaurants and Catering	5	4	3	1	2	4		1	2	2	2	2		1		1			1	1	1		
Tour Operators and Travel Agencies	4	2	2		2	3		1	2	3	1	1		1	1					1		1	
Netherlands (the)	2	3	10	3	4	8	3	5	5	9	1	5	3	4	4	5	4	2		6	9	3	1
Accommodation		1	3	1	2	2	1	2	1	1	1	1	2	2	1	2	1	1		3	3	1	
Destination Managers and Operators																							
Education	1		1	1				1				1	1		1				1	1		1	
Events & Leisure			1		2	1	2	2	3						1	3	1	1		1	2	2	
Food & Beverage		1	1		1				1														
Other			2		1	1	1		1				1						1				
Restaurants and Catering	1				1	1			1		2									1			
Tour Operators and Travel Agencies		1	2	1		1		2	2		1		1	1		1				2			
Other	1	1		1	1	1		1	1			1				2	1			1		1	
Education	1			1								1				1				1		1	
Other		1			1	1			1	1						1	1						
Portugal	6	6	9	4	7	10	5	4	3	10	6	9	4	6	5	3	5	1	4	4	4	5	3
Accommodation			2		1	2		1		3	2	2	1	1	2	1			1	1	1	2	1
Events & Leisure					1					1	1												
Food & Beverage	3	3	4	3	2	3	1	1	1	4	2	3	1	2	1	1	3		1	1	2	2	1
Other					1	1																	
Restaurants and Catering					1	1						1		1									
Tour Operators and Travel Agencies	3	3	3	1	2	3	3	2	2	3	1	2	2	2	2	1	2	1	2	2	1	1	1
Spain	3	1	17	5	7	5	2	3	5	6	5	7	4	5	3	2	10	4	2	5	5	2	
Accommodation			5	2	2					3	1	1	2	1		1		2		1	3		
Food & Beverage		1	1		1	1			1	1	2	2	1	1		2			1		1		
Other			2		1	1			1	1			1			2	1		1		1		
Restaurants and Catering	1		8	3	3	3		1	3	1	2	4		2	1	1	6	1	1	2	2		
Tour Operators and Travel Agencies	2		1				2	2				1		2					1				
Grand total	50	38	71	31	39	55	24	30	27	54	27	49	30	28	29	16	30	15	9	32	42	24	16

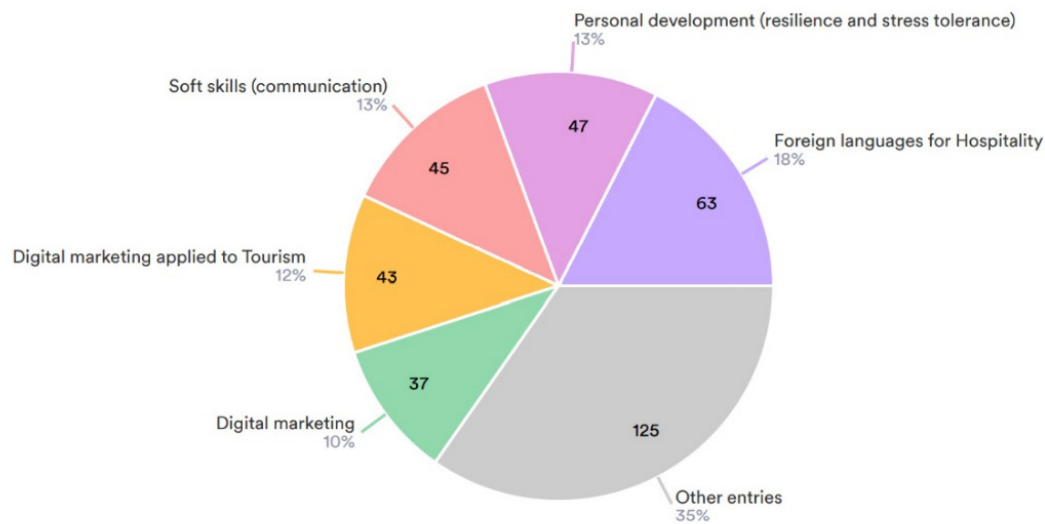
Does your company offer the staff the possibility to follow a course leading to a micro-credential, certificate, or diploma?

127 Risposte



TEF project is developing CVET courses which will lead to a micro-credential. Select those you might be interested in:

360 Risposte- 20 Vuoto

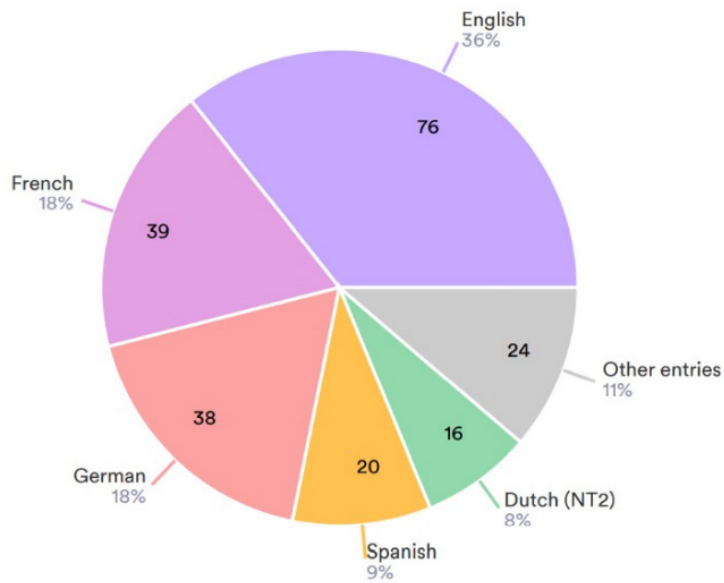


Specified per country in %:

Country	Active learning with technologies (AR/VR/AI)	Catering	Cybersecurity, treatment of personal data	Digital marketing	Digital marketing applied to Tourism	E-marketing - general principles	Foreign languages for Hospitality	Personal development (resilience and stress tolerance)	Production process engineering in HORECA: economic, financial and social sustainability for catering companies	Soft skills (communication)	None
Belgium	0,0%	50,0%	25,0%	25,0%	25,0%	0,0%	50,0%	25,0%	25,0%	75,0%	0,0%
Bosnia & Herzegovina	57,9%	36,8%	31,6%	57,9%	47,4%	36,8%	52,6%	63,2%	15,8%	63,2%	0,0%
Greece	35,7%	28,6%	14,3%	42,9%	35,7%	35,7%	28,6%	42,9%	14,3%	14,3%	7,1%
Italy	29,2%	41,7%	4,2%	33,3%	45,8%	29,2%	54,2%	25,0%	25,0%	20,8%	25,0%
Netherlands (the)	14,8%	11,1%	11,1%	25,9%	14,8%	7,4%	40,7%	44,4%	7,4%	40,7%	29,6%
Portugal	25,0%	56,3%	12,5%	25,0%	43,8%	18,8%	50,0%	56,3%	25,0%	31,3%	6,3%
Spain	14,3%	14,3%	9,5%	14,3%	19,0%	19,0%	0,0%	61,9%	57,1%	0,0%	28,6%
Total	26,4%	30,4%	13,6%	31,2%	32,0%	22,4%	38,4%	46,4%	24,0%	30,4%	17,6%

If 'Yes' to Foreign languages for Hospitality, which language(s)?

213 Risposte- 34 Vuoto



Preferred languages courses per country in %.

Country	Dutch (NT2)	English	French	German	Italian	Spanish	Portuguese	Other
Belgium	100,0%	50,0%	50,0%	25,0%	0,0%	0,0%	0,0%	0,0%
Bosnia & Herzegovina	5,3%	57,9%	26,3%	36,8%	42,1%	31,6%	0,0%	0,0%
Greece	0,0%	71,4%	21,4%	14,3%	14,3%	7,1%	0,0%	7,1%
Italy	4,2%	58,3%	37,5%	50,0%	4,2%	20,8%	4,2%	0,0%
Netherlands (the)	37,0%	44,4%	11,1%	48,1%	0,0%	3,7%	0,0%	0,0%
Portugal	0,0%	62,5%	31,3%	6,3%	25,0%	31,3%	12,5%	0,0%
Spain	0,0%	0,0%	76,2%	57,1%	4,8%	0,0%	9,5%	0,0%

Regarding 'Other' languages: Greek, Turkish and Basque were mentioned.

In **2024: Research** shows that Foreign Languages for Hospitality (18%), Personal development (13%), Soft Skills (communication) (13%), Digital marketing applied to Tourism (12%) and Digital Marketing in general (10%) are the most required topics in upskilling.

Compared to the **2023** survey: Communication (9%), Foreign Languages (7%), Customer Care (7%) Hospitality Skills (6%) and Basic Digital Skills (6%) were the most common answers given.

Conclusion

Based on the results of this survey, we can conclude that the majority of employees in the sector is 30 years or older. The majority has 10 years or more experience in the industry. Family tourism, gastronomy tourism and tourism for all are the three trends we see in participating countries as the most important trends.

Moreover, based on the results of this survey, we can conclude that many companies in the industry do not offer an app to customers/guests as a communication tool. 40% of the respondents are also not planning to. The use of VR experiences is still developing, with only 1 in 5 respondents using VR.

Almost three quarters of companies advertise via social media with Instagram being seen as the biggest platform, followed by Facebook.

Only half of companies have a sustainability label and are doing business sustainably. This is striking with the government's climate targets for 2030 within the EU. Compared to the survey of 2023 it is not improved.

Training and upskilling are considered important by almost all companies in every country. Although there are differences in experiences and knowledge gaps per sector per country, and therefore different interests in courses and upskilling, they have a few needs in common: Training/courses/upskilling in Foreign languages, followed by Personal development and Soft skills. Based, both on the results of the 2023 and 2024 surveys we can conclude that communication skills and foreign language proficiency are very important training needs.



CDEa:

