

COUNTRY SURVEY REPORT | HUNGARY

Author: VIMOSZ, University of Sopron

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NEXT TOURISM GENERATION ALLIANCE - HUNGARY SURVEY REPORT

Introduction

The **Next Tourism Generation Alliance (NTG)** is the first European partnership for improving a collaborative and productive relationship between education and industry, funded by the European Union. The NTG Alliance has partners from 8 countries (Spain, UK, Hungary, Netherlands, Italy, Bulgaria, Germany, Ireland), and will provide employees, employers, entrepreneurs, teachers, trainers and students with a set of Core NTG modules in digital, green and social skills.

Goals of the NTG Alliance are:

- To establish a Blueprint Strategy for Sectoral Skills Development in Tourism to respond to the fast-changing and increasing skills gaps in digital, green and social skills sets;
- To define a scalable mechanism and model for sustainable and digital curricula between the industry and education providers at regional, national and European level;
- To create transformative cooperation in five key tourism sub-sectors: hospitality, food and beverage operations, travel agencies and tour operators, visitor attractions and destination management;
- To develop, deliver and test Next Tourism Generation (NTG) Skills Products for professionals, trainers, students, university tourism departments, local authorities, companies to respond to the fast-changing and increasing skills gaps in digital, green and social skills sets.

Should you wish to know more about the Next Tourism Generation Alliance project, please visit www.nexttourismgeneration.eu

For getting involved in the project (as a community member, affiliate partner or associate partner), please visit nexttourismgeneration.eu/contact/

Country Survey Report

From January-March 2019, a European survey was conducted in the 8 partner countries of the NTG Project (Spain, UK, Hungary, Netherlands, Italy, Bulgaria, Germany, Ireland). Subsequently, an analysis of the survey, exploring the skills gaps per skills sets type, was finished in May 2019. The total sample of the survey on a European level was 1404.

In this Country Survey Report, trends and findings are listed on how each tourism sector (see below), type and size of the business is responding to the skill sets, highs, lows, current and future level of proficiency in digital, environmental, social and soft skills sets. Furthermore, explanations are given on how businesses are accessing training, with an evaluation as to why businesses respond as they have and what may be contributing factors. An overview of the gaps in the current and future level of proficiency in environmental, social and digital levels of proficiency across the 5 sectors is given.

Sectors

Sectors of the tourism industry covered in this report are:

- Visitor Attractions – Historic Buildings, Heritage Centre, Museum/Art Gallery; Place of worship; theatre/Cinema/Leisure/Theme Park; Park/Gardens; Wildlife Attractions/Zoo; Retail;
- Food and Beverage – Café; Restaurant; Bar/Pub; Distillery; Brewery;
- Accommodation – Hotel; Guesthouse/B&B; Self-catering/apartments; Hostel; Caravan/Camping;
- Destination Management – Destination Management Organisation; National Tourism Organisation; Regional Tourism Organisation; City Tourism Organisation; Protected Area Organisation
- Tour Operators – Travel Agency; Tour operator; both

Size of Business/Organisation – (Number of Employees)

- Large = 250+
- Medium = 100-249
- Small = 10-99
- Micro = Less than 10

Sample characteristics

Number of responses for Hungary:	123
Number of responses per sector:	
Visitor Attractions:	8
F&B:	27
Accommodations:	41
Travel Agencies / Tour Operators:	34
Destination Management Organizations:	13

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Digital Skills 39

1. VISITOR ATTRACTIONS

Environmental Skills	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> 1. Knowledge of climate change 3,50 2. Promotion of environmentally friendly activities and products 3,38 3. Ability to minimize the use and maximize the efficiency of energy and water consumption 3,25 <p>Least:</p> <ol style="list-style-type: none"> 1. Conservation of biodiversity 2,63 2. Promotion of sustainable forms of transport (e.g. public transport) 2,75 3. Ability to manage waste, sewage, recycling and composting 3,13
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> 1. Promotion of environmentally friendly activities and products 4,25 2. Knowledge of climate change 4,13 3. Ability to minimize the use and maximize the efficiency of energy and water consumption 3,88 Promotion of sustainable forms of transport (e.g. public transport) 3,88 <p>Least:</p> <ol style="list-style-type: none"> 1. Conservation of biodiversity 3,13 2. Ability to manage waste, sewage, recycling and composting 3,75 3. Ability to minimize the use and maximize the efficiency of energy and water consumption 3,88 Promotion of sustainable forms of transport (e.g. public transport) 3,88
Training Provision for these skills?	<p>Yes 50,00 % (4)</p> <p>No 50,00 % (4)</p>

<p>Most popular/ three main types of training</p>	<p>One day on-site training by external provider 28,57% (2) On the job 14,29% (1) Online course 14,29% (1) One day off-site training by external provider 14,29% (1) Several days off-site training by external provider 14,29% (1) Apprenticeship 14,29% (1)</p>
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- This sector does not provide training because (comments from the survey): lack of interest; there is no money and time for that; there is no suitable specialist,; because of the small business, there is no separate coverage for this; there has been no focus on this topic so far; this is not the main priority now, but professional training.
- The importance of environmental skills depends on the type of visitor attraction: if national parks filled out the questionnaire, the conservation of biodiversity would have been the most important skill. The main gap is in the promotion of sustainable forms of transport (40,91%). The average gap is 23,49%.
- In summary, in Hungary, environmental skills are the most important skills for the Hungarian Visitor Attraction subsector. (score for present:3,1) This will be the situation in the future, as well (score for future: 3,83). The Hungarian average is 2,85 at present, and 3,57 in the future.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

<p>Personal, Communication and Diversity Skills</p>	
<p>Current Level of Proficiency. Three most and three least</p>	<p>PERSONAL SKILLS - Most: 1. Customer orientation 4,75 2. Problem-solving 4,50</p>

<p>proficient per category</p>	<p>3. Initiative and commitment 4,13</p> <p>PERSONAL SKILLS - Least:</p> <ol style="list-style-type: none"> 1. Willingness to change 3,50 2. Willingness to learn and to perform 3,75 3. Promoting a positive work environment 3,88 <p>COMMUNICATION SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Oral communication skills 4,38 2. Written communication skills 4,13 <ul style="list-style-type: none"> Active listening skills 4,13 Skills related to intercultural host-guest understanding and respect 4,13 3. Skills related to awareness of local customs (e.g., food, arts, language, crafts) 4,00 <p>COMMUNICATION SKILLS – Least:</p> <ol style="list-style-type: none"> 1. Ability to speak foreign languages 3,63 2. Skills related to cultural awareness and expression 3,88 3. Skills related to awareness of local customs (e.g., food, arts, language, crafts) 4,00 <p>DIVERSITY SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Age-related accessibility skills 4,38 2. Gender equality skills 4,13 3. Skills related to diversity in religious beliefs 3,88 <p>DIVERSITY SKILLS – Least:</p> <ol style="list-style-type: none"> 1. Diets and allergy needs skills 3,38 2. Skills related to disabilities and appropriate infrastructure 3,63 3. Skills related to diversity in religious beliefs 3,88
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<p>Future level of proficiency in 2030. Three most and three least proficient.</p>	<p>PERSONAL - Most:</p> <ol style="list-style-type: none"> 1. Problem-solving 4,75 Customer orientation 4,75 Creativity 4,75 2. Initiative and commitment 4,63 3. Ethical conduct and respect 4,50 <p>PERSONAL - Least:</p> <ol style="list-style-type: none"> 1. Willingness to learn and to perform 4,25 2. Willingness to change 4,38 Promoting a positive work environment 4,38 3. Ethical conduct and respect 4,50 <p>COMMUNICATION – Most:</p> <ol style="list-style-type: none"> 1. Oral communication skills 4,75 2. Written communication skills 4,63 Skills related to cultural awareness and expression 4,63 Skills related to awareness of local customs (e.g., food, arts, language, crafts) 4,63 Skills related to intercultural host-guest understanding and respect 4,63 3. Active listening skills 4,50 Ability to speak foreign languages 4,50 <p>COMMUNICATION – Least:</p> <ol style="list-style-type: none"> 1. Active listening skills 4,50 Ability to speak foreign languages 4,50 2. Written communication skills 4,63 Skills related to cultural awareness and expression 4,63 Skills related to awareness of local customs (e.g., food, arts, language, crafts) 4,63 Skills related to intercultural host-guest understanding and respect 4,63 3. Oral communication skills 4,75
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	<p>DIVERSITY– Most:</p> <ol style="list-style-type: none"> 1. Gender equality skills 4,63 2. Age-related accessibility skills 4,50 Skills related to diversity in religious beliefs 4,50 3. Skills related to disabilities and appropriate infrastructure 4,38 <p>DIVERSITY– Least:</p> <ol style="list-style-type: none"> 1. Diets and allergy needs skills 4,25 2. Skills related to disabilities and appropriate infrastructure 4,38 3. Age-related accessibility skills 4,50 Skills related to diversity in religious beliefs 4,50
Training Provision for Social Skills	<p>Yes 37,50% (3) No 62,50% (5)</p>
Most popular/ three main types of training for social skills	<p>On the job 40,00% (2) One day on-site training by external provider 20,00% (1) Several days on-site training by external provider 20,00% (1) Vocational training 20,00% (1)</p>

- This sector does not provide training because (comments from the survey): no time; lack of capacity; soon there will be money for that; in-house solution; high-level problem-solving HR social issues; not necessary; we have not thought about regular training, but we are aware of social sensitivity.
- There is no reason to evaluate the less important scores because even these are rather high. (The smallest score is 4,25.) Willingness to learn and to perform (4,25) and Willingness to change (4,38) are the least proficient skills, but it is not a special problem of this subsector, it is generally among the employees in Hungary.

- Customer-oriented skills are - and remain- the most important. As to the personal skills development for this sector, it can be stated that the gaps between the present and future needs are the third smallest in this subsector. (9,81)
- Overall summary: Social skills are more important than the European average level. Furthermore, the Visitor Attraction together with the Destination Management subsector has the highest scores in the Hungarian tourism sector.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

Digital Skills	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> 1. Operating System use skills (e.g., Windows) 4,13 Microsoft Office skills (e.g., Word, Excel, Powerpoint) 4,13 Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems, and video projectors 4,13 2. Online marketing and communication skills 3,75 Desktop publishing skills (for designing brochures, catalogues, etc.) 3,75 Social media skills 3,75 3. Skills to monitor online reviews 3,50 <p>Least:</p> <ol style="list-style-type: none"> 1. Artificial Intelligence (AI) and robotics skills 1,88 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality 2,13 Computer programming skills 2,13 3. Website development skills 2,50
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> 1. Operating System use skills (e.g., Windows) 4,50 Microsoft Office skills (e.g., Word, Excel, Powerpoint) 4,50 2. Online marketing and communication skills 4,38

	<p>3. Social media skills 4,25</p> <p>Least:</p> <p>1. Artificial Intelligence (AI) and robotics skills 2,75</p> <p>2. Computer programming skills 3,00</p> <p>3. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality 3,13</p>
Training Provision for digital skills?	<p>Yes 62,50% (5)</p> <p>No 32,50% (3)</p>
Most popular/ three main types of training for digital skills	<p>On the job 22,22% (2)</p> <p>Online course 22,22% (2)</p> <p>Several days on-site training by external provider 22,22% (2)</p> <p>One day on-site training by external provider 11,11% (1)</p> <p>One day off-site training by external provider 11,11% (1)</p> <p>Several days off-site training by external provider 11,11% (1)</p>

- This sector does not provide training because (comments from the survey): lack of resources; we have no time and specialist; the time has not come yet; the external partner carries out a large part of the digital tasks; not our field of expertise; it is a long-term plan; workers do not demand it; all digital development subcontractors are in control.
- In this subsector, the Artificial Intelligence (AI) and robotics skills (1,88), skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2,13), Computer programming skills (2,13), and Website development skills (2,50) are the least proficient at present. This is a general situation in the Hungarian Tourism sector.
- In the future the Operating System use skills (e.g., Windows), Microsoft Office skills (e.g., Word, Excel, Powerpoint), Online marketing and communication skills and, Social media skills will be the most important.
- The gap between the current and future scores is 21,85%, less than the Hungarian average (24,92%) and also than the European average (24,83%)
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

2. DESTINATION MANAGEMENT ORGANIZATIONS

Environmental Skills	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> 1. Promotion of environmentally friendly activities and products 3,31 2. Knowledge of climate change 2,62 3. Ability to minimize the use and maximize the efficiency of energy and water consumption 2,54 Promotion of sustainable forms of transport (e.g. public transport) 2,54 <p>Least:</p> <ol style="list-style-type: none"> 1. Conservation of biodiversity 2,23 2. Ability to manage waste, sewage, recycling and composting 2,31 3. Ability to minimize the use and maximize the efficiency of energy and water consumption 2,54 Promotion of sustainable forms of transport (e.g. public transport) 2,54
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> 1. Promotion of environmentally friendly activities and products 4,15 2. Knowledge of climate change 3,62 3. Promotion of sustainable forms of transport (e.g. public transport) 3,54 <p>Least:</p> <ol style="list-style-type: none"> 1. Conservation of biodiversity 3,23 2. Ability to minimize the use and maximize the efficiency of energy and water consumption 3,38 3. Ability to manage waste, sewage, recycling and composting 3,46
Training Provision for these skills?	<p>Yes 15,38% (2) No 84,62% (11)</p>

Most popular/ three main types of training	<p>On the job 33,33% (2) One day on-site training by external provider 16,67% (1) Several days on-site training by external provider 16,67% (1) Apprenticeship 16,67% (1) Higher education 16,67% (1)</p>

- This sector does not provide training because (comments from survey): lack of resources; no need; there is no time for that; there is no suitable specialist; because of the small business, there is no separate framework for this; no focus on this topic; this is not the main priority now, but professional training; lack of interest.
- There are small differences between the most and the least proficient environmental skills, there is no reason for giving a conclusion.
- According to the Hungarian Destination Management companies, the most important environmental skills are the same at present and in the future. These skills meet the requirements concerning the activities of any destination management organization.
- At present, the environmental skills in this subsector are less important than the Hungarian average. In the future practically there will be no difference between them. In the future, the skills related to the promotion of environmentally friendly activities/products will be the most important (4,15). This value is higher than the sector's total (3,88) and this is the highest score taking into account all the skills of the 5 subsectors.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

Personal, Communication and Diversity Skills	
Current Level of Proficiency. Three most and three least	<p>PERSONAL SKILLS - Most: 1. Customer orientation 4,62 2. Problem-solving 4,38</p>

<p>proficient per category</p>	<p>Promoting a positive work environment 4,38 Creativity 4,38</p> <p>3. Initiative and commitment 4,31 Ethical conduct and respect 4,31</p> <p>PERSONAL SKILLS - Least:</p> <p>1. Willingness to change 3,69 2. Willingness to learn and to perform 4,23 3. Initiative and commitment 4,31 Ethical conduct and respect 4,31</p> <p>COMMUNICATION SKILLS – Most:</p> <p>1. Oral communication skills 4,46 2. Written communication skills 4,23 3. Skills related to awareness of local customs (e.g., food, arts, language, crafts) 4,15</p> <p>COMMUNICATION SKILLS – Least:</p> <p>1. Skills related to cultural awareness and expression 3,77 2. Active listening skills 3,85 3. Skills related to intercultural host-guest understanding and respect 4,00</p> <p>DIVERSITY SKILLS – Most:</p> <p>1. Age-related accessibility skills 4,15 2. Gender equality skills 4,08 3. Diets and allergy needs skills 3,92</p> <p>DIVERSITY SKILLS – Least:</p> <p>1. Skills related to disabilities and appropriate infrastructure 3,69 2. Skills related to diversity in religious beliefs 3,77 3. Diets and allergy needs skills 3,92</p>
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<p>Future level of proficiency in 2030. Three most and three least proficient.</p>	<p>PERSONAL - Most:</p> <ol style="list-style-type: none"> 1. Customer orientation 4,77 2. Willingness to change 4,69 3. Promoting a positive work environment 4,62 Creativity 4,62 <p>PERSONAL - Least:</p> <ol style="list-style-type: none"> 1. Problem-solving 4,31 2. Ethical conduct and respect 4,46 Willingness to learn and to perform 4,46 3. Initiative and commitment 4,54 <p>COMMUNICATION – Most:</p> <ol style="list-style-type: none"> 1. Skills related to awareness of local customs (e.g., food, arts, language, crafts) 4,62 Ability to speak foreign languages 4,62 Skills related to intercultural host-guest understanding and respect 4,62 2. Active listening skills 4,54 3. Written communication skills 4,46 Oral communication skills 4,46 Skills related to cultural awareness and expression 4,46 <p>COMMUNICATION – Least:</p> <ol style="list-style-type: none"> 1. Written communication skills 4,46 Oral communication skills 4,46 Skills related to cultural awareness and expression 4,46 2. Active listening skills 4,54 3. Skills related to awareness of local customs (e.g., food, arts, language, crafts) 4,62 Ability to speak foreign languages 4,62
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	<p>Skills related to intercultural host-guest understanding and respect 4,62</p> <p>DIVERSITY– Most:</p> <ol style="list-style-type: none"> 1. Age-related accessibility skills 4,54 Skills related to disabilities and appropriate infrastructure 4,54 2. Skills related to diversity in religious beliefs 4,46 3. Gender equality skills 4,38 Diets and allergy needs skills 4,38 <p>DIVERSITY– Least:</p> <ol style="list-style-type: none"> 1. Gender equality skills 4,38 Diets and allergy needs skills 4,38 2. Skills related to diversity in religious beliefs 4,46 3. Age-related accessibility skills 4,54 Skills related to disabilities and appropriate infrastructure 4,54
Training Provision for Social Skills	<p>Yes 53,85% (7) No 46,15% (6)</p>
Most popular/ three main types of training for social skills	<p>On the job 21,05% (4) One day off-site training by external provider 21,05% (4) Apprenticeship 21,05% (4) One day on-site training by external provider 15,79% (3) Several days on-site training by external provider 10,53% (2)</p>

- This sector does not provide training because (comments from survey): not necessary; no time; lack of capacity; soon it will be money for that; in-house solution; no attention; we have not thought about regular training, but we are aware of social sensitivity.

- Customer-oriented skills are - and remain- the most important. As to the personal skills development for this sector, it can be stated that the gaps between the current and future needs are the smallest in this subsector (6,28%), much smaller than the European average (10,83%).
- Overall summary: Social skills are more important than the European average level. Furthermore the Destination Management subsector- together with the Visitor Attraction subsector- has the highest scores in the Hungarian tourism sector.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

Digital Skills	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> 1. Microsoft Office skills (e.g., Word, Excel, Powerpoint) 4,38 2. Operating System use skills (e.g., Windows) 4,31 3. Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems, and video projectors 3,85 <p>Least:</p> <ol style="list-style-type: none"> 1. Artificial Intelligence (AI) and robotics skills 1,69 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality 1,85 3. Computer programming skills 2,15
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> 1. Microsoft Office skills (e.g., Word, Excel, Powerpoint) 4,54 2. Operating System use skills (e.g., Windows) 4,46 3. Social media skills 4,38 <p>Least:</p> <ol style="list-style-type: none"> 1. Computer programming skills 3,31 Artificial Intelligence (AI) and robotics skills 3,31

	2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality 3,46 3. Website development skills 3,77
Training Provision for digital skills?	Yes 61,54% (8) No 38,46% (5)
Most popular/ three main types of training for digital skills	On the job 30,00% (6) One day on-site training by external provider 20,00% (4) One day off-site training by external provider 20,00% (4) Online course 10,00% (2) Apprenticeship 10,00% (2)

- This sector does not provide training because (comments from survey): the time has not come yet; the external partner carries out a large part of the digital tasks; lack of resources; we have no time and specialist; not our field of expertise. It is a long-term plan; workers do not demand it; all digital development subcontractors are in control.
- In this subsector, the Artificial Intelligence (AI) and robotics skills (1,69), Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (1,85) and Computer programming skills (2,15) are the least proficient at present. This is a general situation in the Hungarian Tourism sector.
- In the future Microsoft Office skills (e.g., Word, Excel, Powerpoint), Operating System use skills (e.g., Windows) and Social media skills will be the most important.
- The gap between the current and future scores is 36,11%, the highest in the Hungarian tourism sector.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

3. TRAVEL AGENCIES / TOUR OPERATORS

Environmental Skills	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> Promotion of environmentally friendly activities and products 2,94 Knowledge of climate change 2,94 Promotion of sustainable forms of transport (e.g. public transport) 2,76 Ability to minimize the use and maximize the efficiency of energy and water consumption 2,62 <p>Least:</p> <ol style="list-style-type: none"> Conservation of biodiversity 2,00 Ability to manage waste, sewage, recycling and composting 2,32 Ability to minimize the use and maximize the efficiency of energy and water consumption 2,62
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> Knowledge of climate change 3,91 Promotion of environmentally friendly activities and products 3,79 Promotion of sustainable forms of transport (e.g. public transport) 3,65 <p>Least:</p> <ol style="list-style-type: none"> Conservation of biodiversity 3,18 Ability to minimize the use and maximize the efficiency of energy and water consumption 3,29 Ability to manage waste, sewage, recycling and composting 3,38
Training Provision for these skills?	<p>Yes 11,76% (4) No 88,24% (30)</p>

Most popular/ three main types of training	On the job 50,00% (2) Online course 25,00% (1) One day on-site training by external provider 25,00% (1)
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- This sector does not provide training because (comments from the survey): this is not the main priority now, but professional training; there is no money and time for that; there is no suitable specialist; because of the small business, there is no separate coverage for this; there has been no focus on this topic so far; lack of interest.
- Tour-operators and tourist agencies are selling services that have been offered by accommodations, transportation companies, restaurants, etc. Their activity is an intermediary activity consequently they think the conservation of biodiversity is not their “business”.
- There isn't any difference between the present and future skills, but the importance of them increased significantly. Environmental skills will be more important in the future. According to the scores in the table, the main gap occurs in the connection with the conservation of biodiversity.
- The subsector’s average at present is 2,60, in the future, it is 3,53. Both scores are less than the Hungarian tourism sector's total average (2,85 and 3,57). The gap is 36,04%, it is much more than the sector’s total (25,51%). It seems controversial that the representatives of the sector actually evaluate lower the importance of environmental issues. This can be a consequence of the fact that they are overwhelmingly SMEs and apart from daily operations and finances, they have no capacity for other issues. But from the responses regarding the future, it is clear that the "green" area will play a very important role.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

Personal, Communication and Diversity Skills	
Current Level of Proficiency. Three most and three least	PERSONAL SKILLS - Most: 1. Customer orientation 4,53 2. Ethical conduct and respect 4,32

<p>proficient per category</p>	<p>3. Problem-solving 4,12</p> <p>PERSONAL SKILLS - Least:</p> <ol style="list-style-type: none"> 1. Willingness to change 3,76 2. Willingness to learn and to perform 3,91 3. Initiative and commitment 3,94 <p>COMMUNICATION SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Oral communication skills 3,94 2. Skills related to intercultural host-guest understanding and respect 3,88 3. Written communication skills 3,85 <p>COMMUNICATION SKILLS – Least:</p> <ol style="list-style-type: none"> 1. Skills related to cultural awareness and expression 3,35 2. Skills related to awareness of local customs (e.g., food, arts, language, crafts) 3,41 3. Ability to speak foreign languages 3,62 <p>DIVERSITY SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Gender equality skills 3,97 2. Age-related accessibility skills 3,91 3. Diets and allergy needs skills 3,59 <p>DIVERSITY SKILLS – Least:</p> <ol style="list-style-type: none"> 1. Skills related to disabilities and appropriate infrastructure 3,24 2. Skills related to diversity in religious beliefs 3,47 3. Diets and allergy needs skills 3,59
<p>Future level of proficiency in 2030.</p>	<p>PERSONAL - Most:</p> <ol style="list-style-type: none"> 1. Customer orientation 4,53

<p>Three most and three least proficient.</p>	<p>2. Ethical conduct and respect 4,47 3. Promoting a positive work environment 4,44</p> <p>PERSONAL - Least:</p> <p>1. Initiative and commitment 4,24 2. Creativity 4,26 Willingness to learn and to perform 4,26 3. Willingness to change 4,29</p> <p>COMMUNICATION – Most:</p> <p>1. Ability to speak foreign languages 4,26 2. Skills related to intercultural host-guest understanding and respect 4,24 3. Written communication skills 4,21 Oral communication skills 4,21 Active listening skills 4,21</p> <p>COMMUNICATION – Least:</p> <p>1. Skills related to cultural awareness and expression 4,09 2. Skills related to awareness of local customs (e.g., food, arts, language, crafts) 4,15 3. Written communication skills 4,21 Oral communication skills 4,21 Active listening skills 4,21</p> <p>DIVERSITY– Most:</p> <p>1. Gender equality skills 4,24 Age-related accessibility skills 4,24 2. Diets and allergy needs skills 4,09 3. Skills related to disabilities and appropriate infrastructure 4,03</p> <p>DIVERSITY– Least:</p>
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	1. Skills related to diversity in religious beliefs 4,00 2. Skills related to disabilities and appropriate infrastructure 4,03 3. Diets and allergy needs skills 4,09
Training Provision for Social Skills	Yes 26,47% (9) No 73,53% (25)
Most popular/ three main types of training for social skills	On the job 31,58% (6) Online course 21,05 (4) One day on-site training by external provider 10,53% (2) Several days on-site training by external provider 10,53% (2) One day off-site training by external provider 10,53% (2) Several days off-site training by external provider 10,53% (2)

- This sector does not provide training because (comments from survey): high-level problem-solving in HR social issues; soon there will be money for that, No time; we do not feel the need; lack of capacity. In-house solution; not necessary; we have not thought about regular training, but we are aware of social sensitivity.
- In this subsector, the customer-oriented skills are - and remain- the most important. As to the personal skills development for this sector, it can be stated that the gaps between the current and future needs are the second smallest in this subsector (6,67%).
- The communication skills are the most important in this subsector.
- Overall summary: Social skills are more important than the European average level. Furthermore, the Tourist agencies / Tour operators subsector together with the Destination Management and Visitor attractions subsectors have the highest scores in the Hungarian tourism sector.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

Digital Skills	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> 1. Microsoft Office skills (e.g., Word, Excel, Powerpoint) 3,76 2. Operating System use skills (e.g., Windows) 3,74 3. Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems, and video projectors 3,56 <p>Least:</p> <ol style="list-style-type: none"> 1. Artificial Intelligence (AI) and robotics skills 1,97 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality 2,15 3. Computer programming skills 2,21
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> 1. Microsoft Office skills (e.g., Word, Excel, Powerpoint) 4,18 2. Social media skills 4,09 3. Operating System use skills (e.g., Windows) 4,06 <p>Least:</p> <ol style="list-style-type: none"> 1. Computer programming skills 2,88 2. Artificial Intelligence (AI) and robotics skills 3,18 3. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality 3,26
Training Provision for digital skills?	<p>Yes 70,59% (24)</p> <p>No 29,41% (10)</p>
Most popular/ three main types of training	<p>On the job 35,85% (19)</p> <p>Online course 16,98% (9)</p>

for digital skills	One day on-site training by external provider 15,09% (8)
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- This sector does not provide training because (comments from survey): not our field of expertise; it is a long-term plan; lack of resources; we have no time and specialist; the time has not come yet; the external partner carries out a large part of the digital tasks; workers do not demand it; all digital development subcontractors are in control.
- In this subsector, the Artificial Intelligence (AI) and robotics skills (1,97), Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2,15) and Computer programming skills (2,21) are the least proficient at present. This is a general situation in the Hungarian Tourism sector.
- In the future, the Microsoft Office skills (e.g., Word, Excel, Powerpoint), Social media skills and Operating System use skills (e.g., Windows) will be the most important.
- The gap between the current and future scores is 27,19%, the second highest in the Hungarian tourism sector.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

4. FOOD & BEVERAGE

Environmental Skills	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> 1. Promotion of environmentally friendly activities and products 3,37 2. Ability to minimize the use and maximize the efficiency of energy and water consumption 2,96 3. Ability to manage waste, sewage, recycling and composting 2,81 <p>Least:</p> <ol style="list-style-type: none"> 1. Conservation of biodiversity 2,33 2. Promotion of sustainable forms of transport (e.g. public transport) 2,56 3. Ability to manage waste, sewage, recycling and composting 2,81
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> 1. Promotion of environmentally friendly activities and products 3,70 2. Knowledge of climate change 3,59 3. Ability to minimize the use and maximize the efficiency of energy and water consumption 3,52 <p>Least:</p> <ol style="list-style-type: none"> 1. Conservation of biodiversity 3,04 2. Promotion of sustainable forms of transport (e.g. public transport) 3,15 3. Ability to manage waste, sewage, recycling and composting 3,44
Training Provision for these skills?	<p>Yes 29,63% (8) No 70,37% (19)</p>

Most popular/ three main types of training	<p>On the job 63,64% (7) One day on-site training by external provider 27,27% (3) Apprenticeship 9,09% (1)</p>

- This sector does not provide training because (comments from the survey): there is no suitable specialist; there is no money, time for that; there is no separate framework for this; there has been no focus on this topic so far; this is not the main priority now, but professional training; lack of interest; no need.
- A lot of restaurants try to move local or in general 0 km products, but in a lot of cases, they don't even consider this as a green solution.
- The sector is almost exclusively is composed of SMEs, majority of them even micro enterprises and with the actual tragic manpower situation they are happy to run the everyday operations with the least possible mistakes and have no capacity to look forward and consider future-related issues like sustainability.
- Answers regarding the future indicate that in spite of the actual socio-economic situation of the sector, more attention will be paid to this topic.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

<p>Personal, Communication and Diversity Skills</p>	
<p>Current Level of Proficiency. Three most and three least proficient per category</p>	<p>PERSONAL SKILLS - Most: 1. Customer orientation 4,22 2. Ethical conduct and respect 4,19 3. Promoting a positive work environment 4,04</p> <p>PERSONAL SKILLS - Least:</p>

	<p>1. Willingness to change 3,59 2. Initiative and commitment 3,81 Willingness to learn and to perform 3,81 3. Problem-solving 4,00 Creativity 4,00</p> <p>COMMUNICATION SKILLS – Most: 1. Oral communication skills 3,96 2. Skills related to awareness of local customs (e.g., food, arts, language, crafts) 3,81 3. Active listening skills 3,78</p> <p>COMMUNICATION SKILLS – Least: 1. Skills related to cultural awareness and expression 3,37 2. Ability to speak foreign languages 3,41 3. Written communication skills 3,44</p> <p>DIVERSITY SKILLS – Most: 1. Age-related accessibility skills 4,11 2. Gender equality skills 4,07 Diets and allergy needs skills 4,07 3. Skills related to disabilities and appropriate infrastructure 3,70</p> <p>DIVERSITY SKILLS – Least: 1. Skills related to diversity in religious beliefs 3,63 2. Skills related to disabilities and appropriate infrastructure 3,70 3. Gender equality skills 4,07 Diets and allergy needs skills 4,07</p>
Future level of	PERSONAL - Most:

<p>proficiency in 2030. Three most and three least proficient.</p>	<ol style="list-style-type: none"> 1. Customer orientation 4,52 2. Ethical conduct and respect 4,33 <ul style="list-style-type: none"> Promoting a positive work environment 4,33 3. Creativity 4,22 <p>PERSONAL - Least:</p> <ol style="list-style-type: none"> 1. Willingness to change 4,04 2. Willingness to learn and to perform 4,11 3. Problem-solving 4,15 <p>COMMUNICATION – Most:</p> <ol style="list-style-type: none"> 1. Skills related to awareness of local customs (e.g., food, arts, language, crafts) 4,30 <ul style="list-style-type: none"> Skills related to intercultural host-guest understanding and respect 4,30 2. Oral communication skills 4,22 3. Active listening skills 4,15 <p>COMMUNICATION – Least:</p> <ol style="list-style-type: none"> 1. Written communication skills 3,81 2. Skills related to cultural awareness and expression 4,11 <ul style="list-style-type: none"> Ability to speak foreign languages 4,11 3. Active listening skills 4,15 <p>DIVERSITY– Most:</p> <ol style="list-style-type: none"> 1. Age-related accessibility skills 4,37 <ul style="list-style-type: none"> Diets and allergy needs skills 4,37 2. Gender equality skills 4,26 <ul style="list-style-type: none"> Skills related to disabilities and appropriate infrastructure 4,26 3. Skills related to diversity in religious beliefs 4,00 <p>DIVERSITY– Least:</p>
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	<p>1. Skills related to diversity in religious beliefs 4,00</p> <p>2. Gender equality skills 4,26 Skills related to disabilities and appropriate infrastructure 4,26</p> <p>3. Age-related accessibility skills 4,37 Diets and allergy needs skills 4,37</p>
Training Provision for Social Skills	<p>Yes 51,85% (14)</p> <p>No 48,15% (13)</p>
Most popular/ three main types of training for social skills	<p>On the job 38,10% (8)</p> <p>One day on-site training by external provider 19,05% (4)</p> <p>Apprenticeship 19,05% (4)</p> <p>Vocational training 9,52% (2)</p>

- This sector does not provide training because (comments from the survey: the basic condition is the existence of these skills due to our profession; lack of capacity; soon there will be money for that; in-house solution; high-level problem-solving in HR social issues; not necessary; we have not thought about regular training, but we are aware of social sensitivity).
- Above we mentioned that the guest-related soft skills are overvalued this is particularly true for this segment. A normal waiter can think to have served perfectly the customers, but a thorough analysis of the whole procedure would identify a lot of systems and personal mistakes.
- Due to the high number of foreign guests and customers with diversities, the sector is best prepared for handling these issues in Hungarian society.
- Some of the most important personal skills have to come from the family, the schools and the employment environment can make only adjustments and completion of these skills.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

Digital Skills	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> 1. Operating System use skills (e.g., Windows) 3,85 2. Microsoft Office skills (e.g., Word, Excel, Powerpoint) 3,78 3. Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems, and video projectors 3,67 <p>Least:</p> <ol style="list-style-type: none"> 1. Artificial Intelligence (AI) and robotics skills 1,96 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality 2,04 3. Computer programming skills 2,44 Website development skills 2,44
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> 1. Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems, and video projectors 4,15 2. Operating System use skills (e.g., Windows) 4,07 Microsoft Office skills (e.g., Word, Excel, Powerpoint) 4,07 Online marketing and communication skills 4,07 3. Skills for implementing online safety procedures 3,96 <p>Least:</p> <ol style="list-style-type: none"> 1. Artificial Intelligence (AI) and robotics skills 2,78 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality 2,85 3. Computer programming skills 3,00
Training Provision for digital skills?	<p>Yes 55,56% (15) No 44,44% (12)</p>
Most popular/ three	On the job 43,48% (10)

main types of training for digital skills	One day on-site training by external provider 13,04% (3) Several days on-site training by external provider 13,04% (3) Online course 8,70% (2) Apprenticeship 8,70% (2)
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- This sector does not provide training because (comments from the survey): workers do not demand it; lack of resources; we have no time and specialist; the time has not come yet; the external partner carries out a large part of the digital tasks; not our field of expertise; it is a long-term plan. All digital development subcontractors are in control.
- It is interesting to see how high values the most modern aspects of the digital scenery have obtained (AI, VR, AR, etc.) but it turned out from the personal interviews that there are more serious problems with everyday usage of available hardware and software due to lack of knowledge, only a low percentage of the potentiality of these solutions is used (for example a programmable steamer or the data mining of the restaurant software). There are cases when restaurant personnel is scared to use PDAs (Personal Digital Assistants).
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

5. ACCOMMODATIONS

Environmental Skills	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> 1. Promotion of environmentally friendly activities and product 3,59 2. Ability to minimize the use and maximize the efficiency of energy and water consumption 3,27 3. Knowledge of climate change 3,05 <p>Least:</p> <ol style="list-style-type: none"> 1. Conservation of biodiversity 2,76 2. Promotion of sustainable forms of transport (e.g. public transport) 2,93 3. Ability to manage waste, sewage, recycling and composting 2,98
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> 1. Promotion of environmentally friendly activities and product 3,90 2. Ability to minimize the use and maximize the efficiency of energy and water consumption 3,80 3. Ability to manage waste, sewage, recycling and composting 3,66 <p>Least:</p> <ol style="list-style-type: none"> 1. Conservation of biodiversity 3,39 2. Promotion of sustainable forms of transport (e.g. public transport) 3,61 3. Knowledge of climate change 3,63
Training Provision for these skills?	<p>Yes 36,59% (15) No 63,41% (26)</p>

Most popular/ three main types of training	<p>On the job 52,17% (12) Online course 21,74% (5) One day on-site training by external provider 13,04% (3)</p>
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- This sector does not provide training because (comments from the survey): there is no money and time for that; there has been no focus on this topic so far; there is no suitable specialist; because of the small business, there is no separate framework for this; this is not the main priority now, but professional training; lack of interest.
- The Hotel Association of Hungary has a long year successful programme under the title “Green Hotels”, which helped a lot in creating awareness in the sector. This explains also the relatively high values given to certain issues.
- With the entrance of the younger generations into the workforce of hotels, the environmental awareness is increasing, therefore accommodation owners are confident to perform well in this area also in the future.
- More and more West European visitors of the Hungarian accommodation market have very high green expectations and although there are some financial and knowledge-based obstacles the sector is proceeding to meet these expectations.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

Personal, Communication and Diversity Skills	
Current Level of Proficiency. Three most and three least proficient per category	<p>PERSONAL SKILLS - Most:</p> <ol style="list-style-type: none"> 1. Customer orientation 4,29 2. Ethical conduct and respect 4,17 3. Promoting a positive work environment 3,95 <p>PERSONAL SKILLS - Least:</p> <ol style="list-style-type: none"> 1. Willingness to change 3,61

	<p>2. Willingness to learn and to perform 3,68 3. Initiative and commitment 3,76</p> <p>COMMUNICATION SKILLS – Most: 1. Oral communication skills 3,93 2. Written communication skills 3,78 3. Active listening skills 3,61</p> <p>COMMUNICATION SKILLS – Least: 1. Skills related to cultural awareness and expression 3,34 2. Ability to speak foreign languages 3,49 3. Skills related to awareness of local customs (e.g., food, arts, language, crafts) 3,59 Skills related to intercultural host-guest understanding and respect 3,59</p> <p>DIVERSITY SKILLS – Most: 1. Gender equality skills 3,93 2. Age-related accessibility skills 3,83 3. Diets and allergy needs skills 3,78</p> <p>DIVERSITY SKILLS – Least: 1. Skills related to diversity in religious beliefs 3,49 2. Skills related to disabilities and appropriate infrastructure 3,66 3. Diets and allergy needs skills 3,78</p>
<p>Future level of proficiency in 2030. Three most and three least proficient.</p>	<p>PERSONAL - Most: 1. Customer orientation 4,59 2. Ethical conduct and respect 4,39 3. Promoting a positive work environment 4,37</p>

	<p>PERSONAL - Least:</p> <ol style="list-style-type: none"> 1. Initiative and commitment 4,22 <ul style="list-style-type: none"> Willingness to change 4,22 Willingness to learn and to perform 4,22 2. Creativity 4,24 3. Problem-solving 4,29 <p>COMMUNICATION – Most:</p> <ol style="list-style-type: none"> 1. Ability to speak foreign languages 4,24 2. Oral communication skills 4,10 <ul style="list-style-type: none"> Active listening skills 4,10 3. Skills related to intercultural host-guest understanding and respect 4,07 <p>COMMUNICATION – Least:</p> <ol style="list-style-type: none"> 1. Skills related to cultural awareness and expression 3,85 2. Written communication skills 3,88 3. Skills related to awareness of local customs (e.g., food, arts, language, crafts) 3,90 <p>DIVERSITY– Most:</p> <ol style="list-style-type: none"> 1. Diets and allergy needs skills 4,34 2. Gender equality skills 4,15 <ul style="list-style-type: none"> Skills related to disabilities and appropriate infrastructure 4,15 3. Age-related accessibility skills 4,10 <p>DIVERSITY– Least:</p> <ol style="list-style-type: none"> 1. Skills related to diversity in religious beliefs 3,98 2. Age-related accessibility skills 4,10 3. Gender equality skills 4,15 <ul style="list-style-type: none"> Skills related to disabilities and appropriate infrastructure 4,15
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Training Provision for Social Skills	Yes 48,78% (20) No 51,22% (21)
Most popular/ three main types of training for social skills	On the job 28,57% (12) One day on-site training by external provider 23,81% (10) Apprenticeship 14,29% (6)

- This sector does not provide training because the basic condition is the existence of these skills due to our profession. No time. We don't feel the need. Lack of capacity. Soon there will be money for that. In-house solution. High-level problem-solving in HR social issues. We have not thought about regular training, but we are aware of social sensitivity.
- Above we mentioned that the guest-related soft skills are overvalued this is particularly true for this segment. A normal waiter can think to have served perfectly the customers, but a thorough analysis of the whole procedure would identify a lot of systems and personal mistakes.
- Due to the high number of foreign guests and customers with diversities, the sector is best prepared for handling these issues in Hungarian society.
- Some of the most important personal skills have to come from the family, the schools and the employment environment can make only adjustments and completion of these skills.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.

Digital Skills	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> 1. Operating System use skills (e.g., Windows) 3,98 2. Microsoft Office skills (e.g., Word, Excel, Powerpoint) 3,85 3. Online marketing and communication skills 3,78 <p>Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems, and video projectors 3,78 Skills to monitor online reviews 3,78</p> <p>Least:</p> <ol style="list-style-type: none"> 1. Artificial Intelligence (AI) and robotics skills 2,12 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality 2,20 3. Computer programming skills 2,59
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> 1. Microsoft Office skills (e.g., Word, Excel, Powerpoint) 4,49 2. Operating System use skills (e.g., Windows) 4,46 3. Online marketing and communication skills 4,44 <p>Least:</p> <ol style="list-style-type: none"> 1. Computer programming skills 3,27 2. Artificial Intelligence (AI) and robotics skills 3,29 3. Website development skills 3,56
Training Provision for digital skills?	<p>Yes 65,85% (27) No 34,15% (14)</p>
Most popular/ three main types of training for digital skills	<p>On the job 33,85% (22) Online course 16,92% (11) One day on-site training by external provider 10,77% (7)</p>

- This sector does not provide training because (comments from the survey): lack of resources; we have no time and specialist; the time has not come yet; the external partner carries out a large part of the digital tasks; not our field of expertise; it is a long-term plan; workers do not demand it; all other digital development subcontractors are in control.
- Also, the hotel sector is characterized by SMEs and they are very vulnerable to all kind of digital risks (fake evaluations, hacker attacks, subject to algorithms, etc) and most of them don't even realize it due to lack of capacities.
- The majority of the hotels does not even dispose of facility management software, those who have this software, use an only very low percentage of their capacities due to lack of skills of the personnel.
- Remarks: The research is not representative. The results do not represent the opinions of the total subsector. The scores depend on the composition of the respondents.