NTG ALLIANCE

COUNTRY INTERVIEW REPORT

SPAIN

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The **Next Tourism Generation Alliance (NTG)** is the first European partnership for improving a collaborative and productive relationship between education and industry, funded by 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/

Sample

Number of respondents interviewed for this report: 30

- Tour operators / travel agencies: 3
- Destination management organizations: 6
- Attractions: 2
- Accommodation: 14
- Food & beverage: 5

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Theme 1: NTG Skills Sets: For each subsectors of the tourism industry, a summary of respondent's ideas of *current skills needs* (green, social, digital), current *shortage of skills*, current *training provision*.

Tour operators / travel agents - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:

Firms need staff with the specific skill of adaptability and flexibility, especially in digital and social skills: to learn fast, to manage different technologies, not to be afraid with changes, etc. This adaptability is very important in digital skills because companies handle different specific computer programs and everything is much automated. Companies highlight the need to interconnect all different activities and services with digital area.

At the environmental level, travel agencies and tour operators are incorporating certain basic sustainable measures such as saving energy and water, recycling paper, avoiding unnecessary transfers (of customers or themselves). However the biggest environmental changes and demands are coming from the destination per se that is becoming more sustainable. For example, there are many pedestrian streets, more bike lanes, etc. and this can affect the route or even pick up or drop-off of clients. This is also a change for tour operators. All different actors in the sector must consider the new concept of tourism under the sustainability paradigm.

Social skills are different depending on each department and area of work. For instance, in the area of transfers and excursions that has a more operational profile does not need these skills as much. However, in other areas such as the Contract Processing Department, which needs more contact with different actors in the sector social skills become paramount. In general is very important to be versatile and know how to adapt to different cultures since the clients are diverse and from different countries and backgrounds. It could be highlighted the ability to adapt to other cultures and to be very social oriented.

However, the importance of the green, social and digital skills has to be seen as a whole and the synergic effect must be sought. For example, the total digitization will favor the elimination of paper and that customers (even workers) do not need to physically move to their commercial office. But trust and the social relationship must continue to be cultivated taking care of the appropriate language to the digital medium and the management of social relations.

Regarding how to achieve effective training, this should be:

- ✓ Intuitive in the contents and in the processes and tools.
- ✓ Mixed: Internal in the company itself and external in universities, private trainers or associations;
- ✓ Based on "learning by doing" for day-to-day operational issues and more academic for competitive intelligence issues; talks, webinars, courses, etc.
- ✓ It must result in a direct benefit for the company that is quantifiable (increase in the number of contracts, efficiency, etc.).
- ✓ In all cases, it must be continuous.
- ✓ Adapted to the different skills,
    - Digital: In addition to webminars, perhaps face-to-face courses that allow testing without affecting the operating system for employees to practice externally.
    - Green: Awareness talks.
    - Social: experience

Destination Management - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:

Smart Destinations require personnel to have skills on the environmental and socio-cultural level as much as digital skills.

On the digital arena, depending on the tasks that are developed the team is trained in current needs, as technology is incorporated. The use of tools to monitor the destination is fundamental, as well as monitoring social networks. Employees are trained in digital marketing, web updating, knowledge of all google tools, office package, conducting online research, Social Network Management, data analysis tools, management of online hosting sales platforms (type booking or airbnb), etc.

However, digital skills are still missing as further development in Business intelligence continuous to grow. There is also a lack of knowledge in big data analysis, Digital design, adwords, etc. and as the digitally administrative processes progress towards paperless environment new digital skills will be incorporated in the daily work of companies.

Training methods

Companies provide different ty kinds of training, internal and also external, provided by other companies, as well as different formats (face to face and online training).

The suggested methodology is a combination of thematic courses, external advisory / consultancy and mentoring, and frequent knowledge or experience exchange with other DMOs and private sector to analyse and monitor the progress. Public speaking and teamwork activities will be very important as well, mainly to generate more cohesion among team members.

An important concern is that currently, there is an imbalance between excessive digital training and lack of training in human skills. One of the main skills that must always be improved is communication and this must be understood as the ability to inform, convince, persuade, and negotiate.

In the environmental, employees work with continuous training and through training networks, such as the Spanish Centre for Responsible Tourism and SANNAS[1].

The most effective method for developing social skills for employees is Face-to-face practical workshops within the company's own network or with experts' consultants to help train staff in social skills. Experiential workshops are crucial while the online would be a little lame in this domain. Companies provide training or education for the development of these competencies through internal training in SANNAS and continuous training. His company uses

Public institutions confront the issue of working with civil servants that often show a passive attitude towards training and personal development due to the lack of market pressure.

At the regional level (Valencia Autonomous Community)

Digital skills. It is so complicated to generalize but we can find two or more speeds on the digitalization process:

- Hotels and camping are the leaders of digitalization. They are already seeing "how to manage data, interpret information and turn it into knowledge". The pre-booking centers, CRMs, management of websites, social networks, etc., have already past. They are beginning to touch on issues of artificial intelligence.

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[1] SANNAS is a Spanish business association that aims to extend a new way of understanding economic activity based on the triple bottom line, considering that must be a balance between economic, social and enviromental interest in the private sector.

- The rest (individual travel agencies, rural houses, apartments, smaller camping, etc.) still are at the beginning of the digitalization process.
- Restaurants are lagging behind and it is in this subsector where more things have to been done. They continue with the POS terminals and little more have been digitized. Nor have risen so much to social networks; there are very few restaurants that have done so. Restaurants look more in the short term, not in the long term. They should take into account that customers of today are very different from that of 10 years ago.
- Destinations. There are also 2 speeds depending on the importance of tourism in the destination:
  - Valencia and Benidorm are the pioneers of Valencian Region.
  - The rest of destinations lag behind.

In 2018 it was launched a program of digital transformation. It is a training program with courses of 30-32 hours, 4-hour seminars, Pills for 1-2 hours. The program has 5 areas or lines of action, including:

- IOT (Internet of Things), with development of applications, blockchain, artificial intelligence, etc.
- Social media.
- Intelligent management of destinations and Smart marketing for business.
- Innovation in processes: lean methodology, design thinking, etc.
- Others.

Green skills. Those that already exist are the ones related to waste management. Last years a lot of firms have been obtaining environmental certificates.

Now it is time to social sustainability (related to overtourism and equality among employees). According to Invat.tur, Valencian regional government tries to encourage social sustainability linking public funds with the UNWTO Code of Ethics; that is, the firms that adopt UNWTO Code of Ethics are those obtaining public funds.

Social skills. The most important are the skills related to customer orientation, internal and external relationship, etc. It is very important to be hospitable and good hosts with the clients. The problem comes from two sources: in the years of economic boom hospitality skills were neglected by the business; on the other hand, they were poor training of employees in the sector. Valencian region government launched 2 or 3 years a 'hospitality program' directed to workers of the sector.

There are differences depending on the subsector. For instance, in the case of hotels, that are the more professional subsector inside tourism, social skills are more developed. On the opposite case, restaurants, integrated by a lot off businessmen and employees without specific training, social skills are less developed.

Training. The companies of the 5 sub-sectors make formation of the 2 types, internal and external, for the 3 skills. All firms have internal training; but they also come to forums, courses etc., organized by Invat.tur, universities and CdTs.

However, restaurants are the firms that use more frequently external training provided by Invat.tur

The most effective method is the case study, that is to say, a leader business showing its strategy. It is a good practice example.

Attractions - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:

The attractions segment is multifaceted. Cultural institutions differ from natural or manmade attractions.

In the digital domain nowadays there are many apps and software of all kinds. It is easy to fell into the trap of programmers. It is crucial for heritage institutions to maintain usability of devises and programs for all publics. They must be easy to use as the digital divide still exists among visitors. Final users must be able to follow any new improvement in an easy way. But also has to be easy to feed.

Employees must be capable of creating new contents and these contents must reach the public in an easy, fast and cheap way.

> *Every time we hire a company, we put as a condition that what you do is not captive, that they do not have to upload content, that we do things, because that is a lot of money and we do not have it* (AT1).

> *Our museum is lucky enough to be a poor museum; because that means that we are forced to be resourceful and to put conditions and limits on waste* (AT1).

- ✓ QR technology (accessible for blind users)
- ✓ Web interfaces and webapp
- ✓ Resources for interpretation and content generation (video making, storytelling, google maps design, etc.)
- ✓ Specific software to be used in cultural heritage institutions such as programs to catalogue museum artefacts (DOMUS)
- ✓ AutoCat to design spaces for exhibits allocating proper routes for visitors inside the exhibits and the perfect location of artefacts and signage.
- ✓ Knowledge of booking systems, channel managers, digital marketing, e-commerce, CRM, social networks.

Environmental skills

- ✓ Waste management, energy saving, environmental sustainability

Social Skills

Gender issues must be acknowledged transversally, touching all aspects of the institution from management to interpretation.

Cultural heritage interpretation and accessibility are also paramount.

Training is done mainly by internal courses and seminars but also taking advantage of public programs offered by different institutions

> *We do two internal training courses every year and we open them to other professionals in the region. A training course in heritage interpretation, because we believe that it is the key to communicate well. It is a discipline that is very little known but is fundamental. And, we do another course of interpretation in accessibility and inclusive care* (AT1)

Training is done through face-to face practical courses.

> *Knowledge has to be put into practice* (AT1)

Food & beverage - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:

Current provision of digital skills in the catering sector in Spain is difficult to characterize because there is much atomization. We can differentiate three levels or speeds:

1. Large franchises or groups. - They are leading the entire digital movement because it is a demand of the market itself and because it capitalizes economically on their companies.
2. Great chefs who are beginning to realize that the differentiation in the dish is increasingly complex and they are beginning to find elements of differentiation in the digital part. But always with a very subtle digitalization, they continue to maintain a very emotional relationship with the customer, but then they have great data, they are taking great care of online reputation, Internet positioning, etc.
3. The third speed is carried by independent restaurants where there are two groups: those who do not see how to make these aspects profitable and others that are beginning to integrate it little by little.

We are witnessing a change of model in the food & beverage sector. The relationship between providers and clients has changed.

We come from a basically face-to-face model and now we are starting to combine face-to-face with digital. The contact with the client starts in the digital, many aspects of the face-to-face part (offline) have digital connotations and after the gastronomic experience the digital part follows (stretches). A large percentage of the relationship with the client has been digitized (FB1).

Many of the trends we see in the sector are promoted more by the client than by the companies. In digitization, the client is ahead of the company. The customer is more digitized than many of the companies.

Therefore a very important part of **digitization** is related to:

✓ Marketing and customer relationship
✓ Management of different devices
✓ Knowledge of basic computer tools (Microsoft Office)
✓ Management and optimization of resources

Currently the people working in the operation must have basic technological skills. Basic knowledge of Internet, electronic mail, access to internal communication channels, management of different devices (taking command with tablets).

Regarding employees at the support center, and depending on the area in which they develop their activity, the technological skills change. In general, a higher knowledge of IT tools and specialization in Social Networks, Marketing tools, CRM, ERP, Payment Systems, Mobile Applications, Online Security, Cloud, Microsoft Office, Connectivity and Business Intelligence is required.

Missing digital skills in some companies are Computer Management Systems and an efficient use of databases for commercial and statistical purposes.

Environmental skills are a lever in the sector that is starting to have a lot of strength. It is a demand that is growing. The customer begins to value company differentiation in terms of environmental aspects such as traceability of products, organic components ... And many firms of the sector are finding a differential value in this environmental field beyond the mandatory measures o rules that are being put underway.

Related to green skills the most relevant are:

✓ Efficiency in the use of inputs (energy, water, raw materials, etc.). For instance, in the case of raw materials, the interviewee considers that near 14 or 15% of inputs are lost, that is, go to the trash.

- ✓ More awareness on recycling issues regarding the separation of plastics and packaging, and greater efficiency in the kitchen so that this process does not impact the service.
- ✓ Knowledge of efficient and sustainable products and materials in the construction of the establishment and their impact on the environment, it is necessary to develop greater awareness.

In terms of **social skills**, we are in the era of ultra-personalization of the product, based on that digital knowledge of the customer, in those data that allow us to know their gastronomic DNA. We move towards personalized restaurants for each type of client. Based on consumption data, their way of consuming, their values ... We are seeing a personalization in social aspects trying to surprise the client. The restaurants are getting to know the customer before they go to the restaurant. The social relationship with the client is broader than a few years ago. And customers are also starting to look for restaurants that have socially similar values to their own, from habits of life, ways of acting internally in the company, etc.

The need of social skills is especially relevant in the case of 'emotional restoration', that is, the restaurants with Michelin stars and establishments where customers go in order to spend a memorable time (for instance in the case of events, ceremonies, etc.). In this kind of restaurants, roles of employees have changed.

For instance, the profile of a waiter is closer to a public relations person, being necessary to know the psychology of customers and to have social and communication skills in order to convince customers about the quality of service provided. Skills related to positive attitude, cooperation and customer service from understanding and listening.

For intermediate level managers there are other social skills that are not exclusive of restaurants, but are suited for firms of every sector: communication skills, skills related to creation of high-performance teams, negotiation with suppliers and with staff, organization and management of meetings, etc. Skills that promote leadership, gender equality and teamwork will be valued.

Related to **current shortage of skills**

> *The lack of digitizing is impressive in absolutely all staff levels. The scarce firms in the sector that are digitized grow faster and the gap between those that are not digitized grows in an exponential rate. An important impulse on training should be done in this regard* (FB5).

Training offer, however, is wide-ranging and it is provided by universities and vocational training centers.

> *The problem is that most of owners of restaurants are not skilled, and for that reason they do not value training for its employees: they consider training as a waste instead as an investment. The exception comes from restaurants affiliated to large chains* (FB5).

This is the reason why restaurant chains have passed from 14% to 26% of market share in just seven years, that is, the investment that they do in training for its workers. These restaurant chains use external training offered by universities and VTCs, but many of them also use internal training.

Training opportunities in the Spanish changes are aimed at improving technological skills (digitalization, computer tools, internal tools, etc.) and social skills (leadership, teamwork, team coaching, etc.). The most effective training method in developing digital skills for employees would be training during working hours, a few hours per week, on a continuous basis.

On environmental issues, training provision is done at different stages in people's professional careers. Everyone is trained in issues related to management of energy loss and efficiency, etc.

Accommodation providers - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:

DIGITAL:

Current Skills: Data analytics, small data and design thinking, SEO and marketing online, analytics account, PMS (property management system), mobility key and check in, customer relationship management, e-commerce, use of social networks, connectivity

Skills Shortages: big data, internet of things, augmented reality, business intelligence, fidelity programs, revenue management, automatized logistics systems, improvement on developing client demands, domotics

Training provision: on technological skills with specialized academies: EXEVI, INVATTUR, AGENCIA VALENCIANA DE TURISMO

GREEN:

Current Skills: re-use of natural resources, waste treatment, improvement of green areas, renewable energy, energy saving

Skills Shortages: better management of natural resources, promotion of public transports on clients, staff qualified on EMAS certificate, solar energy, plastic and paper removal, more contact on local providers, electric vehicles, use of non-polluting products in the maintenance of the facilities

Training provision: EUROCONTROL

SOCIAL:

Current Skills: disabled people mobility, customer focus, gender equity, customer insight, use of positive and open language, understanding of cultural diversity, ability to integrate sector activities with the rest of the destination and its culture, tolerance and respect

Skills Shortages: integration of disabled people on the staff, improvement of motivation and talent retention on staff, dispute resolution, empathy, social inclusion

Training provision: EDUCATUR, CUALTIS, TEITRAL, THE CREATIVE DOTS, UMIVALE

Theme 2: The future of tourism. A summary of respondents' ideas of tourism and the tourism industry in general and his/her company in particular in ten years' time (2030).

Tour operators / travel agents: what will tourism and the industry look like around 2030?

Tour operators and travel agents professionals consider that the new generation of travellers will be more demanding. The travel agent will have to be ready to offer unique packages, designed to measure the personal needs, adjusting to the economic, motivational, age, cultural and adaptive demands of the new costumers.

At the same time, it will be crucial to understand the way this itineraries and travel plans are been booked. The customer has evolved and is able to book by himself bringing new challenges to the tour operator and travel agent professional.

Regarding skills,

> *In the future, we must be able to have a global perspective with different skills, although it will be necessary that people also have some specialization in their work* (TATO2).

Any of these skills are important (green, social and digital), although the digitalisation will become basic and more important, for this sector.

> *The tourism sector has undergone a dramatic change with the introduction of new technologies. Years ago, it was unthinkable that with the mobile you could book a trip, or simply have an application that collected different companies and gave us the best price to fly. These changes have happened so quickly that it makes us think that future changes will be surprising. This leads to that any company in the sector will have to be very flexible to adapt quickly to any change that may occur on a digital level. This will be the great challenge for companies in the future* (TATO2).

The digitalisation has increased very quickly and the trend nowadays is to be more and more digital. The needs will be focus on digital skills. People will need to specialize in some issues of the firms. They will need to know how to manage the data, through analysis, and interpret the results attending to different aspects of the business (customers, revenue, services, etc).

Digital skills, that will be present in younger generations, would be complementary to several social skills. Due to the need to know what the client is looking for, a direct contact with him will be fundamental.

Thus, the professional's success will depend on:

- ✓ The ability to exploit previous experiences and the data collected at the company level, regarding client's profile and most valued offers.
- ✓ The ability to interact and establish relationships with other employees, colleagues or other companies such as hotels, transport companies, parks, etc., and with customers.

Destination Management: what will tourism and the industry look like around 2030?

Concepts such as **Mindful travel destinations or Smart Destinations** appear in the lingo of the Spanish experts showing a growing interest for sustainability in the DMOs.

Values such as health and care of the environment will be promoted both in society and in companies. What is now considered **good practice will become law** (e.g., disposal of plastics, diesel cars, etc.). The market will require companies to have good environmental performance.

Management through **business intelligence** and destination intelligence will play a very important role in the future of tourism destinations, searching for data and cooperation among different departments and agents to better understand the total functioning of conurbations.

The digital reigns today and will continue to strengthen this trend in all areas, whether in the management of small businesses of rural accommodation, as in business consulting and tourism planning. The level of use of technologies by the tourism sector goes hand in hand with the use of technologies by society. For that reason, in ten years the mastery of digital skills it will something innate for employees of the sector.

Interviewees think the main change will come from a **better balance between the use of technologies and "human to human" experiences.** In all this, digital competences combined with market / culture understanding is crucial. The soft skills oriented to communication, the creation of experiences, the dynamization of human teams, the interpretation and dynamization of heritage will become very important.

Experiences linked to cultural tourism will focus on the personalized guided tours. Tourists are looking for new experiences, tired of traditional destinations, researching to discover unexplored places where marketing has not yet modelled services and can experience the true spirit of each place.

Differences in the market by origin, age or purchasing power will mark consumption in terms of development.

- ✓ Foreign Tourism will become more and more important; specifically from very distant countries,
- ✓ There will be a large gap between high and low purchasing power;
- ✓ The 'grey segment' is going to become one of the major segments of demand in the short to medium term. People over 50 years, conform a niche that is becoming more and more important. Moreover in a few years this collective will be very up-to-date with new digital technologies.

They will be more demanding clients. *"It is a generations that has grown up in the immediacy of the internet, in the bosom of families that have raised them in front of an iPAD. They are people with an aversion to frustration, who give few second chances"* (DM4).

Promotion of DMO will also realy on technology, the way of promoting a much more online world. For the promotion of DMOs, the visibility and sales channels of destinations in a digital format will be increasingly important. International customers will increase, for smaller destinations this will especially be in the area of "special interest" / niche markets.

The job market will be more flexible with more freelance collaborators. Today's business model must be highly flexible, because the changes in technologies and market needs are continuous, so in the future job spaces with be made of a network of freelance experts, to build ad hoc teams according to projects.

New / future staff needs to be specialized in the main areas: language, digital competences, transcultural communication for new (and yet widely unknown) markets like China, India, or SE Asia. The final objective is the capacity to understand these new markets, their behaviour and preferences, and then generate the adequate marketing. Also dealing with these visitors in the destination must be addressed; however this is more a task for tourism businesses where DMOs have a consulting / advisory role to play.

More people, skilled in history, psychology and interpretation will work in the tourism industry and therefore training for people with this background will be needed by 2030.

Gender equity will be a paramount item in the future.

With **training** in tourism combined with environmental, cultural and socio-economic aspects. They will have to become more and more skilled in offline and online marketing, as well as in interpretation and dynamization of the natural and cultural heritage with an emphasis on the need for attention to social, cultural, ethnic and religious diversity.

In the future they will be need for emotional management, "*we must not forget that in tourism we are people making people happy, so learning to manage their own emotions and act accordingly with others will help design attractive tourism products Experiences*" (DM4).

Attractions: what will tourism and the industry look like around 2030?

The precariousness of hospitality positions will require different management and training approaches. Flexible contracts, instability, overtime, stress, etc. can have a serious effect on tourism workers' attitudes and therefore training in hospitality and customer care will become more relevant.

Tourist companies will be more technical, but without losing direct personal contact between our employees and customers. The customers will remain the same as nowadays, but more informed, more technological.

Tourist companies also will need less operational staff, but very focused on managing emotions.

The most demanded skills will be those related to customer satisfaction, and in attention to diversity, as well as environmental and technological skills.

Accessibility in all senses of the term will be one of the main challenges. Innovation will be crucial to generate new accessible opportunities for all publics. For instance, the social company Illunion, ONCE Foundation and the Spanish Ministry of Education, Culture and Sports are developing an innovative interactive and accessible application called AMUSE, that alloys visiting museums and cultural exhibits through 'beepcons', intelligent guidance beacons via Bluetooth. Tourism and cultural professionals will need to be up to day on those innovative ways to interact with all publics.

Understanding a globalized and diverse working force will be paramount. Cultural heritage spaces will employ a diverse force but specially will have to cater for a mixed public. Being able to respond to social demands and needs will require very skilled staff.

Globalization is bringing new issues to society and cultural heritage institutions have the opportunity and the challenge to provide spaces for social interaction, communication and understanding. In order to create this type of spaces, cultural staff needs to be conscious of cultural nuances, prepared to cope with changes and ready to generate new creative and innovative solutions to respond to the new challenges.

Diversity is very valuable; it is a wealth for destinations. Local heritage institutions need to capitalize in this wealth and communicate it to the general public.

Funding is always short in cultural institutions. That could become even a bigger problem in the future.

- ✓ Patronages from civil society will be very important and therefore, museums and cultural institutions will need to develop strong linkages with the local publics.
- ✓ Staff needs to be resourceful to cope with money shortages, generating creative ideas to do more with less.
- ✓ It will be crucial to always remember the mission of heritage institutions as many activities are not economically profitable but they are socially gainful.

Interconnection among tourism, culture and other important agents at the destination level will be crucial for the sustainable future of destinations.

> *There has been a radical change with the entrance of the municipality in the Smart Destinations Program. A Smart Office has been created in which the five department heads have to be present. Suddenly the heads of tourism, historical heritage, urban planning, information society and the environment (5 pillars of Smart Destinations) have to meet two and three times a week, generating a great flow of information from one administration to another. I think this is going to be very positive for the future* (AT1).

Food & beverage: what will tourism and the industry look like around 2030?

Looking to the 2030, we are going to find a completely different scenario.

10 years in tourism nowadays, it is like 100 years before (FB4)

We are at the beginning of a historic change that is based on a change in eating habits. The client has decided to feed himself differently and has a technology that allows him to access food in a faster, easier and cheaper way.

Previous generations went to restaurants for celebrations in a timely manner. Afterwards, going to the restaurants became an act of socialization where to meet friends, boyfriends, etc. Now and future generations have normalized eating in restaurants and they only cook at home to celebrate something, just the opposite behaviour than before (FB1).

Technology is going to have a very important advance in this sector because until now the progress has been slow, in comparison with other sectors. Engineers will enter the kitchens to analyse how they can optimize the production processes and manage all the generated data. It will be one of the key levers in the sector's skills that will be demanded in the future.

We started to find technologies such as chat bots that are a step more to the digitalization of the conversation; they are algorithms that are learning to predict what we need. The whole relationship with food is digitized, which means millions of data is constantly being produced (FB1).

Block chain technology allows the customer to know the traceability of all products and have all the information of the product they are consuming without the need for the restaurant to tell them.

The relationship with payment is also changing, which brings more information for companies.

New players are entering the sector:

This means opportunities for small restaurants that may have access to this data but also it presents a great challenge, as few companies can monopolize the sector. The big competitors are going to be Google, Amazon, Facebook, Alibaba ...The big technology companies have realized that this sector is key, they control technology and they lack control of food to control the world. They are going to be the great connectors, they have the customer data and Google does not care about offering you a pair of glasses, a trip or a hamburger. They do not generate the reservation system or orders because this is done by other companies but they are going to connect the company with the client because they have the relationship with the client (FB1).

Price variability: Restaurants must adapt to a new generation of customers that are aware and used to price variability.

Price will no longer be fixed. In any other sector it is assumed that price varies (hotel rooms, airline tickets, theatre tickets, etc.). In the restaurant sector prices have been fixed for cultural reasons and also because there were no tools to change the price either. Now they have digital tools and a generation that understands it. The price may vary depending on the day, the time, the lounge, the situation of the table, the menu... (FB1).

Industrialization of the sector: The sector will need a level of industrialization and use of intelligence technologies that have not been used yet.

The volume of demand for food through technology changes the formula. The formula demands to produce more food and mechanize processes, something that is normal in many industries and in restaurants not so much (for example, a simple kneading can be done by a machine, it does not have to

be done by hand). Behind a population that has decided to feed in this way, demanding more and more prepared food and not cooking at home, there must be an industry that can supply it (FB1).

Dark kitchens and delivery services: Delivery services from physical restaurants and digital restaurants or dark kitchens (centralized kitchens that only relate to the customer through home delivery). This is another of the changes. Digital restaurants are growing at double digits. Orders through these applications are growing more than direct consumption in the restaurants. This current trend contradicts sustainability, as it creates environmental issues due to the large amount of packaging, transportation, etc. A balance must be achieved in the future. These companies, if they want to differentiate themselves and adapt to the habits and values of consumers, must offer ecological packaging that respects the environment.

The clients in the future will be the same but with new habits related to changes in food and nutrition.

In terms of **employment**, the costs of everything related to human work increase with respect to the costs of machines. In the future it is expected that the machines will be incorporated to a large extent into the sector. In the future there will be a substitution process and a man-machine collaboration process. The machine will be part of the production process. The sector considers it a threat, especially those less qualified workers that are more easily replaced by machines. Although this incorporation of technology means that new skills will emerge in the sector.

The **human factor** and attendance will continue to be important. There will also be an increase in the number of people concerned about their well-being and to create companies in the world of gastronomy based on values such as sustainability (environmental and social) and the promotion of people's health.

> *The new king of the restaurant is the employee; it is no longer the customer. We do need to crown king the employee, for him to trait the client like a prince. The client wants to be a prince, not a king* (FB5).

Sustainability concerns are also going to grow, from the demand as well as the law requirements. In 2021 the European regulations focusing on single-use products/waste management etc. are approved and ambitious environmental impact targets have been set for 2030. Companies will have to adapt to these changes at all levels.

> *Tourism sector is in very poor health as never an industry has been treated as badly as tourism* (FB5).

The main trends that are going to affect tourism are the following:

- **Society is aging** and tourism professionals must focus in elderly clients; population pyramid leads to the fact that our potential clients will be mostly older people, so the interaction with the client at a technological level will have to be built thinking about this situation.
- **Segmentation of market**. In other words, digitalization and artificial intelligence allow the offer of a suited product to each customer.
- Effect of **automation** is the ending of low valued jobs or tasks. Automation is going to grow specially in the kitchens, in cooking tasks, especially in the case of casual food, fast food and restaurants under 20€ ticket. As a consequence, the number of needed employees in gong to decrease.
- **Flexibility** in the distribution of work, that is the classic 40 hours per week, is changing to a most flexible system. More part-time employees in the operational departments and more free-lancers on the strategic areas.
- **Skills needed** in 10 years:
  - Workers are becoming more digital savvy.
  - In ten years' time the most demanded skills will relate to ICT (cloud computing, transactions, analysis of data, internet search and communication, etc.) and digital tourism.

o More and more competencies will be essential in the areas of LMS (Learning Management Systems), in the domain of audio-visual tools.
o Profiles specialised in sustainable and healthy eating will also be increasingly in demand.
o Self-learning will be crucial, as well as learning by doing, motivation to assist to conferences and watch webinars...

In hospitality training we will see the following trends:

✓ An increase in hours of telework/work at home, thanks to the increase in online training;
✓ More and more specialized people will work in the sector, with great leadership skills based on collaboration, teamwork and conciliation
✓ Specialized profiles also in areas not related to gastronomy, but to education, digital marketing, etc.
✓ Adaptation to new trends in training, by listening to the teams, especially the newcomers and the younger ones; listening to the client, the student, knowing their concerns and desires and creating pilot courses to test the changes and then apply them to larger scales.
✓ In some cases betting very strongly for radical changes and new training models.

Accommodation providers: what will tourism and the industry look like around 2030?

The sector tends towards greater specialization by specific segments of customers.

It will have to be able to meet expectations of older people, as population is getting older year by year (improved life expectancy). We will need to improve leisure offer for people over 50/60.

We should be able to integrate more technology at the time we offer a more human treatment to clients. Clients will appreciate a personalized offer, more experiences or easy access to technology on our business. They should feel as the process protagonist: they should participate on creating their own offer. They will also appreciate knowing that our businesses are environmental friendly.

We should be prepared to receive different types of families, to which we are not used now. We should be able to anticipate on client needs attending to the groups they belong to.

It will be also important to give this human treatment to our own employees. In fact, we should improve training, as we will need our employees to be better trained on the future. This training should be based on robotics and process engineering but also on human needs (closeness, communication and listening skills, commitment and generosity).

Theme 3: Digital skills. A summary of the digital skills rated as the most important in ten years' time by interview participants.

The respondents working at <u>tour operators / travel agents</u> **consider the following digital skills as the most important in ten years' time:**

For a time, there has been a difference between the online and offline offer of travel agencies; in the future potential customers will be technology users, some of them digital natives, and this differentiation will not make sense anymore. The same is translated for employees. The average level of digital competences of employees at the operational level will be sufficient for the demands that the tasks of a travel agent may have. Even more, because in a medium or large company there will be a group of professionals who will automate processes and forms to make operations at the office level even more intuitive. Consequently, professionals working in the physical office will have to handle their own computer applications and the Internet (management of operating systems, Microsoft Office knowledge, online security and data protection, internet usage and search, etc.).

However, for the company as a whole, professionals with technical knowledge about data management, developers and programmers of online content and applications and management of social networks (Facebook, twitter, YouTube, Instagram, blogs, google +) will be required.

The new era of digitalisation has come to the sector and it is not enough with to manage different technologies. The staff will be able to analyse all different date about the business. Therefore, in the future there will surely be fewer employees, with a different profile than now, basically related to the analysis of data from the sector and the company itself. The data analysis capacity will be fundamental for the tour operator and travel sector.

At a digital level, the company should be more flexible to adapt to the new client, which will be very digital, and offer adequate tools to contract the services. These digital skills, that are very global, must also be complemented with some other skills, essentially those related with social skills.

Digital security will continue to be crucial as workers will need to deal with hacker attacks and need to know how to take measures to prevent them.

Teleworking is also becoming more present and therefore, employees and companies will need to develop personal, digital and cultural capabilities to work remotely. An integrated system will be required, also integration of the server, telephones, etc.

Digital skills needed for the travel agent and tour operator sector will be:

- ✓ Management of operating systems and its developments (Microsoft Office knowledge, Google drive, etc.)
- ✓ Online security and data protection
- ✓ Internet usage and search
- ✓ Development of online content and applications
- ✓ Data management and data analysis
- ✓ Management of social networks (Facebook, twitter, YouTube, Instagram, blogs, google +)
- ✓ Teleworking (integrated system, integration of the server, telephones, etc.)

The respondents working at <u>destination management organizations</u> **consider the following digital skills as the most important in ten years' time:**

An effective and humanized online communication will be the most important skill for the next decade, as well as a better balance between digital competences and human skills.

The biggest need will be capacity to analyse Big Data, skills that allow the use of destination monitoring tools. This is critical for obtaining a well-founded background for decision making and follow-up. Big data is the basis of the present and the future, moving from data to data that serves to make decisions based on real information. That is very powerful, today few companies can do it (only the big ones) but this will become popular in a short time. Security will be the biggest problem, so it will be and it is very important to dedicate resources to it. The important question will be how to manage the great volume of information that firms have today and will increase tomorrow.

Related to automation and artificial intelligence, technology brings a complement to the tourism business that workers have to know how to take advantage, but they are not going to replace human strength. It will be crucial to know how to integrate these tools in the company.

Virtual Reality is needed increasingly for presenting a destination, while Augmented Reality assists the visitor once on site.

For small public-managed entities like DMOs, it is critical to assure that these competences are covered in time, "not to be left behind".

On digital skills, there is no adequate training in place for DMOs and in general, for related structures of the administration and tourism value chain.

The respondents working at <u>attractions</u> **consider the following digital skills as the most important in ten years' time:**

It will be very important to develop programs that allow sharing information between organizations. By standardizing procedures and processes (not culture) institutions will be able to share information to improve the visitor experience.

- Artificial Intelligence
- Digital Marketing
- Tools specific to their roles
- Digital communication skills
- Digital Storytelling

The respondents working in the <u>accommodation sector</u> **consider the following digital skills as the most important in ten years' time**:

Big data and business intelligence
Internet of things
Cybersecurity
Biometrics
Domotics

The respondents working in the <u>food & beverage sector</u> **consider the following digital skills as the most important in ten years' time**:

Looking ahead to 2030 into digital skills there is concern about the gap that is emerging between a part of the sector that understands the new model and another part of the sector that remains stagnant in the traditional ways.

We can encounter serious issues if in 10 year time clients and tourist are digitized but the sector it is not up to speed. Technologies such as big data, Internet of things, block chains are already in being incorporated in other domains need to reach the food and beverage sector as these technologies are going to have a very important value added.

Nowadays it would be necessary to differentiate between the people who work in operations (in the businesses) and the people who work in the operation support center (in the offices).

Digital skills are not the most important for the future, but they are the most perceived. Main changes about digital competences will take place slowly but in a continuous way.

Digital skills are needed in the following aspects:

- ✓ Relationship with customers, both from the point of view of marketing in order to attract clients and from the point of view of online reputation and continuous communication with customers.
- ✓ Internal management of firms, both from the point of view of incomes and from the point of view of costs in order to achieve an improvement around 15% in profits.
- ✓ Also, artificial intelligence (AI) offers a lot off possibilities in order to achieve sustainability. For instance, AI allows the overall control of the business, helps the improvement of product quality, etc.
- ✓ Working with robots or co-bots will grow significantly. This is seen as a threat in the sector since there is a risk of job loss, although it should not be the case as it can be a very interesting complement, however, skills to manage this relationship will be needed.
- ✓ More and more food is bought to be delivered or take away. We are starting to see even buildings without kitchens. This trend is expected to increase in the future and that will require industrializing the activity.
- ✓ Digital storytelling is going to become a critical skill in the sector to develop and foster experiential tourism (advanced reality...)
- ✓

To develop these digital skills in companies, in recent years, training providers are finding a great receptivity with the use of mobile phones and other devices that allow online training without losing contact with the students. In addition, this allows you cover different scenarios more quickly and easily and also know what the students demand and their concerns.

> **Theme 4: Environmental management ('green') skills.** A summary of the environmental management skills rated as the most important in ten years' time by interview participants.

The respondents working at <u>tour operators / travel agents</u> consider the following environmental management skills as the most important in ten years' time:

According to Spanish interviewees, the environmental issues are a latent concern in the sector, even though most companies do not provide training or awareness programs yet. Some companies are incorporating some principles and values to their businesses culture that try to convey to their employees such saving energy and water, recycling paper, avoiding unnecessary transfers (of customers or themselves).

Making a better use of resources would be the objective of the firms, that is, to be more efficient so that the impact is the least. There must be a balance between the management of resources and the environmental impact. In addition, the suppliers with whom they work are also in that line. For example, they are already looking at which coaches will be better for the future.

Also, there is also a growing concern for environmental issues at the destination level that forces travel providers to adjust to this new perspective. It is the example in Benidorm of more and more pedestrian streets. Companies must redefine their routes, inform the customers, and realise a more efficient work in line with a more sustainability service. These changes benefit the destination as well as residents and the tourist himself. Tourist will be able to enjoy the destination in a healthier way respecting the territory and its occupants, but at the operational level it implies a change of mentality with the consequent need to re-educate the final client and the tour operator.

Management of rural and sustainable tourism itineraries and destinations will require as well a better understanding of green issues and capacities to contribute sustainable measures in destinations.

Therefore, the environmental needs will force to:

- ✓ Increase staff awareness of environmental issues
- ✓ Capacity to translate green knowledge and understanding to the final user
- ✓ Development of sustainable itineraries
- ✓ Environmentally friendly and less polluting services (vehicles, hotels and catering establishments),

The respondents working at <u>destination management organizations</u> consider the following environmental management skills as the most important in ten years' time:

Environmental management competencies are neglected at this moment in many companies, but expect to generate a more responsible commitment about that in 2030.

There is a lack of sustainability management systems designed for small companies. For overcoming this gap in Spain sustainability systems such as GREEN DESTINATIONS and TRAVELIFE for tour operators are being introduced.

DMOs need to be more aware and do monitoring of the carrying capacity of specific locations within the desination to avoid – or at least better manage – the risk of over-tourism. Idem for the management of massive arrivals.

There are tourists that are sensitive to the environment, but the bulk of tourists are no sensitive (except, maybe in the case of overtourism). For this reason, it is not sure that the more environmentally sustainable firms will

have a long-term competitive advantage. Therefore communicating sustainability to the market will also be crucial, reflected on an increased need for sustainability communication experts both B2B and B2C.

In rural accommodation, saving energy and water, minimising waste and recycling are the basic skills to be considered. If today they are important and highly valued and demanded by our European clients, in 2030 they will be an obligation, a border condition for someone to choose a destination. No one wants to be in a place where waste or aggression to the environment is present.

Sustainability is no longer a good word in all projects; it is now a market requirement, as well as being a requirement by law in many areas. That is the trend, fashion will become law.

Sustainability management (water, energy, mobility...) and sustainability marketing is a differential advantage in the market for many companies. Mobility, water and energy will be just as critical as or more so than now. Energy consumption, responsible use of printed material, Cloud management and the elimination of paper will be very important environmental management skills in 2030.

With regard to the use of local products by tourism firms, it is something that should be incorage by the DMO in tourist towns and cities.

Employment quality needs to be improved, both through better distribution of arrivals (seasonality) and through a generally better qualification of persons working in the tourism value chain.

More than a specific profile with training in ecology, the whole team of the company will have this understanding in the future, because current education promotes respect for the environment and sustainability. Hopefully this will be a reality accepted and practiced by all.

Sustainable management knowledge and competences will be more required in the future, both for the management of tourism flows, and to reduce impact on invironment through transport, emissions, waste, and energy consumption. Climate change is in the mind of most visitors now, and can be a good leverage for reasoning on such measures. Certifications or quality labels can assist to make efforts more visible, both for improving internal management and to give external signals to the costumer (for this however, they must be recognized and provide a real value from the point of view of this client).

The respondents working at attractions **consider the following environmental management skills as the most important in ten years' time:**

- Energy and water saving techniques.
- Recycling and waste management.
- Creativity to generate new solutions to environmental issues

The respondents working in the accommodation sector **consider the following environmental management skills as the most important in ten years' time**:

Reduction of paper use
Promotion of an environmental friendly awareness all over the production chain
Carbon footprint

The respondents working in the food & beverage **sector consider the following environmental management skills as the most important in ten years' time**:

To develop a sustainable culture in food and beverage organizations will be essential around 2030 even more than digital skills.

At present there are quite different perspectives in the Spanish Food and Beverage sector:

Large chains and the great chefs understand the need for environmental concern and the value added of good environmental practices; however, the small, traditional restaurants are still behind in these practices although they begin to give value to aspects of environmental management, environmental protection, gastronomy of km 0, products of proximity, understanding that client's identify with these values.

> *In many cases the relationships that exist with restaurants start from the emotional and start from identifications with lifestyles (sports, environmental values, agricultural, healthy food, organic food...*(FB1).

There is a clear need for the development of sustainable skills, but there is not understanding on how to develop them.

- ✓ **Control system of energy consumption in room**: professionals must have the ability to know the cycle and routines of customers to understand which areas of the establishment should be open or close to the public, so the use of energy consumption can be managed efficiently.
- ✓ **Efficiency in kitchens:** professionals must understand how to be more efficient in the use of kitchens and industrial machinery optimizing to the maximum their use.
- ✓ Use of **renewable** sources of energy with a good management of water and energy supply.
- ✓ **Control of food surpluses:** professionals are trained so that they can make an accurate estimate of the product they must defrost each day, so that waste is minimized.
- ✓ **Recycling management in cardboard and glass:** how to manage the cooking process to be efficient in recycling, with a growing interest for recycling oil and other raw materials. Good use, reuse and recycling have to be considered.
- ✓ **Good selection of materials**. Attention to biodiversity, ecological footprint, safeguarding the health of animals and people.

Regarding the use of ecolabels and sustainable certifications, some companies are in the process of validating different quality certifications, but at the moment they not adhere to any particular seal for lack of knowledge regarding costs/benefits and for lack of standardization of internal processes.

> *Nowadays there is too much confusion – a jigsaw puzzle of certifications* (FB4)

Some challenges to confront in the future will be:

- ✓ About 70% of the arable land in Valencian Autonomous Region is abandoned, and the middle age of farmers is above 50 years. How restaurants can help to correct this situation?
- ✓ Why the 80% of agricultural products are discarded because they have no the best colour or size?
- ✓ What is happening with the 'ugly food',
- ✓ Why it is not taking advantage of the food waste for reuse and putting it in charity channels?

In the provision of training it will be essential to have teachers trained in ecological skills, on ecological footprint, biodiversity, local and seasonal product, recycling and also on circular economy and social sustainability, through practical training by having pedagogical restaurants, skills related to waste management, avoiding food waste and choosing local and seasonal products are particularly important.

The respondents working at <u>tour operators / travel agents</u> consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

At social level it will be necessary to maintain personal contact with different agents. This requires adaptability and sociocultural understanding.

Travel agents have the competitive advantage of the direct contact with the final client. That allows the professional to track changes and understand trends in clients' needs and desires. The communication and listen skills of employees in this sector are paramount. Without this communication the company will not know relevant information to continue offering some specific services.

Teleworking is going to grow and therefore teamwork and internal communication between the different departments will stand out at a social level. Linkages with other companies will be also crucial and the social skills to interact and negotiate will be very important. This implies that the communication would need to be fluid and wide and it will be considered as an important and fundamental skill that the staff will be able to communicate inside and outside their organization.

Due to the nature of the operations carried out, it will be necessary to develop social skills that result in a greater:

- ✓ Customer orientation. Professionalism and flexibility should allow focusing all efforts and making decisions prioritizing customer service.
- ✓ Teamwork. Clients come and go, but colleagues remain and we must take care of the social relationship within the company.
- ✓ Listen and be empathetic. The basis of social relationships with clients, with colleagues, with suppliers is to know their needs and that there is a fluid communication.
- ✓ Ability to mediate with sales offices and tourism providers of the destination recipient.
- ✓ Creativity to continue advancing, because the problems may be more or less new but the important thing is the novelty of the solutions.
- ✓ Adaptation to the needs of clients for the development of itineraries and organization of services.
- ✓ Transmit tranquillity and security in communication. There is always a part of the trips with uncertainty and that cannot be controlled. There are clients who need to know that in case of unforeseen circumstances they will have a professional who will help to resolve the situation or the conflict.
- ✓ Entrepreneurship. Have initiative, be decisive, be able to undertake within your own company plans, measures, and new solutions.
- ✓ High level of English and other languages.

The respondents working at <u>destination management organizations</u> consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

To work in the future with a staff increasingly prepared in social and interpersonal skills.

Adaptation to change will basically be the most important thing and therefore fflexibility and resilience will be critical attributes to be developed.

Public relations are basic to our daily lives. By 2030, the most important skills will be leadership skills, conflict resolution, team management and emotional intelligence. Interpersonal communication, management of human groups, dynamization of tourist groups, etc.

Conflict management as important, both at internal (DMO and surrounding political structures) level, and when interacting with visitors or travel trade. In a wider understanding, this includes transcultural tolerance, understanding, and empathy. Emotional intelligence, understanding the other deeply in order to learn how to approach and resolve a possible conflict assertively will be a relevant social skill in the future.

Today's society operates at a speed that does not facilitate people to connect with their emotions, this generates dissatisfaction, self-disconnection, anxiety ... so the need to travel to "flee" is increasingly present. The client is looking for exciting experiences.

Human touch and authentic hospitality of persons dealing with visitor are at the heart of any good service in tourism. They will be a decisive element for destination selection and for making it "special" in the mind of the visitor. Therefore, customer orientation - The customer comes first, hospitality, kindness and empathy are the basis of the industry.

> *Love on working with people* (DM3)

> *The human factor is becoming more important every day, even if they want us to believe that robots are the future, there is no substitute for a smile* (DM4)

Attention to social and cultural diversity will be paramount. A better understanding of cultural and personal diferences such as as social backgrounds, cultural traits, religiouss believes, etc. will help develop emapthy among workers. In such a globalized world it is essential to understand the client. Awareness and training in the field of different abilities, religious and cultural knowledge and gender issues will be very important.

> *Gender equality is a "must", as long as it continues to be listed like this, there will be work to be done* (DM4)

On the side of destinations, there are many destinations that are highly committed to employee equality, to the physical accessibility and with everything that refers to the social sustainability. However, on the side of the private sector, it is not so clear. It is true that there are more and more hotels that have seen that accessible tourism is a broader segment, so that step by step they are moving from the purely physical access to housing (ramp), to other actions so that the customer can easily get all kinds of information (for example on web pages). But employees of hotels and restaurants do not have skills to treat properly these people with disabilities, that is, disabled or invalid persons.

Work in DMOs is so far considered as undervalued both by administration and private sector. This needs to be improved, both to motivate existing staff and also to attract qualified new staff. The public-administrative base of DMOs in Spain is not helpful – too much political intervention, too little space for professional and flexible management.

There is so much to do in this aspect, and it would be important for the future. In fact, the tourism sector, the most important in terms of its contribution to GDP, should be the first to lead all these issues.

The respondents working at <u>attractions</u> consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

Scientific communication is a must. Cultural heritage interpretation and environmental education has to be part of university and vocational training programs for all professionals in tourism and hospitality for employees to be able to communicate properly cultural and environmental messages to all kind of publics.

Accessibility and inclusion are the main issues for the future. Diversity must be understood in a holistic way. It is not limited to people with different functional capacities (40% of current users have accessibility issues); it also has to be understood from a socioeconomic, religious or cultural background. A gender perspective must be incorporate on all plans and procedures to the public and also inside the organization.

Accessibility and inclusion has also to be understood by other professionals such as architects or cultural curators that do not realize the importance of accessibility and public visitation. The tourism industry needs to generate better messages to make other collectives understand the important role of public visitation to heritage resources.

Hospitality and customer care training and attention to customer satisfaction will continue to be crucial especially in a difficult job market.

Training and education in accessibility, sustainability and inclusion cannot be an option in hospitality and tourism curricula, needs to be compulsory in all training and education programs to ensure it long term effects.

The respondents working in the <u>accommodation sector</u> **consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) skills as the most important in ten years' time**:

      Universal accessibility
      Better knowledge of customer demands. Customer orientation
      Team building, talent management and recruitment
      Customer fidelity

The respondents working in <u>the food & beverage sector</u> **consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time**:

Social skills will be more and more central around 2030

Service orientation and contributing to a great customer experience are the main skills, both in digital and in personal contact, the ultrapersonalization in social values that restaurants can transfer to customers.

Even though digitation is growing, and take away is a main stream in the business, surely the sector will continue into the traditional person to person contact, with the greater physical and human contact with the client. This human contact will be also an important part of the customer experience.

Social skills in need will be:

- ✓ Empathy and service orientation are important in an increasingly digitized world. listening skills, positive attitude, temperance, etc.
- ✓ **Interpersonal and relationship skills** with the aim of understanding the needs of customers (both internal and external).
- ✓ **Teamwork,** especially in hospitality businesses where **coordination** between the kitchen team and the restaurant floor team is essential to bring the service forward.
- ✓ **Active listening and leadership** in some of the positions, interest in the development and growth of people and ability to maintain difficult conversations (build and manage teams).
- ✓ **Attention to diversity**. Teams and individuals must understand the diversity we have today in the business, at all levels (functional diversity, different nationalities, etc.) as well as the interest in promoting gender equality at all levels.
- ✓ Relevance of social skills for **'emotional restaurants'** where customers go to enjoy a memorable time. Social skills are relevant for improvement of business-customers relationship,

✓ **Communication** skills, skills related to creation of high-performance teams, negotiation with suppliers and with staff, organization and management of meetings, etc.
✓ Improving experience **accessibility** for physical as well as sensorial limitations. The adaptation for people with visual disabilities will be a must, even though it currently seems difficult.

The most effective method for developing social skills for employees is to train managers and middle managers; and then the rest of the staff, but always with a focus on life at 360%, not necessarily (or just) to improve productivity.

The big unresolved issue is undoubtedly the gap between people (whether men or women) and reconciliation between work and family life. A lot has to change in this sense. Young people are not only asking for change in terms of environmental sustainability, but also in social terms.

Tour operators / travel agents:

Although tourism sector needs a direct contact with the customer, and traditionally it implies that the companies must be present in specific destinations to operate there, in 10 years the sector will be more centralized. This centralization involves a lot of activities grouped in central departments and a small number of decentralized activities. This sector needs information of first hand of the destination, but with the new technologies much more centralized things can be made. There will be a new way of working in the future.

Attractions:

It is important also to be aware of programs and certifications that are based on superficial training. Accessibility and sustainability have to enter the DNA of the organization. They need to be part of the organizational culture; otherwise we are not in the correct path. Therefore training must be continuous and the organizations need to be seriously committed to a sustainable and accessible agenda, otherwise there is the risk to fell into greenwashing.

> *We need to create numerous opportunities for continuous training, and for that, communication and linkages among different departments in the public sector is crucial* (AT1)

Food & beverage:

Changes in the future in the restaurant sector will not come only from the management of the restaurants but it is a much more profound change that has to do with the changes in the way of feeding and here we are talking about nutrition, well-being and the survival of the human species. And it is something relevant enough to study. It is something that evolves very quickly and with different speeds even within the international scene.

> *Just a walk around Madrid at lunchtime or dinner proves that a significant percentage of the vehicles that circulate are motorcycles and cars of food delivery. These are the waiters of a new generation.*

The restaurants are not prepared for this. They have not been created for food delivery or take-away. In many cases, for them the orders at home are a bother. The alternative is the dark kitchens, which are factories of food at home. As the demand for food at home is growing so much, these digital or virtual restaurants are being created where there is no a physical restaurant, there is no physical service. The entrance door is virtual. In Madrid there are already two industrial polygons with this type of business.

All this will require new regulations on environmental issues that are regulated in other sectors and that should start regulating here because at the level of packaging, transport, etc. This is going to multiply by a thousand.