



NEXT TOURISM GENERATION ALLIANCE

INTERVIEW REPORT

ITALY

MAY 2019

NKA2: COOPERATION FOR INNOVATION AND THE EXCHANGE OF GOOD PRACTICES -
SECTOR SKILLS ALLIANCES - CALL: EACEA/04/2017



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NTG ALLIANCE

COUNTRY INTERVIEW REPORT

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Background

A general overview of the Next Tourism Generation Alliance project, and the number of interview participants per subsector in this country report.

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: 34

- | | |
|---|----|
| • Tour operators / travel agencies: | 3 |
| • Destination management organizations: | 5 |
| • Attractions: | 3 |
| • Accommodation: | 16 |
| • Food & beverage: | 7 |

Theme 1: NTG Skills Sets

A summary of respondents' 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:

The interviewees deem necessary, nowadays, to have basic Microsoft Office competences, to know how to use travel-booking software, and to be familiar with online travel agencies as Booking and Expedia as well. They are aware of the importance of social media on which they will invest more time and resources, now, it is required a better organization and an online sharing experience through, for example, platforms that allow to view the actual rack rate of a hotel. The personnel training is deemed important, although it is not equally distributed, it is mostly online provided in-house. Two interviewed travel agencies have stated their activity in general (types of customers, management, etc.) will not change in the future, both being already well established in the market.

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

DIGITAL SKILLS:

Nowadays, the digital skills required for destination managers are all those skills related to communication and tourism trend analysis activities. This includes skills related to audio-visual content digitalization, product promotion connected to the virtual reality and how to do a tourism market study through methods including big data analysis, Funnel Marketing, Social Media (especially for events) and graphics (3D). Those strategies, although slowly, are gaining approval but they are still a minority compared to other forms of digital marketing? The training courses are not common but desirable both online and at work. An Italian DMC, ad regard training, has affirmed to provide employees with a manual of skills to be taken into consideration and applied, in addition to creating an online membership area for enrolment in training courses.

GREEN SKILLS

Among the most important professionalisms for a sustainable tourism firm management, the interviewees take into consideration all those sustainability-oriented practices, as applied in all productive fields. As in hotels, cruise ships or meeting organizations, the attention is to reduce the environmental impact decreasing energy consumption and thanks to food recycling and a proper waste disposal. So, they are aware that the environmental issues regards all productive activities carried out, and the awareness is proved by the personnel training provided, even if still not common, and the attainment of green certificates, for example Ecolabel, moreover considering the path and the efforts of the company to achieve this recognition. The large companies present a greater commitment to environmental issues, in particular one states that it is interested in all the affiliated tourist businesses (cruise ships, restaurants, etc.) to prevent the discharge of waste into the sea to facilitate the carrying out of an economic activity with low environmental impact. An Italian DMC reported having actively contributed to a project aimed at food recycling called "Food for Good" in collaboration

with Federalberghi. Even small tourism companies, such as an interviewed Italian restaurant, emphasize the importance of proper waste disposal and energy saving for environmental reasons.

SOCIAL SKILLS

Problem solving skills are considered even more important than understanding the customer needs, and it mainly consists of the use of social media that are nowadays required by the travel industry. Moreover, for those who work in tourism is still important to have the ability to create dreams in the touristic imaginary of people and to know how to amaze them with the services provided. The interviewees agree about the necessity of training that, although not common, allows the acquisition of skills necessary for an efficient business activity. The social competences of those who work in tourism, as underlined by an interviewed travel agency, are those related to the ability to perceive the needs of customers (human touch), to know how to surprise with their services and even before being able to create dreams in the tourist imagination of people. An Italian DMC, ad regard training, has affirmed to provide employees with training courses about social responsibility. In general, all tourist enterprises underline the importance of using external organizations for training courses and of encouraging 24-hour interaction between the various company levels. An interviewed company, whose activity concerns the field of tourism and events, asserts that a good internal training should spread the conceptual idea that there are no employer and employee but partners of the same company that cooperate for the pursuit of a common goal.

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

DIGITAL SKILLS:

The digital skills now required in the tourist attractions relate to the digital communication and promotion concepts that generally translate into the company's ability to make its information online available and usable to the customers. The need to be on the market and reach a wider number of clients requires communication to allow the organizations to have views for their activities with the twofold aim to promote themselves (i.e. through e-commerce platforms) and to have an online interaction, for example, uploading video contents on their websites. The limits in the digital area now derive from structural lacks (lack of a fast web connection) and lack of promptness of the organizations to adapt to the technological changes of equipment and systems. This inactivity is reflected in the field of training, with a few diffusion of training courses for upgrading digital competences, when there are courses, they are for managers only. Despite this delay on the European market, it is important to underline the effort of some institutional bodies in the technical-IT field to allow our country to increase competitiveness. For example, the MIBAC (Ministry of Cultural Heritage and Activities in Italy) is equipping itself with digital archives and has collaborated with the APT to create an online list of museums for tourist customers. An important company operating in the field of water parks in Italy, focuses entirely on commercial communication by using an e-commerce platform and on online interaction with all customers through video contents on the website.

GREEN SKILLS

The role of the tourist attractions relates to the territory preservation in which they are located, if they are related to cultural heritage or leisure places, in both cases they promote the growth and the

economic development of the places in which they are located. In general, the operators interviewed stress the importance of spreading landscape culture and environmental protection. Specifically, the reduction of electricity consumption using renewable energy sources, the conservation of biodiversity and work in synergy with local authorities for the economic development of the territory. This awareness is translated into a wide organization and participation to events, meetings and in-house training courses about discussion of educational topics.

SOCIAL SKILLS

Among the social skills required by tourism workers, the interviewees consider for sure useful having a customer-oriented approach, also they consider essential the language competence and the ability to transmit the touristic and cultural heritage to customers.

There are no training courses, but they would be considered useful if provided by the central body.

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

DIGITAL SKILLS:

The interviewees deem necessary, nowadays, to have basic Microsoft Office competences, to know how to use software both for orders and warehouse management. Moreover, they deem necessary to have a good knowledge of social media for a better advertising and it represents one of the digital skills most required and, at the same time, still to be enhanced.

Few companies organize training courses in the digital field and mostly just for management software, for example an Italian hotel interviewed has affirmed to provide oral training, with explanations on the use of the hotel management software “Passepartout”. Those who do not provide training courses as they do not believe training is useful because of the small dimension of the activity.

GREEN SKILLS

Among the most important competences for a sustainable management of the business, the interviewees deem necessary to raise awareness regarding the environmental impact reduction, both concerning the waste disposal and the decrease in water and electrical consumption. A few firms organize environmental training courses using external professionals and they aim mostly to reduce kitchen wastefulness and to have a better food storage management. An Italian restaurant interviewed reported having won the 2008 first prize in Ravenna for Environmental Management and joined the charter of sustainable catering by Confesercenti in 2010. Moreover, it obtained the quality restaurant label in the province of Ravenna. As a result, it has gained a certain appreciation from customers and an important awareness among employees.

SOCIAL SKILLS

The operators agree about the necessity of having social skills including a good attitude to understand the customer needs, be open about positive resolutions and good foreign languages proficiency. The training, when provided, is at work and directly overseen by the managers. An Italian hotel interviewed

has affirmed to periodically organize meetings on Romagna culture: music, literature, food and wine, both for customers than employees because it's very important to understand and speak Italian well, as well as the Romagna dialect, the history and geography of Romagna, the main pedestrian and bicycle routes, tourist attractions, cultural sites, etc. to live a real emotional experience of travel in Italy.

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

DIGITAL SKILLS:

The interviewees deem necessary, nowadays, having basic Microsoft Offices competences, know how to use management software, Office package and having basic web marketing, sales system and logistic skills. An interviewed hotel underlined the imminent predominance of robotics based on a faster and more efficient relationship with customers. The lack found regards a fast internet connection and a limited knowledge about social media management, business intelligence and CRM.

As regards the digital skills training, half of the hotels organize training courses about digital competences using external private companies. The courses are related to management software updates and web marketing. The operators interviewed agree on the necessity to have an in-house training and to have classes followed by training at work as well. The director of an interviewed hotel stated that his structure offers to the staff, through the For.te fund, courses in foreign languages, bartenders, waitresses, plans, cooking, marketing and animation, as well as using ISCOM training (Higher Institute of Communications and Information Technology). A small hotel has affirmed to provide its staff some courses organized by CEFAS (Center for Training and High Specialization) on computerization and digitization.

GREEN SKILLS

The hotel are aware about the need of an eco-friendly approach through the creation of circular economies that would pay attention to the energy recovery (water consumption reduction thanks to low-flow devices and electric consumption reduction thanks to solar panels), waste reduction (avoiding wasting printing, paper and using recyclable materials) and separate collection are widely used by the operators interviewed.

The environmental training is mostly provided by external courses, whereas half of the operators do not consider appropriate to start environmental training courses for all the staff, but just for managers. The director of an interviewed hotel affirmed that his structure in 2030 will be totally eco-friendly with energy recovery extended to all energy sources and the furnishings will have a low environmental impact as we already consider a tariff where action is taken. Moreover, he stated that his structure was a member of Legambiente Turismo, and the advantages were water and energy savings and customer visibility. Another big hotel has claimed to have received the ISO 90001: 2015 and ISO 14001: 2015 awards that attest to their high-quality standards and certify their sustainable management. Small hotels, on the other hand, claim to know the various ecological certifications as well as the importance of environmental sustainability, but currently they do not act in this regard in any way.

SOCIAL SKILLS

All the operators agree on which social skills in the tourism field are considered essential, those include: cooperation and teamwork attitude, respect and take care of the guest without distinction of gender or origin, a good attitude for listening, interacting and communicating with customers, attitude for positivism and problem-solving skills, cooperation with the community and the local economic system.

It must be highlighted that training courses are related to improvement of interpersonal relations both inside and outside the company, training courses for a better customer management and the teaching of sign language even if most of the operators interviewed do not consider internal or external training to be important.

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?

The travel industry development in the coming years regards incoming and out-coming (in particular, the increase in visiting tourists and the diversification of the target customers, for example the increase in Oriental tourists), the need to keep up with a world more and more digital and the necessity to have a staff even more prepared in planning target-focused travel packages considering different customer needs.

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

It is thought that the tourism industry will grow in the coming years with important development in social media, Marketing and promotion fields, and with the aim of increasingly focusing on direct contact with the customer, still shy about the web, towards the online search of services. However, tourist companies at the same time feel motivated to direct their customers primarily towards the use of their websites, newsletters, etc., trying to make them feel safer while browsing online. The change from the offline to the online services provision will benefit the operators in the fields of communication, research and promotion as well, thanks to big data platforms and web audience analysis. The path undertaken to deal with the future challenges goes through staff training, digitalization, that start from the audio-visual content sharing with different territories and destinations on digital common platforms, to the investment in promotion through Virtual Reality products, and travel market analysis thanks to big data as well.

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

The perception of the operators' future in the field of tourist attractions and their consequent action ability, changes depending on private or national firm point of view. There are two visions and two speeds as reaching new foreign markets, increasing the number of travellers and the construction of new sites, contrast with the awareness for a re-planning need at national level about the cultural heritage in terms of promotions of tourist sites, digitalization and resources re-planning. In both cases the personnel would be more and more trained and with a good knowledge of the digital instruments, in detail the private sector would know how to best manage the real time customer profiling technologies.

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

The restaurant operators' vision on how will evolve the tourism industry in 10 years is clear: the change will be evident from an organizational point of view and through the variety of gastronomic offering as well. On one side, there will be a stronger management aspect of the company that will be more and more oriented towards a business strategy based on developing and reaching those purposes that could improve the services provided to the clients. On the other side, the gastronomic offering will be

improved on the quality side and it will focus on a regional specialization and the use of quality raw materials, this to meet the demand of more curious clientele, careful, prepared and longing to know the territorial identity of the food. In this respect, the personnel would be even more trained and with better foreign language skills. To deal with the changes the companies are becoming more and more digital thanks to new software and management software and they are inclined to organize training courses for their personnel.

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

Among the accommodation providers there is a climate of uncertainty about future dynamics, but in general the tendency will be of a better specialization of their activity towards specific targeted customers that will be more and more connected with the business, luxury, health, nature and culture fields. Moreover, it is expected a structure re-organization more and more digitalized with a progressive change from offline to online in sales mode. The operators expect that there will be fewer workers in the companies but more qualified especially with better digital, language and management skills, qualifications, diplomas or degrees, related to tourism. To keep up with the change now and in the future of the travel industry, the companies are getting ready through professional update training courses in general and sectoral.

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 tour operators / travel agents consider the following digital skills as the most important in ten years' time:

The digital skills will be even more important in the travel agency field and will be connected to social media and all communication instruments.

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

The digital skills in the next 10 years will relate to those concepts as Funnel Marketing and landing pages. Moreover, the communication, as first way of development and tourism promotion of a Country, will acquire a role more and more important through different information and training methods. At last, Social Media (especially in the context of events) and graphics (3D).

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

The digital skills in 10 years will be even more important especially considering the implementation of e-commerce platforms and the development of promotional websites, but all this will be necessarily based on good management skills.

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

The most important digital competence in 10 years will be web marketing and social media sales competences.

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

The most important digital competence in 10 years will be related to the use of digital instruments for a better optimization of business processes and development of social media, instruments to be considered both as a showcase for organisation and as shop windows for monitoring sectoral trends.

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 tour operators / travel agents consider the following environmental management skills as the most important in ten years' time:

The most important environmental skills in 10 years will be more and more connected with environmental impact reduction and the spread of sustainable touristic business (hotels, holiday villages, resorts).

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

The environmental issues awareness and sustainability are concepts now strictly related to and foundation for future promotional strategies.

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

The most important environmental skills in 10 years will relate to habitat management and with the capability to know how to create a common environmental awareness that will be translated into respect but also opportunity for territorial development.

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

The most important environmental skills in 10 years will be more and more connected with the creation of a circular economy (for example, reduction of electricity consumption, separate collection of waste and management of water resources) and with the environmental care and protection in which we live for developing a sustainable economy.

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

The most important environmental skills in 10 years will relate to environmental impact decrease in terms of reducing the waste of resources and energies related to the environmental preservation and food safety.

Theme 5: Social skills

A summary of the social skills (i.e., personal-, communication/cultural-, and diversity skills) rated as the most important in ten years' time by interview participants.

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

Future social skills will be more and more connected with the emotional intelligence and so to understand needs and feelings of the customers.

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

Future social skills will relate to emotional intelligence, empathy and problem-solving attitude. Furthermore, the ability to preserve the importance of the human being despite so much technology thanks to emotional and sensitive skills that will be the base for developing successful services and products.

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

The most important social skills in 10 years will be those connected with public engaging ability, and it is expected a development of the customer interaction, from the entertainment to the mediation for making the tourist experience unique and exciting.

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

The most important social skills in 10 years will be those connected with guest care without discrimination of gender and origin, having a good listening attitude, positivity and problem-solving inclination, a better management of the human resources both inside and outside the organization.

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

The most important social skills in 10 years will relate to the listening attitude of the staff, problem solving, cooperation and courtesy and friendliness to provide help to the customers.

EXTRA

A summary of relevant additional comments by interview participants.

Summary of small hotels and restaurants

In this first analysis step, a picture of the small hotel and restaurant sector stakeholders is returned. The Italian reality of hôtellerie and restaurant is characterized by small and medium-sized enterprises, making the entrepreneurial structure of the territory in general fragmented and not very competitive with the big international companies.

In Italy there is a strong delay in digital skills where companies complain of basic IT deficiencies, starting from the Office package up to the practical application of the concepts of Marketing and Social Media Management. Still, few companies organize training courses, just a half of those interviewed, because they prefer highly qualified personnel with many years of experience (for example, managers) to hire while the new generations are not facilitated in entering the labour market. People who guarantees training are almost always relies on the use of management and online courses.

Regarding green skills, there is a general awareness of the main actions related to environmental sustainability: from the reduction of energy consumption to the correct disposal of waste. The training makes use of external agencies and practitioners aimed at all the figures of the reference tourist structure.

Social skills are considered important, from the good attitude to listening to the predisposition to problem-solving. Respondents consider congenial both internal and external training in order to improve the skills of the personnel under the supervision of the managers of reference.

Regarding the future of tourism, the accommodation facilities are hesitant, although they affirm an overall predisposition to specific branches of the clients: business, luxury, wellness, nature and culture. the restaurateurs, on the other hand, have a clearer vision, that is, an activity focused on the enhancement of the Italian territory thanks to food and wine as a workhorse of our country. The mastery of foreign languages is fundamental to spread the cultural identity of the food offered to tourists.

The future of digital skills will provide for the direct application of Web Marketing and Social Media as tools for the 360 ° promotion of the Italian tourist offer, environmental skills will see the development of a sustainable economy aimed at maximizing profits and minimizing time and costs. Finally, social skills will focus on the client and on the staff's ability to satisfy their needs, requests and dreams.

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