



NEXT TOURISM GENERATION ALLIANCE

SURVEY REPORT

GERMANY

MAY 2019

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



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Survey Country Report for Germany

Number of responses for Country:	246 respondents
Number of responses per sector:	
Visitor Attractions:	18
F&B:	12
Accommodations:	50
Travel Agencies / Tour Operators:	21
Destination Management Organizations:	145

Sectors:

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

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1. VISITOR ATTRACTIONS

Environmental Skills		
Current Level of Proficiency. Three most and three least proficient	Most: 1. Ability to manage waste, sewage, recycling and composting (3.61) 2. Knowledge of climate change (3.55) 3. Conservation of biodiversity (3.33) Least: 1. Ability to minimise the use and maximise efficiency of energy and water consumption (3.05) 1. Promotion of environmentally friendly activities and products (3.05) 2. Promotion of sustainable forms of transport (3.11)	
Future Level of proficiency in 2030. Three most and three least proficient.	Most: 1. Ability to minimise the use and maximise efficiency of energy and water consumption (4.05) 1. Promotion of environmentally friendly activities and products (4.05) 1. Ability to manage waste, sewage, recycling and composting (4.05) Least: 1. Promotion of sustainable forms of transport (3.77) 2. Conservation of biodiversity (3.83) 3. Knowledge of climate change (4.00)	
Training Provision for these skills?	Low training provision on overall contemplation of the sector as well as compared to other sectors.	
Most popular/ three main types of training	1. On the job (6) 1. One-day-off-site (6) 2. Several days off-site (4)	Total number of environmental trainings sector: 23 Total amount of all 3 skills trainings sector: 92 Total amount of environmental skills trainings all sectors: 246

Issues related to environmental skills and possible differences in relevance

All in all, the assessments of the skills are very close, which makes a ranking difficult. The decisive factor for competence development is therefore all the more the focus on the gaps.

The relevance score can be explained by economic reasons. Energy saving (current 3.04 / future 4.05) etc. as well as waste avoidance/separation (current 3.61 / future 4.05) are important topics in order to reduce costs. Therefore, Visitor Attractions are interested in it and scale it with similar importance. However, the gap between the current and future level of proficiency is more than double referred to the ability to minimise the use and maximise efficiency of energy and water consumption (+33%) than referred to the ability to manage waste, sewage, recycling and composting (+12%). Other topics, such as climate change and biodiversity, etc., appear important today because they are on the media agenda. However, they have less relevance for museums, amusement parks,

theme worlds, etc. in future terms. Main reason possibly is that working as closed theme parks they are far less dependent on primary environmental factors than, for example, destinations. Furthermore, complex interrelationships and possibilities of the company to influence overall events cannot be estimated easily. Accordingly, the gap between current and future level of proficiency is lower than e.g. promotion of environmentally friendly activities and products / sustainable forms of transportation. It can be assumed that the technological development in mobility is not very tangible and is not in the hands of visitor attractions. It is therefore of little relevance today and in the future.

Main reasons why businesses in this sector do *not* provide Environmental Management Training:

Most companies are too small or tasks are only honorary activities. Often "sustainability" as such has not yet been an issue in the company or has so far had too little relevance for the core business. In addition, "environmental protection" is generally not part of the employee's task in the company, so that - if trained - then training is more likely to focus on other topics. In individual cases, attendees stated that management did not want further training or that the management generally puts little value on the qualification of employees.

Most important types of training provision and why some type of training are less important

Generally, employees are trained "on the job" or through "one-day-off-site" training courses. Somewhat less often employees are trained for "Several days off-site". "Green skills" do not play a role in the relevant training occupations (e.g. event manager, technician, office clerk) and therefore receive little or no training.

Personal, Communication and Diversity Skills	
Current Level of Proficiency. Three most and three least proficient per category	<p>PERSONAL SKILLS - Most:</p> <ol style="list-style-type: none"> 1. Customer orientation (4.06) 2. Initiative and commitment (4.00) 3. Ethical conduct and respect (3.94) <p>PERSONAL SKILLS - Least:</p> <ol style="list-style-type: none"> 1. Problem solving (3.72) 2. Creativity (3.83), Willingness to change (3.83), Willingness to learn and to perform (3.83) <p>COMMUNICATION SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Skills related to awareness of local customs (3.83), Skills related to cultural awareness and expression (3.78), Oral communication skills (3.78) 3. Written communication skills (3.61) <p>COMMUNICATION SKILLS – Least:</p> <ol style="list-style-type: none"> 1. Ability to speak foreign languages (2.56) 2. Active listening skills (3.44) 3. Skills related to intercultural host-guest understanding and respect (3.22)

	<p>DIVERSITY SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Gender equality skills (3.94) 2. Age-related accessibility skills (3.78) 3. Skills related to disabilities and appropriate infrastructure (3.33) <p>DIVERSITY SKILLS – Least:</p> <ol style="list-style-type: none"> 1. Diets and allergy needs skills (2.44) 2. Skills related to diversity in religious beliefs (3.28) 	
<p>Future Level of proficiency in 2030.</p> <p>Three most and three least proficient.</p>	<p>PERSONAL - Most:</p> <ol style="list-style-type: none"> 1. Customer orientation (4.44) 2. Promoting a positive work environment (4.39) 3. Creativity (4.28) <p>PERSONAL - Least:</p> <ol style="list-style-type: none"> 1. Willingness to change (4.06) 2. Ethical conduct and respect (4.17) 3. Problem solving (4.22), Willingness to learn and to perform (4.22), Initiative and commitment (4.22) <p>COMMUNICATION – Most:</p> <ol style="list-style-type: none"> 1. Active listening skills (4.17), Oral communication skills (4.17), Skills related to cultural awareness and expression (4.17), Skills related to awareness of local customs (4.17) <p>COMMUNICATION – Least:</p> <ol style="list-style-type: none"> 1. Written communication skills (3.83) 2. Ability to speak foreign languages (3.89) 3. Skills related to intercultural host-guest understanding and respect (4.00) <p>DIVERSITY– Most:</p> <ol style="list-style-type: none"> 1. Gender equality skills (4.39) 2. Age-related accessibility skills (4.33) 3. Skills related to disabilities and appropriate infrastructure (4.00) <p>DIVERSITY– Least:</p> <ol style="list-style-type: none"> 1. Diets and allergy needs skills (3.39) 2. Skills related to diversity in religious beliefs (3.78) 	
Training Provision for Social Skills	Low training provision on overall contemplation of the sector as well as compared to other sectors. However, a higher training activity is recognizable than offered with regards to "Green Skills".	
Most popular/ three main types of training for social skills	<ol style="list-style-type: none"> 1. One-day-off-site (9) 2. On the job (6) 2. One-day-on-site (6) 	<p>Total number of social trainings sector: 33</p> <p>Total amount of all 3 skills trainings sector: 92</p> <p>Total amount of social skills trainings all sectors: 394</p>

Issues related to social skills and possible differences in relevance

The leisure industry is a highly emotional and strongly customer-oriented segment. Accordingly, customer orientation is regarded as an essential aspect of experience and emotional quality. Not least with a view to the general development in German tourism, internationalization is regarded as an important topic for the future. This is underlined by a clear gap between current and future proficiency in the ability to speak foreign languages (+52%) as well as skills related to intercultural host-guest understanding and respect (+24%). The topic of accessibility is also relevant because it not only addresses heterogeneous target groups, but also families with children. This is demonstrated by a high growth rate in the proficiency of diets and allergy needs skills (+39%).

Main reasons why businesses in this sector do *not* provide Social Skills Training:

"Lack of time" is one of the most important reasons whether rare or no training is offered. A general opinion shows that social skills must come into people's mindsets in the long term and while within the company / job they can only be taught to a limited extent. Often times decision makers about sustainable solutions come from other sectors. In individual cases, attendees stated that management did not want further training or that the management generally puts little value on the qualification of employees.

Most important types of social training provision and why some types of trainings are less important

Training is mainly offered one-day-off-site or on-the-job. Usually lack of time is the reason for not offering trainings. In addition, not every form of training is equally suitable for social skills. Many skills can only be improved in practice.

Digital Skills	
Current Level of proficiency. Three most and three least proficient	Most: 1. Operating System use skills (3.72) 2. Microsoft Office skills (3.61) 3. Social media skills (3.39) Least: 1. Artificial Intelligence (AI) and robotics skills (2.06) 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2.22) 3. Data analytics, business intelligence, big data skills (2.61)
Future Level of proficiency in 2030. Three most and three least proficient.	Most: 1. Skills to monitor online reviews (4.22) 2. Skills for implementing online safety procedures (4.11) 2. Operating System use skills (4.11) 3. Online marketing and communication skills (4.06) 3. Social media skills (4.06) Least: 1. Computer programming skills (3.06) 2. Artificial Intelligence (AI) and robotics skills (3.44)

	3. Website development skills (3.72)	
Training Provision for digital skills?	Low training provision on overall contemplation of the sector as well as compared to other sectors. However, in the comparison of the skills it apparently has most relevance. In addition, the reference to vocational training / higher education is also established here.	
Most popular/ three main types of training for digital skills	1. Online course (8) 2. One-day-off-site (7) 3. On the job (5)	Total number of digital trainings sector: 36 Total amount of all 3 skills trainings sector: 92 Total amount of digital skills trainings all sectors: 516

Issues related to digital skills and possible differences in relevance

There are two important digital fields that refer to the occupational fields in the leisure industry: digital process design (booking, billing, cash register etc.) as well as online-marketing/social media (event manager, marketing). It is interesting to note that operating system use skills (current 3.72 / future 4.11) and Microsoft Office skills (current 3.61 / future 3.94) are still considered to be of great proficiency today, while this user knowledge will be much less important in the future or a high level is assumed. The gap is correspondingly small. This is significantly higher for skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (+70%) and Artificial Intelligence (AI) and robotics skills (+68%). Interestingly enough, however, these are at the bottom of the list when it comes to assessing proficiency and are therefore not considered as relevant to the everyday work of employees in theme parks as marketing skills are. Even more important, and here too an indication of a personal leisure industry, is the fact that skills to monitor online reviews (current 2.83/future 4.22) will be assessed as being of major importance in the future.

Main reasons why businesses in this sector do *not* provide digital skills training

Some attendees stated that they do not have a need of digital skills training while others feel their management does not put any focus on qualification of employees.

Most popular types of digital training provision and why some types of digital training are less important

Usually, external service providers initiated or operated digital solutions. Thus, digital skills are only necessary to a limited extent in the leisure company itself, but are provided by external service suppliers or are their responsibility. Larger companies also have their own IT departments, so that competencies are bundled there. In addition, only content relevant to employees with customer contact is trained (which would then be social skills again).

-- END OF VISITOR ATTRACTIONS SECTION --

2. DESTINATION MANAGEMENT ORGANIZATIONS

Environmental Skills		
Current Level of Proficiency. Three most and three least proficient	Most: 1. Knowledge of climate change (3.12) 2. Promotion of sustainable forms of transport (3.11) 3. Promotion of environmentally friendly activities and products (3.04) Least: 1. Ability to minimise the use and maximise efficiency of energy and water consumption (2.64) 2. Conservation of biodiversity (2.65) 3. Ability to manage waste, sewage, recycling and composting (3.02)	
Future Level of proficiency in 2030. Three most and three least proficient.	Most: 1. Promotion of environmentally friendly activities and products (4.03) 2. Promotion of sustainable forms of transport (3.94) 3. Knowledge of climate change (3.71) Least: 1. Ability to minimise the use and maximise efficiency of energy and water consumption (3.40) 2. Ability to manage waste, sewage, recycling and composting (3.43) 3. Conservation of biodiversity (3.54)	
Training Provision for these skills?	Quite a lot training provision on overall contemplation of the sector as well as compared to other sectors.	
Most popular/ three main types of training	1. One-day-off-site (38) 2. Online course (29) 3. On the job (27)	Total number of environmental trainings sector: 170 Total amount of all 3 skills trainings sector: 778 Total amount of environmental skills trainings all sectors: 246

Issues related to environmental skills and possible differences in relevance

Energy efficiency and careful use of resources as well as waste avoidance are essential aspects for the future of destinations. In addition, biodiversity and alternative mobility concepts are at stake, especially in rural areas. The focus here is on the sector and, accordingly, on the relevance of the skills.

If one looks at the gaps, the conservation of biodiversity (34%) still has the most proficiency, but the promotion of environmentally friendly activities and products (33%) is just as important. This can be linked to the trend of regionality. Guests particularly enjoy the beautiful landscape and typical regional products. This in turn corresponds to the ability to minimize the use and maximize efficiency of energy and water consumption (29%).

In summary, it can be said that environmental skills are most decisive for DMOs in a sector comparison and, with a gap of 25% overall, are above the average (22%). The DMOs have

understood the importance of sustainability in their destinations and are aligning their skills and training accordingly.

Main reasons why businesses in this sector do *not* provide Environmental Management Training:

Unless it is a niche product, the focus for most of the businesses in this sector does not lie on environmental management as legislative regulation give a frame anyway. The majority therefore focus on operative topics when deciding for a training. On the other hand, lack of time, money and interest / consciousness are reasons given by the attendees. Another reason for not providing trainings is a lack of knowledge about suitable offers.

Most popular types of environmental training provision and why some types of trainings are less important

Generally, employees are sent to external training providers for further training. Online courses and on-the-job training are also offered. It is assumed that employees are supposed to gain special knowledge referred to the individual enterprise here. Very interesting is, that also vocational training / higher education, where environmental topics are already conveyed, are stated as training types. Environmental skills in general are seen as part of the mindset that needs to be strengthened.

Personal, Communication and Diversity Skills	
Current Level of Proficiency. Three most and three least proficient per category	<p>PERSONAL SKILLS - Most:</p> <ol style="list-style-type: none"> 1. Customer orientation (3.98) 2. Initiative and commitment (3.77) 3. Ethical conduct and respect (3.72) <p>PERSONAL SKILLS - Least:</p> <ol style="list-style-type: none"> 1. Willingness to change (3.14) 2. Creativity (3.41) 3. Promoting a positive work environment (3.52) <p>COMMUNICATION SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Skills related to awareness of local customs (3.98) 2. Oral communication skills (3.70) 3. Written communication skills (3.66) <p>COMMUNICATION SKILLS – Least:</p> <ol style="list-style-type: none"> 1. Ability to speak foreign languages (3.02) 2. Skills related to intercultural host-guest understanding and respect (3.39) 3. Skills related to cultural awareness and expression (3.40) <p>DIVERSITY SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Gender equality skills (3.77) 2. Age-related accessibility skills (3.59) 3. Skills related to disabilities and appropriate infrastructure (3.23)

	DIVERSITY SKILLS – Least: 1. Diets and allergy needs skills (2.68) 2. Skills related to diversity in religious beliefs (2.94)	
Future Level of proficiency in 2030. Three most and three least proficient.	PERSONAL - Most: 1. Customer orientation (4.56) 2. Willingness to change (4.34) 3. Willingness to learn and to perform (4.30) PERSONAL - Least: 1. Creativity (4.17) 2. Ethical conduct and respect (4.21) 3. Promoting a positive work environment (4.23) COMMUNICATION – Most: 1. Promoting a positive work environment (4.36) 2. Oral communication skills (4.32) 3. Active listening skills (4.26) COMMUNICATION – Least: 1. Ability to speak foreign languages (4.02) 2. Skills related to intercultural host-guest understanding and respect (4.11) 3. Skills related to cultural awareness and expression (4.15) DIVERSITY– Most: 1. Age-related accessibility skills (4.32) 2. Gender equality skills (4.26) 3. Skills related to disabilities and appropriate infrastructure (4.17) DIVERSITY– Least: 1. Diets and allergy needs skills (3.40) 2. Skills related to diversity in religious beliefs (3.66)	
Training Provision for Social Skills	Quite a lot training provision on overall contemplation of the sector as well as compared to other sectors.	
Most popular/ three main types of training for social skills	1. One-day-off-site (70) 2. On the job (39) 3. One-day-on-site (33)	Total number of social trainings sector: 251 Total amount of all 3 skills trainings sector: 778 Total amount of social skills trainings all sectors: 394

Issues related to social skills and possible differences in relevance

Customer orientation currently is and remains in future terms the essential topic for DMOs. Since the tasks of the DMOs are changing, the willingness to change / willingness to learn and perform is attributed an equally high relevance as future skills. This is also shown by the gap of 38% (willingness to change) and 20% (willingness to learn and perform). It is interesting to note that customer

orientation has a much smaller gap (15%), which means that it already exists fundamentally and may have to be adapted to changing trends and habits.

Communication skills are crucial – for communication both internally (with suppliers within the region) and externally (as the region's ambassador towards guests). In addition, the importance of foreign languages - like all fields in the point "Communication" - is high (current 3.02 / future 4.02) but not as relevant as other skills. However, it shows a big gap of 33%, saying the need of qualification seems to be higher than referred to other skills.

Future topics for DMOs are accessibility (gap 29%) and age-related accessibility skills (20%), both significantly higher than the average for all sectors (Skills related to disabilities and appropriate infrastructure 24% and age-related accessibility skills 17%).

The total gap in current and future proficiency for DMOs is 20% above the average (16%). Here, too, the DMOs see a decisive need to catch up.

Main reasons why businesses in this sector do *not* provide Social Skills Management Training:

Social skills training often are not considered as core skill for businesses in this sector. As long as it doesn't occur to be needed in daily business (e.g. positions with customer contact), trainings on social skills are neglected and focus on operative topics. On the other hand, a general lack of time and money are reasons given by the attendees. In some cases, employees have to look for suitable trainings themselves which then might be approved by the management but will not initiated by the management. This leads to an important aspect where one attendee pointed out that especially social competence must be set as an example by the manager's behaviour. A low willingness to change is seen by some participants as a possible obstacle. Another reason for not providing trainings is a lack of knowledge about suitable offers.

Most popular types of social training provision and why some types of trainings are less important

One-day-off-site trainings are right at the top of the list. In addition, competencies are taught on the job. It becomes clear that the DMOs have a strong relevance (also in comparison to other sectors and skills) on the apprentice. It is assumed that a large number of university graduates work in the DMOs who gain important practical experience and social skills in addition to the training.

Digital Skills		
Current Level of proficiency. Three most and three least proficient	Most: 1. Microsoft Office skills (3.87) 2. Operating System use skills (3.78) 3. Online marketing and communication skills (3.41) Least: 1. Artificial Intelligence (AI) and robotics skills (1.52) 2. Computer programming skills (1.74) 3. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (1.79)	
Future level of proficiency in 2030. Three most and three least proficient .	Most: 1. Online marketing and communication skills (4.41) 2. Social media skills (4.32) 3. Microsoft Office skills (4.15) Least: 1. Computer programming skills (2.38) 2. Artificial Intelligence (AI) and robotics skills (2.97) 3. Website development skills (3.00)	
Training Provision for digital skills?	Quite a lot training provision on overall contemplation of the sector as well as compared to other sectors, more than on green or social skills.	
Most popular/ three main types of training for digital skills	1. One-day-off-site (91) 2. Online course (67) 3. Several-days-off-site (53)	Total number of digital trainings sector: 357 Total amount of all 3 skills trainings sector: 778 Total amount of digital skills trainings all sectors: 516

Issues related to digital skills and possible differences in relevance

While process optimization through digital solutions is still the focus today, the future DMO sees itself primarily as a region's image manager, also including a steering role. This is also reflected in the fact that the gap for Microsoft Office skills (+7%) and Operating System use skills (+3%) is very small.

Marketing and communication skills will therefore become much more important in the future (online marketing and communication skills – current 3.41/ future 4.41). This is proved in the assessment of future proficiency as well as in the training intensity. Data analytics, business intelligence, big data skills (+64%), skills to monitor online reviews, skills for implementing online safety procedures (+45%) are crucial competencies for the future in order to better assess the guests of the future and to be able to address them more specifically and individually in the competition between destinations. In this context, but also with regard to online marketing activities, data security is a relevant field of knowledge for the future (+37%), which despite the clear gap in significance does not come under the TOP 3 level of future proficiency.

Even though Artificial Intelligence (AI) and robotics skills (current 1.52/future 2.97) and skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (current 1.79/

future 3.34) are rated as less important, the increase in proficiency is considerable and well above the overall average of all sectors. This shows that DMOs see a considerable need to catch up in these skills, even if other competences are decisive for the work of the DMOs.

The fact that website development skills (current 2.21 / future 3.00) belong to the least proficient skills shows that these competences often do not lie within the company but with external service providers, even though the gap – and so it is with computer programming skills – lies at +36/37 % for future terms. This means that in general there seems to be a lot of catching up to do in order to get on a good mainstay in digitization. Overall, DMOs do not see a much higher growth rate of digital skills than other sectors.

Main reasons why businesses in this sector do *not* provide Digital Skills Management Training

As in other sectors and businesses, the lack of time and manpower is the main reason of not providing digital skills training. Some answers given stated the fact, that employees do not want to face the topic “digitation” yet or there is no demand so far. On the other hand, businesses do not yet systematically deal with the topic either. In individual cases, there are possibilities and the management supports personal engagement. However, according to the attendees, subsidies are often too expensive. Regular trainings do not take place yet in many of the businesses or little value is placed on further training. Reason mainly is, that other departments do digital issues or special knowledge comes from external suppliers, therefore competences lie with the respective service providers.

Most popular types of digital training provision and why some types of digital training are less important

The training intensity of digital skills is significantly higher than in other skills, but also the highest of all sectors. As a rule, these are one-day-off-site trainings that are offered. Online courses and several-day off-site training courses are also relevant. However, vocational training and higher education also play an important role.

-- END OF DESTINATION MANAGEMENT SECTION --

3. TRAVEL AGENCIES / TOUR OPERATORS

Environmental Skills		
Current Level of Proficiency. Three most and three least proficient	Most: 1. Knowledge of climate change (3.90) 2. Promotion of environmentally friendly activities and products (3.71) 3. Promotion of sustainable forms of transport (3.66) Least: 1. Conservation of biodiversity (3.23) 2. Ability to minimise the use and maximise efficiency of energy and water consumption (3.28) 3. Ability to manage waste, sewage, recycling and composting (3.57)	
Future Level of proficiency in 2030. Three most and three least proficient.	Most: 1. Knowledge of climate change (4.00) 2. Promotion of sustainable forms of transport (3.90) 3. Promotion of environmentally friendly activities and products (3.80) Least: 1. Conservation of biodiversity (3.66) 2. Ability to minimise the use and maximise efficiency of energy and water consumption (3.71) 3. Ability to manage waste, sewage, recycling and composting (3.76)	
Training Provision for these skills?	Low training provision on overall contemplation of the sector as well as compared to other sectors.	
Most popular/ three main types of training	1. Online course (9) 2. One-day-off/on-site (5) 3. On the job (4)	Total number of environmental trainings sector: 32 Total amount of all 3 skills trainings sector: 99 Total amount of environmental skills trainings all sectors: 246

Issues related to environmental skills and possible differences in relevance

It is noticeable that TA/TO by far indicate a very low need for environmental skills (+7% - average for all sectors +22%). However, there are three essential skills: Knowledge of climate change (current 3.90/ future 4.00), promotion of environmentally friendly activities and products (current 3.71/ future 3.80) and promotion of sustainable forms of transport (current 3.66/ future 3.99). This can be attributed to the fact that these aspects have a significant influence on the target areas that a) demand customers and b) want to anchor tour operator / travel agent in their portfolio in the long term. If you look at the gaps, you can see that the above-mentioned skills have hardly any growth in the future. This means that they are already known or taught at a sufficiently high level.

On the one hand, customers are more sensitive to environmental issues; on the other hand, tour operators / travel agents must maintain the basis of their business - intact destinations. In the end, however, in many cases a low-price offer decides. In contrast, waste separation and regional

environmental aspects are only relevant or feasible on site. Therefore, Tour Operator / Travel Agents have only limited influence. Some contribute by special selection of regional partners or by funding projects within the destination.

A look at the gap shows that the future level of proficiency is rated significantly higher than it is today, i.e. a lot of focus can be placed on qualification at this point.

Main reasons why businesses in this sector do *not* provide Environmental Management Training:

No interest and no relevance was one of the frequent answers. In addition, some people are not aware of the range of training courses available. For a large number of companies, however, the lack of resources (time, money, personnel) is the main reason why no training courses are offered.

Most important types of training provision and why some types of training are less important
Online courses are the most commonly used form of training. It suggests that the time factor is decisive for this selection. Overall, not much training is offered for environmental skills.

Personal, Communication and Diversity Skills	
<p>Current Level of Proficiency.</p> <p>Three most and three least proficient per category</p>	<p>PERSONAL SKILLS - Most:</p> <ol style="list-style-type: none"> 1. Customer orientation (4.33) 2. Ethical conduct and respect (4.24) 3. Initiative and commitment (4.05) <p>PERSONAL SKILLS - Least:</p> <ol style="list-style-type: none"> 1. Willingness to change (3.52) 2. Problem solving (3.67) 3. Creativity (3.71) <p>COMMUNICATION SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Oral communication skills (4.14) 2. Skills related to intercultural host-guest understanding and respect (4.05) 3. Written communication skills (4.00) <p>COMMUNICATION SKILLS – Least:</p> <ol style="list-style-type: none"> 1. Ability to speak foreign languages (3.57) 2. Active listening skills (3.81) 3. Skills related to awareness of local customs (3.86) <p>DIVERSITY SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Gender equality skills (4.19) 2. Age-related accessibility skills (3.71) 3. Skills related to diversity in religious beliefs (3.43) <p>DIVERSITY SKILLS – Least:</p> <ol style="list-style-type: none"> 1. Skills related to disabilities and appropriate infrastructure (2.90)

	2. Diets and allergy needs skills (3.24)	
Future Level of proficiency in 2030. Three most and three least proficient.	<p>PERSONAL - Most:</p> <ol style="list-style-type: none"> 1. Customer orientation (4.57) 2. Problem solving (4.24) 3. Promoting a positive work environment (4.19) <p>PERSONAL - Least:</p> <ol style="list-style-type: none"> 1. Creativity (3.95) 2. Willingness to change (4.10), Willingness to learn and to perform (4.10), Initiative and commitment (4.10) 3. Ethical conduct and respect (4.14) <p>COMMUNICATION – Most:</p> <ol style="list-style-type: none"> 1. Oral communication skills (4.19) 2. Skills related to intercultural host-guest understanding and respect (4.14) 3. Skills related to awareness of local customs (4.10) <p>COMMUNICATION – Least:</p> <ol style="list-style-type: none"> 1. Written communication skills (4.00) 2. Ability to speak foreign languages (4.05), Active listening skills (4.05), Skills related to cultural awareness and expression (4.05) <p>DIVERSITY– Most:</p> <ol style="list-style-type: none"> 1. Age-related accessibility skills (4.05), Gender equality skills (4.05) 2. Skills related to disabilities and appropriate infrastructure (3.62) <p>DIVERSITY– Least:</p> <ol style="list-style-type: none"> 1. Diets and allergy needs skills (3.48) 2. Skills related to diversity in religious beliefs (3.52) 	
Training Provision for Social Skills	Low training provision on overall contemplation of the sector as well as compared to other sectors. No importance is attached to vocational training / higher education.	
Most popular/ three main types of training for social skills	<ol style="list-style-type: none"> 1. One-day-off -site (10) 2. Online course (6) 3. Several-day-on-site (4) 	Total number of social trainings sector: 30 Total amount of all 3 skills trainings sector: 99 Total amount of social skills trainings all sectors: 394

Issues related to social skills and possible differences in relevance

Travel Agent / Tour Operators are customer-oriented segments. This is why these skills are high on the agenda today and in the future. In this context - because, for example, sale and recommendation are an essential part of the activity - oral communication skills are crucial. It shows that accessibility is an important topic for the future.

It is striking that the TO/TA remain below the overall average in terms of future levels of proficiency. It is also interesting to note that many skills have the same importance in the future. All the more

important a look at the gaps. This shows that the increase in social competences of +6% is far below the average of +20%. Only the topic of accessibility becomes obviously more important in this consideration. Problem solving and willingness to change (both +16%) as well as ability to speak foreign languages (+13%) follow with customers as well as with local partners and service providers by a clear margin.

What is particularly exciting here is that both written communication skills and gender equality skills apparently already are available at a high level or accepted as given and therefore no growth is expected.

Main reasons why businesses in this sector do *not* provide Social Skills Training:

Again, the size of the company plays an important role. In addition, the lack of personnel and time prevents training from being provided. Not infrequently, the offer of possible training courses is not known or the relevance of social skills is not recognized as such.

Most important types of training provision and why some types of training are less important

In general, tour operators / travel agents do not train as much as e.g. the DMOs. If training is provided, then it is mainly in one-day off-site trainings. That with great distance to other types of trainings. In this context, vocational trainings / higher education are attributed little relevance. This suggests that TO/TA specifically train competencies that arise within the framework of the company's activities or core fields.

Digital Skills		
Current Level of Proficiency. Three most and three least proficient	Most: 1. Microsoft Office skills (3.76) 2. Operating System use skills (3.67) 3. Online marketing and communication skills (3.24) Least: 1. Artificial Intelligence (AI) and robotics skills (1.48) 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (1.67) 3. Computer programming skills (2.05)	
Future Level of proficiency in 2030. Three most and three least proficient.	Most: 1. Online marketing and communication skills (4.05), Microsoft Office skills (4.05) 2. Operating System use skills (3.90) 3. Skills for implementing online safety procedures (3.76), Social media skills (3.76) Least: 1. Artificial Intelligence (AI) and robotics skills (2.43) 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2.62) 3. Computer programming skills (2.76)	
Training Provision for digital skills?	Low training provision on overall contemplation of the sector as well as compared to other sectors.	
Most popular/ three main types of training for digital skills	1. Online course (9) 2. One-day-off-site (8) 3. Several days off-site (6)	Total number of digital trainings sector: 37 Total amount of all 3 skills trainings sector: 99 Total amount of digital skills trainings all sectors: 516

Issues related to digital skills and possible differences in relevance

AI / VR as well as robotics have no great relevance for travel agencies - neither today nor in the future. Marketing and communication skills are crucial. However, if the gap is taken into account, it becomes clear that the increase in future proficiency appears enormous (Artificial Intelligence (AI) and robotics skills + 65%, skills related to applying digital hardware technologies, such as Augmented and Virtual Reality +57%). This leads to the conclusion that there are large gaps in this field of competence today, but that the significance of this technology for the future is considered less relevant. Nevertheless, it is important not to miss the connection to digitization.

Here again an indication that the TO/TA sector is a consulting-intensive industry. Data analytics, business intelligence, big data skills (+39%) and skills to monitor online reviews (+35%) are crucial for responding individually to customers in the future, even if they do not reach the top positions in the placement. In the future, the main focus will be on social media (current 2.81/ future 3.76) and online marketing (current 3.24/ future 4.05). The comparatively small gaps suggest that basic knowledge is already available in companies today.

In addition, user skills that guarantee a smooth booking process are crucial (Microsoft Office skills (current 3.76 / 4.05), operating system use skills (current 3.67/ future 3.90). These can be retrained if necessary, e.g. if employees come from the university and this was not part of the training.

TO/TA see digital skills as less relevant than other sectors.

Main reasons why businesses in this sector do *not* provide digital skills training

In some companies, digital skills are concentrated in the IT-Department, so employees outside these areas of responsibility do not receive any digital training. In addition, a lack of resources as well as a lack of knowledge about the training offered are reasons for not providing a training program. In individual companies, employees acquire new skills through self-study or other focuses are set.

Most popular types of digital training provision and why some types of digital training are less important

According to the assumption that booking software and online marketing tools are the most popular types of digital training provisions. In addition, online courses - as well as through on-day-off trainings - can provide important basics or additional expert knowledge.

-- END OF TRAVEL AGENCIES / TOUR OPERATORS SECTION --

4. FOOD & BEVERAGE

Environmental Skills		
Current Level of proficiency. Three most and three least proficient	Most: 1. Ability to manage waste, sewage, recycling and composting (3.00) 2. Conservation of biodiversity (2.91) 3. Promotion of environmentally friendly activities and products (2.83) 3. Knowledge of climate change (2.83) Least: 1. Promotion of sustainable forms of transport (2.50) 2. Ability to minimise the use and maximise efficiency of energy and water consumption (2.58)	
Future level of proficiency in 2030. Three most and three least proficient.	Most: 1. Knowledge of climate change (3.50), Ability to manage waste, sewage, recycling and composting (3.50) 2. Conservation of biodiversity (3.33) Least: 1. Ability to minimise the use and maximise efficiency of energy and water consumption (3.08) 2. Promotion of sustainable forms of transport (3.16), Promotion of environmentally friendly activities and products (3.16)	
Training Provision for these skills?	Low training provision on overall contemplation of the sector as well as compared to other sectors. However, vocational training/apprentice and higher education play a small role.	
Most popular/ three main types of training	1. Online course (5) 1. On the job (5) 2. One day on/off-site (3)	Total number of environmental trainings sector: 22 Total amount of all 3 skills trainings sector: 65 Total amount of environmental skills trainings all sectors: 246

Issues related to environmental skills and possible differences in relevance

Ability to manage waste, sewage, recycling and composting is and remains a key competence. It is clear that on the one hand the legislation provides a framework, but also the awareness and not least the recognition of an economic advantage. Closely linked to this is the knowledge of climate change. From the point of view of the participants, this is the biggest change. From currently 2.83 to 3.5 in the future (+24% gap).

Promotion of environmentally friendly activities and products as well as of sustainable forms of transport is of comparatively little importance / competence for a large part of the respondents today and in the future. Nevertheless, the leap in promotion of sustainable forms of transport is

relatively large at +26%, which may link to the fact that numerous businesses are situated in rural areas, where mobility is an important topic for the future in general. On the other hand, promotion of environmentally friendly activities and products is rated surprisingly low (+12% gap), although regional menus and sustainable products are in demand by growing target groups. The growing awareness is reflected not least in the strong assessment of the importance of Conservation of biodiversity.

Also of interest is the relatively low assessment of ability to minimize the use and maximize efficiency of energy and water consumption for the future, as this also creates ecological and economic added value for service providers. Looking at the +19% gap here, it is quite clear that the gain in knowledge is estimated to be comparatively high and that the category would thus even be in 3rd position.

Main reasons why businesses in this sector do *not* provide Environmental Management Training

Environmental management does not have certain relevance for many businesses therefore, trainings are not provided. In addition, some attendees stated that they are not interested in trainings. Again, lack of time and information about environmental issues are important reasons. The size of the company is also decisive. A small number of participants did not find a corresponding training offer yet.

Most popular types of environmental training provision and why some types of environmental training are less important

The main reasons why businesses do not provide environmental management trainings are compatible with the overall number of trainings environmental skills. There is a low training provision on overall contemplation of the sector as well as compared to other sectors. However, vocational training/apprentice and higher education play a small role. It can be assumed that a distinction between "hard facts" - i.e. knowledge of economic effects of sustainable management on the one hand and "soft facts" - i.e. the ability to integrate regional products into the menu as well as creativity and how to cooperate with regional suppliers etc. on the other hand - makes sense. This also refers to different decision-making levels and operational areas within the company.

Personal, Communication and Diversity Skills	
Current Level of proficiency. Three most and three least proficient per category	PERSONAL SKILLS - Most: 1. Customer orientation (3.92) 2. Ethical conduct and respect (3.67), Initiative and commitment (3.67) 3. Creativity (3.58) PERSONAL SKILLS - Least: 1. Willingness to learn and to perform (3.33), Problem solving (3.33) 2. Willingness to change (3.42), Promoting a positive work environment (3.42) COMMUNICATION SKILLS – Most:

	<p>1. Oral communication skills (3.75), Active listening skills (3.75) 2. Skills related to awareness of local customs (3.67) 3. Skills related to cultural awareness and expression (3.58), Skills related to intercultural host-guest understanding and respect (3.58)</p> <p>COMMUNICATION SKILLS – Least: 1. Ability to speak foreign languages (2.83) 2. Written communication skills (3.42)</p> <p>DIVERSITY SKILLS – Most: 1. Gender equality skills (4.17) 2. Skills related to disabilities and appropriate infrastructure (4.08) 3. Age-related accessibility skills (4.00)</p> <p>DIVERSITY SKILLS – Least: 1. Skills related to diversity in religious beliefs (3.67) 2. Diets and allergy needs skills (3.83)</p>
<p>Future level of proficiency in 2030.</p> <p>Three most and three least proficient.</p>	<p>PERSONAL - Most: 1. Customer orientation (4.50) 2. Ethical conduct and respect (4.42) 3. Willingness to learn and to perform (4.25), Willingness to change (4.25), Creativity (4.25)</p> <p>PERSONAL - Least: 1. Problem solving (4.08), Initiative and commitment (4.08) 2. Promoting a positive work environment (4.17)</p> <p>COMMUNICATION – Most: 1. Skills related to cultural awareness and expression (4.33), Skills related to awareness of local customs (4.33) 2. Skills related to intercultural host-guest understanding and respect (4.25) 3. Written communication skills (4.08)</p> <p>COMMUNICATION – Least: 1. Ability to speak foreign languages (3.83) 2. Active listening skills (3.92) 3. Oral communication skills (4.00)</p> <p>DIVERSITY– Most: 1. Gender equality skills (4.50) 2. Age-related accessibility skills (4.25)</p> <p>DIVERSITY– Least: 1. Skills related to diversity in religious beliefs (4.17), Diets and allergy needs skills (4.17). Skills related to disabilities and appropriate infrastructure (4.17)</p>
Training Provision	Lowest training provision on overall contemplation of the sector as well as

for Social Skills	compared to other sectors. However, especially apprentice plays a significant role.	
Most popular/ three main types of training for social skills	1. Online course (4) 1. On the job (4) 2. apprentice (3)	Total number of social trainings sector: 19 Total amount of all 3 skills trainings sector: 65 Total amount of social skills trainings all sectors: 394

Issues related to social skills and possible differences in relevance

Even if here only COMMUNICATION - least with (3.83) shows the ability to speak foreign languages overall the largest gap with +35% from today's competence assessment to future. Closely followed by willingness to learn and to perform, which is less stated in the overall assessment of personal skills for the future. Instead, the most important skills for the future will be customer orientation (4.50), gender equality skills (4.50), skills related to cultural awareness and expression (4.33) and problem solving (4.08). In the service-oriented F&B sector, the focus is on the guest, the knowledge of his or her cultural and individual characteristics and the corresponding flexibility in solving problems.

It is also interesting to note that age-related accessibility skills (4.25) are considered important, but that corresponding accessibility does not yet appear to be an issue that is anchored in the awareness of service providers, or that the gap between today and in the future is very small (+2%).

The question as to why oral communication skills and active listening skills are relatively low and written communication skills relatively high can possibly be explained by the fact that communication with the guest will primarily take place online.

Main reasons why businesses in this sector do *not* provide Social Skills Training:

Social skills do not have certain relevance for many businesses therefore, trainings are not provided. In addition, some attendees stated that they are not interested in trainings. Again, lack of time and information about are important reasons. The size of the company is also decisive.

Most popular types of social training provision and why some types of social training are less important

The fact, that apprentice plays a significant role - compared to other sectors and skills - is interesting. It seems that there are certain expectation on the training related to the knowledge about a guest's needs. This is also in line with the statements made in the accommodation sector. Vocational education apparently has a special meaning as well. Continuing education in the form of online course/training on the job can deepen knowledge and, for example, impart content such as "internationalisation", "accessibility", etc. Here, too, the decisive factor is certainly the view at management level within the company, as well as size and location of the enterprise.

Digital Skills	
Current Level of proficiency.	Most: 1. Operating System use skills (3.50)

Three most and three least proficient	2. Microsoft Office skills (3.33) 3. Online marketing and communication skills (2.83), Skills for implementing online safety procedures (2.83), Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems and video projectors (2.83) Least: 1. Artificial Intelligence (AI) and robotics skills (2.00), Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2.00) 2. Skills to monitor online reviews (2.17) 3. Data analytics, business intelligence, big data skills (2.33)	
Future level of proficiency in 2030. Three most and three least proficient.	Most: 1. Online marketing and communication skills (3.92) 2. Skills for implementing online safety procedures (3.83), Social media skills (3.83), Microsoft Office skills (3.83) 3. Website development skills (3.75), Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems and video projectors (3.75), Operating System use skills (3.75) Least: 1. Artificial Intelligence (AI) and robotics skills (3.33), Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (3.33) 2. Computer programming skills (3.42) 3. Skills to monitor online reviews (3.50)	
Training Provision for digital skills?	Low training provision on overall contemplation of the sector as well as compared to other sectors. However, training provision is higher than in environmental and social skills. Again, apprentice plays an important role.	
Most popular/ three main types of training for digital skills	1. Online course (6) 1. On the job (5) 2. apprentice (3)	Total number of digital trainings sector: 24 Total amount of all 3 skills trainings sector: 65 Total amount of digital skills trainings all sectors: 516

Issues related to digital skills and possible differences in relevance

All in all, the assessments of the skills are very close, which makes a ranking difficult. The decisive factor for competence development is therefore all the more the focus on the gaps.

Skills can be divided in online marketing skills, operating skills as well as programming / monitoring skills. While operating skills today are scaled as “most”, according to the survey it will be marketing / social media skills in the future. Looking on gaps, the overall gap of digital skills current to future is the highest in the food and beverage sector compared to other sectors (+37%) F&B to overall average of +33%) is the highest. While online marketing and communication skills as well as website development skills are stated the future skills “most proficient”, the gap is much higher for Artificial Intelligence (AI) and robotics skills and skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (+67% each) as well as data analytics and monitoring (+57 – 62%). One can assume that tools such as digital booking systems, CRM etc. are established in many of the

companies (+7 – 15%), but customer data/big data, as well as security issues and monitoring is not widely spread yet. Digitalisation is set as a basis, but not in the mind-set of the managers and employees to use it within the whole enterprise.

Main reasons why businesses in this sector do *not* provide digital skills training

Digital skills are not of relevance for many employees therefore, trainings are not provided. Lack of information about specific skills is an important reason. The size of the company is also decisive as the shortage of labour is rising.

Most popular types of digital training provision and why some types of digital training are less important

The provision of training is low on overall contemplation of the sector as well as compared to other sectors. However, training provision is higher than in environmental and social skills. When training provisions are offered, it is online course (6) or training on the job (5), where employees often train each other in new tools or programmes. Again, apprentice plays an important role.

-- END OF FOOD & BEVERAGE SECTION --

5. ACCOMMODATIONS

Environmental Skills		
Current Level of proficiency. Three most and three least proficient	Most: <ol style="list-style-type: none"> 1. Ability to manage waste, sewage, recycling and composting (3.66) 2. Knowledge of climate change (3.40) 3. Ability to minimise the use and maximise efficiency of energy and water consumption (3.28) Least: <ol style="list-style-type: none"> 1. Promotion of sustainable forms of transport (2.90), Conservation of biodiversity (2.90) 2. Promotion of environmentally friendly activities and products (3.06) 	
Future level of proficiency in 2030. Three most and three least proficient .	Most: <ol style="list-style-type: none"> 1. Knowledge of climate change (3.94) 2. Ability to manage waste, sewage, recycling and composting (3.88) 3. Ability to minimise the use and maximise efficiency of energy and water consumption (3.84) Least: <ol style="list-style-type: none"> 1. Conservation of biodiversity (3.64) 2. Promotion of sustainable forms of transport (3.76) 3. Promotion of environmentally friendly activities and products (3.82) 	
Training Provision for these skills?	Second highest training rate in sector comparison (position 1 DMOs) in general. Within the accommodation sector, the provision of environmental management training is the lowest. High value of apprentice.	
Most popular/ three main types of training	<ol style="list-style-type: none"> 1. On the job (14) 2. One-Day-off Site (13) 3. Online Course (9) 	Total number of environmental trainings sector: 62 Total amount of all 3 skills trainings sector: 251 Total amount of environmental skills trainings all sectors: 246

Issues related to environmental skills and possible differences in relevance

As with Food & Beverage, the ability to manage waste, sewage, recycling and composting (current 3.66 / future 3.88) is one of the most important proficiencies today and in the future. The fact that knowledge of climate change (current 3.40 / future 3.94) will play a greater role in the future can also be associated with the current media presence and a growing awareness of the topic. Considering the gap, it seems that the greatest gain in significance is the promotion of sustainable forms of transport (current 2.90 / future 3.76) with a gap of +30%. In contrary the ability to manage waste, sewage, recycling and composting, which according to the survey attendees is more important, is a skill already today and therefore only shows an increase in proficiency of +6%.

It becomes clear that the importance of promotion of environmentally friendly activities and products (+25%) and in this context the conservation of biodiversity will increase in the future (+26%). On the one hand side this may be explained by a global travel trend towards regionality and, on the other, by a growing awareness of the scarce resource "beautiful landscape" on which accommodation enterprises depend.

Main reasons why businesses in this sector do *not* provide Environmental Management Training:

For most of the companies, the main reason for not providing any trainings is the lack of resources (time, money) as well as a very small number of employees. In addition, the majority of accommodation suppliers does not feel a strong demand for environmental topics so far. Legislative regulations often lead in high bureaucracy, which is particularly difficult to implement for micro-enterprises.

This is why SMEs and micro-enterprises do not focus on this. Especially in small 1-2 man companies without personnel, the responsible persons get a picture of the environment himself (vegetable garden etc.). Many suppliers do not yet internalize urgent relevance of environmental issues – therefore it rarely is an explicit corporate goal. Other social aspects or industry-specific topics are a focused instead.

Most popular types of environmental training provision and why some types of environmental training are less important

Essential content is conveyed through training on the job (14) or one-day-off site (13). This is in line with the trend across all sectors. It is interesting to note that comparatively high value is placed on apprentice (13) and vocational training (7). Important environmental skills are already taught integrative in the hotel industry during training. This is also exciting with regard to F&B, where a similar picture emerges. In addition, taking a look at the overall answers makes clear that the greatest percentage of apprentice and vocational training seems to come from the hotel and restaurant sector.

Personal, Communication and Diversity Skills	
Current Level of proficiency. Three most and three least proficient per category	<p>PERSONAL SKILLS - Most:</p> <ol style="list-style-type: none"> 1. Customer orientation (4.22) 2. Ethical conduct and respect (4.18) 3. Initiative and commitment (4.06) <p>PERSONAL SKILLS - Least:</p> <ol style="list-style-type: none"> 1. Willingness to change (3.68) 2. Creativity (3.74) 3. Problem solving (3.86) <p>COMMUNICATION SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Skills related to intercultural host-guest understanding and respect (3.88), Oral communication skills (3.88) 2. Written communication skills (3.80)

	<p>3. Active listening skills (3.72)</p> <p>COMMUNICATION SKILLS – Least:</p> <ol style="list-style-type: none"> 1. Ability to speak foreign languages (3.34) 2. Skills related to cultural awareness and expression (3.36) 3. Skills related to awareness of local customs (3.50) <p>DIVERSITY SKILLS – Most:</p> <ol style="list-style-type: none"> 1. Gender equality skills (4.14) 2. Age-related accessibility skills (3.80) 3. Skills related to diversity in religious beliefs (3.66) <p>DIVERSITY SKILLS – Least:</p> <ol style="list-style-type: none"> 1. Diets and allergy needs skills (3.42) 1. Skills related to disabilities and appropriate infrastructure (3.42)
<p>Future level of proficiency in 2030.</p> <p>Three most and three least proficient.</p>	<p>PERSONAL - Most:</p> <ol style="list-style-type: none"> 1. Customer orientation (4.48) 2. Ethical conduct and respect (4.42) 3. Promoting a positive work environment (4.36) <p>PERSONAL - Least:</p> <ol style="list-style-type: none"> 1. Problem solving (4.16) 2. Creativity (4.18) 3. Willingness to change (4.28), Initiative and commitment (4.28) <p>COMMUNICATION – Most:</p> <ol style="list-style-type: none"> 1. Skills related to intercultural host-guest understanding and respect (4.34) 2. Written communication skills (4.28) 3. Oral communication skills (4.26) <p>COMMUNICATION – Least:</p> <ol style="list-style-type: none"> 1. Skills related to awareness of local customs (4.02) 2. Skills related to cultural awareness and expression (4.10) 3. Ability to speak foreign languages (4.22), Active listening skills (4.22) <p>DIVERSITY– Most:</p> <ol style="list-style-type: none"> 1. Age-related accessibility skills (4.28) 2. Gender equality skills (4.18) 3. Skills related to disabilities and appropriate infrastructure (3.98) <p>DIVERSITY– Least:</p> <ol style="list-style-type: none"> 1. Diets and allergy needs skills (3.84) 2. Skills related to diversity in religious beliefs (3.86)
Training Provision for Social Skills	<p>Second highest training rate in sector comparison (position 1 DMOs) in general. Within the accommodation sector, the provision of social training is the highest (total of 100) – even higher than digital trainings (total of 89).</p>

	High value of apprentice, vocational training and higher education.	
Most popular/ three main types of training for social skills	1. One-Day-off Site (20) 2. On the job (19) 3. Online Course (13)	Total number of social trainings sector: 100 Total amount of all 3 skills trainings sector: 251 Total amount of social skills trainings all sectors: 394

Issues related to social skills and possible differences in relevance

Customer orientation (current 4.22 / future 4.48) and ethical conduct and respect (current 4.18 / future 4.42) are and remain the most important social skills. It is exciting, however, that the gap is comparatively small at +5-6%. This suggests that important skills are already being taught or available today. Looking at the gap, ability to speak foreign languages (+26%) clearly comes first. This is where qualification and a perceived need to catch up are assumed.

The importance of consumer orientation is also demonstrated by the fact that skills related to intercultural host-guest understanding and respect (current 3.88 / future 4.34) and age-related accessibility skills (current 3.80 / future 4.28), as well as skills related to disabilities and appropriate infrastructure (+16%), are rated particularly highly in the future.

Gender equality skills (current 4.14 / future 4.18), which have a high overall significance in the field of diversity, already appear to be well rated today, as the gap to future proficiency has the lowest growth rate of +1%.

Communication skills are currently in the midfield and will remain so in the future, with the increase being mainly in active listening and written communication skills. On the one hand, this again points to customer orientation and, on the other hand, to growing communication at the online level.

Main reasons why businesses in this sector do *not* provide Social Skills Training:

Most companies are too small or one person is alone and independently responsible for the company. In some cases there is also a lack of interest or an assessment that the employees already have sufficient skills. An essential aspect is also the lack of time. For some, this simply does not provide the opportunity for training.

Most popular types of social training provision and why some types of social training are less important

Second highest training rate in sector comparison (position 1 DMOs) in general. Within the accommodation sector, the provision of social training is the highest (total of 100) - even higher than digital trainings (total of 89). Here, too, the importance of apprentice and vocational training is particularly high. This shows that essential social skills such as customer orientation are already taught in the basics in the training courses. It can be assumed that further qualification measures, such as on-the-job training (19), will often deepen internal skills. If one draws a connection between mentioned proficiency current / future and types of trainings, one can assume that in one-day-off site trainings (20) as well as online course (13) further skills such as target group knowledge, languages or special communication skills are imparted.

Digital Skills		
Current Level of proficiency. Three most and three least proficient	Most: 1. Operating System use skills (3.80) 2. Microsoft Office skills (3.76) 3. Online marketing and communication skills (3.46) Least: 1. Artificial Intelligence (AI) and robotics skills (1.58) 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (1.84) 3. Computer programming skills (2.08)	
Future level of proficiency in 2030. Three most and three least proficient.	Most: 1. Skills for implementing online safety procedures (4.22) 2. Online marketing and communication skills (4.14), Microsoft Office skills (4.14) 3. Skills to monitor online reviews (4.12) Least: 1. Artificial Intelligence (AI) and robotics skills (2.90) 2. Computer programming skills (3.00) 3. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (3.04)	
Training Provision for digital skills?	Second highest training rate within the accommodation sector (total of 89). High value of vocational training and apprentice as well as higher education.	
Most popular/ three main types of training for digital skills	1. One-Day-off Site (21) 2. Online Course (18) 3. On the job (16)	Total number of digital trainings sector: 89 Total amount of all 3 skills trainings sector: 251 Total amount of digital skills trainings all sectors: 516

Issues related to digital skills and possible differences in relevance

While operating system use skills (3.80) and Microsoft Office skills (3.76) are still clearly in the foreground today, these will in future be replaced by data security and marketing relevant skills. It can be assumed that on the one hand the importance of these competences will increase, on the other hand pure user knowledge is increasingly assumed and therefore little need for training is seen. This is also shown by the comparatively small gap.

It is also interesting to note that although Artificial Intelligence (AI) and robotics skills (current 1.58 / future 2.90) and skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (current 1.84 / future 3.04) are rated at a low level, the gap (AI / robotics +84% and AR / VR +65%) is quite different. In this respect, it can be assumed that the accommodation sector sees a need to catch up in these skills, but that the importance of other fields of competence, such as online marketing and communication, is significantly higher for the employee base.

Computer programming skills (current 2.08 / future 3.00) and website development skills (current 2.56 / future 3.40) also appear to be less important, with catching-up needs seen in the middle range.

It is interesting to note that skills to monitor online reviews (current 3,22 /future 4,12) are becoming increasingly important. This can possibly be linked to the trend towards personalization / individualization. Smaller companies in particular have an important need for training here.

Main reasons why businesses in this sector do *not* provide digital skills training

Some suppliers have not yet thought about digital training, others are not interested in a qualification. In addition, a majority cite the lack of resources as a reason for not offering training. The size of the company (too small, no or few employees) also plays a role. Individual suppliers sometimes take over all tasks within the company themselves. Others do not recognize any possibility of further training for themselves or are not aware of trainings offered.

Opinions that digital skills should already be taught at school/training are also raised.

Most popular types of digital training provision and why some types of digital training are less important

Looking at digital skills training across all sectors, the accommodation sector shows the second highest training rate (89 out of 198 total). It also becomes clear that around 1/5 of the Apprenticeship / Vocational training / Higher education training comes from the accommodation sector, another 1 / 5 from the F&B branch. Basic digital skills therefore appear to be taught during training. On the other hand, around 61% of the training courses in the accommodation sector are offered as further training one-day-off sites, online courses or on-the-job training. It can be assumed that deeper knowledge or special knowledge is imparted here. This corresponds to the general picture of digital training across sectors.

-- END OF ACCOMMODATIONS SECTION --

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