PANTOUR

PACT FOR NEXT TOURISM GENERATION SKILLS

02/24

COUNTRY SKILLS PROFILE REPORT

FINLAND

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EXECUTIVE SUMMARY

Digitalisation and green transition change tourism occupations.

The purpose of this Country Skills Profile Report is to provide a comprehensive overview of tourism employment and the needed skills when working in the Finnish tourism sector. In general, tourism employment in Finland is expected to grow. The sector is changing quickly, so the need for specialised skills is growing simultaneously. This often results in employees feeling inadequate in their jobs and highlights their ability to learn fast to cope with their daily work. As many SMEs cannot employ full-time the needed expertise, employment will be more about networking to share the needed expertise and freelancers working simultaneously for multiple companies. In addition, an increasing number of immigrants will be working in the tourism sector, and English is becoming more common as a customer service language in Finland.

Digitalisation and green transition change tourism occupations. Specialists concentrating on smart solutions, tools, and platforms, as well as digital content creation, are required desperately. In addition, basic tasks in the sector, such as working as a receptionist, require much more digital skills than before. The most needed digital skills in the tourism sector in the future are related to digital and data security and online marketing and communication.

The sector is also moving into a greener direction, which means that environmental management will be the key content in the emerging occupational profiles. In addition, green skills in Finland include resource-efficiency and applying the principles of circular economy, carbon management to reduce CO_2 emissions, sustainable product and service design, and sustainability communication. The biggest skills gaps are in carbon management as well as in sustainability communication.

Social and cultural skills are highly necessary as tourism is "a people's business". Providing excellent customer service is the most necessary skill in the future. More skills are needed to communicate effectively, not only with a diversity of guests, but also within the workplace. Taking care of the persons working for the company in the same way as taking care of the customers is the key issue. In addition, as tourism is about cooperation with various stakeholders, cooperation and networking skills are deemed essential.

Collaboration is also the main issue in the best practices related to upskilling, reskilling, attracting, and retaining staff in the tourism sector in Finland. The national and regional public authorities, public education and training institutions, and the tourism industry collaborate in employment and skills development. When the volume of tourism is moderate and the sector consists of micro-size companies, coordinated training and networks of freelancers providing their expertise is a must.

INTRODUCTION

The Erasmus+ PANTOUR Project is a European partnership for improving a collaborative and productive relationship between education and industry. PANTOUR is the follow-up project of the NTG project (Next Tourism Generation Skills Alliance; 2018-2022). The PANTOUR project aims specifically at designing innovative solutions to address skills needs in tourism.

With the exploitation of its outputs, PANTOUR seeks to benefit job seekers, employed and unemployed workers from the tourism industry, employers, SMEs, sector associations and policy makers. Therefore, it has dedicated special attention to the reskilling and upskilling of the generic workforce on future skills needs. To be able to achieve this goal, research has been conducted in every country of the project consortium, to investigate the future of tourism, skills gaps between current levels of skills in the tourism industry and the future skills needed in the future.

As a start, up to date information is needed. This will be covered with this Country Skills Profile Report: a comprehensive document, covering one country that provides an in-depth analysis of the general tourism and skills landscape, gaps, needs and workforce capabilities within a particular country. It serves as a valuable resource for policymakers, government officials, employers/employees, and educational institutions to understand the current state of skills and make informed decisions regarding workforce development strategies.

The purpose of this Country Skills Profile Report is to provide on the basis a comprehensive overview of the following:

General information of each country in the PANTOUR consortium regarding tourism and tourism employment, i.e., tourism facts & figures;

Summary of the current situation regarding the delivery of Digital, Green and Social Skills training provision for the main types of suppliers of education/training;

Analysis of online survey results within each country in the PANTOUR consortium, held among tourism professionals, HR managers and decision makers;

Overview of contemporary developments in tourism, trends in tourism employability, and the existing gaps between current levels of skills in the tourism industry and the projected future skills needed in 2030;

An inventory of Best Practices (i.e., innovative initiatives, projects, programs, philosophies, tools, methods, ideas, solutions, and concepts) in relation to upskilling, reskilling, attracting, and retaining staff in order to improve the knowledge on digital, social, and green skills development in tourism.

1. GENERAL TOURISM CHARACTERISTICS, FACTS & FIGURES OF FINLAND

The primary aim of this chapter of this Country Skills Profile report is to elaborate on general information and give a summary of the tourism situation in the country. This is conducted by collecting and analysing data from country sources and summarising these. The analysis is built upon existing online sources, course content, reports, existing research results, articles, books.

1.1 TOURISM FACTS & FIGURES

Tourism globally

The tourism industry is a vast and complex sector that encompasses many industries, including accommodation, transport, attractions, travel companies, and more. According to the international statistics portal Statista (2023 [1]), the total contribution of travel and tourism to the global economy was $ 7.71 trillion in 2022 (Statista, 2022), a 7.6% share of the total global GDP, remaining 5% below pre-pandemic levels.

Prior to the pandemic, Travel & Tourism was one of the largest sectors in the world and accounted for 1 in 4 jobs. Growth is expected at 5.8% annually between 2022 and 2032, outpacing the general economy.

The same source (Statista, 2023 [2]) reports that the number of international tourist arrivals worldwide was 963 million in 2022.

According to another study of Statista (2023), global employment in the travel and tourism sector rose slightly in 2022 over the previous year, following a sharp drop with the onset of the coronavirus pandemic. Despite the increase, the number of travel and tourism jobs worldwide remained below pre-pandemic levels, totaling 295 million in 2022. As forecast, this figure is expected to grow to 320 million in 2023 and to 430 million in 2033.

1.1.1   Contribution of travel & tourism to GDP in Finland

In 2019, tourism exports accounted for more than 17% of the export income generated by services in Finland. Tourism export share was 5.3. billion EUR and it has doubled since the year 2000. The total demand for tourism was approximately EUR 16 billion, and its direct share of GDP was 2.7%. In 2017-19, international tourism demand increased faster than other sectors at an annual rate of approximately 8%. It should be noted that the share of GDP from tourism differs heavily between the regions in Finland. For example, in Åland, it was 19.7%, and in Lapland, it was 6.9% of GDP (Ministry of Economic Affairs and Employment of Finland, 2021; Ministry of Economic Affairs and Employment of Finland, 2022a).

Before the COVID-19 pandemic, between the years 2015–2018, tourism's direct share of GDP was growing from 2.5% to 2.7%. In 2020, this share dropped to 1.7% due to the pandemic, and the total demand for tourism was 9.7 billion EUR. In 2021, the total demand for tourism recovered to 11.2 billion EUR due to the increase in domestic tourism. International tourism to Finland is expected to recover to the same level as before the COVID-19 pandemic in the year 2025 (Visit Finland, 2023a).

1.1.2 Size and relevance of the subsectors

In Finland, the key sub-sectors in the tourism cluster are passenger transport services, food and beverage, accommodation, travel agency and tour operator services, and rental and leasing services. These subsectors comprise 28,600 companies with a joint turnover of 21 billion EUR in 2019 (Ministry of Economic Affairs and Employment of Finland, 2022a).

Passenger transportation services is the biggest sub-sector, with a turnover of 9.7 billion EUR and 9,098 companies. Food and beverage services is the second biggest sector, with a turnover of 6.0 billion EUR and 10,340 companies. Travel agency and tourism operator services is the third biggest subsector with a 3.0 billion EUR turnover and 6,686 companies. In Finland, this sector also includes the so-called programme service sector. The accommodation sector is the fourth biggest sector, with a 1.7 billion EUR turnover and 2,078 companies. The rental and leasing services' turnover is 1 billion EUR, and it includes 429 companies (Ministry of Economic Affairs and Employment of Finland, 2022a).

1.1.3 Incoming and outgoing tourists

Distribution of tourism receipts in 2019 was as follows: Russia 19%, Sweden 11%, China 8%, Estonia 7%, Germany 7%, USA 5%, and UK 5 %. Furthermore, distribution of registered foreign overnight stays was as follows: Russia 12%, Germany 9%, UK 8%, Sweden 8%, China 6%, France 5%, USA 4%, and the Netherlands 4% (Visit Finland, 2020b). Due to the Ukrainian war, the focus markets have changed and the priority markets in 2022 are German, UK, and Swedish markets. During 1.1.-31.12.2022 the primary source markets of registered foreign overnight stays were the United Kingdom, Sweden, France, United States, Netherlands, Estonia, Spain, and Italy (Visit Finland 2023b). In practice, the biggest change in the foreign overnight stays is the lack of Russian and Asian tourists.

Finns made 10.4 million trips abroad in 2019. The most popular destinations were Sweden 2.14 million trips (20%), Estonia 2.03 million trips (19.5%), Spain 790,000 trips (8%), Germany 610,000 trips (6%), Russia 470,000 trips (4.5%), Italy 350,000 trips (3%), UK 320,000 trips (3%), Norway 310,000 trips (3%), and Greece 260,000 trips (2.5%). In 2022, Finns made 6.2 million trips aboard. The most popular destinations were Estonia 1.55 million trips (25%), Sweden 1.3 million trips (21%), Spain 600,000 trips (9.7%), Greece 310,000 trips (5%), and Germany 290,000 trips (4.7%) (Official Statistics of Finland, 2023).

1.1.4 Share of different transportation modes (plane, car, train) in tourism

In Finland, the share of road traffic is dominant. In passenger traffic, road traffic accounts for approximately 90% of traffic performance. If the distance of travelling in Finland is 100-200 kilometres, almost 90% of travel is made by car, 15% by train, and 6% by bus. If the distance is more than 200 kilometres, approximately 70% of travels are made by car, 8% by train, 7% by bus, and 12% by other means (i.e., plane, ferry). Passenger car journeys are longer than before, and public transport journeys are shorter. The number of public transport trips has not changed, but the number of kilometres travelled by public transport has decreased. The use of public transport has been more clearly focused on urban areas than before (Finnish Transport and Communications Agency Traficom, 2023; Finnish Transport Infrastructure Agency, 2023).

1.1.5 Arrivals of international versus national tourists

Domestic tourism plays a key role in Finland's tourism. Domestic demand accounts for around 70% of the total demand for tourism (Ministry of Economic Affairs and Employment of Finland, 2021). In 2019, there were 23.1 million overnight stays at Finnish accommodation establishments, of which 69% were domestic stays and 31% were foreign overnight stays (Ministry of Economic Affairs and Employment of Finland, 2021). However, the growth rate in foreign overnight stays was faster in Finland than on average in Europe before the COVID-19 pandemic. In March 2023, the share of domestic overnight stays was 74% and international stays 26% in Finland (Visit Finland, 2023b).

1.2 TRAVEL AND TOURISM'S CONTRIBUTION TO EMPLOYMENT

In 2019 the tourism sectors employed about 154,000 persons, which was about 5.8 % of all employed persons in Finland. In addition, temporary agency work is commonly used, which equals to 10,000 estimated number of full-time equivalents (FTE). In total, FTE in tourism employment in Finland is 120,000. This means that in the accommodation and catering sector about 40% of the employees worked part time and temporary agency workers accounted for about 6% of the employees in these sectors (Ministry of Economic Affairs and Employment of Finland, 2022b). The tourism sectors are female-dominated and major employers of women in Finland. Indeed, the labour force in these sectors includes more female workers (71% in Finland) than male workers (2022b). This means that these sectors also have more women entrepreneurs and managers than many other sectors.

In Finland, almost half (46%) of the FTEs were generated on the food & beverage sector employing 54,646 persons, and one third (34%) in the passenger transport services employing 39,658 persons. Travel agency and tour operator services incl. the programme service sector generated 11% of the FTEs and accommodation sector almost 10% of the FTEs (Ministry of Economic Affairs and Employment of Finland, 2022b).

The Covid-19 pandemic worsened the shortage of labour. The number of employees decreased by over 25,000 persons (-16 %) to 128,700 persons in 2020 (Ministry of Economic Affairs and Employment of Finland, 2022b).

1.3 DIRECT AND TOTAL CONTRIBUTION OF TOURISM TO GDP IN 10 YEARS' TIME

The aim is for Finland's tourism sector to grow significantly until 2028. The key objective is to double tourism exports. Tourism direct value added as a share of GDP (%) is estimated to grow to 3.0% until 2028. The general objective is to reduce the gap between the domestic and inbound travel accounts. Especially, the number of international tourists and Finland's market share in inbound overnight tourists in relation to other Nordic countries is expected to grow. The international target market is expected to grow at an annual rate of around 4% in overnight stays and around 5 % in tourism exports (Ministry of Economic Affairs and Employment of Finland, 2022a).

In Finland, tourism income can be increased by producing high-margin value-added services for domestic and international tourists. Growth is also expected to occur because of innovation at the interface between tourism and other sectors (e.g., sports and wellness services, food industry and ICT).

1.4 DIRECT AND TOTAL CONTRIBUTION OF TOURISM TO EMPLOYMENT OF TOURISM IN 10 YEARS' TIME

Tourism is estimated to employ 164,000 persons in 2028 (Ministry of Economic Affairs and Employment of Finland, 2022b).

1.5 MAIN FOCUS POINTS OF NATIONAL STRATEGY FOR TOURISM

The national strategy for tourism (Ministry of Economic Affairs and Employment of Finland, 2022a) envisions Finland as the world's leading sustainable travel destination. The strategy identifies four key priorities that will enable sustainable growth and renewal of the tourism sector: supporting activities that foster sustainable development, responding to digital change, improving accessibility to cater to the tourism sector's needs, and ensuring an operating environment that supports competitiveness.

Finland's country image as a safe and stable country provides a solid foundation for the development and growth of the tourism sector after the pandemic. The recovery is supported by responding to the digital transformation, making use of innovations, improving access, investing in the development of sustainable and responsible tourism, and strengthening the competitiveness of the sector's business environment.

Nature is the biggest attractive factor in Finnish tourism, alongside the local style of living and experiencing the Finnish culture. The most important segment of this niche-tourism destination is a so-called Modern Humanist. Modern Humanists are considered experienced travellers who prefer locality over mass tourism and are interested in experiencing nature (Visit Finland, 2020a). This type of person likes to explore and go on adventures on their own terms. The characteristics of this group are higher than average education and income levels and interest towards sustainability, new cultures and local people. Accordingly, the core segments of the Finnish travel markets are Nature Wonder Hunters seeking unique nature experiences, Nature Explorers looking for peaceful nature to rewind, and Activity Enthusiasts enjoying an active holiday in nature.

Indeed, the sustainability of tourism is a basic requirement in Finland. Since sustainability is in the core of all tourism development activities, Visit Finland has launched the Sustainable Travel Finland programme for tourism companies and destinations. The programme and its criteria relate to Sustainable Development Goals and sustainable tourism indicators, but it has been applied to the Finnish context.

The national tourism strategy identifies responding to digital change as one of its key priorities. Therefore, Finland is developed as a smart tourism destination (Visit Finland, 2019; 2020a). In particular, digitalisation of its tourism sector is promoted to increase the discoverability, findability, buyability and experientiality of tourism services. Tourism is developed by leading with knowledge, enhancing digital accessibility as well as the development is supported by digital platforms.

During the pandemic, the relative importance of domestic tourism in the total demand for tourism has increased (Ministry of Economic Affairs and Employment of Finland, 2021). Various rural, nature-based destinations were the biggest winners. In particular, the Finnish coast and archipelago hit records in tourist arrivals and there was a significant growth in the number of visitors. However, turnover of tourism companies has decreased even if the number of customers/tourists increased. This is connected to the change in segments. Individual, domestic leisure tourists cannot generate the same turnover as business and group travel or international tourists before the pandemic. Therefore, the Finnish Government launched a Growth Programme to support the sustainable growth of domestic tourism with additional funding to seize its opportunities.

Indeed, due to the pandemic, many tourism companies developed their business operations. Pandemic was seen as a chance to renovate and clean properties, review and analyse different business operations in-depth, digitalise operations and increase skills in online marketing, rationalise the cost structure, develop new products and services, and revise and renew the business concept. Simultaneously, sustainable development has gained more attention as a competitive advantage for tourism companies due to the national Sustainable Tourism Finland Programme by Visit Finland. Companies also highlighted that pandemic has increased the level of cooperation between tourism stakeholders to respond jointly to the challenges. In sum, the COVID-19 pandemic has contributed to the skills development, especially to the development of digital and green skills.

1.6 COUNTRY-SPECIFIC CHALLENGES AND DEVELOPMENTS IN TOURISM

Russia's invasion of Ukraine significantly weakened the operating conditions of the sector. The biggest effects for Finland are related to the stoppage of Russian tourism and the weakening of accessibility from Asia due to Russia's overflight ban. Before the pandemic, the Russian and Asian markets covered a total of almost a third of Finland's international tourism income, and their absence reduces this by at least one billion euros annually. The decline in Russian and Asian tourism also weakens Finland's competitive position in relation to the other Nordic countries, as this market is relatively more significant for Finland. New growth is sought in, for example, the United States and by strengthening its position in the European market.

Other challenges in Finland relate to company structure, which is dominated by micro-companies, and larger companies leading tourism development are mostly missing. These companies' skills in strategic business planning should be strengthened to ensure viable business operations. The tourism business is also very seasonal, and product development differs extensively among regions. Digitalisation is exploited at the company level, but it is not utilised holistically in the service/product chain. This makes it difficult for tourists to purchase travel packages. In addition, climate change has a significant impact as it is difficult to predict the winter season and its activities – if there is a lack of snow and ice. '

The future opportunities relate to developing original, intriguing, safe, high-quality, year-round tourism products and services for the chosen and specific target segments (e.g., educational tourism, wellness tourism) that are easy to buy. In product development, service design and storytelling, as well as multisectoral collaboration, should be used as tools.

A lot has already been done in Finland for sustainability, and this should be utilised as Finland's tourism competitive asset and supported by continuous quality development with the customer and the development of the safety, security and accessibility of tourism services. Understanding digitalisation and competence development are also essential components

of the digital reform of the tourism sector. Digital buyability, i.e., the possibility to book online, findability and discoverability of tourism services, and the use of digital solutions in tourism products and services, must be developed.

2. CURRENT SKILLS TRAINING DELIVERY IN FINLAND

In this section, you will find an overview of the training delivery of digital, green, and social skills sets in Finland. In Finland, vocational and higher education is state-funded and free of charge for the Finnish students and students from the EU. Therefore, tourism education and training providers are usually public entities: vocational colleges and universities of applied sciences (table 1). They offer various vocational qualifications, degrees, and diplomas. It is important to note that training for the tourism sector is not usually provided by private educational institutions or training companies. As the size of the tourism companies is small, only the biggest hotel and restaurant chains (e.g., S Group, Scandic Hotels Group AB) organise their own training for their staff professional development. Instead, the public entities provide adult learners qualifications, degrees, and diplomas where learning is strongly integrated in the daily work life and tasks in the workplace.

In Finland, vocational education and training (VET) is designed both for young people without upper secondary qualifications and for adults already in work life. Vocational qualifications can be completed in school-based VET or as competence-based qualifications. The qualifications structure in vocational education and training (VET) has three levels: vocational upper secondary qualification, further vocational qualification, and specialist vocational qualification. Upper secondary qualifications are intended for those who are new to the field, while further and specialist vocational qualifications are aimed at those who already have acquired the basic skills but who are looking to progress in their career. The main idea is that individual learning pathways are designed to help students gain an occupation or progress in their careers (Ministry of Education and Culture, 2023a). This qualification structure responds to people's lifelong need to develop their professional skills, which means that tourism sector employees study further and specialist qualifications and integrate learning and working.

Table 1. Tourism, hospitality and restaurant education and training providers

EQF level 4, vocational upper secondary qualification	EQF level 6, bachelor's degree	EQF level 7, master's degree
AhlmanEdu	*Universities of Applied Sciences*	*Universities of Applied Sciences*
Lappia Vocational College	Haaga-Helia UAS	Haaga-Helia UAS
SamiEdu Vocational College	Högskolan på Åland	Jyväskylä UAS
Tavastia Vocational College	Jyväskylä UAS	Kajaani UAS
Careeria	Kajaani UAS	Laurea UAS
Ekami	Karelia UAS	Savonia UAS
Gradia	LAB UAS	Seinäjoki UAS
Hyria	Lapland UAS	Tampere UAS
Kainuu Vocational College	Laurea UAS	
Keuda	Satakunta UAS	*Universities*
Kiipula Special Education Vocational College	Savonia UAS	University of Lapland
JEDU Vocational Education Centre	Seinäjoki UAS	University of Eastern Finland
Salpaus Further Education	Tampere UAS	
Lapland Education Centre REDU	XAMK UAS	
Luksia		
SASKY	*Universities*	
Omnia	University of Lapland	
OSAO		
Perho Culinary, Tourism & Business College		
Raseko		
Riveria		
The Sámi Education Institute		
Saimaa Vocational College		
Salo Vocational College		
Savo Vocational College		

Sedu		
Helsinki Vocational College and Adult Institute		
Tampere Vocational College Tredu		
Turku Vocational Institute		
VAMIA		
Vantaa Vocational College Varia		
WinNova		

In addition, a total of 22 universities of applied sciences operates as public limited companies. Universities of applied sciences are mainly regional higher education institutions whose activities highlight their connection to working life and regional development. They provide education for professional expert tasks that are based on the requirements of working life. Universities of applied sciences provide bachelor's and master's degrees. Bachelor's degrees are mainly targeted to young people without higher education and master's degrees are targeted to adults who have already gained work experience and want to progress in their career. Both degrees are also offered for adults and can be studied while working with the blended learning model (Ministry of Education and Culture, 2023b).

In addition, tourism authorities are very active in skills development. As the tourism sector is dominated by micro and small-size companies, it is essential to increase their skills to ensure profitability and competitiveness. For this reason, the national tourism board, Visit Finland, is the main training provider in Finland and it has introduced its Visit Finland Academy. The Visit Finland Academy, established in 2016, offers a training path consisting of intensive group training days (Visit Finland, 2023c). It is a training selection aimed at tourism destinations and companies. As the Academy serves micro and small-size companies' interests, the training is very practical and includes many real-life examples.

The Academy ensures that the tourism sector in Finland has up-to-date knowledge and skills about the relevant topics to increase Finland's competitiveness as a tourism destination and that tourism development is coherent in Finland. The training is booked and paid for by Visit Finland's partners, such as regional tourism organisations, regional tourism projects or other regional development agencies that are responsible for tourism development in

their region. Therefore, this is a network approach working through the network of different actors responsible for regional tourism development in collaboration with Visit Finland.

2.1 DIGITAL SKILLS

First, it can be concluded that the main skill sets provided by the training organisers relate to online marketing and sales. For example, when reviewing the training contents of the Visit Finland Academy, they mainly focus on marketing communication, search engine optimisation, social media marketing, distribution and sales channels. Also, in tourism degree programmes social media marketing is highlighted: Facebook and Instagram marketing, community building as well as search engine optimisation. In addition, new technology trends e.g., AI and gamification are emphasised in many training contents. Big data and data analytics are also emerging topics in training offering.

Regarding the skills needed, it can be stated that it is crucial to understand the significance and opportunities of the digital world and digital transformation in tourism business and service development. Thus, skills in developing digital services in a customer-oriented way are vital. Customer orientation means that these services provide tourists with means to access and purchase tourism products and services, and get and share information as well as experiences. These services should be tailored, customised and automated.

Therefore, it is necessary to be able to identify new technology trends and their role in developing innovative experiences and creating a competitive advantage for the business. These technologies include for example artificial intelligence (AI) and machine learning, virtual reality (VR), augmented reality (AR), Internet of Things (IoT), robotics, and gamification, which create many new opportunities for the development of tourism services and for understanding and analysing tourists with the help of the data obtained. Increasing the skills required to use these digital solutions in tourism product and service development is required. In addition, understanding the evolving role of mobile technology and identifying its potential in value creation and grasping business opportunities is needed.

Big data and business intelligence have become a significant factor in competitiveness and productivity in the tourism sector. Big data i.e., large data sets that exist within companies as well as business intelligence referring to the utilisation of this data for analytical purposes to make more informed business decisions are essential skill sets. The key skills are related to the development and utilisation of the related tools, so that decisions that guide the business are made based on data. In sum, tourism companies should be able to recognise the importance of business intelligence/data in the development of services and business, as well as collect, analyse, and utilise data.

The positive impact of the sector on regional well-being and employment requires an increase in the sales of tourism services offered in Finland. More effective sales of tourism services is possible by investing in the digital discoverability of Finnish tourism services and making them easier to purchase. Therefore, skills are needed to develop online purchasing/sales of travel services and to utilise the opportunities of the platform economy. In addition, the expertise of tourism companies in the selection and utilisation of digital distribution channels should be increased. Thus, the following themes in digital skills should be emphasised to increase sales: the digital footprint/discoverability, online sales and digital distribution channels, online presence, the use of social media to support sales. Furthermore, understanding the opportunities and challenges in the sharing economy is deemed important as the sharing economy has changed towards professional, platform-based business.

Other digital skills in tourism include skills in digital communication and marketing. To be able to plan, implement, and develop digital communication and marketing is vital. Understanding online customer behaviour, creating and managing content in different channels, and measuring the success of the activities are part of the digital skillset. In addition, the ability to develop online customer service, service quality, and customer satisfaction using digital tools is highlighted. Skills in understanding legislation concerning digitality and developing digital security are also considered essential.

It is important to note that digitalisation is a tool to promote sustainable tourism. Digital technologies and tools support sustainability of the tourism sector by providing access to data to make sustainable decisions and guide tourists towards responsible actions. The accessibility and visibility of sustainable and inclusive tourism products and services is enhanced by using digitality. In addition, tourists receive good-quality, interactive information on nature as a tourism attraction and sustainable use of natural resources.

However, it is important, not only to focus on single technologies and tools, but to take a holistic approach to the opportunities of digital transformation which is currently lacking. Digital skills in the tourism sector should be developed starting from the strategic level digital business planning and development to assessing and developing digital business processes.

In sum, the key implications for digital skills development are the following:
- Skills are needed at the strategic level of digital business planning and development. It is essential to understand the significance and opportunities of the digital world and digital transformation in tourism companies, their process and service development.
- It is important to develop skills in identifying new technology trends and their role in developing innovative experiences and creating a competitive advantage for the business.
- Big data and business intelligence have become a significant factor in competitiveness and productivity in the tourism sector. Skills related to the utilisation of this data for analytical purposes to make more informed business decisions are essential skill sets.
- Digital marketing communication requires practical skills. To be able to plan, implement, and develop digital communication and marketing is vital. This also involves skills in digital security.
- It is important to note that skills are needed, not only in digital marketing communication, but to develop online purchasing and sales of travel services and to utilise the opportunities of the platform economy.
- The newest trend is to utlilise digitality to ensure sustainable development i.e., sustainable digitalisation.

2.2 GREEN SKILLS

First, it can be concluded that, Visit Finland Academy and its training focus on the key skills related to the Sustainable Travel Finland Label e.g., sustainability dimensions, sustainability marketing and communication, sustainable leadership, climate change, circular economy, impact management, sustainable food tourism, and ethical animal interaction. There are also various courses related to ecological sustainability in tourism, resource management, circular economy, and sustainability communication integrated in tourism and hospitality degree programmes in the universities of applied sciences.

About the skills needed, a major skill set, which emerged from the results, is improving resource efficiency. This includes skills in circular economy mainly related to the principles of reducing, reusing, and recycling resources, for example reducing the use of raw materials, energy, and water consumption as well as increasing the use of renewable energy. It is also deemed important to be able to find and apply opportunities to keep materials and products in use to minimise waste, for example by reusing old furniture and cutlery, or using recycled materials in work clothes and décor fabrics. Applying the principles of sharing economy, for example by sharing and renting equipment, also supports this aim. It is also essential to be able to adopt various preventative measures and recycling practices to minimise plastic and food waste efficiently, for example by replacing single-use items, avoiding the use of printed materials, and developing composting systems. In addition, skills in sustainable procurement i.e., in making sure that the products and services the company purchases are as sustainable as possible, with the lowest environmental impact. This includes procuring fresh, local ingredients, also in bulk when appropriate.

The second skill set refers to skills related to climate change and the transition to a low-carbon economy. Skills are needed to identify, assess, and prevent the impacts caused by climate change on tourism companies. This involves skills in identifying the influence of environmental conditions on the safety of tourists and preventing potential risks. It is also important to assess the influence of climate change and create solutions to combat the change in environmental resources used in product development. This means that skills are needed to develop year-round products and services to combat seasonality and tackle the challenges in

business operations in the winter season caused by the loss of sea ice and the lack of snow.

Certainly, it is critical to understand how tourism companies themselves contribute to climate change. Skills are required in identifying and implementing procedures that limit greenhouse gas emissions. This involves skills in understanding the sources of greenhouse gas emissions in tourism companies and opportunities to reduce them. It is essential to be able to calculate the Carbon Footprint generated by their actions and make plans for how to reduce and compensate for it.

In addition, there is a need for skills in promoting transport sustainability from various perspectives. It is pivotal to promote environmentally friendly ways of travelling, e.g., cycling and public transport, as well as to encourage longer stays in the selected destinations, optimise routes, and prefer direct connections. It is also essential to ensure short supply chains of products when transporting them to tourism companies. This means that preferring local suppliers should be the priority.

The next skillset, conservation of biodiversity, relates to skills in environmental protection and management of local natural resources. Tourism companies should understand the concept of carrying capacity and how to sustain it. It is also deemed important to understand governmental planning systems ensuring carrying capacity and collaborate with local government as their plans direct the tourism flows and they maintain services such as waste recycling and disposal. Furthermore, this skillset emphasises sustainable use of natural resources in tourism products: developing products related to nature conservation, managing animal interactions responsibly and utilising nature-protected areas and designated trails in a sustainable manner. In product development, also productising the wellbeing effect and health benefits of nature is essential. At the company level, skills in minimising pollution, for example by using environmentally friendly detergents and cleaning materials are required.

Another major skillset emerged from the results is sustainability communication. Skills are required in communicating to customers and other stakeholders about the measures implemented by the companies and their goals and efforts to transform towards green economies. In many cases, companies do implement various measures, but they are not communicated transparently. As production

and consumption are inseparable in tourism, equally important is to be able to change customer behaviour by increasing their customers' environmental awareness, encouraging their engagement, and supporting their transition into a green economy. It is essential to make them, as co-producers and co-creators, aware of their consumption of resources and their environmental impacts, which guides them to act in a responsible manner. This could contain information on energy-saving practices, the use of recycling bins, reusable towel and linen schemes, and food waste reduction measures.

Certainly, skills in environmental management are crucial. At the management level, understanding how the company impacts the environment and how to manage these impacts by planning, operating, monitoring, and improving its actions is emphasised. The skillset involves skills in setting environmental objectives and integrating the specifics of environmental legislation into its actions. There is a need to adopt an environmental management system to plan, act, and monitor its environmental objectives and performance. This also includes applying and managing sustainability certification schemes. Furthermore, skills in using digital technologies to integrate smartness and sustainability to manage environmental impacts is highlighted. This supports for example monitoring the consumption of resources in tourism companies and understanding and influencing guest behaviour. It is also necessary to be able to redesign supply chains and increase cooperation with the local stakeholders.

The key implications for green skills development are the following:
- A major skill is improving resource efficiency. This includes skills in circular economy mainly related to the principles of reducing, reusing, and recycling resources.
- The second skill set refers to skills related to climate change and transition to a low carbon economy. Both viewpoints should be considered: how tourism companies themselves impact climate change and what are the impacts of climate change to tourism companies. Carbon management is also an emerging skill that needs to be addressed.
- Skills in environmental protection and management of local natural resources as well as sustainable use of natural resources in tourism products is also of utmost importance.
- Currently, a significant and much-emphasised skillset is sustainability communication.

- The most important skill set is environmental management: managing a company's environmental performance and impacts by planning, operating, monitoring, and improving its actions.

2.3 SOCIAL SKILLS

Based on the existing training offering (existing qualifications, degrees, and diplomas) and the national tourism strategies and main reports, the key social and cultural skill sets needed by the tourism sector in Finland were identified and are described in this section.

Currently, Visit Finland Academy offers training in inclusive tourism, which consists of the following topics: segments in inclusive tourism, integrating inclusivity in tourism product development and marketing communication, and accessibility in tourism. In degree programmes of the universities of applied sciences, courses are related to e.g., accessible tourism, corporate social responsibility, customer experience management, designing employee experience, and cultural competence in customer service. As the topic itself is very wide and the social and cultural skills needed depend on the context, there are a variety of courses and training related to these skills at different levels of education.

The main skill set needed by the Finnish tourism industry relates to understanding the changes in target groups and responding to their needs and preferences. Skills are required in inclusive tourism to ensure that travel experiences are equally accessible to all, regardless of age, sexual orientation, religion, culture, and special needs. It is necessary to understand travel experience and service processes from all target groups' perspectives and how to take this into account in business operations. This involves understanding the specific characteristics of people with physical and sensory limitations, the needs of different generations, as well as LGBT people as customers. Accessible tourism requires equal hospitality to all and skills in producing equally accessible services, products, and environments to ensure that everyone can feel involved and participate equally. In addition, their needs should be integrated into communication activities to promote their products and services. As said,

customer orientation is not enough without skills to properly serve various target groups and identify their specific needs.

Indeed, skills in serving customers and meeting their needs in various service situations and understanding and managing the customer experience and journey are deemed of utmost importance. This includes understanding, how customer experience is built, how it is produced, as well as managed operationally and strategically. Customers from different cultures and their expectations in service situations are also considered important. The needed skills refer to identifying the effects of cultural diversity on international customer service and understanding the customer´s value creation process based on cultural knowledge. It is also important to be able to design and develop services increasing international customer satisfaction and implementing high-level service by taking into consideration the customers' cultural origin.

In addition, skills in protecting and respecting the local culture and authenticity, as well as interacting with locals, are highlighted as the demand for authentic local experiences (the live like a local trend) has been growing for a long time. For example, participatory planning in producing high-quality tourism services requires integrating the local community, information sharing, and shared stewardship. It is also essential to support the local community by employing local people, using local ingredients and food, increasing the visibility of local culture, and doing volunteer work. In Finland, it is important to ensure that especially the Sámi people themselves are actively involved in the tourism sector.

As tourism is an ecosystem of various actors, cooperation skills are essential in tourism. These skills include understanding the strategies, advantages, and objectives of cooperation, applying different cooperation models including coopetition, and identifying the actors and stakeholders involved. Establishing, managing, and evaluating cooperation and networks e.g., thematic, resource-based, product- and market-related networks is strongly emphasised in skills development.

Furthermore, the significance of skills in corporate social responsibility are growing. Understanding managerial work as part of social responsibility and managing employee experiences by increasing their well-being and personal safety at work is of utmost importance. Therefore, designing and developing employee experience systematically to meet the evolving organisational needs

and needs of the employees has become of utmost importance. Knowing how to act responsibly and ethically and promote equality and equality in workplaces is needed.

In addition, acting in a goal-oriented and responsible way in diverse teams and developing and managing teamwork is essential. This also includes good communication and negotiation skills and emotional intelligence for better collaboration and performance. Workplaces are also cross-cultural, which means that skills in communicating, negotiating, and leading in a cross-cultural workplace are also needed.

Social and cultural skills include various skill sets and training depending on the context, where the skills are needed. From customers' perspective, tourism companies should be able to produce good quality, inclusive, and accessible tourism products and services. It is also essential to develop and manage customer experience and their journey. About this, the cross-cultural aspects are also considered. From locals' perspective, it is important to consider the local culture, cultural heritage and engage locals in tourism development. From a tourism company's perspective, it is important to increase collaboration with other stakeholders in the value chain, ensure employees' well-being at work and establish an organisational culture with functional teamwork.

The key implications for social and cultural skills development are the following: Currently, inclusive and accessible tourism are the main emerging topics in social and cultural skills development.

- As tourism is about serving customers, customer service skills and designing customer experiences are other key skills. This also involves acting in a multicultural context and understanding cultural diversity.
- Skills in protecting and respecting the local culture and authenticity, as well as interacting with locals, should be highlighted to ensure sustainable tourism development.
- Corporate social responsibility and managing employee experience are other emerging skill sets, which relate to sustainable development goals. To increase the attractiveness of the tourism sector in the eyes of potential employees, these should be paid attention to.
- As tourism is an ecosystem of various actors, cooperation skills are essential in tourism. These should be emphasised much more than the current training offering does.

3. SURVEY RESULTS

In this section, an analysis is provided of the online survey results within Finland, held among tourism professionals, HR managers and decision makers. This survey aimed to investigate the gap between current levels of (green, social, digital) skills in the tourism industry and the future skills needed in 2030 – resulting in quantitative data about the skills gaps and future needs. In summary: Key trends are extracted from the survey results of Finland to establish how the sector is responding to the skill sets, highs, lows, current and future level of proficiency in Green, Digital and socio-cultural skills sets.

- An explanation and discussion of the results is provided.
- Gaps are indicated in the current and future level of proficiency in Green, Digital and Socio-cultural levels of proficiency. Comments are made on specific shortages or excellent/good proficiency in different skills and the areas of significant weakness.

Total number of responses in Finland	51 (including category 'Other' = 7)
Number of responses per tourism sub sector:	
Destination management organisations:	10
Accommodation providers:	6
Food & Beverage:	4
Visitor attractions:	16
Travel agents and tour operators:	8

3.1 DIGITAL SKILLS

Digital Skills	
Current existing level of proficiency	**Highest:** 1. 3.98 Use of office applications 2. 3.71 Use of digital marketing systems and communication platforms 3. 3.69 Digital privacy and ethics 4. 3.57 Secure information processing 5. 2.84 Digital business analysis, business intelligence, data-driven decision making **Lowest:** 1. 1.43 Use of robots 2. 1.47 Use of generative AI applications 3. 1.57 Use of digital technologies to create guest experiences 4. 2.06 Web & app development & programming)
Future necessary level of proficiency in 2030	**Most necessary:** 1. 4.49 Secure information processing 2. 4.35 Use of office applications 3. 4.33 Digital privacy and ethics 4. 4.31 Use of digital marketing systems and communication platforms 5. 4.02 Digital business analysis, business intelligence, data-driven decision making **Least necessary:** 1. 2.41 Use of robots 2. 2.96 Use of generative AI applications 3. 2.96 Use of digital technologies to create guest experiences 4. 3.10 Web & app development & programming
Skills gaps between existing and future level of skills sets	**Largest gaps:** 1. 1.49 Use of generative AI applications 2. 1.39 Use of digital technologies to create guest experiences 3. 1.39 Web & app development & programming 4. 1.18 Digital business analysis, business intelligence, data-driven decision making

5. 0.98 Use of robots

Smallest gaps:
1. 0.37 Use of office applications
2. 0.60 Use of digital marketing systems and communication platforms
3. 0.64 Digital privacy and ethics
4. 0.92 Secure information processing

The largest skills gaps concerning all skills categories (digital, green, social and cultural) are found in digital skills in Finland. In general, it could be stated that the level of proficiency in the basic digital skills is advanced. In practice, skills in the use of office applications (0.37) and digital marketing systems and communication platforms (0.60) as well as digital privacy and ethics (0.64) have the smallest skill gaps according to the Finnish tourism industry. Although the level of these basic skills is adequate, it is essential to guarantee that this will continue to be the case in future as the skills needed in secure information processing (4.49), the use of office applications (4.35) and marketing systems and communication platforms (4.31) are ranked high.

According to the results, the level of proficiency is the lowest in new technologies: the use of AI applications (1.47) and digital technologies to create guest experiences (1.57) as well as the use of robots (1.43). The use of AI applications (1.49) and digital technologies to create guest experiences (1.39) are also the largest skills gaps in digital skills. In addition, digital business analysis, business intelligence, data-driven decision making was deemed as a very significant skillset which needs improvement. However, it is interesting to note that these skills were not ranked among the most necessary skills in the future. In particular, the need to increase skills in digital business analysis, business intelligence, data-driven decision making are very much highlighted by tourism strategies, Visit Finland and regional tourism development projects, but the industry does not seem to understand its significance.

3.2. GREEN/ENVIRONMENTAL SKILL SETS

Green Skills	
Current existing level of proficiency	**Highest:** 1. 3.67 Measurement and management of waste 2. 3.59 Understanding of environmental laws and regulations 3. 3.45 Efficient use of resources (e.g., energy, water, materials) 4. 3.27 Promotion and encouragement of sustainable practices among guests 5. 3.08 Green marketing and product development **Lowest:** 1. 1.90 Measurement and management of CO_2 emissions 2. 2.86 Communication about the organisation's efforts towards a green economy 3. 2.88 Use of technology to speed up the green transition 4. 2.96 Green procurement 5 3.02 Adoption of environmental certifications and management systems
Future necessary level of proficiency in 2030	**Most necessary:** 1. 4.27 Efficient use of resources (e.g., energy, water, materials) 2. 4.27 Promotion and encouragement of sustainable practices among guests 3. 4.22 Communication about the organisation's efforts towards a green economy 4. 4.16 Measurement and management of waste 5. 4.10 Understanding of environmental laws and regulations **Least necessary:** 1. 3.20 Measurement and management of CO_2 emissions 2. 3.78 Use of technology to speed up the green transition 3. 3.92 Green procurement and greening the supply chain 4. 3.98 Adoption of environmental certifications and management systems 5. 4.08 Green marketing and product development

Skills gaps between existing and future level of skills sets	**Largest gaps:** 1. 1.36 Communication about the organisation's efforts towards a green economy 2. 1.30 Measurement and management of CO2 emissions 3. 1.00 Promotion and encouragement of sustainable practices among guests 4. 1.00 Green marketing and product development 5. 0.96 Green procurement and greening the supply chain **Smallest gaps:** 1. 0.49 Measurement and management of waste 2. 0.51 Understanding of environmental laws and regulations 3. 0.82 Efficient use of resources (e.g., energy, water, materials) 4. 0.90 Use of technology to speed up the green transition 5. 0.96 Adoption of environmental certifications and management systems

The results show that the current level of skills in resource-efficiency (3.67) and waste management (3.45) is quite advanced and these are the smallest skills gaps. This is also supported by the interview results, where the informants commented that these skills are integrated efficiently in daily practices by employees. The environmental laws and regulations are also considered and understood when developing a green business. Currently, the lowest existing level of proficiency in the Finnish tourism industry is related to measurement and management of CO_2 emissions (1.90) as well as communication about the organisation's efforts towards a green economy (2.86). These two skills also have the largest skills gaps between existing and future level of skills. In Finland, the Visit Finland and the ongoing tourism development projects strongly highlight these two skills and the need for their development, which could be the reason why these are also emphasised in the survey results.

3.3 SOCIAL AND CULTURAL SKILL SETS

Social-cultural skills	
Current existing level of proficiency	**Highest:** 1. 4.35 Provide excellent customer service 2. 4.14 Understand the cultural setting of the own destination and share this information with guests 3. 4.04 Adaptability to change and handle unexpected situations 4. 4.00 Communicate effectively with guests and colleagues 5. 3.96 Support diversity, equality and inclusivity **Lowest:** 1. 3.18 Communicate effectively with guests in their native language 2. 3.80 Communicate and interact with people from different cultural and social backgrounds 3. 3.84 Resolve conflicts 4. 3.92 Work effectively in a team
Future necessary level of proficiency in 2030	**Most necessary:** 1. 4.76 Provide excellent customer service 2. 4.59 Communicate effectively with guests and colleagues 3. 4.57 Work effectively in a team 4. 4.53 Ability to change and handle unexpected situations 5. 4.47 Resolve conflicts **Least necessary:** 1. 3.76 Communicate effectively with guests in their native language 2. 4.43 Support diversity, equality and inclusivity 3. 4.45 Communicate and interact with people from different cultural and social backgrounds 4. 4.45 Understand the cultural setting of the own destination and share this information with guests
Skills gaps between existing and future level of skills sets	**Largest gaps:** 1. 0.65 Communicate and interact with people from different cultural and social backgrounds 2. 0.65 Work effectively in a team 3. 0.63 Resolve conflicts 4. 0.59 Communicate effectively with guests and colleagues

5. 0.58 Communicate effectively with guests in their native language

Smallest gaps:
1. 0.31 Understand the cultural setting of the own destination and share this information with guests
2. 0.41 Provide excellent customer service
3. 0.47 Support diversity, equality and inclusivity
4. 0.49 Adaptability to change and handle unexpected situations

In social and cultural skills, the skills gaps are very small in Finland and much smaller than in digital and green skills. Even the largest skill gaps between the existing and future level of skills sets are small. Overall, in the scale from 1 to 5, the current proficiency level of social and cultural skills is ranked as 3.91. Simultaneously, all social and cultural skills are ranked highly necessary in the future and due to the very small gaps in the future necessary level of proficiency between different skill sets it is difficult to make valid comparisons.

When comparing the social and cultural skills, providing excellent customer service (4.76) is the most necessary skill in the future and its existing level of proficiency is also the highest. This is supported by the interview results, which highlight the fact that tourism as an industry is about interacting with people. However, the results show that communicating with international guests in their native language (3.18) should be improved but simultaneously this was shown as the least necessary skill in the future.

In the future, more skills are needed to communicate effectively, not only with guests, but also with colleagues and work effectively in a team. In addition, understanding different cultural and social backgrounds are the skills that need more attention in the future.

4. EXPERT INTERVIEW RESULTS

In this section, the results are presented of the semi-structured interviews that have been held with experts in tourism in Finland. With these interviews, we are seeking more detailed knowledge and fresh insights regarding trends in tourism, in tourism employment and in the development of Digital, Green, Social and Cultural skills in tourism. Semi-structured interviews are an appropriate tool for this purpose, since they allow for new understandings and thoughts to surface during such interviews, which further facilitate participants' responses and elaborations.

In total, 10 interviews have been held, equally divided over the five tourism sub sectors (travel agents/tour operators, destination management organisations, visitor attractions, accommodation providers and food & beverage providers. Interviewees were senior managers; human resource managers; company owners; entrepreneurs; heads of department.

4.1 THE FUTURE OF TOURISM AND TOURISM EMPLOYMENT

4.1.1 INTRODUCTION

Several societal megatrends - already visible today but with their full impact still unknown - are heavily influencing the future of tourism. Demographic developments - the continued growth of the global middle class, increasingly elderly tourists, digital natives coming of age and entering the travel market, more Asian tourists - will result in additional and diverse tourist preferences and choices. Technological innovations (AI, robotization, virtual and augmented reality, etc.) will continue to impact tourism and transform business models, jobs in tourism and tourist experiences. Social developments (Covid and health issues, migration, economic uncertainty, uproar and wars) will also have their impact on tourism. The inclusion of more sustainable practices is also a widely debated topic in the consumption, production, and development of tourism.

Looking at developments in employment, the tourism and hospitality sector has special characteristics: e.g., working on weekends and holidays, multiple shifts, seasonal work, etc. These atypical forms of employment include a variety of work contracts (e.g., temporary work, part-time work, temporary agency work and other multi-party employment arrangements).

In order to keep pace with all these developments, the tourism sector needs to be prepared for these changes: to transform the tasks expected by employers into new jobs, thereby making the jobs attractive to future employees and offer them career perspectives.

In this section, we aim to get an overall understanding of the interview participants' ideas of the evolution of the tourism sector, tourism employment and the emergence of new job profiles – in tourism in general and specifically in relation to their own organisation, in about seven years' time.

Questions that have been discussed with participants were the following:
● What will the sector and your organisation and the sector look like around 2030? Which new changes do you perceive could occur in your business?
● What impact do the current megatrends and crises (Covid-19 / health; Ukraine War; migration; demographics; environment and climate; energy; cost-of-living) have on employment in your organisation and how does your organisation deal with the consequences of these crises?
● What kind of people will be working in your organisation around 2030? Will there be a significant increase/decrease in the number of employees? And if so, how are these employees different from your current workers?
● How is your organisation changing the tasks that will be required into new job profiles?
● The above-mentioned developments have also transformed the way people work. New concepts such as working from home (WFH); digital nomads; hybrid working; workations; remote working; etc. have emerged or intensified. Which work forms are you now experiencing in your organisation and what effect does this have on recruiting new personnel?
● How does your organisation deal with societal developments such as diversity, inclusion, and flexibility within the recruitment process?
● Which new job profiles do you see emerging in your organisation in the next seven years (2030) and why? Which new job positions will emerge and/or will be 'copied' from other sectors?

4.1.2 RESULTS FROM THE INTERVIEWS

Turbulent but growing sector

The interviewees emphasised that the tourism sector is experiencing very turbulent times, which makes it very difficult to predict the future. The business environment is not stable, and global economic development causes many threats to the sector. However, many interviewees highlighted that people are always curious and interested in new experiences, and they have the need to travel.

For this reason, their attitude towards the future development of the sector is positive. On many occasions, the interviewees stated that the number of visitors at the destination and their company is expected to grow in the near future: how much and how, this cannot still be answered. They strongly believed that although there are challenges in the sector, the sector is still expected to grow as explained by a restauranteur:

> *"Well, the future of tourism and the tourism industry... Tourism is a growing industry. And yes, I see that it will grow in the future. So I see the industry in a very positive light in that sense."*

This also relates to the fact that tourism hit records in Finland during the COVID-19 pandemic when tourists found the local and regional 'hidden gems' and could not travel abroad to the popular holiday destinations. Tourism stakeholders would very much like to see this trend continue. During COVID-19 locals got more interested in their own region and what it has to offer. Therefore, it is hoped that people keep on exploring their own region and the country for the number of domestic tourists not to decrease, and staycations keep growing. A manager of a visitor attraction stated that:

> *"If there was a crystal ball, I would like to see the continuation of local tourism and it becoming more common. People would be more interested in their own home region also in the future."*

This requires innovativeness from the Finnish tourism companies: innovative product development and ambition to develop their business. It was also noted that the municipality has started to invest more in the destination and its infrastructure development, which will be beneficial for the tourism companies

and their future plans. In addition, the COVID-19 strengthened networking and cooperation in the destinations, and it was seen that the networks of tourism companies are growth-oriented, and the companies support each other in future developments.

More specialised expertise needed

The interviewees agreed that the tourism sector is currently changing very fast, which means that the need for specialised skills is growing at the same pace. For example, one interviewee stated that, nowadays, there is a need for such specialised skills that e.g., when an employee leaves her/his duties, another worker cannot be found, and it is difficult to get help from the other employees when challenges arise. As the sector is changing very quickly, the employees feel inadequate in their job due to the new skill requirements. Extensive responsibility in tasks requiring specialised skills burdens the employee. This causes them stress and has negative effects on their well-being at work. Employees must also have an extensive desire and ability to learn to cope in their daily work. The interviewee concluded that specialising and developing employee's skills is a long journey, which is why the company should ensure the commitment of these specialists by enhancing their positive experience as an employee. An expert working in a hotel chain explained about specialised skills that:

> *"This role is so independent that I cannot ask anyone for help. When I get, say, a technical challenge, I have to ask our chief analyst for help with those problems, IT support does not help me. And when I have the summer holidays… There is no one to replace me. After the holiday, there are many issues waiting for my return."*

In particular, the bigger companies need employees with very specialised skills. They state that they could either hire more expertise and offer vacancies or purchase the expertise outside the company from freelancers. However, in smaller companies, employees need multiple skills as they must multitask e.g., work in the reception, in the restaurant and in housekeeping. They do not have money to hire new employees or purchase the needed expertise, which poses challenges for business development and requires a very innovative mindset from the entrepreneur. A tour operator described that:

> *"If there was an opportunity to grow, I would immediately hire five people and I would know exactly what they should do."*

Characteristics of tourism employment

Many interviewees raised concerns about tourism as the sector is no longer something glamorous and trendy. For tourism companies, it is hard to get skillful employees as the salary and the working hours are quite unattractive. Shift work means that the work is too heavy for an employee with small children. Therefore, the tourism sector should be rebranded, which could also increase its attractiveness to job seekers.

There are some specific features in tourism employment in the future. Freelance work is increasing. A person can work simultaneously for many companies: she/he is not anymore employed by one single company, but companies share employees jointly. This means that employment in the tourism sector in 10 years will be more about networking as special expertise is needed: there will be a pool of different experts who will be subcontracted by different tourism companies. With their expertise, they work as independent experts and are subcontracted when needed because of their expertise. This means that tourism companies can, thus, subcontract marketing and communication services, project management and law-related services and no longer hire a separate person who works only in/for one single company. In sum, this responds to the fact that the needed skills and expertise are very specific in the future. A tour operator clarified that:

> *"In my opinion, the tourism industry is about networking. There are many entrepreneurs and then the employees just change working clothes to represent them, according to whose assignment they are at. The employees establish their own companies and or just bill through an invoicing service."*

A restauranteur continued that:

> *"In the future, we will have joint employees with other enterprises. They work for several different enterprises, they are no longer employed by one employer."*

One of the key issues in tourism employment will be the increasing number of immigrants working in the tourism sector. Indeed, as we have a lack of employees in Finland, we should be able to employ more immigrants and they could be a very interesting asset for the tourism sector. Now, they are, for example, working in housekeeping and kitchen. However, English is starting to become more common as a customer service language, so the number of immigrant employees

is increasing in different positions. This means that personnel will be more multicultural and it requires many changes also in the operations of the companies starting from the language used in IT systems and internally in the company. These issues were commented by a representative of a destination management organisation as follows:

> *"I want to believe that immigrants can really be an interesting resource in the tourism sector. When we are talking about the international tourism industry, they can have surprising positive resources to develop our industry."*

It was also noted that the age difference between staff is growing, but in many cases, tourism companies offer the first job ever to young people. Therefore, tourism companies have started to emphasise their social responsibility as a very important part of their actions.

In addition, the interviewees agreed that seasonality makes tourism employment very challenging. Seasonality is a significant problem, and business operations must be developed year-round to increase tourism employment. As a major proportion of the employees are seasonal, companies try to recruit the same employees that worked also during the past season, which makes the introduction slightly easier. To find the employees, tourism companies use various innovative means to market their vacancies e.g., social media channels and the live broadcasts organised by the national employment office.

Distance work is possible in the tourism sector in all back-office operations e.g., sales, marketing, and administrative tasks. Remote work will certainly continue to increase. This will also have a negative impact on the restaurant sector as people go out to lunch less often during the working day.

Digitalisation and tourism employment
The interviewees agreed that digital skills are becoming more essential as the importance of digitalisation is growing from multiple perspectives. Tourism companies will start to use more sophisticated technologies to provide customers with memorable and holistic experiences and the use of VR and AR will grow. The use of artificial intelligence will explode in digital marketing and marketing communications. Digital business analysis and business intelligence as well as data-driven decision making in tourism will prevail soon.

Self-service technologies are rapidly growing, and process automation supported by robotics in tourism companies will bring many benefits. In addition, the growth of the sharing economy results in an increased need for digital skills.

The interviewees stated that some tasks are already replaced by digitalisation and digitalisation advanced during the COVID-19 in tourism companies. However, they also highlighted that face-to-face service cannot ever be totally replaced. In the future, the company's number of personnel will not necessarily change, even though the customer can handle many things her-/himself through the self-service machine. Hotels' digital services are certainly developing, but they don't necessarily replace people because customer service staff is needed.

Regarding new professions in the tourism sector, the interviewees agreed that new occupations will emerge related to digitalisation. For example, a data scientist is needed in the future. This means that jobs in data analytics as well as business intelligence are a necessity in near future to support marketing and sales. A manager working in a visitor attraction saw that:

> *"We will have, for example, very specialised tasks in data management, management with knowledge. Yes, it's probably....data and somehow managing it, understanding it. It's such a big area, clearly, for sure, that everyone will have it."*

At the moment, the challenge is that tourism companies do not have enough digital expertise. Specialists concentrating on smart solutions, tools, and platforms are required desperately. Graphic designers and video producers are needed to produce content. Technical challenges have also increased so much with digitalisation. This means that companies need a person specialised for solving these challenges. In addition, basic tasks in the sector, such as working as a receptionist, require much more advanced digital skills than before. The need for digital expertise was explained by a manager working in a visitor attraction as follows:

> *" At the moment, if I had money, I would hire a photographer/media expert who could do video production and this kind of graphic design and take photos, videos."*

Another person continued that:

> *"If I had money, I would have a separate digital expert, whose task would be to do nothing else than follow algorithms and do social media marketing. "*

Green transition and tourism employment

The interviewees also agreed that the sector will move to a greener direction where sustainable and responsible business is a must. Based on the interviews, sustainability and responsibility are the key issues of a successful tourism company and a prerequisite for its survival. In the last few years, tourism companies have started to understand that sustainability is much more than just recycling and waste management. The importance of environmental issues has rapidly increased as customers demand sustainable operations. It was expressed that environmental sustainability is one of the main requirements of the tourists and tourism companies cannot escape this. A destination manager explained that:

> *"Skills in saving energy, green energy and avoiding and sorting waste are the basic green skills. At the micro-enterprise level, the basic understanding of why these are important and what are the essential things are at a pretty good level."*

The interviewees highlighted that environmental sustainability is most of all a mindset: how to operate in daily life and why to operate in an environmentally friendly manner. Many interviewees emphasised that sustainability and sustainable values must be integrated throughout the organisational strategies and daily operations of all the employees. It requires rethinking all small details that can have a big impact on sustainability. As environmental sustainability is a mindset, it is not enough just to have an ecolabel or -certification as a manager working in an accommodation business clarified:

> *"Our sustainable actions are not just fancy phrases. We want that they are not a separate part of our activities, but that they are all incorporated into our business."*

New occupations are emerging related to sustainability and responsibility. Environmental management is the key issue in these occupations:

to set their environmental objectives, plan, act, and monitor their environmental performance. Many companies already have a Sustainability Manager responsible for environmental management but companies will increasingly hire Circular Economy Managers focusing on resource-efficiency of the company. Many other business operations e.g., green procurement, carbon management and sustainability communication need specialised expertise. Related to social sustainability, it was proposed that companies will also need an expert in inclusive travel, Inclusive Travel Specialist, to integrate inclusiveness and accessibility in product and service development and customer service in tourism destinations and companies. A Community Manager was also mentioned as a job profile to enhance collaboration with different groups of stakeholders affected by tourism.

4.2 DIGITAL SKILLS

4.2.1 INTRODUCTION

Technological innovations will continue to impact tourism and change business models, jobs in tourism and tourist experiences. This section focuses on digital skills for the future. These are defined as skills related to working with computers, software, digital equipment, internet, online safety. This comprises not only Microsoft Office skills, skills for implementing online safety procedures or skills to adjust digital equipment such as Wi-Fi connectivity, sound systems and video equipment but also desktop publishing skills, computer programming skills, website development skills, social media skills, skills to monitor online reviews, data analytics, business intelligence, big data skills, AI and robotic skills (ChatGPT, Dall-E) and skills related to applying digital hardware technologies such as AR and VR.

This section provides an overview of digital skills that the interview participants rate as the most important in about seven years' time. Questions that have been discussed with participants were the following:
● Which digital skills are important in your company today?
● Which digital skills are currently lacking in your company?
● How important will these skills be around 2030? Which ones will be most important?
● Which other digital skills can you think of that will be vital for the future?
● Which changes do you anticipate will be necessary within your organisation regarding digital skills (2030)?

● Does your company provide training or education for these skills? If so: what kind of training; if not: why not?

● Do you use an external organisation to help train your staff in digital skills? If so: which ones and what kind of training do they provide?

● What would be the most effective training method in digital skill development for your employees?

4.2.2 RESULTS FROM THE INTERVIEWS

Virtual and augmented reality
The interviewees highlighted that producing digital content supported by virtual and augmented reality is an essential skill in tourism companies. The data and materials should be digitised and visualised to create experiences in which a tourist can immerse her-/himself. In addition, customers want to have tailored online experiences, which means that digital tourism products are being increasingly developed.

Artificial intelligence
The interviewees stated that the use of artificial intelligence is exploding in the tourism sector. The use of AI and ChatGPT will grow. AI can perform sales and marketing tasks, bookings. As a result, skills to learn about new AI tools are very much required. A restauranteur described AI and tourism as follows:

> *"The use of artificial intelligence will definitely increase, and it's pointless to fight against it. Rather it should be taken as an opportunity and how could it be used to advantage."*

The interviewees also proposed that process automation will bring benefits for the tourism companies. Many interviewees highlighted that especially the use of online customer self-service tools is increasing. Self-service check-in tools were frequently mentioned and these were seen to change the work of receptionists. In addition, AI and robotics will be used increasingly in the kitchen, which makes the work for chefs much easier.

Online marketing, sales and communication
It was deemed essential to develop skills in online marketing and sales as well as marketing communication. It should be noted that digitalisation is a tool to increase customer satisfaction and it can be applied before, during and after customer encounters. Products and services must be easy to pay and purchase online. This means that tailored packages including various travel services should be offered online to purchase 'with just one click'. The employees need skills in social media marketing, content development and channel management: TikTok, Facebook, Instagram are useful platforms for these services.

Production of content to websites and developing apps for visitors were also seen as very relevant skills. Understanding GIS systems and being able to produce maps are equally important. A manager working in a visitor attraction described the theme as follows:

> *"People want more and more the ease of buying everything in an online store and everything should be tailored. People want individuality and customisation of services, to make it easy."*

Data analytics

The interviewees proposed that data management and business intelligence to support customer management and forecast the demand are the main skills. The key skill is to understand digital business analysis and business intelligence, which data sources can be used and how decisions are made with the help of data. The interviewees also emphasised that data can be utilised in multiple ways. For example, creating different scenarios with data to be able to manage destinations and visitor flows and in revenue management. This also includes pricing skills, which are based on data processing. A manager from a visitor attraction stated that:

> *"Data as it is related to the sales, to the predictability and making scenarios and controlling the demand… the analysis of the data. Yes, we clearly have a need for these."*

Digital skills supporting sustainable development

In addition, sustainable development requires digital skills. For example, companies should be able to use digital tools e.g., carbon footprint calculators. Processes related to resource-efficiency could also be improved with the support of digitalisation in tourism companies. Reporting environmental performance should also be digitalised. This so-called sustainable digitalisation i.e., the process of digitising the tourism sector in a green way, emerged as an increasing skill set in the results.

Digital and data security

The interviewees also noted that data security and payment card security is a growing area of expertise that requires more precision in tourism companies.

4.3 ENVIRONMENTAL/GREEN SKILLS

4.3.1 INTRODUCTION

 In the secondary data section of this report, it was demonstrated that green skills comprise more than skills for reducing the impact of tourism on the environment (minimise the use and maximise the efficiency of energy and water consumption; manage waste, sewage, recycling, and composting; conservation of biodiversity; knowledge of climate change). They also involve developing and promoting sustainable forms of transport and tourism in (rural) areas as an option to diversify local economies, create economic growth and decent jobs for local people (including women and youth) as well as conserve local natural and cultural heritage. On the other hand, managing and reducing the impact of overtourism is also a part of sustainable tourism.

The results of this section provide an overview of environmental management skills that the interview participants rate as the most important in seven years' time.Questions that have been discussed with participants were the following:
●What would you consider green / environmental management skills?
●How important will these skills be around 2030? Which ones will be most important?
●Which green/environmental management skills are important in your organisation today?
●Do you expect any changes regarding the necessity of staff with green skills in your organisation between today and 2030? If so, which changes? If not, why not?
●Does your company provide training or education for these skills? If so: what kind of training; if not: why not?
●Do you use an external organisation to help train your staff in green/environmental management skills? If so: which one and what kind of training does it provide?
●What is your opinion on green certification/awards / eco-labels? Are you a member of one of these? Why? What are the benefits for you? If not, why not?

4.3.2 RESULTS FROM THE INTERVIEWS

Environmental management

The interviewees estimated that all Finnish tourism actors will possess a sustainability certification or ecolabel soon, which requires increasing skills in environmental management. Indeed, interest towards eco-certifications has been rapidly growing due to Visit Finland's actions and accordingly the needed skills in environmental management. Recently, various companies have applied and received an eco-certification and, in many cases, also the Sustainable Travel Finland label: destinations, accommodation businesses, restaurants, visitor attractions. Many interviewees stated that they had already implemented many sustainable actions in the past, but they did not realise that before the certification process.

This means that environmental sustainability and responsibility are integrated in all actions of companies. Companies set their environmental objectives, plan, act, and monitor their environmental performance. The interviewees highlighted that monitoring and measurement of impacts is also an integral part of sustainable tourism development and an important skills-set. A restauranteur saw that:

> *"Certainly, also new occupations are related to environmental management... because after all, we are talking about making environmental management plans and managing entities and monitoring them, so I'm sure there will be job profiles like that in the enterprises."*

The interviewees explained that the eco-certification and the Sustainable Travel Finland (STF) -label cause them cost savings as they have been e.g., able to reduce energy consumption. These also support in promoting and marketing the company. The company has received publicity because of its responsible actions. They also hoped that the eco-certification and the STF-label would make the company an attractive workplace among potential employees.

Resource-efficiency

Many interviewed companies are devoted to acting resource-efficiently. They apply the principles of the circular economy and circular economy manager was also proposed as a job profile needed in the tourism sector in the future. As their environmental objectives, the companies are in many cases concentrating on waste management and reducing energy consumption. No materials are considered as waste and various measures are taken to save energy. Therefore, skills in saving energy and avoiding waste are the basic green skills. The interviewees also highlighted that new sustainable business and service models are also emerging, which require new skills. Therefore, it can be argued that both environmental and economic aims of the circular economy are both equally important for tourism companies.

The interviewees also explained that in case a company has extra resources, they are shared in their local network. Finding synergies and sharing resources is coordinated with the other companies in the destination. For example, the goal of this coordination can be that each company rents different equipment to customers. This way, they can jointly serve a variety of customers' needs and they do not purchase any equipment that will remain unused. A manager in an accommodation business described that:

> *"We have our own equipment rental point, we rent different types of equipment like normal bikes and scooters...but then again, we don't rent fat bikes, because there is another enterprise, which rents them. Doing cooperation with the other enterprises we share resources in the destination."*

It was also deemed important to apply the principles of green procurement. Reusing existing materials should be considered, not purchasing new ones. Textiles and bed linen are rented. Local food is used in restaurants.

Carbon management

In the interviews, carbon management emerged as an essential green skill: how to measure and manage CO2 emissions. All the choices in a tourism company should be connected to carbon management, to reducing CO2 emissions. In fact, all stakeholders must understand the concept of a carbon footprint, how to calculate it and understand how to reduce it. It is estimated that in seven years,

this will be a daily routine in tourism companies in Finland. A destination manager note that:

> *"I believe that at least a basic understanding of what constitutes a carbon footprint, how to calculate the carbon footprint of one's own enterprise and how to reduce it. These are an essential skill set."*

Sustainability communication

The interviewees emphasised that skills in sustainable communication are vital and should be increased. In fact, as an integral part of the eco-certification, tourism companies have been recently concentrating on increasing their skills in sustainability communication. The interviewees noted that sustainability communication is a must towards customers: to communicate about the company's efforts towards sustainability. This also involves increasing customers' awareness of environmental issues and acting responsibly. For this reason, companies are producing information materials for the customers. In addition, the employees are receiving training about the companies' environmental sustainability and how they should act responsibly in their everyday job. A manager from the accommodation business stated that:

> *"In fact, we already ask about sustainability in our job interviews. There we include a question like, how do you see that you are able to act responsibly during your working day?"*

Many interviewees strongly emphasised that it is essential to understand the concept of green washing and absolutely avoid it. Therefore, sustainability must be reported and communicated transparently to give no false expectations to the customers. Sustainability of operations must be communicated carefully also to all subcontractors working in the company's value chain.

Final remark

However, the interviewees highlighted that all sustainability dimensions are equally important and should be integrated into a company's operations. As the volume of tourism is small, economic sustainability is equally important to environmental sustainability. It is essential to ensure profitability as without profit a business cannot exist.

4.4 SOCIAL-CULTURAL SKILLS

4.4.1 INTRODUCTION

Social/cultural skills can be divided into personal skills, communication/cultural skills, and diversity skills. These skills are related to behavioural and practical attitudinal competencies in teamwork, interpersonal communication, cross-cultural understanding, and customer service orientation. Particularly related to working in the tourism sector are competences towards managing personal relationships, understanding the needs and feelings of others, cooperating with others, showing a positive attitude, showing respect, making appropriate contact and active listening. Furthermore, social/cultural skills deal with competencies that promote social progress which recognizes the needs of everyone; accessible tourism provision for those with disabilities; gender equality. These skills are expected to be of major importance for the tourism sector, to match the needs of a "high tech" society with "the human touch" needed in personal and human interactions in the tourism sector.

This section provides an overview of the social/cultural skills (i.e., personal-, communication/cultural-, and diversity skills) that the interview participants rate as the most important in seven years' time. Questions that have been discussed with participants were the following:
● What do you consider the most relevant and important social and cultural skills for people working in the tourism sector?
● How important will these skills be around 2030? Which ones will be most important?
● Can you think of more or other social/cultural skills that might be important around 2030?
● What changes do you expect for your organisation with regard to necessary socialcultural skills in the future (2030) compared to today?
● Does your company provide training or education for these social/cultural skills? If so: which ones; if not: why not?
● Do you use an external organisation to help train your staff in social/cultural skills? If so, which ones and what kind of training do they provide?
● What would be the most effective training method in social/cultural skill development for employees?

4.4.2 RESULTS FROM THE INTERVIEWS

Interpersonal skills

Good quality customer service has been, is and will always be essential in the tourism sector. This means that providing good service quality and memorable customer experiences requires excellent customer service skills. "Tourism is a show business and about entertaining the customers" said one of the interviewees. For this reason, the interviewees proposed customer service skills as the key sociocultural skill in tourism. They also argued that even if the use of technological tools is increasing fast, the need for human interaction is not disappearing.

The interviewees also mentioned other interpersonal skills e.g., teamwork, leadership, adapting to changes, stress management, empathy and listening to customers' needs and interests. As the sector becomes multicultural the amount of the international workforce will increase, skills in intercultural communication are becoming more valued.

Collaboration and networking

One of the most important social and cultural skills is collaboration and networking. In the tourism sector, everything is accomplished together. Collaboration and networking are essential skills for a tourism company to be successful and for the sector to grow. This is the reason why the level of collaboration is constantly increasing with different stakeholders. A manager from a visitor attraction mentioned that:

> *"We have a Community Manager working in our organisation to maintain relationships with different communities who also takes our activities outside our premises in different ways."*

The interviewees argued that tourism companies cooperate with the local authorities and the other companies in the destination. Networking skills are relevant to share information between tourism-related organisations. This also includes interacting and communicating with different stakeholders in the region. It is also important to consider the locals when developing business activities. It is deemed of utmost importance to lobby tourism as a sector to various stakeholders and to establish a favourable operational environment for

the tourism sector as it is not always seen as a viable sector itself. In addition, there is a growing number of associations of volunteers participating in tourism development. Therefore, collaboration is also increasing between NGOs and tourism stakeholders. For example, a programme service provider illustrated that:

> *"Our destination was the first in Finland to receive such an environmental certificate. All of us local entrepreneurs applied for it together and we got it."*

Corporate social responsibility

The interviewees proposed that corporate social responsibility is one of the key social and cultural skills. Taking care of the persons working for the company in the same way as taking care of the customers is the main issue. For example, safety and security of both employees and customers should be equally important in a tourism company. In addition, creating an organisational culture emphasising the well-being of employees is extremely important. Corporate social responsibility also involves responsible recruitment as the job in the tourism sector could be the first job ever for many. This means that tourism companies should pay proper attention to guidance and introduction for new staff members. Hiring immigrants was also highlighted as an aspect of corporate social responsibility. A manager working in a destination management organisation outlined this as follows:

> *"We are a welfare society and this should be seen in the position of employees. Social sustainability should be integrated in the workplace and the level of it should be great."*

Inclusive tourism

Inclusive tourism emerged as an important theme. The main issue is that nature and culture in Finland belong to all. Therefore, inclusiveness and accessibility should be integrated in product and service development in tourism destinations and companies. This requires customer insights, and understanding the needs of various customer groups. It is important to meet and interact with diverse people as customers. An expert from a visitor attractions said that:

> *"Yes, of course, accessibility and inclusiveness are definitely particularly important in our actions. Surely in the future we will develop it further and think about its every aspect, what it could mean."*

Respecting the local culture and authenticity

According to the interviewees, understanding the role of cultural identity and heritage is very important. Understanding indigenous people (e.g., Sami) and their needs in sustainable tourism development, protecting and conserving local cultural heritage and involving locals into tourism development are integral social and cultural skills. This also includes knowledge of the local identity and history, which can be utilised in tourism product development by storytelling. This means that stories are an essential part of experiences and skills are needed to use the stories to bring local identity alive.

4.5 SUMMARY OF THE SKILLS PROFILE

Based on the data analysis, the following skills (table 6) were identified as the key skills in the Finnish tourism sector. Digital skills consist of strategic digital business planning and development, the use of new technology trends, data analytics to make decisions with the help of data, online sales and distribution, online marketing and communication, digital and data security, and sustainable digitalisation to digitalise the tourism sector in a green way. Green skills include environmental management, resource-efficiency and applying the principles of circular economy, carbon management to reduce CO_2 emissions, sustainable product and service design, and sustainability communication. Social and cultural skills are related to inclusivity, diversity and accessibility, providing good quality customer service and unforgettable experiences, corporate social responsibility and managing the employee experience, cooperation and networking with stakeholders as well as respect and protecting local cultural heritage and engaging locals in tourism development.

It can be concluded that the most needed digital skills in the tourism sector in the future are related to digital and data security and online marketing and communication. Instead, the biggest skills gaps in digital skills are in the use of new digital technologies. The most needed green skills in the future are related to resource-efficiency and sustainability communication. The biggest skills gaps are in carbon management as well as in sustainability communication. All social and cultural skills are highly necessary in the future as tourism is "a people's business". Providing excellent customer service is the most necessary skill in the future. More skills are needed to communicate effectively, not only with a diversity of guests, but also within the workplace. Taking care of the persons working for the company in the same way as taking care of the customers is the

key issue. In addition, as tourism is about cooperation with various stakeholders, cooperation and networking skills are deemed essential.

Table 6. Skills profile of the Finnish tourism sector

Digital skills	Green skills	Social and cultural skills
Digital business planning and development	Environmental management	Inclusivity, diversity, accessibility
New technology trends (e.g., AI, VR, AR, robotics, gamification)	Resource-efficiency	Customer service, customer experience design
Data analytics	Carbon management	Corporate social responsibility, employee experience management
Online sales & distribution	Sustainable product and service development	Cooperation and networking
Online marketing & communication	Sustainability communication	Protection of local cultural heritage
Digital and data security		
Sustainable digitalisation		

5. BEST PRACTICES

UPSKILLING AND RESKILLING

In each country that is represented in the Pantour consortium, partners have each selected, analysed and interviewed **5 best practices** in upskilling, reskilling, attracting/retaining staff in the five tourism sub sectors. The goal of the analysis is to have an inventory of innovative initiatives, projects, programs, philosophies, tools, methods, ideas, solutions, and concepts in relation to upskilling, reskilling, attracting, and retaining staff in order to improve the knowledge on digital, social, and green skills development in tourism.

In short, a Best Practice in upskilling, reskilling, attracting staff has all or many of these characteristics:

1 It has a clear goal.

2 It purposely addresses the bridging of existing skills gaps and future skills needs in tourism.

3 The organisation and individual staff members have a set of core values that strengthen their dedication, morale, and resolve a shared sense of purpose for the work.

4 It looks at urgent skills development challenges and human capital in their context – on macro level (sustainable/digital transition in tourism), sector/subsector level or skills level (digital, social, green skills).

5 It targets the underlying causes in addition to the challenge in upskilling and reskilling, attracting/retaining.

In the following sections, a short overview and analysis will be provided of each of the Best Practices investigated in the frame of the PANTOUR project.

5.1 BEST PRACTICE: VISIT FINLAND ACADEMY

The Visit Finland Academy offers training paths consisting of intensive training days as well as separate thematic training for the Finnish tourism companies.

5.1.1 Background information

The Visit Finland Academy is a tailored approach to develop skills of the tourism sector in the Finnish context. The Academy is a link between the development activities made by Visit Finland and the tourism companies. It ensures that tourism development is aligned and coherent in Finland: without the Academy tourism development in the country would be very fragmented. In particular, the Academy serves micro and small size entrepreneurs' interests. This means that training packages and courses are very practical, participative and include a lot of real-life examples..

5.1.2 Analysis and overview

Key principles

The Visit Finland Academy, established in 2016, is a training selection aimed at tourism destinations. The Academy is a tool for internationalisation, product development, sales and marketing to tourism companies that are ready for the international market or are interested in them, divided into three levels; Ready, Steady and Go. The Academy coaches (n=33 in July 2023) are experts from Visit Finland's partner coach network and are also trained by Visit Finland. In addition to the subject area offered by each coach, the training also includes information about Visit Finland's activities.

Examples and case studies

Related to digital skills, the focus is on marketing communication, search engine optimisation, social media marketing, distribution and sales channels. In addition, data management as well as digital customer journey and experience management. The main aim is for the participant to learn to increase the company's digital discoverability and make it easier to purchase its products and services, to choose a suitable booking system, to set up an online store and choose suitable digital distribution channels for their products, to offer digital customer service and to utilise customer recommendations as part of digital discoverability.

For example, the Visit Finland Academy has a training day specially designed to support the Sustainable Travel Finland programme. The Sustainable Travel Finland training is the best possible way to get the sustainable tourism programme started in the destination and the entire business network of the destination involved in sustainable tourism activities. Concrete and practical training provides good basic information and a starting level for the systematic promotion of sustainable tourism at the company level. Although the content in the training concept is always the same, it is tailored to the specific needs of the destination.

Benefits and outcomes

The Academy ensures that the tourism sector in Finland has up-to-date knowledge and skills about the relevant topics to increase Finland's competitiveness as a tourism destination and tourism development is coherent in Finland. As the volume of tourism is moderate and there are a lot of micro and small size tourism companies in Finland, the Academy serves their interests. It also responds to the needs of the micro- and small tourism companies who want to develop their business.

Responsibility and accountability

The training is booked and paid for by Visit Finland's partners, such as regional tourism organisations, regional tourism projects or other regional development agencies who are responsible for tourism development in their region. Therefore, this is a network approach working through the network of different actors responsible for regional tourism development in collaboration with Visit Finland. The Academy, as a network of coaches, makes it easier for the developers to find trainers who upskill tourism companies. Therefore, the Academy is also a tool to make the training to upskill the sector easily accessible.

References and external resources

For more information, visit the website:
https://www.visitfinland.fi/liiketoiminnan-kehittaminen/akatemia

Conclusion

This is a tailored approach for skills development in Finland, which acknowledges its specific context. It is also a network approach to skills development, which ensures that the specialised expertise needed by the tourism companies can be provided with a wide network of coaches. With this example, it is encouraged to identify the specifics of the context and its key stakeholders before planning the most suitable approach for skills development in each destination.

TE-live is a modern job advertisement.

5.2 BEST PRACTICE: TE-LIVE BROADCASTS

TE-live is a TE Office (the Finnish National Employment Agency) service that produces live broadcasts online for recruitment purposes.

5.2.1 Background information
TE-live broadcasts are live encounters and dialogue between employers and jobseekers. TE-live is a service concept that offers employers and job seekers an efficient, interactive, and location-independent way of recruitment.

5.2.2 Analysis and overview
Key principles
"TE-live is a modern job advertisement, job advertisements are not printed in newspapers anymore", says the representative of the employment agency. The broadcasts are very similar to a TV show and their purpose is to provide as versatile and interesting information about jobs as possible. TE-live broadcasts are organised for free for employers and job seekers.

Examples and case studies

For the broadcasts, the agency collects employers who represent the same sector and have vacancies to offer. The broadcasts can be also organised to single companies who may have many vacancies to offer. In the broadcasts, the companies and their vacancies are introduced to jobseekers. There can be for example five restaurants from the same region looking for cooks and organising together a broadcast for applicants looking for a job. In addition, videos are produced about the company, its premises, and the vacancies for potential job seekers.

The jobseekers can follow live broadcasts live on YouTube, Facebook and at www.te-live.fi and participate in the conversation via chat. During the live broadcasts, the applicant can use the chat feature to ask anonymous questions about jobs and the application process. The applicant can also use the preliminary questions feature to submit questions about the broadcast even if she/he won't be able to watch the broadcast live. The broadcasts are also recorded.

Benefits and outcomes

In the research interviews, many tourism companies mentioned this as a best practice. According to the tourism companies, these broadcasts are a very efficient means to recruit people. They say that the broadcasts give them an opportunity to describe and talk about the vacancies much better to jobseekers. In addition, they stated that these broadcasts are a marketing tool for the company to increase its visibility and attractiveness in the eyes of the job seekers. The companies can also complement these broadcasts by posting the material to their own social media channels.

The benefits for the employers are related to the feature of the live broadcast, where the employer can tell more about what the organisation offers as a job than in the job advertisement. Employers can get to answer the job seekers' questions, so the job seekers better understand what the employer really needs. In addition, the employer will receive better applications from those who are suitable for the position. Furthermore, the job seeker can get a realistic picture of the work community, salary and workplace benefits.

References and external resources

For more information, visit the website:
 https://te-live.fi/en/what-te-live

Conclusion

This best practice is a very relevant example of how public authorities can innovate their operations. This is also a great example of how the attractiveness of the employers can be increased with collaboration between the public authorities and the sector. It can be concluded that by matching the potential applicants and employers via these live broadcasts is a modern way of networking and helps the tourism sector in the shortage of the labour force.

> *VET-qualifications are obtained in the workplace.*

5.3 BEST PRACTICE: JOLLAS INSTITUTE

A vocational institute, which is owned by the S Group operating the largest hotel and restaurant chains in Finland.

5.3.1 Background information

Jollas Institute supports the hotels and restaurants owned by its S Group with changes, the successful implementation of change projects and the implementation of the group's strategy. It is a network of various training professionals specialised in skill development in the relevant topics included in its training offering. Some of the training days and programmes are provided by the institute itself and some by external training providers.

5.3.2 Analysis and overview

Key principles

The institute offers various training days and programmes according to the needs of employees working at different organisational levels and positions e.g., as trainers, receptionists, waiters, and managers. This means that training is tailored to different personnel groups. The training offering includes short training sessions about the current topics and longer training programmes to obtain VET qualifications (see examples and case studies). The training is delivered either online or physically, or they are implemented using a hybrid model including both modes of implementation. Longer training may also entail job rotation in the company.

Examples and case studies

Indeed, Jollas Institute is a vocational education and training (VET) institution offering secondary vocational qualifications: further vocational qualifications and specialist vocational qualifications e.g., further vocational qualification in business, specialist vocational qualification in business, further qualification in first-level management, and Specialist Vocational Qualification in First-Level Management in the Hotel and Catering Sector. Currently, there are longer training programmes for vocational qualifications to hotel and restaurant managers, which provide them support in this challenging operational environment and increase their leadership skills and resilience.

At Jollas Institute, these qualifications are implemented with an apprenticeship contract. It is a working life-oriented and agile way of obtaining a qualification. Studies are personalised, i.e., a personal competence development plan is designed for each student, which considers the student's previous knowledge. Most of the learning takes place at the workplace, and the student is guided by a designated workplace instructor. In addition to workplace-based learning, the qualification includes training organised by the educational institution online or offline. An apprenticeship requires an employment contract and working hours must be at least 25 h/week.

In addition, there are short training days and sessions to update the skills in managing the digital customer experience and improving safety of the hotel and restaurant employees. The selection also includes short training related to GDPR and information security, sales and marketing and product development.

Benefits and outcomes

As the company is large, each job profile and position requires specific skills. Therefore, the institute implements tailored training for persons working in different positions in the company to ensure that they have the necessary skills to implement the group's strategy, provide excellent customer service as well as services to match and exceed customers' needs.

Responsibilities and Accountability

The identification of the training needs and the needed skills is accomplished by the supervisors/managers in hotels and restaurants. In the yearly employee development discussions, the employee's skills needs and aspirations for personal development are mapped and matched with the Institute's training offering.

References and external resources

For more information, visit the website https://jollas.fi/

Conclusion

This best practice is a systematic and efficient way of lifelong learning in the company to ensure a consistent, up-to-date employee skill set. This best practice allows the company to respond very flexibly to emerging skills needs and train the personnel in their workplace. It is of utmost importance that the level of education can be raised while working and staff will be provided, not only short training, but actual vocational qualifications. Thus, this is a great example of lifelong learning that can be promoted at the workplace.

5.4 BEST PRACTICE: SEASON-TO-SEASON SERVICE

The Finnish government's programme of measures to respond to the challenges facing the workforce in the tourism industry, the so-called Matkailudiili. In the programme, market-oriented solutions to the challenges facing the tourism industry are sought as well as new ways to bring together job seekers and vacancies in the tourism industry.

5.4.1 Background information

There is a labor shortage in the tourism industry, which in certain destinations can even be an obstacle to the growth of companies. In particular, seasonality in tourism employment is one of the biggest challenges in these destinations. Therefore, the questions to which a solution was sought in the programme were: How to get the workforce to move better to tourist destinations suffering from a labor shortage and how regional differences in tourist seasons can be taken into account in order to develop year-round tourism.

As a solution, the programme piloted a "Season-to-Season Service" to establish opportunities for the employees to work year-round and for employers to get familiar and reliable employees from frequent employment relationships. The goal of the service is to look for new ways to employ and be employed in the tourism industry from the perspective of seasonality.

5.4.2 Analysis and overview

Key principles

The goal of the service is, for companies and employees participating in the service, to form a pool of employers and employees and agree on employees' transition from one season to another. Employees for suitable seasonal jobs in the tourism industry are searched for and helped in contacting tourism companies. The employee gets opportunities for successive employment relationships, and companies can share seasonal workers.

Examples and case studies

With the pilots, a new model was tested to promote the employment of loggers in the tourism industry, as well as easing the labor shortage in the tourism industry during the busy winter season. The goal was to get as many loggers as possible to find employment through the pilot in the tourism companies in their vicinity during the winter layoff from logging. During the winter season, the loggers provided authentic local knowledge and expertise available to tourism companies e.g., for service and maintenance work, nature guidance and off-road vehicle transport tasks.

Benefits and outcomes

For employers, recurring employment relationships make the operations easier when they don't spend time on recruitment and orientation at the beginning of each season as employees are already familiar with the daily operations and practices of the tourism company. Jobseekers get new employment opportunities all year round and support to find a job.

Responsibilities and Accountability

The Season-to-Season Service is provided by TE services (the National Employment Agency), Matkailudiili programme and a private training company. In the service development, the perspectives of TE services (the National Employment Agency), job seekers and employers in the tourism industry were taken into account.

References and external resources

A promotional video: https://youtu.be/7aU6SwdmiJ0?si=s-e6ZQsvKI3XhEGI

Conclusion

As seasonality is one of the biggest challenges in tourism employment both from the perspective of the employers and employees, this example sheds light on how the seasonality challenges can be overcome.

5.5 BEST PRACTICE: A TRAINING MODEL FOR FOREIGN SEASONAL EMPLOYEES

A new training model is developed in industry collaboration to respond to the labour shortage and ensure the integration of foreign employees in the Lappish tourism and restaurant industry.

5.5.1 Background information

The tourism and restaurant industry in Lapland is experiencing labor shortages. The COVID-19 pandemic has worsened the availability of the labor force and the COVID-19 pandemic further aggravated the situation. Employers have been trying to solve this problem by attracting foreign seasonal employees to work in Lapland. Their training has been solely the responsibility of the employers. This has led to cases where employees have not been treated well, and their salary has not been in line with the collective agreement.

The new training model enables the start of tourism training in English-language at Lapland Education Centre REDU. Together with employers in the region, Lapland Education Centre REDU is designing English-language degrees for Lapland's tourism industry, which will guarantee the skills of employees moving to Lapland. The model fills the employees' skills gaps, such as local knowledge and understanding of Finnish working life.

5.5.2 Analysis and overview

Key principles

Lapland Education Centre REDU is implementing a project for foreign employees to support them in their studies and integrate them into the tourism and restaurant industry and its workplaces in Lapland. The key activity is to develop a new training model in collaboration with the industry that combines vocational degrees/qualifications implemented in English based on the needs of working life in cooperation with employers in the area. In addition to vocational skills, the studies include local knowledge, working life skills, and the teaching of the Finnish language and culture.

Examples and case studies

In the project,

1.   First, the training and skill needs of the foreign employees are mapped. The target group's Finnish language and cultural skill needs are also mapped.
2.   The designed training packages are piloted with the target group and the tourism and restaurant industry.
3.   Student guidance is developed paying attention also to the Finnish language skills and knowledge about the Finnish culture and working life. A model is created, which supports participants to progress in their studies and integration to the working life.

Benefits and outcomes

With the help of training, seasonal employees will know their rights and responsibilities and possibly stay working in tourism in Lapland. This way, employers would not have to hire new staff every year.

Responsibility and accountability

The model is developed by Lapland Education Centre REDU and financed by The Service Centre for Continuous Learning and Employment's (SECLE).

References and external resources

For more information, visit the website https://www.redu.fi/en

Conclusion

The best practice provides an efficient solution for attracting and training foreign employees and ensuring social sustainability in remote areas with a great volume of seasonal tourism.

SKILLS SYNTHETIS

a skilled workforce is essential for the sustainable growth competitiveness of the tourism sector

The findings presented in this report serve as a roadmap for policymakers, educators, and industry stakeholders to collaborate effectively in shaping the future of tourism workforce development.

In essence, the PANTOUR Country Skills Profile Reports serve as a call to action, urging stakeholders to prioritize skill enhancement initiatives and embrace innovative practices to ensure the continued success and resilience of the tourism industry in the years to come.

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PANTOUR
PACT FOR NEXT TOURISM GENERATION SKILLS

https://nexttourismgeneration.eu/pantour/

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APPENDIX 1. Visit Finland's training offering

Responsible tourism	Digitalisation and marketing	Business intelligence
Inclusive tourism	Search engine optimisation	The basics of business intelligence
Sustainable tourism	Marketing communication	Revenue management
Sustainable Travel Finland Programme	Social media	Digital customer experience development
Safety in tourism	Visit Finland DataHub	
	Digital marketing	Business development
Sales and distribution	AI in tourism	Quality management
FAM-trips	Digital distribution	Strategic management
Distribution channels	Digital sales channels	Internationalisation
Sales channels	Digital customer journey	
	Word-of-mouth marketing	Product development and pricing
Customer insight	Google analytics and marketing	Service design
Segmentation and target groups		Storytelling
Customer experience management	Themes	Product development
Market information	Well-being and sauna	Product decriptions
	Culture	Benchmarking
	Nature	
	Luxury	
	Education	
	Food	