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**COUNTRY
SKILLS
PROFILE
REPORT**



PORTUGAL



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EXECUTIVE SUMMARY

The purpose of this Country Skills Profile Report is to provide a comprehensive overview of tourism employment and the current situation regarding the future competences needed by the Portuguese tourism sector in three areas: digital, environmental and social. The report also aims to draw up ideas about the future of tourism, forecast trends and new professional profiles.

Based on primary and secondary research, conclusions are drawn about the tourism sector in Portugal, a very important sector for Portugal's economy, as it represents a significant share of the country's gross domestic product (GDP), employment, exports and investment.



“Leading the tourism of the future” is how Portugal aims to be seen.

In the past years, Portugal has strengthened its position as the world's best destination when it comes to Tourism.

For the 6th time in the last seven years Portugal was considered "Europe's Leading Destination" in the World Travel Awards 2023 (Worldtravelawards, 2023).

The Tourism Strategy 2027 (Turismo de Portugal, 2016) launched by the portuguese government in 2017, aims at positioning Portugal as one of the world's most competitive, safe and sustainable tourism destination, with the motto “Leading the tourism of the future”. This means a cohesive territory, innovative and competitive, that values work and talent.

Portugal wants to be a destination to visit, to invest, to live and to study in, being an inclusive, open, and creative country that positions itself as a specialized hub for travel & tourism (Turismo de Portugal, 2024a):

To reach all the desired goals, tourism in Portugal must invest in:

- The digital transformation of the tourism sector, which requires the development of digital skills and competencies among the tourism workforce, as well as the adoption of new technologies and innovation by tourism businesses. The digitalization of tourism offers opportunities for marketing, product and destination development, as well as for improving the quality and efficiency of tourism services. However, there are still gaps and challenges in terms of digital infrastructure, access, literacy and skills in Portugal.
- The sustainability of the tourism sector, which involves balancing the economic, social and environmental impacts of tourism activities. The tourism sector faces challenges such as managing the carrying capacity of tourist destinations, reducing the seasonality and concentration of tourist flows, diversifying the tourist offer and markets, promoting social responsibility and inclusion, and mitigating the effects of climate change. The tourism sector needs to adopt a strategic vision and a coordinated approach to address these challenges and ensure its long-term competitiveness and resilience.
- The next tourism workforce generation, which need a boost in social-cultural skills training such as empathy, responsibility, critical thinking, and social-cultural background to achieve excellence in customer service.



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 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 PORTUGAL

The primary aim of this chapter of the Country Skills Profile report is to elaborate on general information and give a summary of the tourism situation in Portugal. 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, 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) 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 PORTUGAL

In 2022, travel and tourism contributed 8,7% to GDP, the international tourist receipts reached 21.1 billion, 10.1% more than in 2021. The results achieved in 2022 in this indicator also meant an increase of 15.6% compared to 2019 (pre-pandemic year) and represented the first sign of the sector's recovery. The 20 largest markets together accounted for 91.2 per cent of total revenue in 2022 (Banco de Portugal, 2023; Instituto Nacional de Estatística, 2023).

1.1.2. SIZE AND RELEVANCE OF THE SUBSECTORS

Size and relevance of sub-sectors in 2019	Accommodation	Restaurants	Transportation	Tour operators	Cultural services	Recreation and other entertainment services	Other tourism services	Connected products	Non-specific products
Tourism consumption on the economic territory	8 605 382	8 009 991	5 815 276	832 935	395 978	952 013	786 550	2 053 265	5 454 488
Total tourism consumption on the economic territory	32 905 878	32 905 878	32 905 878	32 905 878	32 905 878	32 905 878	32 905 878	32 905 878	32 905 878
% share	26,2%	24,3%	17,7%	2,5%	1,2%	2,9%	2,4%	6,2%	16,6%

1.1.3. INCOMING AND OUTGOING TOURISTS

In 2022:

- Number of guests in tourist accommodation: 15 322 910
Source: Statistics Portugal - Accommodation Survey

- Number of trips abroad by Portuguese residents: 1 608 547
Source: Statistics Portugal - Travel Survey of Residents

1.1.4. SHARE OF DIFFERENT TRANSPORTATION MODES IN TOURISM

Passengers disembarking at national airports grew by 42% from 8.8 million in 2020 to 12.5 million in 2021 (+ 3.7 million, of which + 1.1 million were domestic flights and + 2.6 million international flights). Air travel remains by far the preferred means of transport to travel to Portugal (Turismo de Portugal, 2021d).

1.1.5. ARRIVALS OF INTERNATIONAL VERSUS NATIONAL TOURISTS

In 2022 there were 15 322 910 international arrivals at hotels and similar establishments.

In 2022 there were 11 196 811 domestic arrivals at hotels and similar establishments (INE, 2022).

TOP5 markets | overnight stays: UK, Germany, USA, Spain and France (Turismo de Portugal, 2022b).

1.1.6. TYPE OF TRAVEL: BUSINESS TRAVEL, CONSUMERS/LEISURE TRAVEL

In September 2022, the European Travel Commission (ETC) released the 13th report of the project Monitoring Sentiment for Domestic and Intra-European Travel (European Travel Commission, 2022), which measures the travel intention in ten high-volume European source markets. This document focuses on domestic and intra-European travel, since September 2020, in the context of the pandemic crisis.

Portugal is in the TOP 10 of European countries preferred by respondents for their next international trip. In the previous wave, Portugal occupied the 7th position, with 4.9% of travel intentions, and in this way, it moved to 8th place, having been overtaken by Austria (Turismo de Portugal, 2022b).

Leisure is by far the main motivation to travel throughout the year, followed by visits to friends and relatives.

Almost 45% of Europeans that were willing to travel to Portugal in the next 6 months will do it for city break (24,8%) and culture and heritage (18,7%) motives.

Despite that, travelling to enjoy the sun and beach or the coast and sea remains strong among Europeans (16% and 11,5% respectively).

The top 3 travelers experiences that Europeans look for when travelling to Portugal are local cuisine, experience the local culture and enjoy nature by seeing scenic landscapes.

1.1.7. COMPANY SIZES

In 2021 there were 85 919 SME´s and 45 large companies operating in tourism sector (accommodation, restaurants and similar) (INE, 2022).

1.1.8. TOURISM IN THE 2020-2021 BIENNIUM

In the biennium 2020-2021, Tourism has experienced a long period of profound crisis, both for economic activities and for public health in the world.

The Portuguese tourism sector began to recover in 2021. Tourist accommodation data in 2021 showed growth, with overnight stays increasing 45% compared to 2020. Especially a strong summer season was recorded, 65% from pre-pandemic levels. In 2021 tourism receipts totaled EUR 9.9 billion, 46% below pre-pandemic levels (Turismo de Portugal, 2021d).

Tourism Receipts	Overnight stays and guests in the accommodation units*	Professionals in the Tourism sector	National Airports	Revenue in accommodation units*
+30% (-45%) 10.1 billion tourism receipts	+45% (-47%) 37.3 million overnight stays +4 p.p. (+11 p.p.) 47.2% seasonality rate +46% (-47%) 1.1/day tourist density	-14% (-24%) 244.4 thousand people at the service	+42% (-57%) 12.5 million passengers landed at airports (78% international and 22% nationals).	+61% (-46%) €2.3 billion of total revenue
+2,2 p.p. (-14,4 p.p.) 36.8% share of the exports of services receipts	+39% (-47%) 14.5 million guests	-0,9 p.p. (-1,6 p.p.) 5.1% of the total economy	+36% (-60%) 9.8 million international passengers landed in airports (78.4% share).	+63% (-46%) €1.8 billion of room revenue
+0,8 p.p. (-8,3 p.p.) 11.2% share of the global export's receipts	+42% (-51%) Algarve, Lisbon and the North are the main national destinations with almost 25 million overnight stays (share of 66% when compared to the total overnights stays in the country)	-4 p.p. (-5 p.p.) 73% of Tourism professionals were self-employed	+36% (-47%) 37.3 million seats in the air capacity	+44% (-34%) 32.64€ of RevPar +14% (-1%) 88.24€ of ADR

*includes hotels, tourism villas and apartments, local accommodation and TER-TH
Note: The % variations shown () refer to 2021 versus 2019, a pre-pandemic year
Source: Turismo de Portugal, Statistics Portugal, BP and ANA (airports)

Sustainability Report | 2021

1.1.9. TOURISM IN 2022 AND AFTER

The tourist accommodation sector registered 2,9 million guests and 7,7 million overnight stays in September 2022, the highest monthly values since records have been registered, corresponding to increases of 41,3% and 37,4%, respectively. Compared to September 2019, there were increases of 0,2% and 0,7%, respectively.

Total revenue increased by 70,3% to 608,2 million euros, and revenue from accommodation reached 469,2 million euros, reflecting a growth of 74,5%. Comparing with September 2019, there were increases of 21,3% and 22,5%, respectively (INE, 2022).

Until September 2022, overnight stays amounted to 54.835,3 thousand and increased by 133,0% (+27,3% in residents and +222,3% in foreigners). Comparing with the same period of 2019, overnight stays decreased by 2,4%, as a result of the decrease in overnight stays from foreigners (-7,0%), given that overnight stays from residents increased by 8.0%.

Total revenue, which amounted to €396.4,4 million, grew by 143,0% and revenue from accommodation, €3.039,2 million, increased by 144,1% (+14,3% and +15,4%, compared to the same period of 2019, respectively).

The tourism receipts registered 2,378.7 million euros in September, an increase of 72,2% compared to the same month of 2021 and 17,4% higher than in September of 2019 (Turismo de Portugal, 2022a).

According to estimates from Turismo de Portugal, based on data from INE and Banco de Portugal, 2023 was a record year for Portugal as a tourist destination: revenues reached more than 25 billion euros (+ 37% compared to 2019), guests exceeded 30 million (+ 10% compared to 2019) and the overnight stays indicator reached 77 million (+ 37% compared to 2019 and + 18.5% compared to 2022) (Turismo de Portugal, 2024b).

1.2. TRAVEL AND TOURISM'S CONTRIBUTION TO EMPLOYMENT

In 2021, activities related to Accommodation, Restaurants and Similar Establishments employed 244.4 thousand individuals, 39.4 thousand less than in 2020 (-13.9%) and 76.3 thousand less than in 2019 (-23.8%).

The population employed in the Accommodation, Restaurants and Similar Establishments sectors represented 5.1% of the total economy in 2021, 6.0% in 2020 and 6.7% in 2019 (Turismo de Portugal, 2021d).

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

Contribution of tourism to GDP from 2012 to 2022 was as follows (Banco de Portugal, 2023):

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Tourism Receipts	8 606	9 157	10 284	11 605	12 811	15 550	17 054	18 291	7 716	10 064	21 141
GDP	168 296	170 492	173 054	179 713	186 490	195 947	205 184	214 375	200 519	216 053	242 341
Contribution of Tourism in GDP	5,1%	5,4%	5,9%	6,5%	6,9%	7,9%	8,3%	8,5%	3,8%	4,7%	8,7%

The travel and tourism sector in Portugal was expected to contribute 40,400 million euros to GDP in 2023, surpassing the record of 40,100 million in 2019, predicted the World Travel and Tourism Council (WTTC) (Theportugalnews.com, 2023).

The global tourism entity predicts that the sector will increase its contribution to the Gross Domestic Product (GDP) to 56,400 million euros by 2033, representing more than a fifth (21.1%) of the Portuguese economy (WTTC, 2022).

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

Employment in tourism (Hotel and Restaurant sectors) from 2012 to 2022 (% share on total employment) (INE, 2022):

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022*
Employment (thousands)	277	289	276	259	279	323	328	321	296	252	293
% share on total employment	6,1%	6,5%	6,1%	5,9%	6,3%	7,0%	7,0%	6,7%	6,3%	5,3%	6,0%

In the next decade, travel and tourism in Portugal could employ more than 1.2 million people across the country, with one in four people working in the sector (Theportugalnews.com, 2023).

1.5. MAIN FOCUS OF NATIONAL STRATEGY FOR TOURISM

1.5.1. PORTUGUESE STRATEGY FOR TOURISM

Operating under the auspices of the Ministry of the Economy and Maritime Affairs and the Secretary of State for Tourism, Turismo de Portugal is Portuguese national tourism authority.

Turismo de Portugal is responsible for the development of tourism policy, promotion of Portugal as a tourism destination, development of updated research on tourism as well as training the tourism workforce.

It brings together all the institutional competences involved in making tourism more dynamic, from supply to demand.

In 2017 the Portuguese Government launched Tourism Strategy 2027 (Turismo de Portugal, 2016) as the reference for the development of public policies and business strategies in the tourism sector for the decade. It aims at positioning Portugal as one of the world's most competitive and sustainable tourism destination, with the motto "Leading the tourism of the future". This means a cohesive territory, innovative and competitive, that values work and talent.

In 2021, framed by the Portugal 2030 Strategy and in view of the devastating effects caused by the pandemic, the Government designed a Plan of Resilience and Recovery based on the European Commission's Recovery and Resilience Mechanism, that can put the sector back on the pre-COVID-19 path of growth, at the same time equipping it with mechanisms to make it more sustainable, more responsible, more competitive and even more resilient, which will enable it to overcome the objectives and targets set out in the Tourism Strategy 2027, approved by the Council of Ministers Resolution No. 134/2017 of September 27th (ET27), projecting it into the future.

The four pillars that sustain this strategy are as follows, and they highlight Portugal’s main concerns and goals.

PORTUGAL 2030 STRATEGY AGENDAS

The Portugal 2030 Strategy is structured around four thematic agendas central to the development of the economy, society and territory of Portugal by 2030.

Agenda 1	Agenda 2	Agenda 3	Agenda 4
People First: a better demographic balance, greater inclusion, less inequalities	Digitalization, Innovation and Qualifications as development drivers	Climate Transition and Resources Sustainability	An externally competitive and internally cohesive country
1.1 Demographic sustainability 1.2 Promotion of inclusion and fight against exclusion 1.3 Resilience of the health system 1.4 Fight against inequalities and discrimination	2.1 Promotion of a knowledge society 2.2 Business innovation 2.3 Qualification of human resources 2.4 Qualification of the institutions	3.1 Less carbon emissions and promotion of the energy transition 3.2 Promote a circular economy 3.3 Reduce the risks and value the environmental assets 3.4 Sustainable agriculture and forests 3.5 Sustainable sea economy	4.1 Competitiveness of urban networks 4.2 Competitiveness and cohesion in low density areas 4.3 Projection of the Atlantic strip 4.4 Territorial insertion in the Iberian market

Figure 1 - Reactivate Tourism | Build the Future Action Plan

The +Sustainable Tourism Plan 20-23 (Turismo de Portugal, 2021c) is one of the measures of the Reactivate Tourism | Build the Future Action Plan (Turismo de Portugal, 2021a) (Pillar 4 – Build the future – Sustainability in companies and destinations), contributing to strengthen the positioning and competitiveness of Portugal as a sustainable and safe tourism destination, also meaning to accommodate the requirements of new guidelines at national and European level that will occur in the short and medium term, within the circular economy and environmental sustainability.

1.5.2. SUSTAINABILITY AND SOCIAL IMPACT OF TOURISM

Turismo de Portugal has been carrying out important work in the field of sustainability (Turismo de Portugal, 2023f), which it considers to be one of the pillars for building the tourism of the future.

The purpose of the +Sustainable Tourism Plan 20-23, aimed at contributing to a tourism response to the urgent challenges of sustainability, is aligned with the national Tourism Strategy 2027 and the objectives of the Environmental Fund, in terms of circular economy and sustainability.

The +Sustainable Tourism Plan 20-23, launched by Turismo de Portugal in 2021, is the strategic, participative, and dynamic, broad, and creative reference through which the responsibility is taken to mobilize agents and society to promote sustainability in Tourism in Portugal over the next three years.

A public consultation phase of the Plan was promoted with more than 100 participations from sector agents, public entities, associations, and citizens. The Plan includes, within the scope of its management and monitoring, the promotion of a Sustainability Monitoring Group (53 entities representing the tourism sector, institutional partners, NGOs, and Academia), aimed at a shared responsibility in achieving the Plan's goals and, consequently, the Tourism Strategy 2027 (Turismo de Portugal, 2016).

One of the actions envisaged in this Plan was the creation of several Thematic Guides to Best Sustainability Practices (Infrastructures for Nautical Tourism on the Coast, Rivers and Lakes; Beach Management for Surfing Activities; Tourist Entertainment and Thermal Baths) (Turismo de Portugal, 2023b, 2023d, 2023c, 2023a). These guides, thus, aim to support tourism agents in changing their behaviour and adopting best practices, especially in the environmental and social dimensions.

Likewise, the Reactivate Tourism | Build the Future Action Plan proposes actions and sets goals in line with this context, aiming to build a more sustainable, responsible, and resilient tourism (Turismo de Portugal, 2021a).

The 360° Tourism Companies Programme (Turismo de Portugal, 2023e), launched by Turismo de Portugal in 2021, as part of pillar 4 - Sustainability in Companies and Destinations - of the Reactivate Tourism | Build the Future Action Plan, is a measure that aims to place companies at the heart of the sector's sustainable transformation process. It is an innovative initiative that puts tourism companies at the heart of the sector's sustainable transformation process, challenging them to report on their ESG - Environmental, Social and Governance - performance.

To report ESG performance, Turismo de Portugal provides companies with access to an analytics and reporting tool through FOREST - a Tourism Sustainability Organizational and Reporting Tool - which allows them to automate the collection, management and reporting of data associated with ESG metrics and obtain their annual sustainability report (Turismo de Portugal, 2023e).

By joining the Portuguese Plastics Pact (part of the Ellen MacArthur Foundation's Plastics Pacts Network), Turismo de Portugal aims to contribute to overcoming obstacles and making progress in the circular economy of plastics in the tourism sector in partnership with its partners, also promoting efficient waste management in tourism - one of the objectives of the Tourism Strategy 2027 (Turismo de Portugal, 2016).

The tourism industry was one of the industries most affected by the covid-19 pandemic. Considering the widespread concern in the resumption of economic and social activity as soon as the evolution of the pandemic allows, Turismo de Portugal created a "Clean and Safe" stamp of approval to distinguish tourist activities which are compliant with hygiene and cleaning requirements for the prevention and control of COVID-19 and other possible infections.

This measure seeks to raise awareness of companies to the minimum procedures to be adopted and encourage the resumption of the tourism sector at national and international level, reinforcing the confidence of all in the destination Portugal and its touristic resources.

The digital platform Clean & Safe (Turismo de Portugal, 2020), created by Turismo de Portugal, gathers information about establishments adhering to the stamp.

1.5.3. REGIONAL SUSTAINABILITY OBSERVATORIES

The sustainability of tourist destinations is an absolute priority of tourism policy in Portugal.

The creation of sustainability observatories in the various regions, which allows for in-depth knowledge of the impacts of the activity on the territory and greater efficiency in the planning and management of destinations is one of the strategic objectives of Turismo de Portugal, aiming to contribute to affirming Portugal as an international leader in sustainability.

In this sense and in pursuit of the defined objectives, four observatories in Portugal have joined the UNWTO's international network of observatories (UNWTO, 2004):

- Alentejo Sustainable Tourism Observatory (ASTO)
- Azores Tourism Observatory (OTA)
- Algarve Sustainable Tourism Observatory (AlgSTO)
- Centro de Portugal Sustainable Tourism Observatory (OTSCP)

1.5.4. TOURISM AND DIGITAL TRANSFORMATION IN PORTUGAL

The Portuguese tourism workforce will need digital skills to make effective use of new technologies and exploit the opportunities digitalisation is opening up for marketing, as well as product and destination development.

Undertaken at the request of Portugal, the OECD developed a report that examines and assesses current policy approaches to support digital skills and workforce development in the sector and presents a selection of policy considerations (OCDE, 2021):

- i) to address digital transformation gaps, shortages and opportunities for workforce organization and skills development, and
- ii) to enhance governance mechanisms to support the digital skills transformation of the tourism workforce.

Besides the role of Turismo de Portugal in training the tourism workforce, the main responses to digital skills gaps and shortages in tourism sector are supported by NEST - Tourism Innovation Center, which is an official Tourism Cluster in Portugal focused on promoting digital technologies for tourism companies to develop their businesses by introducing new digital services or products (NEST, 2023).

- NEST is a private non-profit association founded in 2019 by 8 entities, Turismo de Portugal, ANA Airports, Brisa Via Verde, Google, Microsoft, Millennium BCP, NOS and BPI.
- NEST, as a multi-partner, public-private that aims to promote digitalisation and skills development in the sector, has a wide range of activities focusing on knowledge creation and transfer, in key areas such as Artificial Intelligence or Data Analytics. Additionally, NEST has competences in other areas such as Cybersecurity, Advanced Digital Skills, Digital Solutions/Interoperability to Public Sector, IoT, Science and Big Data, Simulation, Cloud Computing, Mobility and Connectivity.
- NEST is focused on the development of the InnovTourism Digital Innovation Hub (DIH), a one-stop-shop that helps companies become more competitive regarding their businesses, production and commercialization of products or services, using digital technologies. Therefore, this Hub will provide access to technical expertise and experimentation, provide training on skills, create experimental labs / free zones for innovation, so that companies can “test before invest”, develop inexistent solutions and it will also offer support on areas such as financial advice. The hub positions itself as a gateway for innovation that will strengthen the ecosystem of tourism, being capable of step changing developments and enabling technology adoption in the industry.
- NEST is also the anchor project of the Tourism 4.0 initiative (NEST, 2023) and aims to help boost Portugal as a global hub for tourism innovation. Tourism 4.0 is a specific joint initiative of the Ministry of Economy and Maritime Affairs, the Secretary of State for Tourism and Turismo de Portugal to promote the transition of tourism activity to the digital

The National Training Commission for Tourism (National Training Commission for Tourism, 2023) is worth mentioning as well, since it provides a focus for cross-stakeholder dialogue and advice to Turismo de Portugal on skills and training development issues for the sector. At present its focus is on basic digital skills capacity in the sector.

- The National Training Commission for Tourism was created (2019) as an informal body that brings together stakeholders related to education and training in tourism, constituting itself as a strategic forum for analysing the future challenges of qualifying human resources for tourism.
- The relevant issues identified are the dignification of professions, the identification of fundamental competences and the interrelationship between school/company, the diagnosis of training needs and the corresponding adaptation to the needs and challenges of the sector; promoting the sharing of information on the evolution of employment, skills, qualifications, and training, through prospective studies; among others.

Betting on innovation is fundamental - not only to increase the visibility of the destination, but also to maximise the tourist experience. In this area, the FIT Programme - Fostering Innovation in Tourism - stands out (FIT, 2023).

- Created in 2016, FIT is a Turismo de Portugal programme in partnership with a network of incubators aimed at promoting entrepreneurship and innovation in the tourism sector, developing strategies to rejuvenate the business fabric and developing new ideas and business models in tourism. By 2022, 69 ideation, acceleration and open innovation programmes had been supported, involving the participation of 1,400 national and international startups and projects.

1.5.5. IMPACT OF COVID-19 PANDEMIC IN PORTUGAL

Prior to the pandemic Portugal was the 12th most competitive country in the world in Tourism (World Economic Forum in the 2019 World Economic Forum's Competitiveness in Tourism Report – WEF, 2020).

The year 2019 confirmed the growth trajectory of the sector since the crisis of 2008/9. In terms of demand, historic highs were reached; 70.2 million overnight stays (+3.7% compared to 2018) and 27.1 million guests (+7.5%), both indicators with a majority weight of the external market (70% and 60%, respectively).

The first two months of 2020 indicated that new records would be broken, given the results achieved then (7.1 million overnight stays and 3.0 million guests, representing an increase of 11% and 13%, in the same order, compared to 2019 (Pordata, 2023).

However, the beginning of a pandemic, with strong repercussions and quickly spread throughout the world, reversed the situation and in Portugal, by the end of 2020, 50% of the hotel units were closed or with no movement of guests.

1.6. COUNTRY-SPECIFIC CHALLENGES AND DEVELOPMENTS IN TOURISM

Portugal's main challenges are:

1. Direct challenges: Low salaries paid to the tourism professionals and lack of complements (health insurance plans, benefits, and perks), working hours, conciliation between professional and family life.
2. Indirect challenges: Housing, public transports, social support (nurseries, schools, homes, etc).
3. Structural issues: lack of digital maturity in tourism professionals, scarcity of workforce, lack of valuation of tourism occupations, lack of qualification of managers/entrepreneurs, unprofitable business models in tourism sector, name of tourism occupations (more attractive names are needed).

The most significant areas of skill development identified for the workforce in Portuguese tourism include the necessity for new training programs focusing on digital skills, innovation capabilities, social-cultural skills, green skills, sustainable finances, Environmental, Social, and Governance (ESG) factors, and the EU taxonomy for sustainable activities.

Turismo de Portugal's schools network develops vocational training in tourism in different areas: Hospitality Operations Management, Tourism Management, Food and Beverage Management, Culinary Arts, Pastry Production Management, Cultural & Patrimony Tourism, Adventure & Nature Tourism.

In response to COVID-19, Turismo de Portugal has made significant adjustments in the education system. There was a huge effort to adapt curricular programs to the needs of the tourism sector with an emphasis on new training areas to respond to new demands.

Concerning the role of training for the qualification of human resources, Turismo de Portugal launched, in 2020, Academia Digital (Academia Digital Turismo de Portugal, 2023), an online training platform which provides accessible, diverse, and certified training opportunities (synchronous and asynchronous) that contribute to the upskilling and reskilling of tourism professionals.

The Academia Digital contributes to the upskilling and reskilling of tourism professionals in several ways:

1. Wide range of training contents: The platform offers a variety of courses, workshops, and seminars. This allows professionals to choose the training that best suits their needs and interests.
2. Accessibility: Most of the courses are offered online, making them accessible to professionals regardless of their location. This is particularly beneficial in the current context where remote learning has become increasingly important.
3. Focus on development: The platform is designed to promote the development of people and the capacity building of companies. This focus on development helps professionals to enhance their skills and adapt to changing industry trends.
4. Certified training: The platform has provided certified executive training to participants. This certification can enhance a professional's credentials and open up new career opportunities.
5. Free participation: Most of the courses are free, although subject to registration. This makes professional development accessible to a wide range of professionals.

To overcome some of the national challenges related to the lack of professionals in the sector, Turismo de Portugal launched recently an innovative project called Cartão Atlas (Atlas, 2023) – a loyalty card for the sector, that aims to offer some benefits to the tourism professionals.

This is a platform where the affiliated entities (companies, cultural organizations, public entities, among others) offer special benefits such as special programs, discounts, service upgrades, etc.). The main goal goes beyond these advantages – it tries to develop a sense of belonging to tourism sector, making professionals feel valued.

Cartão Atlas contributes to attract and retain tourism professionals for several reasons:

1. **Exclusivity and Personalization:** it aims to offer exclusivity and personalization by placing tourism professionals at the center of the tourist experience. This approach recognizes the value of everyone's role in the tourism industry.
2. **Benefits for tourism professionals:** it provides exclusive benefits to tourism professionals. These benefits can enhance job satisfaction, thereby helping to retain talent within the industry.
3. **Promotion of Satisfaction and Loyalty:** it promotes satisfaction and loyalty among tourism professionals. By offering unique experiences and benefits, it encourages professionals to stay engaged and committed to their roles.
4. **Professional development:** is part of a broader initiative to grow the sector in terms of qualifications, attractiveness of professions, and the number of professionals. This focus on professional development which can attract new talent and encourage existing talent to continue their career growth within the industry.

In summary, Cartão Atlas leverages a combination of exclusive benefits, personalization, professional development opportunities, and a focus on job satisfaction to attract and retain talent in the tourism industry.

2. CURRENT SKILLS TRAINING DELIVERY IN PORTUGAL

In this chapter, you will find an overview of the training delivery of digital, green and social skills sets in Portugal. This is conducted by collecting and analysing data from country sources and summarising these.

The types of training programs available in Portugal are varied and cover different areas and levels of qualification in the tourism sector. Some examples are: vocational education and training (VET) programs in tourism and hospitality, which aim to prepare young people and adults for the exercise of professions related to the sector, through a theoretical and practical training that confers a double certification (academic and professional). These programs are offered by a network of 12 hotel and tourism schools managed by Turismo de Portugal, as well as by other public and private entities accredited by the National Agency for Qualification and Vocational Education.

There are also higher education programs in tourism, hospitality and management, which aim to train qualified staff for the sector, through a scientific, technical and cultural training that confers an academic degree (bachelor's, master's or doctorate). These programs are offered by various public and private higher education institutions, such as the University of Aveiro, University of Algarve, Universidade Católica Portuguesa, Universidade NOVA de Lisboa, among others.

Continuing education programs in tourism, which aim to update and develop the skills of professionals in the sector, through courses, workshops, seminars, conferences and other training actions. These programs are offered by various public and private entities, such as Turismo de Portugal, the Porto Business School, the Association of Hospitality of Portugal, among others.

Portugal has a consistent set of initiatives underway aimed at promoting and improving the training provision in the tourism sector. These initiatives also aim to improve the quality and efficiency of tourism services, promote social responsibility and environmental sustainability in tourism, and increase the economic, social and territorial benefits of tourism.

For example, the +Sustainable Tourism Plan 20-23 (Turismo de Portugal, 2021b) includes actions such as creating new programmes, updating existing ones, and promoting lifelong learning opportunities for tourism education and training; developing digital platforms and tools for tourism innovation and management; supporting tourism investment and entrepreneurship; enhancing the attractiveness and diversity of tourist products and destinations; and fostering the co-ordination and co-operation among public and private stakeholders.

Another initiative carried out is the Agenda for the Tourism Professions (TdP, 2023), an initiative of the Portuguese Ministry of Economy and Maritime Affairs, consisting of 20 measures on increasing the attractiveness of tourism professions, the qualifications, and the number of professionals. The Agenda for the Tourism Professions aims to make Portugal the reference destination to study and work in the tourism sector.

The main key challenges in skills training in Portugal are: ensuring alignment between education/training and labour market needs; supporting low-skilled employers; promoting lifelong learning and enhancing greater alignment and involvement of all actors – companies, educational institutions and policy makers.

2.1. DIGITAL SKILLS

Portugal is focused on developing digital skills in both formal education system and lifelong learning provided by public authorities, universities, vocational and education schools, private companies and associations.

Aiming to converge with Europe in the digital domain, Portugal is going through its digital journey, speeding up the country's digital transformation so that no one is left behind, projecting Portugal to the world, towards becoming a digital nation. There is a need to develop Portuguese level of digital literacy (from the most basic digital skills to the most advanced ones).

2.1.1 PORTUGAL 'S DIGITAL TRANSITION STRATEGY

The Action Plan for Digital Transition approved by the Council of Ministers' Resolution No. 31/2020 reflects the strategy defined for the country's digital transition, as laid out in the Portugal Digital Mission Structure.

The Portugal Digital Mission Structure (Portugal Digital, 2023) was created to be one of the key components to Portugal's transition to a more digital, competitive, and internationally strengthened country in the context of digital transformation, tasked with monitoring, operationalizing, and implementing the measures planned out in the Action Plan for Digital Transition (Portugal Digital, 2020).

Based on the tourism trends, the available tourism training and the feedback from the Portuguese tourism stakeholders, more training initiatives are needed in these domains: e-business (all the necessary skills for online branding, marketing, distribution, data collection and analysis); big data and data analytics, digitalization of human resources management.

2.2 GREEN SKILLS

Portugal needs to go further in helping companies/organizations to materialize Sustainability in their Strategic and Business Agendas.

In Portugal, the +Sustainable Tourism Plan 20-23 (Turismo de Portugal, 2021b) contributes to stimulating the circular economy in tourism, fostering the transition to an economic model based on prevention, reduction, reuse, recovery and recycling of materials, water and energy, thus strengthening the Agenda for Circular Economy in the Tourism Sector and placing the tourism ecosystem at the climate transition towards a new green and inclusive economy.

To promote the energy transition and the circular economy of tourism companies there is a need to develop new training content on environmental management (green) skills to stimulate a change of attitude throughout the sector's value chain.

As part of the qualification of the tourism professionals there are objectives to be achieved:

1. Qualify and train young people and tourism professionals in sustainability practices, as agents of change;
2. Ensure a transversal integration of the pillars of sustainability in the educational training projects;
3. Educate for sustainability and circular economy;
4. Empower companies for the sustainable management of their activity;
5. Empower tourist destinations for the demands of the planet.

Based on the tourism trends, the available tourism training and the feedback from the Portuguese tourism stakeholders, more training initiatives are needed in these domains: corporate sustainability management; sustainable finances; ESG's; EU taxonomy for sustainable activities; environmental management system and certification and designing green products.

2.3 SOCIAL SKILLS

Portuguese education policies aim to develop students' social skills, so that they better respond to the challenges of today's world.

The National Strategy for Development Education 2018-2022 (Instituto Camões, 2018) reinforces the national political commitment on Development Education (DE) in a new institutional setting, in which Camões – Cooperation and Language Institute I.P. (Camões I. P.) takes on a central role in Development Cooperation and DE, ensuring Portugal's continued engagement in international forums with DE competences such as GENE — Global Education Network Europe and the Development Assistance Committee DAC from the Organisation for Economic Cooperation and Development (OECD).

Related to tourism sector, Aveiro Labour Observatory (Aveiro Labor Observatory, 2023) identified the most important soft skills required: Complex Problem Solving, Teamwork, Critical Thinking, Emotional Intelligence, and Adaptability.

To face the challenges of the globalization and competitive market there are some general training courses in order to provide capacity building in Leadership (although they are not directly oriented to tourism sector).

- Advanced Training in Leadership and Creative Team Development (CATÓLICA, 2023)
- Leadership.YOU (ISEG, 2023)
- Executive Master | Strategic Management of People and Leadership (ISCTE, 2023)

Well-balanced economic, social and territorial cohesion policies are also fundamental in promoting innovation, entrepreneurship and competitiveness in tourism sector.

Based on the tourism trends, the available tourism training and the feedback from the Portuguese tourism stakeholders, more training initiatives are needed in these domains: digital citizenship; cultural awareness (how to deal with customers and co-workers of a variety of nationalities and cultural backgrounds); networking skills (building a loyal clientele); wellbeing and personal safety at work; responsible leadership in tourism industry and employee branding for SME´s in tourism industry.

3. SURVEY RESULTS

In this chapter, an analysis is provided of the online survey results within Portugal, 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 Portugal 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 Portugal	246 (including category 'Other' = 63)
Number of responses per tourism sub-sector:	
Destination management organisations:	29
Accommodation providers:	96
Food & Beverage:	18
Visitor attractions:	25
Travel agents and tour operators:	15

The respondents were asked to estimate the current (2023) and the required future (2030) proficiency level of digital, green, and social skills within their organisation and to rate it on a scale from 1 (no skills) to 5 (expert).

The survey results show the distribution of responses from 5 tourism subsectors in Portugal. The most represented subsector was Accommodation providers, with 96 responses. The least represented subsector was Food & Beverage, with only 18 responses. The other subsectors were Destination management organisations (29 responses), Visitor attractions (25 responses), and Travel agents and tour operators (15 responses).

Given the total number of respondents for Portugal (which is N=246 in total), the conclusions of the Portuguese part of the survey will be summarized by interpreting the findings for the 5 subsectors in total.

3.1. DIGITAL SKILLS

Digital Skills

Current existing level of proficiency	Highest: <ol style="list-style-type: none">1. 4.22 - Use of office applications (text processing, spreadsheets, presentation software)2. 3.79 - Digital privacy and ethics3. 3.63 - Use of digital marketing systems and communication platforms (social media networks, e-mail and direct marketing systems, content management systems)4. 3.53 - Secure information processing (backing-up, cybersecurity, data protection)5. 3.09 - Digital business analysis, business intelligence, data-driven decision making
	Lowest: <ol style="list-style-type: none">1. 1.54 - Use of robots2. 1.84 - Use of digital technologies to create guest experiences (e.g., for Virtual- and Augmented Reality)3. 1.85 - Use of generative AI applications (e.g. ChatGPT, Midjourney, DALL-E, etc.) for generating text and visuals4. 2.67 - Web & app development & programming
Future necessary level of proficiency in 2030	Most necessary: <ol style="list-style-type: none">1. 4.82 - Digital privacy and ethics2. 4.78 - Secure information processing (backing-up, cybersecurity, data protection)3. 4.71 - Use of digital marketing systems and communication platforms (social media networks, e-mail and direct marketing systems, content management systems)4. 4.7 - Use of office applications (text processing, spreadsheets, presentation software)5. 4.55 Digital business analysis, business intelligence, data-driven decision making

Skills gaps between existing and future level of skills sets

Least necessary:

1. **2.97** - Use of robots
2. **3.61** - Use of generative AI applications (e.g. ChatGPT, Midjourney, DALL-E, etc.) for generating text and visuals
3. **3.64** - Use of digital technologies to create guest experiences (e.g., for Virtual- and Augmented Reality)
4. **4.26** - Web & app development & programming

Largest gaps:

1. **1.8** - Use of digital technologies to create guest experiences (e.g., for Virtual- and Augmented Reality)
2. **1.76** - Use of generative AI applications (e.g. ChatGPT, Midjourney, DALL-E, etc.) for generating text and visuals
3. **1.59** - Web & app development & programming
4. **1.46** Digital business analysis, business intelligence, data-driven decision making
5. **1.43** - Use of robots

Smallest gaps:

1. **0.48** - Use of office applications (text processing, spreadsheets, presentation software)
 2. **1.03** - Digital privacy and ethics
 3. **1.08** - Use of digital marketing systems and communication platforms (social media networks, e-mail and direct marketing systems, content management systems)
 4. **1.25** - Secure information processing (backing-up, cybersecurity, data protection)
-

In terms of digital skills, respondents consider themselves to be proficient in the use of office applications (text processing, spreadsheets, presentation software), scoring 4.22 on a scale from 1 (no skills) to 5 (expert).

Despite AI and big data will be top in-demand skills by 2027, according to the World Economic Forum's Future of Jobs 2023 report, it is worth noting that "Digital business analysis, business intelligence, data-driven decision making" is not in the Top 3 of future training concerns for the Portuguese professionals of tourism sector.

The most important skills for Portuguese tourism professionals in 2030 are related with digital privacy and ethics (how digital data of an individual is used by the organization).

The use of robots and the use of generative AI applications are the skills that respondents consider least necessary for their jobs in 2030.

The results indicate that the largest skills gaps are in the areas of using digital technologies to create guest experiences (1.8), using generative AI applications for generating text and visuals (1.76), and web & app development & programming (1.59). These skills are essential for creating innovative and personalized products and services that can attract and retain customers in a competitive market.

The results also show that the smallest skills gaps are in the areas of using office applications (0.48), digital privacy and ethics (1.03), and using digital marketing systems and communication platforms (1.08).

By 2030, for the Portuguese respondents of the survey, digital privacy and ethics will be essential to build consumer trust, and for regulatory compliance. The tourism industry collects and processes a significant amount of personal data, so, competence in digital privacy and ethics is essential to build and maintain consumer trust, as travelers want assurance that their data is handled responsibly. Future tourism professionals will require a deep understanding of data protection laws and regulations, such as GDPR, and the ability to ensure compliance within the tourism sector.

The second most necessary set of skills identified is secure information processing (backing-up, cybersecurity, data protection). This is a very relevant set of skills, including data integrity, cyber threat mitigation, to assure that the tourism professionals will have the competence in secure and process information to prevent data loss or breaches, which could lead to reputational damage and financial losses for tourism businesses. Future professionals must be skilled in identifying and mitigating risks, ensuring the safety of customer data and business operations.

In Portugal, these two areas of competence are clearly identified in the strategies and legislation on data protection and information security, namely in the National Cyberspace Security Strategy 2019-2023 (National National Cybersecurity Center, 2019), in the National Digital Competence Initiative e.2030 and Portugal INCoDe.2030 (Incode, 2022), which have even developed pilot projects for digital transition in some areas of the tourism sector.

Turismo de Portugal has developed some training actions in these areas, either through partnerships with the National Cybersecurity Centre or by incorporating these areas into the new Clean&Safe Programme (Turismo de Portugal, 2020).

The use of digital marketing systems and communication platforms will be also essential for creating engaging and targeted marketing campaigns that reach potential travelers effectively. The future professionals will require the ability to leverage real-time communication on platforms like social media networks to address traveler inquiries and provide immediate assistance.

For many years now, Portugal's promotion strategy has been centered exclusively on digital, combining various instruments that have had very positive results, which have resulted in European and international awards, positioning us as the best destination in Europe and the world. This national strategy is designed with links to companies, especially SMEs, which can leverage their individual strategies in these national campaigns, achieving even more significant results. This is probably one of the areas in which Portugal and its companies are most developed. However, much can still be done, such as, individual and collective awareness of its importance and specific high-quality training at different levels for tourism professionals.

Despite the use of robots and generative AI applications being identified by the respondents as one of less important skill to be proficient at, they should be considered as an important dimension in the tourism workforce, but their relevance will depend on the specific roles and the evolution of technology in the industry.

Robots can be used for tasks like check-in at hotels or providing information in airports. Professions involving the setup, maintenance, and programming of these robots may become relevant. Automated robots for room cleaning and maintenance might require operators and technicians. Robots for language translation could be beneficial in multilingual destinations, and proficiency in managing these systems may be important.

Generative AI can assist in generating marketing content, blog posts, and even travel itineraries. Professions related to content customization might benefit from using such applications. AI can analyse customer preferences to create customized travel packages. Jobs related to the design and management of these packages could utilize generative AI.

While these technologies can enhance efficiency and customer experiences, it's important to note that they may not replace human interaction entirely. The "human touch" is often a critical aspect of the tourism industry, especially in roles that require empathy, cultural sensitivity, and personal connection.

The reason why these areas scored less highly by respondents reinforces the importance that the professionals attach to the more humanised characteristics of tourism activity, proximity service and the relationship with others.

In Tourism Strategy 2027 (Turismo de Portugal, 2016), and in subsequent strategic documents drawn up in recent years, namely the Reactivate Tourism | Build the Future Action Plan (Turismo de Portugal, 2021a), the +Sustainable Tourism Plan 20-23 (Turismo de Portugal, 2021c) and the Agenda for the Tourism Professions (TdP, 2023), central importance is given to the qualification of professionals for the development of a humanised, culturally diverse service. The work Turismo de Portugal has been doing in these areas is producing results among professionals who value and highlight the need to preserve the humanisation of the sector.

In conclusion, the use of robots and generative AI applications may be valuable skills in specific tourism jobs, especially in roles related to automation, content creation, and personalized services. However, traditional tourism skills such as customer service, cultural awareness, and crisis management will likely remain essential, as travelers often seek genuine and human experiences in their journeys. Professionals in the tourism industry should be prepared to adapt to the evolving technological landscape while preserving the core values of the industry. Our challenge is to provide the necessary training to support this dual approach.

3.2. GREEN/ENVIRONMENTAL SKILL SETS

Green Skills

Highest:

1. **3.32** - Promotion and encouragement of sustainable practices among guests
2. **3.31** - Understanding of environmental laws and regulations
3. **3.15** - Efficient use of resources (e.g., energy, water, materials)
4. **3.14** - Communication about the organisation's efforts towards a green economy
5. **2.89** - Adoption of environmental certifications and management systems

Current existing level of proficiency

Lowest:

1. **2.09** - Measurement and management of CO2 emissions
2. **2.7** - Green procurement and greening the supply chain (working with green suppliers)
3. **2.72** - Measurement and management of waste
4. **2.79** - Green marketing and product development
5. **2.88** - Use of technology to speed up the green transition

Most necessary:

1. **4.65** - Promotion and encouragement of sustainable practices among guests
 2. **4.63** - Understanding of environmental laws and regulations
 3. **4.61** - Efficient use of resources (e.g., energy, water, materials)
 4. **4.56** - Communication about the organisation's efforts towards a green economy
 5. **4.5** - Use of technology to speed up the green transition
-

Future necessary level of proficiency in 2030

Least necessary:

1. **4.15** - Measurement and management of CO2 emissions
2. **4.4** - Measurement and management of waste
3. **4.45** - Adoption of environmental certifications and management systems
4. **4.47** - Green procurement and greening the supply chain (working with green suppliers)
5. **4.47** - Green marketing and product development

Largest gaps:

1. **2.06** - Measurement and management of CO2 emissions
2. **1.77** - Green procurement and greening the supply chain (working with green suppliers)
3. **1.68** - Measurement and management of waste
4. **1.68** - Green marketing and product development
5. **1.62** - Use of technology to speed up the green transition

Skills gaps between existing and future level of skills sets**Smallest gaps:**

1. **1.32** - Understanding of environmental laws and regulations
2. **1.33** - Promotion and encouragement of sustainable practices among guests
3. **1.42** - Communication about the organisation's efforts towards a green economy
4. **1.46** - Efficient use of resources (e.g., energy, water, materials)
5. **1.56** - Adoption of environmental certifications and management systems

Regarding the green skills, the promotion and encouragement of sustainable practices among guests shows the highest current level of proficiency, scoring 3.32 on a scale from 1 (no skills) to 5 (expert).

At the lowest level of proficiency is measurement and management of CO2 emissions, with a score of 2.09 on a scale from 1 (no skills) to 5 (expert).

In fact, measurement and management of CO2 emissions and measurement and management of waste are considered by respondents to be the least necessary skills in the future, when it comes to proficiency by tourism professionals.

The results indicate that the largest skills gaps are in the areas of measurement and management of CO2 emissions (2.06), green procurement and greening the supply chain (1.77), and measurement and management of waste (1.68). These skills are essential for reducing the environmental impact and enhancing the social responsibility of tourism activities and operations.

The results also show that the smallest skills gaps are in the areas of understanding of environmental laws and regulations (1.32), promotion and encouragement of sustainable practices among guests (1.33), and communication about the organization's efforts towards a green economy (1.42).

By 2030, the Portuguese respondents of the survey consider that being skilled in promoting and encouraging sustainable practices among guests will be essential for raising awareness and changing guest's behaviour. Informed guests are more likely to engage in sustainable behaviours, such as conserving water and energy or supporting local communities. When guests adopt sustainable practices, it reduces the environmental and social impact of tourism, contributing to the long-term sustainability of destinations and businesses.

The respondents also consider that there will be a need to be proficient in understanding and adhering to environmental laws and regulations to ensure that their operations are sustainable and legally compliant. Understanding this environmental regulation helps mitigate legal and reputational risks associated with non-compliance, promoting a responsible image for the organization.

Efficient resource use not only reduces the environmental impact but also lowers operational costs, so the competence in resource management can lead to significant financial savings.

In some of Portugal's regions, mostly in cities like Lisbon and Porto, and also in natural and protected areas such as Douro Valley, Madeira and Azores Islands, tourism can strain local resources, and it's crucial to ensure that these resources remain available for both tourists and local communities.

If Portugal aims to become a globally sustainable destination, effective communication about sustainability efforts is essential to build trust with customers and stakeholders. So, promoting the competences in conveying these efforts can enhance the reputation of Portuguese tourism organizations and companies.

In this era where sustainability is increasingly important to travelers, the ability to communicate a commitment to green practices will provide a competitive advantage.

The responses also show the importance that professionals assign to technology as a factor in accelerating awareness of the urgent need to preserve resources. They recognize that technology plays a pivotal role in enhancing sustainability, saying that the competence in adopting and adapting green technologies, such as renewable energy systems or waste reduction solutions, accelerates the transition to a more sustainable tourism sector. In fact, technology can provide data and analytics that inform sustainability strategies and it's clear that proficiency in data-driven decision-making can lead to more effective green initiatives.

In summary, the mentioned competences are considered essential for ensuring the sustainability of the Portuguese tourism sector. They enable businesses and destinations to not only reduce their ecological footprint but also align with changing consumer expectations and regulatory requirements. Competent professionals in these areas are better positioned to contribute to the industry's overall environmental and social responsibility, which is crucial for its long-term viability and success.

One possible reason for the low score, given by respondents, in measurement and management of CO2 emissions and measurement and management of waste is that more than 97% of the tourism companies in Portugal are SMEs. For Portuguese small businesses the focus on measuring and managing CO2 emissions may not be cost-effective. It could divert resources away from other more immediate sustainability initiatives.

Portugal faces more pressing sustainability concerns, such as water scarcity, that require attention. In Algarve region, for instance, water is the main concern for the tourism industry (as for other industries, such as agriculture) and all investment efforts in the region are being channeled towards the implementation of a strategic plan that will guarantee the resolution of the situation and the supply of drinking water in the long term (Algarve Regional Water Efficiency Plan).

Although the importance of measurement and management of waste, it is probably not a great concern to our companies since Portugal is a country with a well-developed and structured waste management system and companies have the necessary support for their activity.

Regarding the adoption of environmental certifications and the recognition for good environmental practices, which has been a concern for Portuguese companies, it is an area that is generally developed by specialised consultancy companies. Hence, professionals do not give much priority to it, knowing that their sustainability practices are more crucial than the certification procedure.

Since many regions in Portugal have a reputation for being sustainable, getting more certifications may not make them more attractive to eco-conscious travelers. Therefore, it might be difficult for our small businesses with low buying power to make their supply chain more environmentally friendly. This skill may be more relevant for larger organizations with greater purchasing abilities.

Regarding the supply chain and the need to guarantee a certified supply chain, it is also a hurdle that is not yet overcome for small businesses, because they do not have very structured buying systems, usually buying from small suppliers directly, which complicates this certification assurance. The main thing is to consider that our small businesses already purchase, inherently, in a sustainable way, buying nearby, mostly local and seasonal goods, with shorter transportation distances and less intermediation.

To sum up, the skills mentioned are useful for the sustainability of the Portuguese tourism sector, but their proficiency level and significance can change depending on factors like the size and type of the business or destination, the sustainability issues encountered, and the current sustainability actions implemented. It's essential for tourism professionals to evaluate their unique circumstances and rank competences suitably to make sure that their sustainability endeavours are efficient and pertinent.

3.3 SOCIAL AND CULTURAL SKILL SETS

Social-cultural skills

<p>Current existing level of proficiency</p>	<p>Highest:</p> <ol style="list-style-type: none">1. 3.96 - Support diversity, equality and inclusivity2. 3.91 - Provide excellent customer service3. 3.91 - Communicate and interact with people from different cultural and social backgrounds4. 3.67 - Adaptability to change and handle unexpected situations5. 3.65 - Communicate effectively with guests and colleagues <p>Lowest:</p> <ol style="list-style-type: none">1. 3.41 - Communicate effectively with guests in their native language2. 3.62 - Resolve conflicts3. 3.64 - Work effectively in a team4. 3.65 Understand the cultural setting of the own destination and share this information with guests
<p>Future necessary level of proficiency in 2030</p>	<p>Most necessary:</p> <ol style="list-style-type: none">1. 4.88 - Provide excellent customer service2. 4.85 - Work effectively in a team3. 4.85 - Communicate effectively with guests and colleagues4. 4.83 - Support diversity, equality and inclusivity5. 4.8 - Communicate and interact with people from different cultural and social backgrounds <p>Least necessary:</p> <ol style="list-style-type: none">1. 4.64 - Communicate effectively with guests in their native language2. 4.72 - Understand the cultural setting of the own destination and share this information with guests3. 4.76 - Resolve conflicts4. 4.79 - Adaptability to change and handle unexpected situations

Skills gaps between existing and future level of skills sets

Largest gaps:

1. **1.23** - Communicate effectively with guests in their native language
2. **1.21** - Work effectively in a team
3. **1.2** - Communicate effectively with guests and colleagues
4. **1.14** - Resolve conflicts
5. **1.12** - Adaptability to change and handle unexpected situations

Smallest gaps:

1. **0.87** - Support diversity, equality and inclusivity
 2. **0.89** - Communicate and interact with people from different cultural and social backgrounds
 3. **0.97** - Provide excellent customer service
 4. **1.07** - Understand the cultural setting of the own destination and share this information with guests
-

Attending to social-cultural skills, the survey reflects that the Portuguese tourism workforce is emotionally driven and strongly customer service-oriented, demonstrating a willingness to provide the customer with the best service possible.

Supporting diversity, equality and inclusivity, providing excellent customer service and communicating and interacting with people from different cultural and social backgrounds show the highest current level of proficiency, scoring 3.96 and 3.91 on a scale from 1 (no skills) to 5 (expert).

The lowest level of proficiency is in effective communication with guests in their native language with a score of 3.41 on a scale from 1 (no skills) to 5 (expert).

The results indicate that the largest skills gaps are in the areas of communicating effectively with guests in their native language (1.23), working effectively in a team (1.21), and communicating effectively with guests and colleagues (1.2). These skills are essential for creating positive and lasting relationships with customers and co-workers, as well as for ensuring quality and efficiency of tourism activities and operations.

The results also show that the smallest skills gaps are in the areas of supporting diversity, equality and inclusivity (0.87), communicating and interacting with people from different cultural and social backgrounds (0.89), and providing excellent customer service (0.97).

By 2030, the Portuguese respondents of the survey consider that excellent customer service remains paramount in the tourism sector. Travelers expect personalized and memorable experiences, and professionals who excel in this competence can meet and exceed these expectations. Exceptional customer service leads to positive reviews, word-of-mouth recommendations, and repeat business, which are vital for the success and sustainability of tourism organizations.

The tourism industry often involves complex and multifaceted operations that require collaboration among various departments and team members. Professionals who work effectively in teams can ensure smooth and efficient operations. Cross-functional teams can foster innovation and creative problem-solving, which are critical for adapting to the evolving needs of travelers and the industry.

Effective communication with guests ensures that their needs and preferences are understood and met. This leads to higher levels of satisfaction and positive feedback. It is also relevant to develop clear communication with colleagues recognising that can promote a harmonious work environment and prevents misunderstandings or conflicts, enhancing overall productivity and job satisfaction.

As tourism involves dealing with people from diverse backgrounds, the respondents consider that diversity, equality, and inclusivity are essential to ensure a respectful and welcoming environment. Competence in this area helps professionals adhere to legal requirements and ethical standards, reducing the risk of discrimination and reputational damage.

Also, the ability to communicate and interact effectively with individuals from various cultural and social backgrounds avoids misunderstandings and cultural insensitivity. Tourism professionals who are culturally sensitive can offer more personalized and enriching experiences to travelers, improving their overall satisfaction and the destination's reputation.

These different dimensions of the interpersonal relationship between tourism professionals and tourists are even more relevant in Portugal due to our national strategy focused on the development of a humanized, multicultural, inclusive and personalized service.

That is why it is important that the respondents highlighted these skills as the most needed in the future, as they will keep playing a key role. As the industry evolves, embracing technological advancements and addressing sustainability challenges, the core of excellent customer service, effective teamwork, clear communication, diversity support and cross-cultural competence will remain essential for the success of our tourism businesses and the satisfaction of our future travelers.

4. EXPERT INTERVIEW RESULTS

In this chapter, the results are presented of the semi-structured interviews that have been held with experts in tourism in Portugal. 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 (ten) 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; and 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).

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 the 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

4.1.2.1 THE FUTURE OF THE TOURISM

Although interviewees find that the future of tourism is unpredictable, they agree that the tourism sector is a predatory sector where it is urgent to reconcile income with the climate emergency. Most of them feel very surprised when asked “How will your organization look like in 7 years?”, probably because of the fast-changing era that we are facing as well as the huge impact of the pandemic and the transformations that resulted from it.

Policymakers downplay the signals and only act in regulatory terms. However, it is necessary to know how to see, and how to listen to respond to the issues arising from the climate emergency.

In Portugal, for instance, we need to ensure a virtuous balance between the great willingness to invest in places and the sustainability of the places. Also, soft mobility must be introduced in Portugal to contribute to decarbonization.

Interviewees believe and agree that there will not be less employment but new employment in the tourism sector. And AI and metaverse will impact tourism in such a way that those who don't adapt will disappear. For instance, the receptionists can become concierges due to digitalization.

Following the worldwide trend, and as a result of the COVID-19 pandemic, also in Portugal, many people have left the tourism sector because they have realized that they want a 7-hour job, a fair salary, and a balance between work and family life. Due to the lack of a Portuguese workforce, restaurant sub-sector has a high turnover of people and hires foreign workers who have no training in the HoReCa sector. Considering that new workers have no previous experience or initial training, interviewees find it difficult to maintain the standard of service and quality they wish to have in their companies.

Considering the impacts of the global trends (post-Covid period, war in Ukraine, demographic changes, changes in technology, etc.), as Portugal is receiving migrants from many different cultures, our pole of interviewees find it necessary to think about the (re)design of Portuguese hospitality.

4.1.2.2 PUBLIC INITIATIVES ON TOURISM EMPLOYMENT

The Agenda for the Tourism Professions, an initiative of the Portuguese Ministry of Economy and Maritime Affairs, was launched in March 2023 (TdP, 2023). It is a strategic agenda, consisting of 20 measures on increasing the attractiveness of tourism professions, the qualifications, and the number of professionals.

The 20 measures presented include, among others, the National Plan for the Modernization and Specialization of the Hotel Business and Tourism Schools Network, the implementation of the International Tourism Academy - integrating higher education, vocational education, R&D, and entrepreneurship, the launch of the Atlas Card - a benefit program for tourism professionals, increased funding for companies with the best labour and training practices, strengthening training to accelerate the double transition - climate and digital - and the internationalization of companies and brands. Campaigns are also planned for the valorization of tourism professions.

The importance of valuing the sector's professionals is an essential measure for more and better tourism. Investment in people, in increasing their qualifications, income, and recognition, is a strategic investment to prepare the future of a growing activity.

The Agenda for the Tourism Professions aims to make Portugal the reference destination to study and work in the tourism sector.

4.1.2.3 PRIVATE SECTOR PERSPECTIVE ON TOURISM EMPLOYMENT

University of Aveiro conducted a “Study of the Labour Market for the Tourism Sector | 2023” (Costa et al., 2023), based on nearly 5,000 surveys of workers and tourism students. The central objective of the study was to analyse, evaluate, and prospect the labour market in the tourism sector and its respective subsectors.

Despite 85% of workers in the tourism sector feeling enthusiastic about their work, particularly because it deals with people and cultures, salaries and lack of schedule flexibility continue to be challenges in the sector.

The study concluded that the current problems in the tourism labour market cannot be solved merely within the current paradigm, pointing to the need to introduce new approaches to the work and study of tourism, which must incorporate new value chains more associated with the business of management and relationships between people, quality of life and happiness.

In addition, the study suggests that tourism should expand from its core business of hotels and restaurants to new value chains and new logistics operations, contributing to an expansion into less densely populated and less economically attractive areas.

4.1.2.4 THE PROFESSIONALS NEEDED BY THE SECTOR

Our interviewees consider that there is a lack of professionalization in the tourism sector, which seems to be a great challenge, and when asked they bet that new categories may emerge, not new professionals.

Some interviewees stated that they prefer to hire “older people” (45+ years old), without any experience or training in the tourism sector rather than invest in young people with no sense of responsibility.

Aligned with this another interviewee mentioned that, even though they have a quite young team (employees are aged between 22 and 26 years old) they were chosen, mainly, because of their motivation for the job, which they find more important than initial/previous training. Another important aspect often pointed out is the lack of maturity of new generations about the reality of the labor market, which may lead to the need for more on-the-job training, which will provide a better understanding (Chief Marketing Officer, Destination Management Organization subsector).

Overall, there is the need to have a multidisciplinary profile, with multi-skilled professionals needed by the smaller companies (most of the tourism companies in Portugal) where employees need different skills to guarantee all the tasks given to them – employees will need to know a little bit of everything, from restaurant to reception. If we are talking about a high level of expertise in a specific skill or knowledge they will probably outsource or find a part-time specialist. This may lead to two different outcomes: either you have the financial health to hire/purchase the needed expertise and upgrade your company or you rely on the in-the-house knowledge which sometimes is not enough to provide the needed knowledge – which may lead to less competitive companies - that is why investing on upskilling owners and managers in their management competencies is also a priority in Portugal.

Another option is to bring the competence in-house considering it is the best way to ensure the quality of the service, that's why some of them recruit "people better than us, who do things we don't know how to do".

If recruiting people is a challenge, maintaining them is no less of a problem – that's why companies are implementing new strategies like offering a performance bonus (to trainees also) because they want people to be well and happy or "offering above average salary, a labour incentive system, and a career project. That is why there is a low turnover, with an average of 6 years in the company (Human Resources Manager, Visitors Attraction subsector).

4.1.2.5 THE TRAINING NEEDED AND PROVIDED

Most of the companies provide training to their employees, upholding internal training strategy for the teams, using both internal and external training, such as specific training on the software internally used. Some of them are developing their training academies and one mentions a “Company University” to provide internal training to the employees (General Director, Visitors Attraction subsector).

It is interesting to highlight one of the companies that says that they provide employees with 1-month training with 1-year loyalty (leavers pay the cost of the training to avoid early departures and retain talent). This is a way of dealing with the high cost of turnover and low levels of fidelity from employees (General Director, Visitors Attraction Subsector).

Given the fact that all companies identify training as mandatory and needed some of them establish protocols with universities to provide training to their C-level managers who some of them mention as the ones who sometimes are left outside this urge of guaranteeing new skills.

We also would like to highlight a concern identified by one of our interviewed company owners who said that “providers of training programs should ensure that trainees can undertake the training. A prior selection for admission should be made to assess the interest/willingness of the trainee.” It’s worth mentioning because having so many available and even free-of-charge opportunities, employees’ interest will be the most important asset to ensure learning and the upcoming changes in the way they perform their roles (Human Resources Manager, Food & Beverage subsector).

4.1.2.6 THE TRENDS

The new generations do not identify themselves with the traditional leadership style in hospitality, based on military assumptions. Therefore, organizational environments will need to evolve also when it comes to leadership practices.

One of our interviewees defined the profile of future employees as “people who look for innovation in everything and people who search for companies that are aligned with the causes they believe in diversity and inclusion, social responsibility, environmental responsibility” (Human Resources Manager, Food & Beverage subsector).

Mental illness is one of the biggest challenges in future employment since 1 in 5 young adults will develop a serious mental illness in the future. Managers should encourage “Mental Fitness” practices among their employees; work-life balance and healthy work environments will continue to be important and will be valued by professionals choosing which company they will work for.

Also, remote and hybrid work seems to be important to employees who tend to value that possibility and consider it a strength when it comes to choosing their jobs. Most of the interviewees say that when recruiting that question is often asked by the candidates. As an example, one of the DMO’s companies entitles their employees to work 1 day remotely and the same company is one of 39 Portuguese companies that integrates a pilot project for implementing the 4-day week (and is the only company in the tourism sector).

Interviewees mentioned that the companies have a multicultural environment and need to deal with the cultural management of food, religion, and clothing of the different employees, a situation that is probably going to become more evident, demanding new competencies and management strategies. Nevertheless, it also seems that the main concerns arise from legal issues and constraints, rather than on the diversity itself. Dealing with it seems easier within a sector that already works with diversity in its day-to-day routine.

Work-life balance is an issue and companies are adapting to it. Also, there is a tendency to have more part-time jobs.

4.1.2.7 THE NEW JOB PROFILES

Interviewees suggest some new job positions that are needed in the tourism sector, such as Data Analyst, E-commerce specialist, and Private technology-based concierge. Another job profile mentioned is the revenue manager for Visitor Attractions tourism companies which does not exist yet and needs to be created.

It has been identified this trend that is to have a specialization following a previous degree, like for instance, marketing for tourism, sales management for accommodation, or data analysis for travel agencies.

Others refer mainly to the need to upskill the workers that they have, considering, for instance, management skills that, sometimes, aren't given to professionals who climb the organizational ladder, based on their operational skills rather than on their managerial skills; some examples were mentioned: tour operators have no management skills, or top management needs financial training.

Also, in a more futuristic approach some interviewees consider that we may need an emotions designer for touristic experiences, someone who would design experiences based on the emotions of the tourists.

4.1.2.8 THE CONCLUSIONS

The main conclusion of the Interviews made by the Turismo de Portugal team is that the respondents find it very hard to envision the future of tourism employment.

However, most of the respondents consider that the next tourism workforce generation needs a boost in social skills training such as empathy, responsibility, critical thinking, and social-cultural background. They consider that the younger generations are emotionally immature, irresponsible, and detached.

The tourism and Hospitality sector is one of the most demanding sectors for workers – the working hours, the seasonality, the wages, the nature of work (the “emotional work”), among others – are factors that have always led to extraordinarily high turnover rates.

Changes in the labour market, the priorities of the new generations, and the specific context of the tourism sector set great challenges to talent attraction and retention. There is a clear reversal in the labour market trend. Nowadays, we observe companies focused on looking for workers, not the other way around.

Tourism sector companies should invest in Employer Branding strategies based on solid policies of attraction and retention of talent. Otherwise, they won't be able to cope with the labour shortage and staff turnover. On the one hand, employees need to feel aligned with the values of the company, and on the other hand, employers should strive to create a healthy and positive work environment focused on People Management (the process of overseeing the training, development, motivation, and day to day management of employees to optimise workplace productivity and promote professional growth).

Some important trends/conclusions:

1. Hybrid working as a trend;
2. Emotional salary and life quality (fewer travel costs and less time spent on transport, balance between professional and personal life, helps retention);
3. Concerns about environmental costs;
4. The impact of AI on most of the tourism jobs.

It is said in one of the interviews that “Portugal needs a new literacy for tourism: the training framework must be seen in a set of variables”, proposing the creation of a platform that brings together leaders from each of the sub-sectors: transport, accommodation, tourism, universities, public authorities (Director, Destination Management Organisation subsector).

Finally, tourism companies that value and want to preserve their business over time are becoming places where workers feel happy.

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

Our interviewees had difficulties foreseeing what will be the needed digital skills in the future, taking into consideration that even now they are feeling overwhelmed by the fast and impactful changes that technology is bringing to the tourism sector. Also, talking about digital skills in tourism in talking about the use of sales programme or business analytics. That means that digital skills will vary in importance depending on an employee's specific role within the tourism sector. However, as technology continues to shape the industry, having a foundational understanding of these skills will help employees adapt to the changing landscape and provide better service to tourists.

In our pool of diverse interviewees, representing all the miscellany of the tourism sector, one thing is a common concern/feeling: the digital and technological is a challenge for tourism and tourism businesses in Portugal need to enhance their knowledge and capabilities in digital skills to take the most advantage of them.

When we try to explore what are the gaps in digital knowledge right now there is an overall feeling that training is needed, which makes sense, so training and upskilling are mandatory: either we need to give them the foundations or upgrade their knowledge. In fact, there's a need for training programs and initiatives to help tourism professionals acquire digital skills, which are available in a large variety of educational institutions, industry associations or government agencies, with plenty of them being free.

There are important skills pointed out as priority, such as cybersecurity awareness (with the increased reliance on digital technologies, there's a growing need for cybersecurity awareness and skills to protect customer data and business operations and recognize potential threats or phishing attempts); digital strategy development (tourism businesses in Portugal, most of them are SME's need assistance in developing effective digital strategies tailored to their target markets and customer segments).

Also digital marketing (understanding online advertising platforms, social media marketing, search engine optimization (SEO), and content marketing); social media management (knowledge of social media platforms and the ability to create engaging content, manage social media accounts, and respond to customer inquiries and feedback effectively); as well as CRM software (proficiency in these systems for tracking customer interactions, managing leads, and personalizing customer experiences is, now valued); website management basic skills and content management systems (CMS) like WordPress are also valuable because of the needed maintenance and updating of websites, online booking portals, and other tools; also, there is a need of competence in digital communication tools such as email, instant messaging, and video conferencing for efficient internal and external communication; also, skills on online reviews and reputation management and positive online reputation, while monitoring and responding to online reviews on platforms. And we must also mention the proficiency in digital content creation including videos, images, blog posts, and infographics, to engage and inform. One of the interesting outcomes and reflections of our interviews is that those skills are now considered needed to almost all employees, like they are part of the basic skills set of each individual, nevertheless their job and/or position.

Because most of our interviewees were managers and/or owners, they mentioned some things that are also impactful in the management level and that are impacting the businesses today and will need to be taken into consideration in the future. We can refer, for instance, the expertise in data analysis tools and techniques that will help businesses to make data-driven decisions, while collecting, interpreting, and presenting data to gain insights into tourism and customer behaviour, market trends and changes. Also, technologies like VR and AR (virtual reality and augmented reality) were mentioned and even if, nowadays, they have a residual impact, the future seems to be different, and they will become more integrated into the tourism experience. The same thing happens with blockchain, so basic knowledge for understanding its applications in secure transactions and digital identity verification may be needed in the sector.

One thing that we identified is that lifelong learning will be even more important. Also, the future seems to create the need of specific trainings for the tourism sector business, like an overview of the particularities of the touristic ecosystem, since we will need to bring lots of professionals from other knowledge fields who will need to understand tourism better to create and implement the needed digital and technological solutions.

We must emphasize that self-learning will be needed as well, and companies should encourage that.

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 (green) skills are becoming more important than ever, essential for individuals working in various sectors of the tourism industry, including tour operators, hotel and restaurant staff, destination managers, travel guides, and policymakers. They are aligned with the concept of sustainable tourism that seeks to create a positive and harmonious relationship between tourists, destinations, and host communities, acknowledging that tourism needs to balance economic growth with social and environmental well-being.

Sustainable tourism aims to minimize negative impacts on the environment, culture, and local communities while maximizing the benefits for all stakeholders involved. It seeks to balance the economic, social, and environmental aspects of tourism, ensuring long-term sustainability. Green skills in tourism include the knowledge, abilities, and competencies required by individuals working in the tourism industry to promote and implement sustainable and environmentally responsible practices.

In Portugal this is a concern, a commitment and a strategy as we can see in the introductory note in the +Sustainable Tourism Plan 20-23, that states an ambition: “to position Portugal as one of the world's most sustainable, competitive and safe tourist destinations, through the sustainable planning and development of tourist activities, from an economic, social and environmental point of view, throughout the territory and in line with the 2027 Tourism Strategy”.

The results of the secondary data revealed, as expected, that there are really different levels in this approach when it comes to act sustainable, whether it comes to management approach or day-to-day actions. Even if all of our interviewees identified environmental concerns, not all of them act accordingly in their businesses and not all of them have this sustainability three principles approach - economic, social, and environmental.

The results of our interviews reveal some relevant data that we should consider when evaluating green skills in the tourism sector in Portugal. Environmental approach is becoming more common among our respondents but there is still a lot to do. “The green attitude” is becoming more present, as a must-have to the tourist offer and tourists needs, and as a result also becoming increasingly present in touristic companies but even if all answers are aligned considering that there is a common concern, also all of them acknowledge that there is still a long way to go.

They are all aware that tourism as a sector (worldwide and in Portugal) is being challenged by the way it is seen as a threat for the planet and its high and potential negative impact. There is a need for an urgent change in the way tourism is managed and in this sense our respondents identify some skills that the future will require. We highlight some of them, as developing and implementing sustainability plans and strategies to guide tourism businesses and destinations in minimizing their environmental footprint and maximizing positive impacts and outcomes, and that is why they also identify the need for tools that monitor and evaluate the environmental performance, and their impact on the economic sustainability, enabling informed decision-making through environmental lens; there is also a need of tools to monitor resource consumption (e.g., water, electricity) and identify areas for improvement and this is an area that will, undoubtedly, demand digital tools and knowledge, which is one of our conclusions: green, social and digital skills are absolutely related and need to be seen as interdependent and contributing one to another.

All of them will need the appropriate training for the managers who need to bring this layer to their reports and goals, learning also how to focus on long-term results, not only on short-term. There is also an important reflection that is the difference between the strategic decision and the operational actions since most of the environmental approach is based not only in the management level, but mainly in the employees’ actions and day-to-day decisions.

Our interviews results show that when it comes to environmental training for their staff, they are more likely to rely on internal training. Also, most of them agreed that environmental certifications and labels are becoming more important for their positioning in the market, that's why they also refer the need for training around sustainable certifications and their impact in the environmental management. In this sequence, they also identify the need to have training that allow them to comply with local and national environmental regulations, which are always evolving and need a continuous update.

Continuing in the management level there is also a need to have skilled professionals who can incorporate green building and design principles into the construction and renovation of tourism facilities to improve energy efficiency, water conservation, and overall sustainability which will impact tourism in the long-term, while designing for sustainability.

They all agree that tourists demands more eco-friendly practices and that's why businesses need to implement them but also to communicate them. That's where they mention the need for more corporate social responsibility practices but also outside communication, meaning that effectively communicating a commitment to sustainability to tourists through marketing materials and online channels, highlighting eco-friendly initiatives and responsible tourism practices is important and this is an area where skilled professionals are needed – now and in the future.

If we consider the operational level, there is still the need for more environmental conscientiousness in the tourism staff. When it comes to accommodation and F&B sector we have to identify some specific skills that are needed and where the sector still needs training like waste management (properly sorting, recycling, and disposing of waste, including food waste); energy efficiency and the use of energy-efficient appliances and practices; water conservation and reduction; menu planning that minimize food waste, incorporate local and sustainable ingredients, and dietary needs, including vegetarian and vegan options; circular economy and sustainable and local sourcing.

There is still a need to educate workers in environmental behaviours such as actively conserving resources, efficient service, and waste sorting.

There is also the need to learn how to create and maintain sustainable business relations with the suppliers.

Another dimension of environmental and green skills is related to individual behaviours, considering employees and tourists. And even if we are considering workers point of view, our interviewees also mentioned the need to educate guests, which is an interesting point of view. Some specific points are identified: inform guests about the hotel or restaurant's sustainability efforts and encourage responsible behaviours like for instance, food waste in hotels or supporting local products and producers and encourage guests to do the same. This was mentioned several times because some of our interviewees run local businesses, with a territorial approach that is considered one of their assets.

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 social/cultural 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

Social and cultural skills are indispensable in the tourism sector, and this was a common statement throughout all the interviews. It was consensual, as well, how difficult it is to find the professionals with those skills, and how challenging it is to train the employees to show them, both in relation to the clients or within the organization. This is, overall, an urgent need for all our interviewees. One of them states it clearly: “the future of tourism is based on social skills: there is no hospitality without the human touch; people are the guardians of the tourist experience” (General Manager and Owner, Accommodation subsector).

Considering firstly the gaps that are shown by tourism professionals we can mention the most referred ones: communication, empathy, conflict resolution, active listening, non-verbal communication, adaptability, teamwork, understanding, respect, discipline and a fair, democratic and peaceful environment.

It seems we need to go “back to basics”. One of our interviewees states it in a very direct way, saying that the most needed social skills are “behaviour rules in society, common sense, and “real life” training”, affirming that we must “learn to listen, to speak after the other, to respect and to be calm. Back to basics... that's the challenge!” (General Manager and Owner, Accommodation subsector).

This seems to be more challenging with the youngest generations, and this is also a common and shared idea. Even if in hospitality, the attitude to socialising is fundamental, the younger generations have some gaps in this area.

Other important social/ cultural skills mentioned are as follows: communication and human contact, empathy, resilience, flexibility in reacting, team spirit, acceptance of intuition, knowledge of foreign languages, knowledge of the country, curiosity and fascination for the world (history, geography, etc.), creativity, emotional intelligence, responsibility, critical thinking, problem-solving and critical analysis of the context.

One of the interviewees considers that the strategy for developing social skills is the on-the-job approach, meaning training within a professional context. So, training programs should be on the job and not in the classroom (Chief Marketing Officer, Destination Management Organisation subsector). Also, mentoring sessions are a trend in training. This is aligned with the need for a very clear communication within the team and monitoring must be done. Other mentioned approaches include some workshops (for example, about cultural diversity in the team, valuing different cultures) and cross-training. Also, about the training approaches most of the organizations tend to find it more useful to have internal trainers, which will be more effective in terms of learned and maintained behaviours. They also refer the need to have online platforms that encourage continuous learning. It will be important, as well, to tailor specific training programs for specific needs and backgrounds, which can be customized.

One of our interviewees shares with us an original idea about how her organization train and maintain employees aligned with the behavioural procedures: she created a cartoon book that is spread around the hotel, which defines each procedure of the hotel with an associated image. It's an original and, in her opinion, a very successful way of training the staff (General Manager and Owner, Accommodation subsector).

Professional profiles must have interpersonal skills, and for that the company culture it's critical. That means that companies must guarantee a culture where employees feel consistency, humility to learn, the use of their knowledge to make the company evolve and team spirit. This is important because companies are now, more and more, acting like they need to train their teams in a continuous way.

For the future, there are as well some competencies that need to be developed: some of our interviewees consider that the tourism sector lacks a culture of solidarity, tourism literacy and cultural literacy.

In Portugal, like in most of the European countries we have a more and more diverse workforce, which brings additional challenges. And even if the big companies have already incorporated these issues in their human resources and management strategies, most of the tourism companies (that in Portugal are SME's) don't have yet those concerns and practices in their agendas. For instance, considering gender equality most of our interviewees don't have, yet a specific training on this subject.

The ones that were mentioned are cultural intelligence and cross-cultural communication. This means to understand, to adapt to, and to respect the customs and values of travelers and helping to forge connections between tourists, tourism professionals and local communities.

Our interviewees also consider inclusivity and equity as topics/skills that organisations will need to address in the close future, making managers and team members important vehicles of inclusive practices to ensure that all, regardless of their backgrounds or abilities, feel welcome. Another competency that future professionals in the field will need to have is cultural competency. One of our interviewees mentions this is an interesting way, stressing out that the future generations of travelers expect tourism professionals to be “the soul, the heart and the knowledge of local people”, and therefore, they should have a holistic understanding of the country. This in-depth knowledge of the history, traditions, and cultural significance will be crucial for offering rich and immersive experiences (General Manager, Travel Agencies subsector).

Our interviewees also consider inclusivity and equity as topics/skills that organizations will need to address in the close future, making managers and team members important vehicles of inclusive practices to ensure that all, regardless of their backgrounds or abilities, feel welcome.

It is important, as well, to develop people management skills in the tourism sector leaders and managers, and this is a concern shared by some of our interviewees, mainly the ones working in large organizations. Actually, well-being and mental health practices are becoming more relevant in attracting and retaining talent. So, this is something that needs to be assured, being considered a must-have by the new generations. As referred in the interviews, not everyone who is already working on the sector has these skills, and this is even more important if they have management/leadership positions. So, in the future it will be needed to develop new skills and/or upskill people management skills, investing in leadership development, making them an example for the rest of the team and fostering a culture of well-being.

One thing that is, also, worth mentioning is that none of our interviewees mentioned artificial intelligence or virtual reality in this topic of the interview. This, somehow, shows how people, social and cultural skills are still in the core of the sector for most of the managers/leaders and that they don't foresee, by now, a huge impact of technology when it comes to this particular subject.

One thing is clear for all the interviewees: tourism workforce needs to be continuously trained in social/cultural skills – this should not be a one-time event. Those skills and competencies are essential for delivering exceptional service and this cannot be separated from organizational culture which, in turn, will make employees more engaged and accountable for the service they provide.

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.



Making Portugal the best destination to study and work in Tourism.

5.1 BEST PRACTICE: TURISMO DE PORTUGAL

Turismo de Portugal - "An organisation for the development of Portuguese tourism"

Subsector - Destination management organisation

Turismo de Portugal is Portugal's National Tourism Authority and is responsible for:

- Promoting Portugal as a tourist destination;
- Supporting the development of infrastructures for tourism and investment in the sector;
- Fostering the training of human resources;
- Regulating and conducting inspections of games of chance.

Turismo de Portugal has already won 9 editions of the World Travel Awards - Europe's Edition in the category of Europe's Leading Tourist Board (Worldtravelawards, 2023).

5.1.1 Background information

Turismo de Portugal is responsible for training and qualifying the tourism sector human resources and for the technical and pedagogical research. It also coordinates, implements and recognizes the courses and vocational training actions in this area. Moreover, it certifies the professional skills required for tourism careers.

For this reason, Turismo de Portugal manages a network of 12 hotel and tourism schools that aim to teach and train young people and to prepare them for their first job, improving the quality and prestige of the different tourism careers.

5.1.2 Analysis and overview

Key principles

Turismo de Portugal's general view on skills development in tourism is closely tied to its training strategy.

Turismo de Portugal recognizes the importance of granting individuals with the necessary skills to excel in the tourism sector, and it has implemented several initiatives to achieve this goal:

- In January 2018, the UNWTO distinguished Turismo de Portugal's schools training project – known by Tourism Training Talent (TTT) - with the first place in the Innovation and Public Policy category during the 14th edition of the UNWTO awards, for its example of training of future generations in the sector. Based on the Tourism Strategy 2027, Tourism Training Talent is a training program provided by the network of schools, focused essentially on people's talents, soft skills development, innovation and internationalization of tourism professionals, as a basis for the success of the sector in Portugal.
- In 2020, in response to the COVID-19 pandemic, Turismo de Portugal has made significant adjustments in the education system, launching an online training platform (Academia Digital | Digital Academy) with an emphasis on new training areas to respond to new demands. Academia Digital changed the way tourism professionals learn, enabling the development of specific programmes in three areas: digital, green and social.

- In 2021, the training actions developed under the 360° Tourism Companies Programme, a measure that aims to place companies at the heart of the sector's sustainable transformation process, preparing companies for the challenge they face in the future. It is focused on training tourism companies in sustainability and ESG - Environmental, Social and Governance - management, so that they obtain the technical knowledge needed to incorporate environmental, social and governance performance measurement indicators into their internal processes and to report on them by producing a sustainability report appropriate to their size and type of activity.
- In March 2022, Turismo de Portugal joined the Pact for Skills, a shared engagement model for skills development in Europe.
- In March 2023, the Portuguese Ministry of Economy and Maritime Affairs launched The Agenda for the Tourism Professions, an instrument to support the promotion, attraction and retention of talent in the sector based in training programmes adapted to new trends and to the market.

Examples and case studies

An example which makes Turismo de Portugal a frontrunner in addressing the digital and sustainable transition of the tourism sector is the online training platform and the training programme on the Sustainability and ESG management aimed at tourism companies:

- Academia Digital (Academia Digital Turismo de Portugal, 2023)
- 360° Tourism Companies Programme (Turismo de Portugal, 2023e)

Potential pitfalls and challenges

The tourism customer is increasingly demanding. Tourism industries need to innovate and improve quality standards to ensure the future of business in the long term.

According to the research and reflections within the framework of PANTOUR project, there is no doubt that Turismo de Portugal's strategy for training professionals and companies in the tourism sector should continue to achieve the type of tourist that Portugal wants to receive.

Portugal aims to go beyond Sun & Sea tourism model to a more qualified tourist destination: diversification of tourist products, establishing a sustainable tourism (although more expensive) and ensuring a tourist experience with a standard of excellence.

On one hand, focusing on technology to help the sector to adapt quickly to new behaviours and trends, without forgetting that tourists are looking for a unique, unforgettable and personalized experience. On the other hand, keeping in mind the balance between minimizing the negative impacts of tourism on the environment, society and culture, while maximizing the positive benefits for the host communities and the visitors.

To complement the current training offer, it is required a structured training programme focused on social and cultural skills (probably a third itinerary of the UPGRADE Programme) and on leadership for the tourism companies.

Benefits and outcomes

Some of the benefits that resulted from the Turismo de Portugal's training strategy are:

- It improved the quality and competitiveness of the tourism sector in Portugal, by enhancing the skills and qualifications of the tourism professionals, as well as by fostering innovation and entrepreneurship in the tourism industry.

- It contributed to the valorization and diversification of the tourism offer in Portugal, by creating tailor-made training plans that respond to the specific needs and potentialities of each territory, as well as by promoting the cultural and natural heritage of the destinations.
- It supported the recovery and resilience of the tourism sector in Portugal, by providing training opportunities for workers affected by the COVID-19 pandemic, as well as by aligning the training strategy with the European Union's priorities and initiatives, such as the Pact for Skills.

Measuring success

Turismo de Portugal developed a Power BI on Tourism education and training which collects information on the number of students/trainees attending tourism courses at the different levels of education.

Responsibility and accountability

The responsibility for implementing and monitoring the initiatives presented in this best practice belongs to the Training Department and the schools' network, under the coordination of Turismo de Portugal's Executive Board.

References and external resources

Website: Turismo de Portugal

Visitportugal is the official website for promoting Portugal as a tourist destination (developed by Turismo de Portugal, I.P.) Sobre Portugal BI Portugal | www.visitportugal.com

School network website: Escolas do Turismo de Portugal

Academia Digital: <https://academiadigital.turismodeportugal.pt>



CONTINUOUS
TRAINING

NATIONAL
STRATEGY

SUSTAINABILITY
AND ESG

Conclusion

Turismo de Portugal is a world reference on skilling, reskilling and upskilling the tourism workforce with international recognition for its best practices, and 9 times winner of the World Travel Awards - Europe's Edition in the category of Europe's Leading Tourist Board.

The training courses offered by Turismo de Portugal´s Schools are adapted to the new trends and demands of the tourism market, focusing on innovation, entrepreneurship, sustainability, accessibility, soft skills and multidisciplinary competencies. The courses also have a strong relationship with the market/companies and public entities of the tourism sector, through the realization of curricular internships.



Purpose:

“Taking care of our business and the people who are with us, in order to create wealth in the long term”.

5.2 BEST PRACTICE: ONYRIA GROUP

Onyria - "Life dreamed by Onyria"

Subsector - Accommodation provider

The Onyria Group is based on a family structure. It was created, about 30 years ago, to make the management of Hotels, Villas, Golf Courses, Restaurants - Monte Mar - integrated, in the name of a dream shared by several generations - to offer the best that life has and to perpetuate moments.

Today the Onyria Group involves the second generation of the family and has the ideal of contributing to a higher quality of life, offering special moments in dreamy places.

The Onyria Group has projects in Hospitality, Golf, Catering and Health.

5.2.1 Background information

Onyria Group is developing a strategy for creating a new organisational culture. They are looking for Dreamers to work with, aligned with their purpose: "Taking care of our business and the people who are with us, in order to create wealth in the long term".

5.2.2 Analysis and overview

Key principles

Authenticity, Honesty, Familiarity, Readiness, Team spirit, Trust and Ambition. These are the 7 Values and Attitudes that the Onyria Group seeks when recruiting people and that must be reflected in the actions of its employees.

Examples and case studies

Some great examples of the Onyria Group strategy for creating a new organisational culture are:

1. Onyria Experience Playbook

The e-book aims to facilitate employee integration, to encourage a good working environment and to guide relations with colleagues, clients and partners.

2. Onyria Academy

The Onyria Academy is an academy dedicated to the employees of the Onyria Group, which offers them the opportunity to develop their personal and professional skills through training programmes with a variety of subjects and formats.

The purpose is to promote an energising, motivating and collaborative working environment where the employees feel valued and empowered to achieve a full and meaningful life.

The training programmes developed by Onyria Academy are:

I.THE_BREAKFAST_CLUB (Directors club)

Training for directors of the Onyria Group, usually lasting 1 hour on Fridays, with different topics and speakers.

II.TRAINING_LAB (Dreamers)

A series of training courses on a variety of topics, with the aim of providing participants with fundamental tools and knowledge for both their professional and personal development.

III.HEY_DREAMER

- Welcoming trainees | Buddies Onyria - each trainee is welcomed and accompanied by a "Buddy Onyria"
- Trainings with different themes or specific to a current topic (e.g. Family Day, Financial Literacy)

The main skills trained at the Onyria Academy are clearly defined:

- Soft skills

Team spirit | Patience | Communication | Time management | Problem-solving skills | Leadership | Adaptability | Empathy | Critical thinking | Social sensitivity | Creativity

- Hard skills

Proficiency in English and other languages | Advanced Excel | People management | Project management | Image editing | Microsoft Office | Sales | Interview technique | HTML | SEO | Stock management

3. Happiness Week

The last week of September is internationally recognized as Happiness at Work Week. The aim of this week is to create activities and moments of conviviality among employees that prioritize happiness at work. During this week there are activities with different themes that are interconnected with happiness, to encourage employees to explore personal competences related to the topic.

4. A Happiness survey is carried out for all employees (how they feel in the workplace, level of satisfaction with meals, transport, personal development, working conditions, etc.).
5. A post-internship survey or interview is carried out to evaluate the trainee.
6. Fringe benefits: psychology counselling, medical care, hairdresser and make-up services available at work.
7. Initiatives: Employees of the Onyria Group are guests for a day at the Onyria Quinta da Marinha Hotel.

Potential pitfalls and challenges

Implementing a new organizational culture in a company can be challenging and may encounter several pitfalls:

- **Failing to Communicate:** Effective communication is crucial during a change process. If employees are not informed about why the change is happening and how it will impact them, it can lead to confusion and resistance.
- **Resistance to Change:** Some organizations have a culture that leans toward stability and their leaders may view change as a threat.
- **Limited Knowledge and Resources for Change Management:** If the organization does not have sufficient knowledge or resources to manage the change process effectively, it can lead to implementation failures.

Benefits and outcomes

The benefits and positive outcomes that Onyria Group expects to achieve by adopting a strategy for creating a new organisational culture is to give people a greater voice, to recognise a greater employee involvement and to have workers with more personal and professional skills.

After almost two years of a pandemic, with extreme difficulties for the hotel sector, the Onyria Quinta da Marinha Hotel compensated the employees of the entire Onyria group with a 5-star experience at the hotel. 247 employees and their families were able to enjoy their stay and the hotel's different services and activities, such as hiking, yoga classes, and DJ entertainment 1.

Measuring success

Key steps to measuring the success of the new organizational culture strategy:

- **Employee surveys:** Happiness survey and post-internship survey can provide insights into employees' perceptions of the new culture.
- **Organizational performance:** Confirming if the new culture is contributing to business outcomes.

Responsibility and accountability

The responsibility for implementing and monitoring the results of the initiatives presented in this best practice belongs to the Culture, Communication & Marketing Department.

References and external resources

Website: [Onyria Group](#)



HAPPINESS WEEK

PSYCHOLOGIC COUNSELING

TRAINING FOCUS
HARD & SOFT SKILLS

Conclusion

Onyria Group is a best practice in attracting and retaining talent.

The strategy of Onyria Group is based on:
Recruiting people who are passionate about what they do, who demonstrate commitment and teamwork, and who offer excellent service to their clients.

Offering some benefits and actions to their staff, such as birthday day, medical consultations, psychological support, discounts on services, and more.

Believing that people are the success and the future of their organization and want them to grow professionally and individually.



It is the Group's policy to respect the environment.

5.3 BEST PRACTICE: THE WORLD OF WINE

The Fladgate Partnership | The World of Wine – “A cultural district with a WOW factor”

Subsector – Food & Beverage

The Fladgate Partnership is a holding company that has businesses in Port Wine, tourism and distribution. In Portugal, it also has distribution companies that supply its products and those of others to hotels, restaurants, retailers and consumers.

The World of Wine project is a major initiative in tourism, located in the historic area of Vila Nova de Gaia with a complex of seven museums/experiences, 14 food and beverage outlets (Restaurants, Bars and Cafés), a wine school and shops.

In September 2023, Fladgate Still & Sparkling Wines was created, after the purchase of IdealDrinks by The Fladgate Partnership adding further expertise, knowledge and over three centuries of heritage through this new challenge.

The Group currently has around 1,150 employees, spread across different facilities in Vila Nova de Gaia, Porto, Lisbon and the Douro.

5.3.1 Background information

The original company of the group is Taylor's Port was founded in 1692. However, in 2001 it acquired Croft Port, which was founded in 1588 and celebrated its 430th anniversary in 2018. With its other brand (Fonseca Port) The Fladgate Partnership is a leading player in producing special category Port, which it sells in over 105 countries.

It has been a pioneer in Port and, more recently, in tourism. The creation of The Yeatman Hotel, which opened in 2010, was arguably the catalyst that started the tourist boom in the city of Porto. It also owns the Vintage House Hotel, in Pinhão.

The Fladgate Partnership Group wants to convey a global image of a careful and responsible organization, with constant attention to cost reduction and in search of a positive and cooperative working relationship.

It is the Group's policy to respect the environment, therefore is everyone's responsibility to rationalize the available resources. The aim is to provide the client with a final product of superior quality while respecting the group's values and culture.

5.3.2 Analysis and overview

Key principles

The key principles of the group are competitiveness, rigor and quality, guiding and reinforcing the culture of the company, only achieved with the collaboration of all employees.

When it comes to company values, they are:

- Pride – in the global quality of the company and their products.
- Organization – led with professionalism and rigor.
- Teamwork.
- Respect – for the clients and within the team.
- Boosting and Enhancing - individual and group capabilities.

They value their historic legacy and innovation, as well as diversity of products. Their human capital is considered strategic for achieving their goals.

When it comes to human resources new approaches are being implemented, like for instance, hiring abroad. In this sense, we can mention a pilot-project in Cape Verde (extended recently to São Tomé and Príncipe) with students from the hotel and tourism school, hiring there and providing all the needed help for the immigration process, may it be cultural integration, legal processes or accommodation facilitation.

Examples and case studies

The best practice that will be highlighted is a partnership between public and private sector – in this case, between IEFP (the national public employment service) and the company being addressed.

The group faces the same challenges with job profiles that need to be redefined and the lack of human resources, affecting the whole sector. Taking this into consideration two different assumptions have been made: the need to bring new people to the sector while accepting that they are training people who are passing through. Nevertheless, it is important to ensure they have all the training needed for the job as soon as possible and aligned with the group values as much as possible.

This pilot project (implemented for the first time in 2020) consists in a tailor-made training in partnership with IEFP Gaia (the local branch of the public employment service). Since IEFP mission is to promote the creation and quality of employment and combat unemployment by implementing active employment policies, including vocational training they were available to create this specific training to the new employees in the group.

The process starts with the company identifying the employees they need – this may include a process of recruitment conducted internally and/or identifying unemployed with the help of the IEFP. Afterwards, they will create a group of new employees, who will need to be trained/skilled in order to be able to provide the excellent service they aim to provide (most of them won't have the basic skills/previous training to be able to provide the needed service standards). When the group is created, both institutions work together in order to define the topics that the training will address, may it be soft or hard skills (usually, the training programme will include both). The programme has the duration of one month, starting with three days in the classroom and then alternating between the classroom and the workstation.

The most important aspect is that the design of the training topics is tailor-made for the specific group. Also, the trainers are both internal and external, which seems to bring the best outcome: the external ones won't impact the normal functioning of the organization (which seems to be a downfall of the process) and the in-house training providers are more aligned with the core values and organization culture and will be able to continue training them, even after the end of the initial period, accompanying their development.

One of the highlights is that this partnership allows the company to provide training to their employees that is supported financially by the public institution.

Potential pitfalls and challenges

This best practice is based on bringing new profiles into tourism and hospitality to whom initial training is offered, and the company states that, internally, there is some resistance to this change that has been created by the market itself, since there are no available and trained human resources. Some old employees are more resistant to embrace people with different profiles and sometimes with less professional training. One of the challenges is to convince the middle-management that this is the new reality. Also, it is important that they see themselves as part of the training team, providing continuous feedback and training.

Also, this programme demands internal trainers and not everyone is talented and skilled to be an internal trainer, having as well the availability to do it. Finding the right trainer with the needed skills is a challenge as well.

However, the human resources director identifies the biggest challenge: reconciling training with operations (restaurant downtimes are used for training), since the F&B operation is very demanding. To overcome this challenge, the company decided to conduct the training before people report to their respective workplaces/managers.

Benefits and outcomes

The main benefits of creating a continuous training culture in the organization have been identified internally:

- The employees feel more valued and more prepared to their role, making them feel more confident and therefore, engaged;
- Higher level of service- level of service improves with training;
- Employees feel accompanied and involved, which gives them safety;
- Internal trainers are a way of reinforcing brand values;
- Managers are also involved in the process, assuring better results in the recruitment and onboarding processes;
- Employer branding – the exit interviews, show most of the employees valued the training provided, becoming ambassadors for the group.

Measuring success

The success of the best practice can be assessed by the retention rate that increased in 2023. Also, the exit interviews, as mentioned before, highlight the importance of the training that was given from the beginning. This may also take advantage of the rapid career progression and internal mobility (vacancies available and visible to all).

Responsibility and accountability

The responsibility for implementing and monitoring the results of the best practice is on the Training Coordinator assisted by Human Resources Director and in-house trainers at front of house. All of this needs to be supported by leaders and top management.

References and external resources

Website: <https://fladgatepartnership.com/en/>

Project: <https://www.wow.pt/en>



PUBLIC-PRIVATE
PARTNERSHIPS

INTERNATIONAL
RECRUITMENT

IN-HOUSE
TRAINING

Conclusion

One of the main conclusions of this case study is the importance of setting partnerships between the public and the private sectors, allowing both to fulfil their missions. It is also worth mentioned the need to face the changes occurring in the sector, which will impact the service and the people working in tourism.

Finally, the company considers that training is needed to reinforce skills that will allow more satisfaction and higher quality service, stating that training should not be used as a “salary review”, meaning that it’s not an outcome, but a starting point.



*A human-centered economy
that is based on sharing and
collaboration.*

5.4 BEST PRACTICE: O VALOR DO TEMPO

O Valor do Tempo - "The world has never been so Portuguese"

Subsector: Visitor attractions

O Valor do Tempo Group was created in 1994 in Seia, and its first public expression came in 2002 with the opening of the Bread Museum.

The group currently owns 15 different Portuguese brands and is a business focused on customer experience.

Remaining faithful to the Group's values, the brands are based on a legacy of Portuguese history and heritage and honour the past and traditions that time has preserved. The brands don't want to sell a product; they want the customer to go into the shop and feel absorbed by the atmosphere and take away a memory. They want to leave a memory in the customer's mind.

5.4.1 Background information

O Valor do Tempo is a Portuguese group of companies that works with the best that Portugal has to offer to the world, especially in the fields of history, culture and tourism.

There is a strong focus on the quality and uniqueness of their products and services, which could attract more customers and employees who value the Portuguese heritage and culture.

The group also have a diversified portfolio of brands that cater to different segments and markets, which could reduce their exposure to specific risks and increase their resilience.

O Valor do Tempo Group also claim to have a human-centered economy that is based on sharing and collaboration, which could foster a positive work environment and a loyal customer base.

5.4.2 Analysis and overview

Key principles

At O Valor do Tempo Group, authenticity is a choice, not a consequence. That is why the company values loyal people with a well-developed sense of ethics, who contribute to a happy and harmonious environment in the workplace.

O Valor do Tempo Group believes in the value and power of people as an essential asset for the success of their business. The organization wants every individual to develop their potential and believe there is always room to overcome and reinvent oneself.

Commitment, innovation, creativity, dynamism, a proactive approach, and humility are the values that motivate over 700 employees at O Valor do Tempo Group, who work passionately as a team, every day, spontaneously transmitting this passion to their customers.

The inner talent of their employees is considered their greatest asset; it is an essential source of energy for the group and a strategic pillar for the business activity.

Examples and case studies

O Valor do Tempo Group offers a challenging and valued professional career as part of a relationship that is based on mutual high standards, encouragement, and respect.

How did the company create an organizational culture focused on people management?

I. Training

Factory of Dreams – the Training Academy – is aimed at all who work in the O Valor do Tempo Group and it is for all brands and for all jobs.

The trainings use the brand name to exploit the different possible meanings of the word: “Value of time”; “Being the value of time”, “Sales with value”, “Leaders with value”. Trainings for continuing professional development in the various company departments seek to enhance their employees’ professional skills and excellence in customer contact.

With a training room equipped with audiovisuals, rest and leisure areas, a meeting room and a space for practical training that simulates a store environment, the academy also has accommodation with capacity to host up to 20 people simultaneously so that our people can stay comfortably installed during training periods.

More than a training centre, Factory of Dreams reflects the group essence, helping to reinforce their brands’ concepts and instigate everyone’s creativity and self-improvement.

II. Open communication

Internal communication channels with their employees are a preferred means that allows the company to identify opportunities for improvements in performance, spaces and working relations.

III. Recognition of merit

Identifying individual skills and promoting dialogue are key to enhancing the best in each person and serve as a stimulus for development and professional excellence, rewarding each employee's performance impartially and transparently.

Potential pitfalls and challenges

O Valor do Tempo Group has grown a lot in recent years and there was no structured Human Resources Department.

In 2022, they decided to create a new Human Resources Department (where each brand has its Human Resources manager) and the Factory of Dreams, the group's training academy.

They hired a Chief Happiness Officer that helps promoting the mindset change, so that people stop seeing work as an obligation, something they must do, and start seeing it as a source of personal fulfilment.

At the end of the day who is responsible for happiness at the workplace?

First, the group believes that the main role lies with each individual. Secondly, everyone is responsible for happiness at work. However, managers have an additional responsibility. They have an obligation to promote an environment in which people feel safe. It suggests that the quality of the manager-employee relationship is a significant factor in employee retention and satisfaction.

Finally, the group implemented a Smiling Culture, a way of welcoming and attracting customers to their stores.

Benefits and outcomes

The main benefits of creating a people-oriented organizational culture are clear for O Valor do Tempo Group:

- The employees become great ambassadors for the group's brands;
- Workers know on a daily basis how much they've already achieved in bonuses because they access an app that gives them this information in real time (Casting app). Productivity bonuses bring a valuable return: they help the company grow and also empowers and benefit the employee with knowledge about the organization;
- Some employees who leave the company sometimes return;
- There is a professional progression within the company; the group prioritises internal recruitment first.
- Employee´s Happiness increases (reduction of absenteeism and turnover; increase in productivity and sales).

Measuring success

O Valor do Tempo Group success can be assessed by its internationalization strategy. In August 2023, the group opened the first 'The Fantastic World of the Portuguese Sardine' shop outside of Portugal. They have ventured to live the American dream, bringing one of Portugal's most important business cards to Times Square: canned fish. It's one of the new attractions in Times Square, one of New York's most visited tourist attractions.

Source: Imprensa de Nova Iorque rendida a nova loja portuguesa em Times Square - SIC Notícias (sicnoticias.pt)

Responsibility and accountability

The responsibility for implementing and monitoring the results of the initiatives presented in this best practice belongs to the Human Resources Department.

References and external resources

Website: [O VALOR DO TEMPO – Grupo Empresarial](#)

Promotional videos:

[Grupo O Valor do Tempo \(short version\) \(youtube.com\)](#)

[The Fantastic World of the Portuguese Sardine \(youtube.com\)](#)



Conclusion

O Valor do Tempo Group is a best practice in attracting and retaining talent.

Placing happiness at the heart of the organizational culture is its strategy.

In a changing labour market, where companies are struggling to find employees and not the other way around, O Valor do Tempo Group decided to lead the development of People and promote organizational Happiness, providing their employees with the security to be calm and focused when carrying out their activities.

EMPLOYEES
BONUSES

INTERNAL
PROGRESSION

OPEN
COMMUNICATION



We are a humanist company

5.5 BEST PRACTICE: TRAVELSTORE

Travelstore - "One of the world's best Travel Designers agencies"

Subsector - Travel agents and tour operators

TRAVEL MANAGEMENT 3.0

Travelstore specializes in business travel solutions for companies, differentiating through technology, that allows the maximal customization. It's a company that operates different business units and brands, all entirely focused on servicing corporations and their employees.

The company aims to create "out-of-the-box" solutions for the travel manager, the travel organizer and the traveler. The ability to listen is one of their DNA key components. The company states that is "why it has and always will be the customers who define our value proposition". The company was founded in 2020 and has, now, around 250 employees (180 in Portugal, and the others Algeria, Angola and Mozambique, where they also have branches).

5.5.1 Background information

The organization core values are efficiency ("Best pricing and a dedicated team reassures me that nothing will fail"); confidence ("More balanced financial conditions gives our company the ease to focus on our business") and closeness ("Having someone to help me with anything I need, no matter when.").

The CEO shared they had two main concerns since the company foundation: specialization and humanism. "We are a humanist company", he states.

Considering the sub-sector of travel agents and tour operators and having this kind of approach, the company is seen as very innovative. The employees were given hybrid and remote work way ahead the pandemic.

Also, addressing the well-being of the employees as individuals is, since ever, the way of managing human resources, as well as recruiting focused on interpersonal skills more than technical ones.

Travelstore offers salaries above the market average and links variable compensation to performance for all roles and functions.

So, some specific actions are responsible for the success and competitiveness of the company, as the CEO believes.

5.5.2 Analysis and overview

Key principles

Travelstore key principles are humanism, specialization, a culture of error and appraisal and not less important, variable pay.

In a more general way, it is also important to highlight how they promote the learning by doing, the long-life learning and, also, the on-the-job training. This keeps everyone involved and engaged, since it is also well known that prioritizing employee training and development, benefits both the individual and the organization.

Examples and case studies

Appraisal Culture

It is worth mentioning how Travelstore invests in personal development conducting twice a year a moment of employee development, for all employees, fostering a culture of appraisal, recognition and continuous development.

In addition, the company promotes a culture of praise, sharing good practices and recognition from colleagues or clients. This practice has been facilitated by the existence of collaborative work tools that allow for more constant sharing with a larger number of employees.

Variable Pay

Variable pay seems to have a high impact on the employee performance, because knowing that their efforts directly impact their earnings, make them more motivated and focused on achieving and/or exceeding their goals.

For the CEO this is also the best way to align individual and organization goals, leading to a more goal-oriented workforce which, ultimately, impacts the overall results.

This also impacts the talent attraction and retention, mainly high-performing individuals, who are crucial for Travelstore, focused on specialization and tailor-made services.

The Error Culture

Travelstore fosters a positive error culture, which from their point of view has some key advantages such as increased innovation, allowed by the knowledge that errors will be seen as a learning opportunity and are not going to be punished.

This also improves the transparency and trust among employees and their relationship with the organization. Our interviewee emphasizes that they really take this seriously, stating that this can't be a "false principle", leading to misinterpretations or disappointments. Like he says "this can't be 'marketing'".

Potential pitfalls and challenges

One challenge that is addressed by Travelstore is the way the company trust training and cross-training will happen, naturally, in the work environment as they foster collaboration. Nevertheless, he is now aware that this is not enough, and that is why that by the time of our interview they were considering creating a more structured and intentional training program.

This will help the company to be more efficient providing every employee the needed competencies. This is also a result of this fast-changing world that will keep evolving vertiginously, forcing them to be more rapid to provide the necessary upskilling and reskilling (which is also one of their needs, since they are automating as much tasks as possible).

Other challenge may be to stay competitive in the market since more companies are now following their way of being, mainly, paying above the market. For instance, they mentioned giving a raise to the employees last year (2022), so they can cope with the inflation rate. There is, however, a downside of this approach that has to do with the competitiveness of the organization itself.

This is important as a learning for other companies, since it stresses out that a good work environment needs to be assured, side by side, with a competitive salary but the salary itself will not be enough. Besides, using only (or mainly) salary can be challenging for the company itself.

Benefits and outcomes

A humanist culture, that prioritizes the well-being and development of its employees guarantees various benefits, such as, the employee retention, which diminishes recruitment and training costs, while maintaining a more experienced workforce and a more engaged one.

This also serves as way of creating positive reputation for them as employers. They believe to have this positive employer branding which helps them to attract new employees more easily.

For them, who value efficiency and closeness, having employees more motivated and creative is crucial. Even more because one of their main services is to create tailormade solutions for their clients, business and individual ones.

Measuring success

The success is based on the results of the company, their retention rate and potential of attracting new employees in this highly competitive workforce market. Also, the success as a competitive and sustainable company, which continues to grow after 23 years of business. “Our success is based on our people”.

Responsibility and accountability

The responsibility for implementing and monitoring the results of the initiatives presented in this best practice belongs to the CEO and the Human Resources Manager.

References and external resources

Website: <https://www.grupotravelstore.com/en>



ERROR CULTURE

VARIABLE PAY

APPRAISAL
CULTURE

Conclusion

Travelstore is a real example of how a humanist culture in a tourism organization has a profound positive impact. The CEO refers the close relation between employee well-being, guest satisfaction, and the long-term success of the business.

The competitive market and the fast-changing revolutions, with special emphasis in the technological one, demands engaged and talented workers and Travelstore feels like having a competitive positioning when it comes to attracting and retaining talent.

SKILLS SYNTHESIS

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.

 facebook.com/nexttourismgeneration

 twitter.com/NTGAlliance

 linkedin.com/company/pantour-pact-for-next-tourism-generation-skills/

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 **PANTOUR**
PACT FOR NEXT TOURISM GENERATION SKILLS

<https://nexttourismgeneration.eu/pantour/>



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Appendix 1. Examples of Digital training providers

Training provider name: Turismo de Portugal
Website: Turismo de Portugal
Type of provider: Vocational schools Turismo de Portugal is the Portuguese Tourism Authority responsible for a network of vocational schools.
Covered skills types: <ul style="list-style-type: none">• being digitally literate• online marketing & communication•
Methods of delivery: Online and in person certificated trainings, such as: <ul style="list-style-type: none">• UPGRADE 2.0 Programme Digital with 3 modules: Digital tools, Digital and the social media and Digital strategy and Marketing performance Upgrade 2.0 - Escolas Turismo de Portugal The UPGRADE 2.0 Programme for the tourism sector professionals, enables micro and small enterprises as well as their collaborators to acquire knowledge and develop new skills, thus allowing them to base their businesses on new valued proposals, which are more sustainable and able to meet future challenges within the sector. When possible, this may also increase the level of professionals' qualifications.

Training provider name:

Fundação para a Ciência e Tecnologia (FCT)

Website:

[Home - NAU site](#)

Type of provider:

Public sector

Fundação para a Ciência e Tecnologia is the Portuguese national funding agency for science and research and is part of the Portuguese Ministry of Education and Science.

NAU is an online project, pioneering at Portuguese national level, to support education and training, aimed at large audiences.

NAU platform is a service developed and managed by the FCCN Unit of the Foundation for Science and Technology (FCT) that allows the creation of courses in MOOC format (Massive Open Online Course), that is, courses open and accessible to all, produced by recognized and relevant entities in society, with the participation of thousands of people. This platform is part of the transversal actions of the Portugal INCoDe.2030 initiative by promoting digital development, digital inclusion and literacy, education, and qualification of the active population.

Covered skills types:

- digital security
- privacy and ethics

Methods of delivery:

NAU platform is part of the transversal actions of the Portugal INCoDe.2030 initiative by promoting digital development, digital inclusion and literacy, education, and qualification of the active population.

The trainings on cybersecurity and similar are offered in MOOC format.

[Courses - NAU site](#)

Training provider name:

Universidade NOVA de Lisboa

Website:

NOVA IMS | School of Information Management and Data Science

[NOVA IMS - Information Management School | NOVA IMS \(unl.pt\)](#)

TOHO | NOVA Tourism & Hospitality Platform

An international, innovative, impactful and interdisciplinary platform that is a reference for research and education in Tourism & Hospitality.

[toho – NOVA Tourism & Hospitality Platform – Connected Knowledge \(unl.pt\)](#)

Type of provider:

Universities

Covered skills types:

- (big) data analytics

Methods of delivery of this provider:

The programs offered by NOVA IMS aim at training senior-level staff prepared to face the challenges of the globalized and competitive market in which we are inserted and to perform the new functions that the information society has created.

[Programs | NOVA IMS \(unl.pt\)](#)

Appendix 2. Examples of ‘Green’ training providers

Training provider name: Turismo de Portugal
Website: Turismo de Portugal
Type of provider: Vocational schools Turismo de Portugal is the Portuguese Tourism Authority responsible for a network of vocational schools
Covered skills types: <ul style="list-style-type: none">• Resource-efficiency• Climate change and transition to low carbon economy• Conservation of biodiversity• Sustainability communication• Environmental management
Methods of delivery: Online and in person certificated trainings, such as: <ul style="list-style-type: none">• Upgrade 2.0 Programme Sustainability with 3 modules: Sustainable tourism, Circular Economy and Tourism and Corporate Sustainability Upgrade 2.0 - Escolas Turismo de Portugal The UPGRADE 2.0 Programme for the tourism sector professionals, enables micro and small enterprises as well as their collaborators to acquire knowledge and develop new skills, thus allowing them to base their businesses on new valued proposals, which are more sustainable and able to meet future challenges within the sector. When possible, this may also increase the level of professionals’ qualifications.

Training provider name:

Business Council for Sustainable Development (BCSD) Portugal

Website:

[BCSD Portugal - Companies for Sustainability](#)

Type of provider:

Businesses, trade associations

The Business Council for Sustainable Development (BCSD) Portugal is a non-profit association that brings together and represents more than 140 companies reference companies in Portugal that are actively committed to the transition to sustainability.

Covered skills types:

- Resource-efficiency
- Climate change and transition to low carbon economy
- Conservation of biodiversity
- Sustainability communication
- Environmental management

Methods of delivery:

Sustainability training program in 4 stages - Discovery, Beginners, Intermediate and Advanced.

[Training - BCSD Portugal](#)

Training provider name:

Universidade de Aveiro

Website:

[Universidade de Aveiro \(ua.pt\)](#)

Type of provider:

Universities

Covered skills types:

- Resource-efficiency
- Climate change and transition to low carbon economy
- Conservation of biodiversity
- Sustainability communication
- Environmental management

Methods of delivery:

The Department of Environment and Planning of the University of Aveiro carries out research to understand the complex interactions between human activity and the environment, and how to manage strategic resources (air, water, land, forests, coastal zones, etc.) in a more sustainable manner.

Appendix 3. Examples of Social/Cultural training providers

Training provider name: Universidade Católica Portuguesa (UCP)
Website: UCP Homepage - EN
Type of provider: Universities
Covered skills types: <ul style="list-style-type: none">• Interpersonal and intrapersonal skills• Critical and innovative thinking• Global citizenship• Competences that promote social progress which recognizes the needs of everyone
Methods of delivery: <p>The programmes taught by UCP and the degrees granted (undergraduate, masters and doctoral degree) develop work linking disciplines in order to address complex social challenges.</p> Undergraduate UCP

Training provider name: Instituto Superior de Lisboa e Vale do Tejo (ISCE)
Website: ISCE Instituto Superior de Lisboa e Vale do Tejo

Type of provider:

Universities

Covered skills types:

- Cross-cultural understanding, supporting diversity, gender and racial equality
- Competences that promote social progress which recognizes the needs of everyone

Methods of delivery:

This e-learning Programme aims to contribute to the integration of the gender and diversity perspective in the tourism sector.

[\(Des\)Igualdades de Género no Turismo | Instituto Superior de Lisboa e Vale do Tejo \(isce.pt\)](#)

Training provider name:

ISLA – Instituto Politécnico de Gestão e Tecnologia

Website:

[Institute - ISLA Gaia | Instituto Politécnico de Gestão e Tecnologia](#)

Type of provider:

Polytechnic Institute

Covered skills types:

- Teamwork and cooperating with others
- Open-mindedness, and flexibility to explore unconventional solutions and possibilities
- Competences that promote social progress which recognizes the needs of everyone
- Promoting fair pay and working conditions in tourism
- Self-confidence
- Self-motivation
- Resilience, and goal setting
- Curiosity

Methods of delivery:

ISLA Business Academy is an academy whose mission is postgraduate education and specialised training in the areas of management and technology.

The MBA Corporate Happiness & Mental Health is aimed at professionals who want to develop their knowledge of organisational happiness, well-being and mental health. The MBA Corporate Happiness & Mental Health allows you to develop key concepts and provide the tools and methodologies for implementing happiness-oriented management programmes in a corporate context, without neglecting the current concept of health, which according to the World Health Organisation is not just the absence of physical health, but a state of complete physical, mental and social well-being, which is so often compromised in adulthood and in the workplace.

[ISLA Business Academy – Empowering & Connecting the Leaders of the Future \(ibagaia.pt\)](http://ibagaia.pt)

[MBA | Felicidade Corporativa & Saúde Mental – ISLA Business Academy \(ibagaia.pt\)](http://ibagaia.pt)

Training provider name:

Universidade Aberta (UAb)

Website:

[Universidade Aberta \(uab.pt\)](http://uab.pt)

Type of provider:

Universities

Covered skills types:

• lifelong learning capabilities

Methods of delivery:

UAb uses comprehensively, in its teaching activities, advanced technologies and methods of Distance Learning.

[Aprendizagem ao Longo da Vida \(uab.pt\)](http://uab.pt)