PANTOUR

PACT FOR NEXT TOURISM GENERATION SKILLS

06/24

SECTORAL SKILLS INTELLIGENCE MONITOR

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EXECUTIVE SUMMARY

The PANTOUR Sectoral Skills Intelligence Monitor (SSIM) consists of a toolkit for collecting and analysing data to assess skills and address *skills gaps* on the level of the tourism and hospitality sector. The SSIM for the tourism sector is designed to identify current and future workforce skills in order to enable evidence-based decision-making around workforce strategies required to achieve sustained organisational performance and to build a capable workforce. Workforce skills, in the broadest sense, are the capabilities, competencies, qualities, talents, and knowledge that enable people to perform successfully in the labour market.

What is the Sectoral Skills Intelligence Monitor?

An important benefit of the SSIM is that it is flexible and can thus be used in various ways and at multiple levels: local, regional, national, or international, adding value to existing skills measuring systems, and improving flexibility and feasibility. The SSIM aims to provide an innovative and comparable common approach for assessing and identifying changing skills needs along the tourism value chain and ensuring that education and training systems are responsive to the evolving labour market needs. It does not set any fixed standards, nor does it provide any certification.

The SSIM was primarily developed for assessing digital, green, social-cultural, and transversal skills needs in five tourism subsectors. However, it can be easily expanded and used to address skills needs in other tourism subsectors.

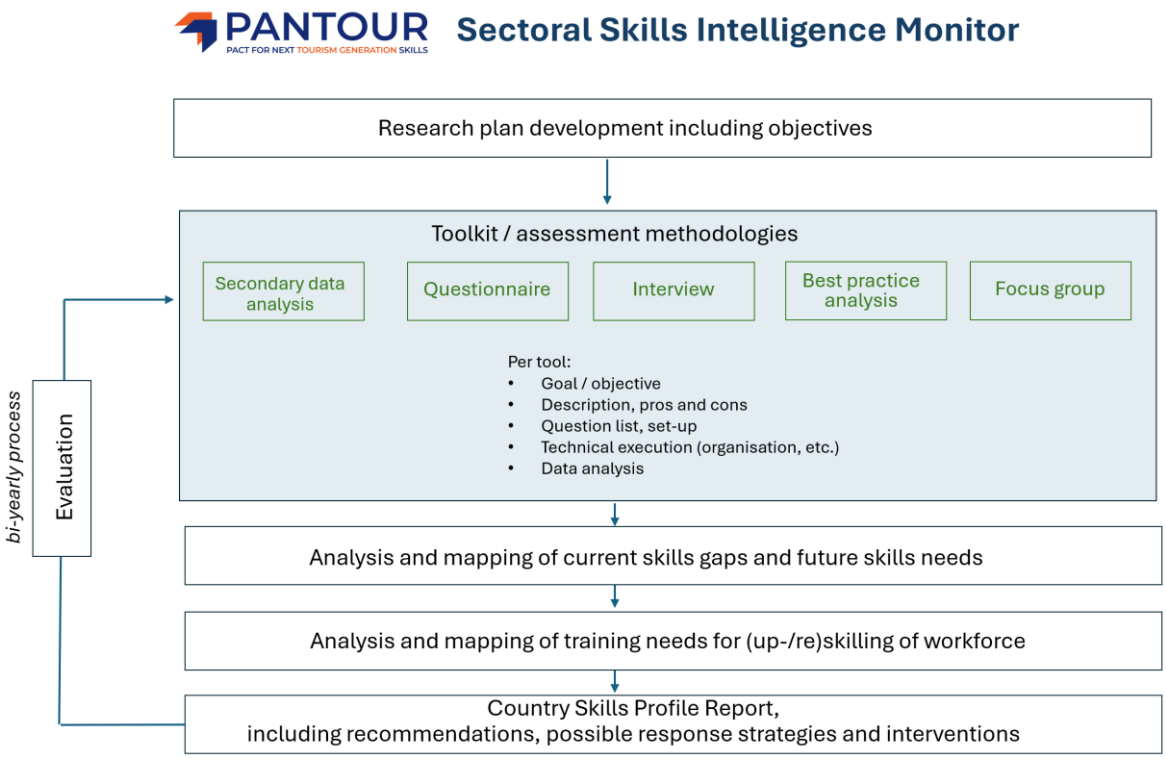
How does the PANTOUR Sectoral Skills Intelligence Monitor work in practice?

The SSIM contains a toolkit with various research and assessment methodologies, that can be used in a flexible way or added to existing methodologies to assess skills (gaps) and future needs. As a preparation to successfully implement the SSIM, the following important conditions need to be met:

- Composition and existence of *National/Regional Skills Partnerships* (NRSPs): a body that initiates, arranges, and manages the structural implementation of the SSIM in each country or region. NRSPs should ideally consist of a diverse group of stakeholders, overseeing the planning, coordination, and monitoring of the SSIM process, stakeholders' management as well as marketing and communication. The roles and responsibilities of the initiative should be clearly defined. Optimally, the SSIM is initiated and managed by one or more leading tourism organisation(s) or associations representing a specific geographical area (local, regional, national, transnational).
- Determination and availability of necessary financial budgets and HR resources to execute the SSIM.
- Setting up cross-country collaboration to create comparability of results.

What does the PANTOUR Sectoral Skills Intelligence Monitor look like graphically?

Below, please find a graphical representation of the SSIM:



1. Introduction

Tourism and hospitality are projected to grow in the years to come and the tourism industry is likely to change substantially as tourism, just as other industries and societies in general, is affected by worldwide socioeconomic and geostrategic forces, such as technological innovations, demographic changes, environmental pressures and changing values. The World Tourism Organisation (2023) stipulates that tourism is deeply influenced by the ongoing social and technological transformations, which are shaping new and disruptive business models (such as collaborative platforms and the internet as a direct distribution channel) and different consumer patterns. To cope with all these changes, new and other skills are necessary for the tourism and hospitality sector.

Digital skills are increasingly needed (e.g. for data management, conducting online business, using augmented reality technologies, artificial intelligence or blockchain technology). At the same time, *social-cultural and transversal skills* will remain key for delivering innovative and personalised services to an increasingly diverse (e.g. Millennials, generation Z, seniors, and travellers with special needs) and international range of customers. *Environmental management or green skills* are also increasingly important, as there will only be a future for tourism when more sustainable practices are incorporated into the consumption and production of tourism.

Bridging of skills gaps

A *skills gap* is defined as the difference between the skills an employee has and the skills s/he needs to stay competitive or do her/his job well. Skills gaps can lead to lower productivity, missed opportunities and slower growth. For example, a social media manager in tourism who is at an advanced level at crafting engaging posts but hasn't yet mastered TikTok may struggle to connect with younger audiences and miss out on opportunities to boost brand awareness under these target groups.

Skills gaps can show up in different ways, like when an employee lacks technical know-how or has trouble with soft skills such as communication or leadership. They can occur due to various reasons, from rapid tech advancements to changing market requirements to inadequate training opportunities. To stay competitive and successful in the long run, organisations in the tourism and hospitality sector (and the sector as a whole) need to find, analyse and fix these gaps.

Skills gaps can not only be mapped on an individual level but also on a team, organisational, or sectoral level. For example:

- *Individual*: when the duties of a certain position are changing, or an employee is falling below performance standards.
- *Team*: when a new project expects employees to complete a different set of tasks or use a new technology.
- *Organisational*: when the company is not achieving its goals, or if a strategy shift requires expanded capabilities to meet up with consumer expectations.

- *Sectoral*: e.g., global socioeconomic and demographic shifts, technological innovations, environmental pressures and changing values are changing general job requirements.

Keeping track of rapidly changing skills needs and bridging skills gaps is necessary to cope with a world in constant flux, posing major challenges for tourism businesses, education providers and governmental bodies. It does not only involve the acquisition of new skills, but also life-long education and continuous reskilling and upskilling.

The PANTOUR project

The Erasmus+ PANTOUR Project (2022-2026) is a European consortium to address skills issues in tourism and hospitality. It aims at improving a collaborative and productive relationship associated with skills development between education and the work field. PANTOUR is the follow-up project of the NTG project (Next Tourism Generation Skills Alliance: 2018-2022). The PANTOUR project aims to design innovative solutions to address skills needs in tourism, with the development of outputs such as a Sectoral Skills Intelligence Monitor, a Skills Lab, a Resource Book for Trainers, a Skills Strategy Plan for 2026-2036, among others.

With the exploitation of its outputs, PANTOUR seeks to benefit job seekers, employed and unemployed workers from the tourism industry, employers, SMEs, tourism associations and policymakers. Therefore, it has dedicated special attention to the reskilling and upskilling of the generic workforce on future skills needs. To achieve this goal, structural insight is needed in the future of tourism, to gain knowledge of skills gaps between current levels of skills in the tourism industry and the skills needed in the future. In other words, it is necessary to continuously forecast skills needs and anticipate all main skills gaps. Hence, up-to-date information is needed for this.

SSIM methodology

Gathering and unveiling this information is the main objective of the PANTOUR Sectoral Skills Intelligence Monitor (SSIM) methodology, as included and substantiated in this report. It is developed to support the tourism and hospitality sector, educational institutes, training providers and government bodies to continuously and longitudinally identify, assess, and monitor skills needs in order to make strategic choices to eradicate skills gaps for a future-proof tourism industry within the EU.

The SSIM consists of a flexible research methodologies toolkit, that can be used in a variety of circumstances in each country (or region), to continuously keep track of existing skills gaps, emerging (new) skills needs and job profiles, best practices and training needs to effectively address and cover gaps and future needs, in a structural cooperation between the relevant national and/or regional stakeholders (tourism associations, educational institutes, training providers, social partners, national/regional sector partnerships and/or governments). It can serve as a valuable tool to understand the current state of skills and make informed decisions regarding workforce development strategies.

2. Toolkit of assessment methodologies

In this section, the flexible modular SSIM architecture with research and assessment methodologies (*toolkit*) is provided which allows countries and regions to apply and customise the SSIM methodology to their specific needs.

2.1 Introduction

In general, conducting any kind of research typically involves a *structured sequence* of activities to plan, gather, analyse, and interpret information effectively. Every research process looks as follows:

a) Identify the research objective and question(s).
b) Design a research plan and approach, including a data storage and management plan.
c) Conduct a secondary data analysis (literature review, desk research).
d) Collect and analyse data with the use of primary research methodologies.
e) Interpret the findings and draw conclusions.
f) Disseminate and communicate the results.
g) Apply and effectuate the results (action planning).
h) Close the loop: review, revise and reiterate the process.

The first step in the research process is *identifying the research objective and question*(s). This task demands clarity, relevance, feasibility, a strong grounding in existing knowledge, and ethical integrity. These elements ensure that the research will be clear, well-directed, manageable, and capable of producing valuable insights.

Secondly, the *research plan and approach* need to be designed that enable the researchers to collect and analyse data to achieve the research objectives. The research plan should include details on the sample size, data collection methods, and data analysis techniques that will be used. As part of this step, a *data storage and data management plan* should be developed and implemented – i.e. what kind of (primary) data will be collected, how and where the data from the questionnaires, interviews, etc., will be stored, which data should be deleted and when, how to take care of privacy and anonymisation of interviewees and company names (if mentioned in the interviews or focus groups), who should have access to the data and to what data, how to deal with risks related to data such as data leakages and data loss. Attention should also be paid to the ethical and legal aspects of the research: an assessment and approval of the research set-up by an objective third party may be necessary.

Subsequently and as an initial step in the actual research process, conducting *secondary data analysis* is key (also known as *desk research*). This involves reviewing **existing data** from literature, academic papers, industry and sector reports, and any other relevant sources of information related to skills (gaps) and human capital development. By delving into secondary data, researchers can gain insights into what is already known about this topic, identify gaps in existing knowledge, and refine the research needs. This phase helps in understanding the context and prior findings that will inform the subsequent stages of the research.

Once the secondary data analysis is complete and the first outline of results is visible, the focus shifts to *primary research methods*. Primary research involves collecting **new data** directly from the source or target population. The choice of primary research methods depends on the gap in information that is still existing and the desired depth of understanding. This SSIM methodology offers a toolkit containing the following primary research methods:

1. **Questionnaires**: these are often used to gather quantitative data from a large sample of respondents. They can be administered in person, but mostly online. Questionnaires allow researchers to quantify opinions, behaviours, and preferences within the population being studied.

2. **Interviews**: they provide a platform for in-depth qualitative data collection. Researchers conduct structured, semi-structured, or unstructured interviews to gather detailed insights from individuals or key informants. This method enables a deeper exploration of attitudes, experiences, and perspectives.

3. **Best practice analysis:** this involves studying successful strategies, processes, or interventions used by organisations or companies to achieve specific outcomes related to skills or human capital improvement. This research method focuses on identifying and understanding the most effective approaches or techniques with evidence from practice that has led to superior performance or desired results in the tourism domain.

4. **Focus groups**: they involve moderated discussions with a small group of participants who share similar characteristics or experiences. This method is particularly useful for exploring diverse viewpoints, uncovering underlying motivations, or testing concepts.

By following this sequence (starting with secondary data analysis and then moving to primary research methods), researchers can leverage existing knowledge to inform the design and execution of their primary research. This approach helps ensure that the primary research is well-informed, targeted, and capable of addressing specific skills gaps, human capital issues and/or other questions identified during the desk research phase.

Moreover, integrating secondary and primary research methods in this manner enhances the credibility and depth of the findings. The insights gained from secondary data analysis provide a foundation for the remainder of the research and the effective interpretation of

primary data. Overall, this structured approach optimises the research process and increases the likelihood of generating valuable, actionable insights.

After collecting and analysing primary and secondary data, findings need to be *interpreted and conclusions drawn*. Lastly, results will be publicly *disseminated and communicated*, and *put into actions* (application and effectuation into action plans). Since the SSIM methodology comprises a recurring approach (e.g., with a bi-annual data collection), the outcomes of the study may provide input for preparing the reiteration of the skills (gaps) research by *reviewing and revising the research process*.

In the following sections, we focus on the core of the research process: the secondary and primary research methodologies that can be used for collecting and analysing data. For each research methodology, a description, guidelines, pros and cons, and requirements for its effective implementation are provided, including (in the appendices) a library with suggestions for pre-designed set-ups, allowing for the addition of specific or existing questions.

2.2 Secondary Data Analysis

Description and goal

A first tool of the PANTOUR Sectoral Skills Intelligence Monitor (SSIM) and – as already set out – the logical start of any kind of research process, consists of creating a current and future skills profile for working in the leisure, tourism, and hospitality sector. The primary aim of this skills profile is to review the current local, regional and (inter)national situations in relation to tourism skills development, policies, and gaps by identifying and summarising existing knowledge (secondary data collection) on tourism and hospitality skills assessment, as well as trends and developments that might have implications for future needs regarding the skills under investigation. This output can be realised by secondary data collection and analysis (*desk research*). This should be completed from the perspective of the tourism industry and/or local government organisations (demand side) as well as from a selection of the supply side (universities, VET institutes, commercial training companies, NGOs). Providing an overview of the current situation regarding skills and skills needs as well as trends and developments that might lead to a change in demand for future skills are crucial steps in the PANTOUR SSIM. It also will ensure that the skills assessment research project is building its research on existing knowledge, confirming the validity and relevance of the findings.

Set-up and execution

Data collection can be a simple process of bringing the conclusions from various data sources together in one document to build a picture of the local, regional and/or (inter)national skills situation. Information on the current and future skills needed in the tourism industry may be partly already available, within EU documents and reports, documents of other international or national organisations, websites (such as the PANTOUR website: https://nexttourismgeneration.eu/pantour/), industry reports,

previous research, and articles. It is highly recommended to study national, regional and/or local tourism strategy and policy documents such as national (regional and local) tourism plans; tourism development strategies; training, education, and skills development for tourism; tourism workforce policies, etc. It is therefore important to gain a broad understanding of what has been done already to decide what is missing and what needs to be further investigated. The information collected will also provide input for the other tools available in the PANTOUR SSIM. For some useful reports and studies in this field, please see under "Supporting documents" at the end of this section.

Conducting the analysis

It is advised to collect and analyse data from existing sources and summarise these in the **PANTOUR Secondary Data Analysis Templates** (see links to documents at the end of this section). The template is easy to complete and provides a useful frame of reference for stakeholders (i.e. the importance of tourism for the local / regional / national economy; the current situation and future needs regarding the skills under investigation from the perspective of the tourism industry and a selection of suppliers of education/training education; implications of findings).

Secondary data analysis is a cost-effective method for accessing and using existing data from various sources, such as:

- *Industry reports*: Reports from industry organisations such as the World Travel & Tourism Council (WTTC), Organisation for Economic Co-operation and Development (OECD), United Nations World Tourism Organisation (UNWTO), Eurostat, World Bank, and the International Labour Organisation (ILO) may offer comprehensive analyses of workforce trends, skills requirements, and gaps in the tourism industry.
- *Government databases and publications*: National tourism boards, government labour departments, and (inter)national bureaus of statistics frequently publish data on employment trends, skills shortages, and workforce development initiatives.
- *Surveys and reports by (inter)national industry associations*: Associations from subsectors of tourism (national and international) conduct surveys themselves and publish relevant reports.
- *Company reports*: large tourism and hospitality firms (e.g., Marriott, Hilton, TUI Group, Booking) and consulting companies (e.g., McKinsey, BCG, EY) may publish reports on workforce development strategies and training of employees in tourism.
- *Academic publications*: academic journals, books, and conference proceedings publish studies related to workforce development and skills gaps in the tourism and hospitality sector. These publications may provide insights from previous research and can be a rich secondary data source.
- Educational institutions (universities) and research centres: working papers, theses, and research reports.

An initial step in the process of desk research (secondary data collection and analysis) is to focus on two perspectives: the international one, and a country-specific focus.

1. International perspective

In this context, secondary analysis also considers global sources. This involves researching data, reports, and studies that span across countries, regions, and continents. Furthermore, useful information on the current and future skills development in the tourism industry and education can be identified in EU documents and (global/European) industry reports, policy documents, and previous academic studies. In this way, partners will gain a broad understanding of the current situation in order to strategically plan for workforce development and address skill gaps. This part, which will focus on the international perspective (valid for all countries), will be conducted by *National & Regional Skills Partnerships* (*NRSPs*), the bodies that initiate, arrange, and manage the structural implementation of the SSIM in each country or region. NRSPs should ideally consist of a diverse group of national/regional tourism & hospitality stakeholders, overseeing the planning, coordination, and monitoring of the SSIM process, stakeholders' management as well as marketing & communication.

Key elements to explore in this part of the secondary analysis include global trends, market dynamics and emerging patterns that impact skills development. Also, existing industry and governmental best practices can be studied.

1. Country-Specific Focus

This perspective narrows down the research to a *specific country or region*. Among others, it includes national/local conditions (related to economy, tourism, consumer behaviour, market characteristics and size); the competitive landscape (market trends, business strategies); and the legal and political environment – all in relation to tourism skills development.

Supporting online documents and useful links

- A Guide to Secondary Data Analysis
- Secondary research: Definition, methods, & examples
- PANTOUR documents:
  - European Skills Survey Report (Feb 2024)
  - Country-specific Desk Research template
  - Social-Cultural Skills Desk Research template
  - Environmental Skills Desk Research template
  - Digital Skills Desk Research template

Recommendations from the PANTOUR Secondary Data Analysis Research reporting process

For PANTOUR research, project partners were asked to first create an overview of the general tourism situation in their countries and regions as well as national and / or regional tourism strategies in order to provide context for the skills assessment. Next, they made a secondary data analysis for:

• the currently required digital, environmental management and social skills in five tourism subsectors (accommodations, visitor attractions, F&B, destination management, tour operators);
• the current situation regarding the delivery of three skills sets (Social-Digital-Green) for a selection of suppliers of education/training (universities, businesses, trade associations, private training providers);
• the future needs regarding the investigated skills in each of the most important tourism subsectors.

Finally, preliminary conclusions - based on this desk research - regarding future skills needs and gaps were drawn.

The PANTOUR Secondary Data Analysis Template can be adjusted to the needs and wishes of each Skills Assessment Research project. It is, however, highly recommended to respect the structure of the final document when answering the questions to collect comparable results which can provide input for the other tools in the toolkit.

2.3 Online Questionnaire

Description and goal

As a first primary data collection tool, an **online questionnaire** can be considered. The purpose of the questionnaire is to measure and map the importance of the skills sets under investigation in *a quantitative way* and to detect if a gap exists between current levels of skills and the skills and levels that will be needed in the future in the targeted subsectors.

Questionnaires are one of the most inexpensive and efficient methods for gathering quantitative data. They can be self-administered. Questionnaires can be distributed via various channels, such as websites, email, or social media profiles. As a downside, however, when deploying a questionnaire, respondents may experience questionnaire fatigue, leading to response bias, particularly when questionnaires are lengthy, and feel repetitive or complex. Also, it may be challenging to gather sufficient respondents to be able to draw statistically significant conclusions.

Set-up and execution

It is highly recommended to construct a questionnaire that can be conducted *online*. These can be easily sent to large numbers of potential participants, are more user-friendly,

and are easier to process than printed questionnaires. Advanced online survey platforms such as Qualtrics or SurveyMonkey provide an aid to create and analyse online questionnaires. Other, more straightforward and user-friendly options are Google Forms or Microsoft Forms. Relevant survey questions can originate from the secondary data collection: topics that emerge as relevant from this phase can be used to create questions.

At the start of the (online) questionnaire, information needs to be displayed about the purpose of the research and the survey, as well as about confidentiality, anonymity, ethics and privacy procedures in line with the European General Data Protection Regulation (GDPR). The survey data should be kept confidential. On the first page of the questionnaire, participants need to explicitly agree with the Participant Consent declaration, expressing their participation in the survey.

Suggestions for questionnaire topics from the PANTOUR project

General background information on the tourism subsector and the company/organisation:

- Which subsector does your organisation operate in?
- What is the size of your organisation?
- What is your role in the organisation?
- Level of seniority?

Current levels of proficiency in digital, environmental management and social (or other) skills.
Rating the current level of proficiency in the following digital skills in the own organisation on a scale from 1 (no skills present) to 5 (expert) on e.g.:

- Microsoft Office skills (e.g., Word, Excel, PowerPoint);
- Online marketing and communication skills;
- Monitoring online reviews;
- Computer programming skills;
- Applying digital hardware technologies, such as Augmented and Virtual Reality;
- Data analytics, business intelligence, big data;
- Artificial intelligence

Future levels of proficiency in digital, environmental management and social (or other) skills:
Estimating the future level of proficiency in the following environmental management skills needed in the own organisation in ten years' time on a scale from 1 (no skills present) to 5 (expert), e.g.:

- Promotion of environmentally friendly activities and products;
- Promotion of sustainable forms of transport (e.g. public transport);
- Knowledge of climate change;
- Ability to minimise the use and maximise the efficiency of energy and water consumption;
- Ability to manage waste, sewage, recycling and composting;
- Conservation of biodiversity

It is recommended to create survey guidelines to be used by all partners involved, covering:

a) The **time frame** for the survey research: when will the questionnaire be ready; which and how many people will test the questionnaire; when will it appear online; how long will it be online; when are the results expected?

b) If applicable: a procedure for the **translation** of the English questionnaire to the national language; who is responsible for this; who will check the quality?
c) A procedure for **sampling**: how many respondents are needed; from which sectors / companies / organisations, mix of large and small companies/organisations to represent the tourism business landscape. The number of respondents can obviously be adjusted to the size of the country.
d) A procedure for **contacting potential participants** in the survey: explicit consent and anonymity in accordance with the EU General Data Protection Regulation (GDPR); a cover page of the online questionnaire that explains the aims of the research, why the respondents have been contacted, contact details of a person responsible to answer any questions related to the questionnaire, and a concept text for the letter or e-mail to inform participants about the NRSP and the purpose of the questionnaire (see supporting documents at the end of this section).

Conducting the analysis

Subsequently, an analysis of the **survey results** should be compiled and presented as part of the Country Skills Profile report**,** exploring the **skills gaps** per skills sets type (see supporting documents below).

Analysis of the questionnaire data can be done in Excel or with more dedicated statistical analysis programs such as IBM-SPSS or R. The assistance of one or more people who are experienced in constructing online questionnaires and processing the results is required for this.
The survey results may provide important information for the other tools within the SSIM. The outcomes of the survey can be distributed as a stand-alone report and further discussed in the National & Regional Skills Partnership (NRSP) and website and used to make the tourism and hospitality sector to be future proof.

By comparing the current and future skill levels in measuring the actual absolute and relative difference between those levels, one can observe which types of skills need the most attention in the pool of skills which are measured by the survey. The difference is calculated by a Paired Samples T-test in IBM-SPSS, showing the overall mean of both the current and future skill levels and whether the differences in these averages are statistically significant.

Supporting online documents and useful links

- Explanation of Paired Sampled T-test
- PANTOUR documents:
  - Skills Assessment Survey List of Questions
  - Example letter or e-mail for communicating and promoting the questionnaire and the research to potential participants

Recommendations from the PANTOUR Online Survey process

From February to May 2023, a European survey was conducted in the partner countries of the PANTOUR project (Spain, Greece, Hungary, Netherlands, Italy, Bulgaria, Germany, Ireland, and Finland). The total sample of the survey on a European level amounted to 873. In some countries, it turned out to be quite difficult to attract the targeted number of participants. In order to maximise response, it is advised to create questionnaires that can be completed within a timespan of five to ten minutes.
To get a clear and concrete grasp of the skills needs and gaps under investigation, it is recommended to use the survey results to calculate the gap for each skill set by calculating the difference between the *existing current level* of a skills set and the *future needed level*.

2.4 Expert interviews

Description and goal

As an addition to the other research tools, more in-depth insights and understandings of the future of digital, environmental management and social (or other) skills may be collected from the perspective of (experts working in) the tourism industry through *interviews*. Possible participants include senior managers; human resource managers; company owners; entrepreneurs; heads of departments, etc. The goal of conducting expert interviews is to gather in-depth insights and knowledge from individuals who possess specialised expertise and authority in tourism. Expert interviews allow researchers to dive into complex topics related to skills and gain nuanced perspectives that may not be readily available through existing data sources or questionnaires. Speaking directly to the source also increases the overall credibility of the skills research.

Set-up and execution

To make the most of the expert interviews, thoughtful upfront planning is crucial. This includes creating a well-crafted interview plan and an interview guide. The interview plan helps select the right experts to speak with, while the interview guide outlines specific questions to discuss with the chosen experts.
It is advised to use semi-structured interviews of around 45 minutes. Semi-structured interviews with open-ended questions that generate lengthy and descriptive answers are a suitable tool for gathering in-depth knowledge and fresh insights. They allow for new ideas and perceptions on the topics to be discussed because of the interviewees' responses and elaborations.

However, the interviews should deliver reliable and comparable qualitative data and facilitate a comparison of the insights gathered during the interviews. Therefore, an **interview guide** (see supporting documents at the end of this section) should be constructed with interview themes to provide a coherent focus for the interviews as well as some example questions, which the interviewer can tailor to the interview context and the interview participants.

All participants should be provided with a **Participant Information Sheet** (see supporting documents at the end of this section), explaining the purpose of the research and the interviews as well as confidentiality and anonymity procedures in line with the European General Data Protection Regulation (GDPR). The interview data should be kept confidential; participants' and their companies' identities should not be revealed to third parties or the research analysis team (if different to the data collection team); at the end of the study, the documentation used to gather the data should be destroyed. Participants also need to sign a **Participant Consent Form** (see supporting documents at the end of this section), agreeing to be interviewed and for the interview to be recorded. If the interviewee does not wish the interview to be audio recorded, notes should be taken instead.

Data collection should continue until *data saturation* is achieved, i.e. when the additional interviews do not add new information, but everything shared by the interviewees is already said in the previous interviews. This may be expected to occur somewhere after 10-15 interviews if the sample is diverse enough.

The number of interviewees is also dependent on the size of the skills assessment research project at hand. A healthy mix of small and large companies and organisations should be pursued. The gathered interview data should be used anonymously to compose a report, which can be shared with the NRSP partners, trade associations, policymakers, and other relevant stakeholders.

Suggestions for SSIM Skills Assessment interview topics and questions can be found in the supporting online PANTOUR document at the end of this section.

Conducting the analysis

The process of analysing the data gathered from interviews involves seven steps:

1. **Transcribe** the recordings of the interviews into a written text. This allows for easier review and coding of the data.
2. Then, it is time to **Familiarise** yourself with the information collected. This is done by reviewing the transcripts and, if possible, the audio or video recordings several times to become familiar with the content and identify emerging themes or patterns.
3. The third phase is the **Coding**. During the coding phase, labels are systematically assigned to the data to categorise it, based on its meaning or content. Codes can be predetermined or developed during the analysis process. This step may involve multiple rounds of coding to refine and finalise the categories.
4. Subsequently, it is time to **Develop Themes**. Here, group-related codes are identified into broader themes that capture the essence of the data. Themes should be grounded in the data and provide insights into the research question or objectives.
5. Next, it is time for **Data Interpretation and Analysis**. The themes and their relationships to one another are then analysed. This is done in conjunction with existing literature and theoretical frameworks, and further used to draw conclusions, make recommendations, or generate new research questions.

Throughout the analysis process, it is important to maintain a reflexive stance, acknowledging your own biases and preconceptions and how they may influence your interpretations. Additionally, the use of qualitative data analysis software may be considered (e.g., NVivo, ATLAS.ti) to help manage and organise the data.

6. Throughout the analysis process, employ strategies to ensure the rigor of the findings and therefore ensure **Trustworthiness**.
7. Finally, the **Reporting** phase concludes the analysis process. In this stage, the findings are presented in a clear and concise manner, using appropriate visual aids, such as tables or diagrams, to illustrate the themes and their relationships. The report should also include a description of the methodology and any limitations or challenges encountered during the analysis. Also, the report needs to explicitly mention what constitutes a best practice and provide a justification why this is considered as a best practice.

Supporting online documents and useful links

- General guide for conducting Expert Interviews
- PANTOUR documents:
  - Skills Assessment Interview Guide for Semi-structured Expert Interviews on the Future of Digital, Environmental Management and Social Skills in Tourism
  - Interview Report Template
  - Participant Information Sheet and Participant Consent Form

Recommendations from the PANTOUR Expert Interviews process

During the PANTOUR research process, interviews took place with over 100 tourism directors, heads of department and entrepreneurs, delivering a wealth of in-depth insights into (the future of) digital, environmental management, and social skills. Many of the interviewees communicated that they would like to stay in touch with the PANTOUR Alliance. The personal contacts established during the interviews between the PANTOUR researchers, and the interviewees are not only important for gaining valuable information but also for convincing participants of the relevance of the PANTOUR project and getting new partners on board.

2.5 Best Practice Analysis

Description and goal

A Best Practice is defined as a practical example that has been shown by experience to produce optimal results and that is established or proposed as a standard, suitable for widespread adoption.

In the SSIM context, a Best Practice Analysis means searching for **practical examples in upskilling, reskilling, attracting/retaining staff in the field of skills development in green, digital, and social-cultural** and analyse their characteristics. These real-life cases should exemplify an innovative view on skills development. Researchers will look for best practices, for instance per tourism subsector, based on the previous selection criteria.

The organisations of these selection can be SMEs, global organisations, startups/pioneers, and others.

Bear in mind that "promising practices" - that may not have been tested or in existence for very long but that seem to work and have serious potential are also worth investigating.

Set-up and execution

The goal of the selection process of best practices is to have an inventory of **innovative initiatives, projects, programmes, 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.

We suggest analysing and interviewing (approx. 60 minutes) at least **5 organisations with Best Practices** in upskilling, reskilling, attracting/retaining staff, spread across tourism subsector such as tour operators, travel agencies, accommodation, F&B operations, visitor attractions, destination management organisations.

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

- It has a clear goal, and it purposely addresses the bridging of existing skills gaps and future skills needs in tourism.
- 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.
- 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).
- It targets the underlying causes in addition to the challenge in upskilling and reskilling, attracting/retaining.

Please make sure to only select best practices, **following this checklist**:

- Relevance: the organisation has a knowledgeable focus on green/sustainability *and/or* digitalisation *and/or* social/cultural skills challenges within tourism and is a thought leader based on the consistency of their activities with sectoral skills needs, and their activities align well with the direction and intended outcomes of research process.
- Efficiency and impact: the organisation has concrete examples on how economic resources/inputs (funds, expertise, time, etc.) are converted to impactful results on skills development.
- Sustainable employability: The organisation practices, at least to some extent, the principles of sustainable employability of its workforce. This concept focuses on an employees' functional capacities in work throughout their career; key elements are:

    - *Employability*: the worker needs to be able to gain, maintain and obtain new employment. Investments in Lifelong Learning are crucial.
    - *Workability*: employees can only bring out the best in themselves when they have the physical, mental, and social ability to cope with work demands.
    - *Vitality*: employees need to have energy and motivation to go to work.
- Objectives/rationale: the organisation contributes to a resilient tourism sector.

Conducting the analysis

The process of conducting the data analysis gathered from Best Practice interviews involves basically seven steps and are basically similar to the process with regard to the expert interviews as mentioned earlier.

1. The first step is to **Transcribe** the recordings of the interviews into a written text. This allows for easier review and coding of the data.
2. Then, it is time to **Familiarise** yourself with the information collected. This is done by reviewing the transcripts and, if possible, the audio or video recordings several times to become familiar with the content and identify emerging themes or patterns.
3. The third phase is the **Coding**. During the coding phase, labels are systematically assigned to the data to categorise it, based on its meaning or content. Codes can be predetermined or developed during the analysis process. This step may involve multiple rounds of coding to refine and finalise the categories.
4. Subsequently, it is time to **Develop Themes**. Here, group-related codes are identified into broader themes that capture the essence of the data. Themes should be grounded in the data and provide insights into the research question or objectives.
5. Next, it is time for **Data Interpretation**. The themes and their relationships to one another are then analysed. This is done in conjunction with existing literature and theoretical frameworks, and further used to draw conclusions, make recommendations, or generate new research questions.
6. Throughout the analysis process, employ strategies to ensure the rigor of the findings and therefore ensure **Trustworthiness**.
7. Finally, the **Reporting** phase concludes the analysis process. In this stage, the findings are presented in a clear and concise manner, using appropriate visual aids, such as tables or diagrams, to illustrate the themes and their relationships. The report should also include a description of the methodology and any limitations or challenges encountered during the analysis.

Supporting online documents

- PANTOUR documents:
    - Best Practices Research Guide
    - Best Practice Report Form template
    - Participant Information Sheet and Participant Consent Form

2.6 Focus Groups

Description and goal

A Focus Group is a qualitative research method that involves bringing together a small group of participants (6-10 persons) to discuss a specific topic or issue. The group is typically led by a moderator who guides the discussion using a set of predetermined questions or prompts.
The main goal of a focus group is to gather in-depth insights, opinions, and experiences from participants in an interactive setting. By encouraging participants to engage with each other and share their thoughts, focus groups can generate rich, qualitative data that may not be obtainable through other research methods, such as online questionnaires or individual interviews.

Focus groups are generally used to:

- Explore attitudes, perceptions, and beliefs about a particular topic or issue;
- Gain a deeper understanding of participants' experiences or behaviours;
- Generate new ideas or solutions to problems;
- Assess the potential success or effectiveness of a product, service, or intervention;
- Identify areas for further research or investigation.

The interactive nature of focus groups allows participants to build upon each other's responses, which can lead to the emergence of new ideas or perspectives. The group setting also enables researchers to observe group dynamics and non-verbal cues, providing additional context and insight into participants' opinions and experiences.

The advantages of this methodology are the richness of the data collection and the option to have direct interaction with the group, making use of flexibility and adaptiveness during the session. On the other hand, working with focus groups may pose the risk of imbalanced group dynamics (risk of dominant participants; social desirable behaviour in complying within the group) and it therefore need to be made sure that the focus group moderator has sufficient capacities and experience to manage and lead the group.

Set-up and execution

- Define the research objectives and develop a discussion guide with open-ended questions that align with these objectives.
- Identify and recruit participants who meet the desired criteria (e.g., demographics, experiences) and can provide valuable insights. Aim for a group size of 6–10 participants.
- Choose a neutral, comfortable location for the focus group and ensure that the space is conducive to discussion (e.g., good lighting, minimal distractions).
- Select a skilled moderator who can facilitate the discussion, keep the group on track, and ensure that all participants have an opportunity to contribute.
- Prepare any necessary materials, such as consent forms, name tags, refreshments, and recording equipment (if applicable).

Regarding the execution of a Focus Group session:

1. Welcome participants and provide an overview of the purpose and format of the focus group. Establish ground rules for the discussion (e.g., respect for others' opinions, confidentiality).

2. Have participants introduce themselves and engage in a brief icebreaker activity to create a comfortable atmosphere.

3. Begin the discussion by asking the first question from the discussion guide. Encourage participants to share their thoughts and experiences and use probing questions to elicit more detailed responses.

4. Ensure that all participants have an opportunity to contribute and that no single participant dominates the discussion. The moderator should guide the conversation, but not lead or bias the responses.

5. Take notes throughout the discussion and record the session (with participants' permission) for later transcription and analysis.

6. Conclude the focus group by summarising the key points discussed and thanking participants for their time and insights. Provide any necessary follow-up information or compensation.

7. Debrief with the research team to discuss initial impressions and identify any areas that may require further exploration in subsequent focus groups or through other research methods.

8. Transcribe the recording and analyse the data using qualitative methods such as thematic analysis to identify key themes, patterns, and insights that address the research objectives.

Conducting the analysis

The analysis of focus group data involves several steps to systematically examine the qualitative information collected. These include transcription; familiarisation; coding; thematic analysis; interpretation; validation and reporting. A description of this process is as follows:

1. **Transcription:** If the focus group discussions were audio-recorded, the first step is to transcribe the recordings verbatim. This creates a written record of the sessions that can be easily analysed.

2. **Familiarisation**: Read through the transcripts several times to become familiar with the content. This helps you gain an overall understanding of the participants' experiences and perspectives.

3. **Coding**: Begin the coding process by identifying and labelling meaningful segments of text that are relevant to your research questions. Codes can be descriptive, interpretive, or theoretical, depending on your research objectives.

4. **Thematic analysis:** Group related codes into broader themes or categories. Themes should capture the essence of the coded data and provide a meaningful structure for understanding the participants' experiences. This process may involve several iterations of refining and reorganising themes.

5. **Interpretation:** Examine the themes in relation to your research questions and the existing literature. Consider how the themes relate to each other and what they reveal about the phenomenon under study. Look for patterns, similarities, and differences across the focus groups.

6. **Validation:** Employ strategies to ensure the credibility and trustworthiness of your findings. This may include member checking (seeking feedback from participants on your interpretations), peer debriefing (discussing your findings with colleagues), or triangulation (using multiple data sources or methods to corroborate your findings).

7. **Reporting:** Write up your findings in a clear, coherent manner that communicates the key themes and their significance. Use quotations from the focus groups to illustrate and support your interpretations. Discuss the implications of your findings for theory, practice, or future research.

Throughout the analysis process, it is important to maintain a reflexive stance, acknowledging your own biases and preconceptions and how they may influence your interpretations. Additionally, consider using qualitative data analysis software (e.g., NVivo, ATLAS.ti) to help manage and organise the data, especially if you have many focus groups.

Supporting online documents and useful links

- Bolin, G., Kalmus, V. Figueiras, R. (2023). Conducting Online Focus Group Interviews with Two Generations: Methodological Experiences and Reflections from the Pandemic Context. *International journal of Qualitative Methods, 22.* https://doi.org/10.1177/16094069231182029, accessed 30 April 2024.
- Hassan, M. (2023). Focus Groups – Steps, Examples and Guide, https://archive.ph/7Vdsz, accessed 28 May 2024.
- Hennink, Monique M., 'Writing Focus Group Methods', *Understanding Focus Group Discussions,* Understanding Statistics (New York, 2014; online edition, Oxford Academic, 24 Mar. 2015), https://doi.org/10.1093/acprof:osobl/9780199856169.003.0003, accessed 30 April. 2024.
- Krueger, R. A. & Casey, M. A. (2014). Focus Groups: A Practical Guide for Applied Research. Fifth Edition. Sage Publications Inc., https://books.google.nl/books?id=8wASBAAAQBAJ

3. Analysis and mapping of current skills gaps and future skills needs

From the secondary data analysis and the primary data collection methods selected from the SSIM Toolkit as substantiated above, the next step is to analyse all results and map the current skills gaps and future skills needs.

To analyse and determine skills gaps and forecast future skills needs:

- Compare the identified necessary skills levels with the existing skill levels of the workforce.
- Evaluate the disparity between required skills and the skills possessed now by employees.
- Prioritise gaps, based on their impact and urgency for addressing workforce deficiencies.

To conduct the mapping of the detected skills gaps, root causes need to be made visible, i.e., the main reasons behind the identified skills gaps need to be made explicit. For instance, the main reasons behind skills gaps may be inadequate training provision, rapid technological changes, crises and unexpected events, outdated curricula, or insufficient professional development opportunities. Make it as concrete and focused as possible.

This process involves looking for patterns or trends in the data that may provide clues to underlying causes or relationships; identify recurring themes and look for nuanced insights beyond surface-level observations. Subsequently, interpret the findings within the broader context of the skills gap research.

The findings may be presented using clear and concise language, with the use of visual aids (tables, charts, graphs) to enhance the understanding of key results.

4. Analysis and mapping of training needs

To address the current skills gaps and emerging future skills needs of the previous phase, the next step of the SSIM methodology is to analyse and map training provision and needs. This requires a comprehensive approach that integrates the outcomes from the deployed primary research methods and the skills gaps mapping process (on current and future skills). This process is essential for being able to offer effective training provision, to counter the skills gaps and to address future skills needs.

Based on the detected skills gaps and future skills needs, start with summarising the current situation regarding the delivery of skills training for the main types of suppliers of education/training (in your respective country). This can be taken from the secondary data collection. A clear overview is necessary of which skills needs are already properly addressed in existing trainings. Sources to be used to create the overview may entail websites, brochures, company/organisational reports and documents, and module content. Types of training suppliers can be universities/vocational schools, incubation centres, businesses, trade associations, private/commercial training providers, or NGOs.

Subsequently, make an overview of necessary (new) training provisions. A start maybe by defining clear learning objectives: what do learners want to achieve after completing the training? These objectives could guide the further development process.

5. Country Skills Profile report

A concluding part of the SSIM is that all the previous analyses and mappings are brought together, to create a Country Skills Profile Report, to support the adoption and/or implementation of a national tourism skills strategy.

A set-up of the Country Skills Profile Report, authored and validated by the National/Regional Skills Partnership (NRSP), may be the following:

- General information of the country regarding tourism and tourism employment, i.e., tourism facts & figures; main tourism characteristics; travel and tourism's contribution to employment; main focus points of the national strategy for tourism; country-specific challenges and developments in tourism (by means of secondary data analysis / literature review).

- Analysis and mapping of current skills gaps and future skills needs building on the primary research results (depending on the tools that were used), with a breakdown and analysis of:
  - online questionnaire results,
  - expert interviews,
  - focus groups,
  - best practice analyses.

This provides an overview of the existing gaps between current, existing and necessary levels of skills in the tourism industry, and the projected (new) future skills needed (in 10 years).

- Analysis and mapping of training needs for (up-/re)skilling of the workforce: summary of the current situation regarding the delivery of current skills training provision for the main types of suppliers of education/training in the country (by means of secondary data analysis/literature review), and an overview of training provision for the future. In other words, ideating or designing new training modules tailored to close the gaps that have appeared from the research, and to address future skills needs.

- Recommendations, possible response strategies and interventions: a concrete approach on how to address skills needs at industry level as well as at university and college levels, by:

- Integrating the findings of the research and other relevant sources with other, already existing, tools for skills assessment at a national level (such as skills monitors or observatories), or with the Skills Matrix developed in the frame of the Next Tourism Generation (NTG) project that was executed in 2018-2022. The NTG Skills Matrix is a dynamic online tool that explains and presents the different

digital, environmental management and social skills required for various job positions in the tourism industry as well as the levels of competence needed for each position; it also comprises education possibilities in different European countries. The NTG Skills Matrix can be used by all stakeholders in the tourism industry to gain an overview of required skills, relevant and current skills gaps, as well as skills development and training options to improve job performance.

- Developing guidelines and quality standards on future skills, expected skills gaps and closing these gaps for human resources departments in the tourism industry and public organisations in tourism as well as for educational organisations.

- Compiling best practices related to working with and training of digital, environmental management and social skills from both the tourism industry and education perspectives and disseminating these via the project website, workshops and/or meetings.

- All the strategies mentioned above (skills matrix, guidelines, new modules) can be combined into a Skills Toolkit for addressing skills needs and gaps.

- The research results can also be used for finding funding opportunities needed to develop best practices, modules, training projects.

Supporting online documents and useful links

PANTOUR documents:

- Overview of European and National Skills Reports (2024)

6. Conclusion

The PANTOUR Sectoral Skills Intelligence Monitor (SSIM) as described in this report provides a flexible toolkit for collecting and analysing data to assess skills and address skills gaps in the tourism and hospitality sector. It is designed to identify current and future workforce skills in order to enable data-driven decision making around workforce strategies.

The SSIM should ideally be implemented, managed and executed by National & Regional Stakeholder Platform (NRSP) in each country or region, engaging all stakeholders, and determining the principal instruments for collecting and analysing data, and implementing the results.

A key characteristic of the SSIM is a multi-stakeholder approach that encourages countries, regions, or destinations to form an interdisciplinary skills partnership, which stimulates cooperation and a sharing of responsibility, ownership, and decision-making.

The PANTOUR SSIM provides benefits for all stakeholders involved in skills in tourism and hospitality. That is, based on this intelligence monitor:

- EU, national, regional, and local governments bodies can continuously identify current and future skills needs.
- Tourism and hospitality associations, organisations and companies can identify current and future workforce skills and skills gaps and implement strategies to address these, e.g. through (e-)learning and development; this will support them in workforce planning, aligning skills development to company goals and needs, and increase their competitiveness.
- Education and training providers can assemble relevant input about skills needs and set benchmarks, thereby strengthening the exchange of knowledge and practice between education and the labour market and developing relevant courses and education to bridge skills gaps.
- Individual workers can find relevant information on future skills in order to support their career planning, employability, and life-long-learning aspirations.
- In sum, with the research and assessment methodologies within the SSIM, stakeholders in tourism and hospitality are provided with a structured and flexible approach for the analysis of rapidly changing skills, ensuring the development and implementation of skills strategies that meet the requirements of the future tourism workforce.

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With the exploitation of its outputs, PANTOUR seeks to benefit job seekers, unemployed and employed workers from the industry, employers and SMEs, dedicating a special attention in reskilling and upskilling the workforce on future skills needs.

Pantour is a 4-year project that seeks to boost innovation through cooperation to develop activities, strengthen partnerships and produce resources to implement the Blueprint for Sectoral Skills Development in Tourism in Europe. The project and its partners aim especially at designing innovative and cooperative solutions to address skills needs in the all the tourism ecosystem.

facebook.com/nexttourismgeneration

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

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PACT FOR NEXT TOURISM GENERATION SKILLS

https://nexttourismgeneration.eu/pantour/

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