



**NEXT TOURISM  
GENERATION  
ALLIANCE**

**SURVEY  
REPORT**

**ITALY**

**MAY 2019**

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



Co-funded by the  
Erasmus+ Programme  
of the European Union

## Survey Country Report for Italy

<b>Number of responses for Country:</b>	<b>370</b>
<b>Number of responses per sector:</b>	
Visitor Attractions:	<b>58</b>
F&B:	<b>61</b>
Accommodations:	<b>201</b>
Travel Agencies / Tour Operators:	<b>19</b>
Destination Management Organizations:	<b>31</b>

### Sectors:

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

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## 1. VISITOR ATTRACTIONS

Visitor attractions (first 3 current skills)				
<ul style="list-style-type: none"> <li>- Manage waste, and recycling</li> <li>- Efficiency of energy and water consumption</li> <li>- Environmentally friendly activities and products</li> </ul>	<ul style="list-style-type: none"> <li>- Ethical conduct and respect</li> <li>- Creativity</li> <li>- Initiative and commitment</li> </ul>	<ul style="list-style-type: none"> <li>- Written communication</li> <li>- Oral communication</li> <li>- Awareness of local customs</li> </ul>	<ul style="list-style-type: none"> <li>- Age-related accessibility</li> <li>- Skills related to disabilities</li> <li>- Gender equality skills</li> </ul>	<ul style="list-style-type: none"> <li>- Microsoft Office skills</li> <li>- Operating System use skills</li> <li>- Social media skills</li> </ul>
Environmental skill	Personal skill	Communication skill	Diversity skill	Digital skill

Visitor attractions (first 3 future skills)				
<ul style="list-style-type: none"> <li>- Environmentally friendly activities and products</li> <li>- Manage waste, and recycling</li> <li>- Knowledge of climate change</li> </ul>	<ul style="list-style-type: none"> <li>- Promoting a positive work environment</li> <li>- Creativity</li> <li>- Ethical conduct and respect</li> </ul>	<ul style="list-style-type: none"> <li>- Awareness of local customs</li> <li>- Oral communication</li> <li>- Intercultural host-guest understanding and respect</li> </ul>	<ul style="list-style-type: none"> <li>- Age-related accessibility</li> <li>- Skills related to disabilities</li> <li>- Gender equality skills</li> </ul>	<ul style="list-style-type: none"> <li>- Microsoft Office skills</li> <li>- Operating System use skills</li> <li>- Social media skills</li> </ul>
Environmental skill	Personal skill	Communication skill	Diversity skill	Digital skill

<b>Environmental Skills</b>	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Ability to manage waste, sewage, recycling and composting (3,52)</li> <li>2. Ability to minimise the use and maximise efficiency of energy and water consumption (3,38)</li> <li>3. Promotion of environmentally friendly activities and products (3,34)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Promotion of sustainable forms of transport (2,88)</li> <li>2. Conservation of biodiversity (3,14)</li> <li>3. Knowledge of climate change (3,31)</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Promotion of environmentally friendly activities and products (3,57)</li> <li>2. Ability to manage waste, sewage, recycling and composting (3,53)</li> <li>3. Knowledge of climate change (3,48)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Promotion of sustainable forms of transport (3,26)</li> <li>2. Conservation of biodiversity (3,36)</li> <li>3. Ability to minimise the use and maximise efficiency of energy and water consumption (3,47)</li> </ol>
Training Provision for these skills?	<p>Total number of companies providing environmental skills training in the sector: 30 companies out of 58</p> <p>Total number of companies providing environmental skills training in all sector: 187 companies out of 370</p> <p>In the industry of tourist attractions 1 out of 2 companies provide environmental management training, a high propensity in the comparison between sectors, but more limited within the sector itself as compared to other training areas</p>
Most popular/ three main types of training	<p>On the job 23</p> <p>Vocational training 5</p> <p>Online course 4</p> <p>One day on-site training by external provider 4</p>

### Most important types of training provision

Half of the companies linked to tourist attractions provide their staff training on environmental issues (51.7% of respondents). It takes place mainly in the workplace (76.7%) or through professional training (16.7%), limited, instead, the use of online courses and the organization of in-house training courses with consultants external (13.3% of companies).

### **Reasons why businesses in this sector do *not* provide Environmental Mgt Training**

Among the reasons why companies do not provide any training on environmental management to their employees, it emerges the irrelevance with the company activity (37%), and the impossibility to organize them because they are not foreseen by the central body they depend on (22.2% of the companies). Another 25% of companies, on the other hand, do not provide training due to lack of information, lack of environmental awareness or because it is not a priority in the company, a sign of an environmental awareness that is still not widespread.

### **Issues related to environmental skills**

In general, there are no major differences in the assessment by respondents of current and future environmental competencies, among the highest scores are those relating to waste recovery and recycling measures (current 3.52 / future 3.53), those related to water saving (current 3.38 / future 3.47) and the promotion of environmentally friendly products and activities (current 3.34 / future 3.57).

The gap is increasing, in particular, due to the inherent knowledge of climate change and the conservation of diversity (approximately 7% and 5% respectively), which, although extremely topical, present more modest assessments in the sector tourist attractions, in part probably attributable to the difficulty of companies in actually evaluating the impact of their activity on the environment. The lowest rating refers to the promotion of sustainable forms of transport with an average current score of 2.88 which, however, records growth of over 13% in the future.

<b>Personal, Communication and Diversity Skills</b>	
Current Level of Proficiency. Three most and three least proficient per category	<p><b>PERSONAL SKILLS- Most:</b></p> <ol style="list-style-type: none"> <li>1. Ethical conduct and respect (4,16)</li> <li>2. Creativity (4,05)</li> <li>3. Initiative and commitment (4)</li> </ol> <p><b>PERSONAL SKILLS- Least:</b></p> <ol style="list-style-type: none"> <li>1. Problem solving (3,71)</li> <li>2. Promoting a positive work environment (3,86)</li> <li>3. Customer orientation (3,86)</li> </ol> <p><b>COMMUNICATION SKILLS – Most:</b></p> <ol style="list-style-type: none"> <li>1. Written communication skills (4,14)</li> <li>2. Oral communication skills (4,1)</li> <li>3. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (4,09)</li> </ol> <p><b>COMMUNICATION SKILLS – Least:</b></p> <ol style="list-style-type: none"> <li>1. Ability to speak foreign languages (3,33)</li> <li>2. Skills related to intercultural host-guest understanding and respect (3,95)</li> <li>3. Active listening skills(3,97)</li> </ol> <p><b>DIVERSITY SKILLS – Most:</b></p> <ol style="list-style-type: none"> <li>1. Age-related accessibility skills (3,83)</li> <li>2. Skills related to disabilities and appropriate infrastructure (3,83)</li> <li>3. Gender equality skills (3,74)</li> </ol> <p><b>DIVERSITY SKILLS – Least:</b></p> <ol style="list-style-type: none"> <li>1. Diets and allergy needs skills (3)</li> <li>2. Skills related to diversity in religious beliefs (3,43)</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient .	<p><b>PERSONAL - Most:</b></p> <ol style="list-style-type: none"> <li>1. Promoting a positive work environment (4,43)</li> <li>2. Creativity (4,38)</li> <li>3. Ethical conduct and respect (4,36)</li> </ol> <p><b>PERSONAL - Least:</b></p> <ol style="list-style-type: none"> <li>1. Problem solving (4,19)</li> <li>2. Customer orientation (4,29)</li> <li>3. Initiative and commitment (4,29)</li> </ol> <p><b>COMMUNICATION – Most:</b></p> <ol style="list-style-type: none"> <li>1. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (4,45)</li> <li>2. Oral communication skills (4,4)</li> <li>3. Skills related to intercultural host-guest understanding and respect (4,36)</li> </ol> <p><b>COMMUNICATION – Least:</b></p> <ol style="list-style-type: none"> <li>1. Ability to speak foreign languages (4,05)</li> <li>2. Active listening skills(4,33)</li> <li>3. Skills related to cultural awareness and expression (4,33)</li> </ol> <p><b>DIVERSITY– Most:</b></p> <ol style="list-style-type: none"> <li>1. Age-related accessibility skills (4,26)</li> </ol>

	2. Skills related to disabilities and appropriate infrastructure (4,24) 3. Gender equality skills (4,12) DIVERSITY– Least: 1. Diets and allergy needs skills (3,59) 2. Skills related to diversity in religious beliefs (3,97)
Training Provision for Social Skills	Total number of companies providing social skills training in the sector: 32 companies out of 58 Total number of companies providing social skills training in all sector: 156 companies out of 370  In the leisure sector, half of the companies provide their staff training on social skills, a high propensity in the comparison between sectors but more limited within the sector itself as compared to digital training.
Most popular/ three main types of training for social skills	On the job (21) Online course (7) Vocational training (5)

### Most important types of training provision

Half of the companies linked to tourist attractions provide their staff training on social skills (55.2% of respondents). It takes place mainly at the workplace (65.6%), through online courses (21.9%) or professional training courses (15.6%). Conversely, the use of higher education (9.4%) or the organization of multi-day internal / external training courses (6.3% of companies) was limited.

### Reasons why businesses in this sector do *not* provide Social Skills Training

The lack of a central organization that prepares courses for this topic (27% of companies) or low interest (23.11%) are the motivations that emerge among those who do not provide training on social skills to its employees. Among other reasons, we note the non-pertinence with the company's core business (19.2%) and the small size of the company that represents a limit for 11.5% of them.

### Issues related to Social Skills

In the assessment of the social competences currently present in the companies of the leisure sector, a good communicative ability of the personnel emerges, in particular as regards written skills (4.14), oral skills (4.1) and knowledge of local traditions (4,09). A staff endowed with respect and ethical conduct (4,16), initiative and commitment (4) and creativity (4,05).

These are therefore companies that can count on highly qualified, trained and reliable employees, but whose capabilities can be further perfected in the future (with growths ranging from 5% to 9%

depending on the various skills). The weak point of the companies in the sector concerns the skills relating to the management of diversity, paying attention to various food needs (3) and the various beliefs (3.43) for which an interesting growth in the future is expected (about + 20% and + 16%), passing through the accessibility of both elderly and disabled people (both with a current score of 3.83) and for which a score higher than 4.24 is expected in the next decade.

The last but not the least important skill to continue to focus on in the future is the knowledge of foreign languages which, with a current score of 3.33, will increase, according to the forecasts of the companies interviewed, by over 21%.

<b>Digital Skills</b>	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Operating System use skills (e.g., Windows)(4,02)</li> <li>2. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (4,02)</li> <li>3. Social media skills (3,64)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Artificial Intelligence (AI) and robotics skills (2,03)</li> <li>2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2,41)</li> <li>3. Computer programming skills (2,64)</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (4,29)</li> <li>2. Operating System use skills (e.g., Windows)(4,24)</li> <li>3. Social media skills (4,19)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Artificial Intelligence (AI) and robotics skills (2,97)</li> <li>2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (3,36)</li> <li>3. Computer programming skills (3,4)</li> </ol>
Training Provision for digital skills?	<p>Total number of companies providing digital skills training in the sector: 41 companies out of 58</p> <p>Total number of companies providing digital skills training in all sector: 226 companies out of 370</p> <p>In the leisure sector 7 out of 10 companies provide digital skills training. A high propensity, together with travel agencies and DMOs, in the comparison between sectors, whereas it's widely spread within the sector itself.</p>
Most popular/ three main types of training for digital skills	<p>On the job (25)</p> <p>Online course (17)</p> <p>Vocational training (7)</p>

## **Most important types of training provision**

Widely used is the digital skills training, in the tourist attractions sector the companies that train their employees on this topic amount to 70%. It takes place mainly at the workplace (61%) and via online platforms (41.5%).

## **Reasons why businesses in this sector do *not* provide Digital Skills Training**

Less than 2 out of 10 companies organize training courses through training or on-site one-day courses. Among the companies that are not interested in training for digital preparation of their employees, the reasons that stand out are linked to the limited company size or to the lack of interest (23.5% of companies), as well as the lack of time and financial resources to devote (17.6%) and the impossibility of organizing courses because, also in this case, not foreseen by the central body on which they depend (11.8%).

## **Issues related to Digital Skills**

As regard digital competences currently present in the leisure sector, they are more oriented towards knowledge of the Office package (4.02) and the operating system (4.02), all computer skills that in the near future will continue to play a role of relevance in the business cycles of companies and which will tend to be more consolidated, as can be seen from the expected growth margins (about + 7% and + 6% respectively). In a future projection, therefore, alongside these skills, which are part of the daily activities of the administrative-accounting and booking area, there are those more linked to the area of promotion through social channels (4.19) and to online marketing (4.1), that are still not very widespread in the business realities of the tourist attractions sector but for which important increases are expected in 10 years (both about + 15%). By analyzing, instead, the major gaps between current and future digital competences emerge those inherent Artificial Intelligence and digital hardware technologies such as Augmented Reality. Although their importance is recognized, such as to justify a forecast of an increase in the future of the order of 40%, they appear and will continue to be lagging behind among the various digital skills as they are difficult to apply in the daily working reality of leisure sector companies .

-- END OF VISITOR ATTRACTIONS SECTION --

## 2. DESTINATION MANAGEMENT ORGANIZATIONS

Destination management organization (first 3 current skills)				
<ul style="list-style-type: none"> <li>- Environmentally friendly activities and products</li> <li>- Sustainable forms of transport</li> <li>- Efficiency of energy and water consumption</li> </ul>	<ul style="list-style-type: none"> <li>- Willingness to learn and to perform</li> <li>- Initiative and commitment</li> <li>- Ethical conduct and respect</li> </ul>	<ul style="list-style-type: none"> <li>- Oral communication</li> <li>- Written communication</li> <li>- Awareness of local customs</li> </ul>	<ul style="list-style-type: none"> <li>- Age-related accessibility</li> <li>- Gender equality skills</li> <li>- Skills related to disabilities</li> </ul>	<ul style="list-style-type: none"> <li>- Operating System use skills</li> <li>- Microsoft Office skills</li> <li>- Social media skills</li> </ul>
Environmental skill	Personal skill	Communication skill	Diversity skill	Digital skill

Destination management organization (first 3 future skills)				
<ul style="list-style-type: none"> <li>- Environmentally friendly activities and products</li> <li>- Sustainable forms of transport</li> <li>- Efficiency of energy and water consumption</li> </ul>	<ul style="list-style-type: none"> <li>- Willingness to learn and to perform</li> <li>- Willingness to change</li> <li>- Promoting a positive work environment</li> </ul>	<ul style="list-style-type: none"> <li>- Awareness of local customs</li> <li>- Oral communication</li> <li>- Written communication</li> </ul>	<ul style="list-style-type: none"> <li>- Skills related to disabilities</li> <li>- Age-related accessibility</li> <li>- Gender equality skills</li> </ul>	<ul style="list-style-type: none"> <li>- Online marketing</li> <li>- Social media skills</li> <li>- Operating System use skills</li> </ul>
Environmental skill	Personal skill	Communication skill	Diversity skill	Digital skill

<b>Environmental Skills</b>	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Promotion of environmentally friendly activities and products (3,58)</li> <li>2. Promotion of sustainable forms of transport (e.g. public transport) (3,35)</li> <li>3. Knowledge of climate change (3,26)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Ability to manage waste, sewage, recycling and composting (3,19)</li> <li>2. Conservation of biodiversity (3,23)</li> <li>3. Ability to minimise the use and maximise efficiency of energy and water consumption (3,26)</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Promotion of environmentally friendly activities and products (4,1)</li> <li>2. Promotion of sustainable forms of transport (e.g. public transport) (4)</li> <li>3. Knowledge of climate change (3,84)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Ability to manage waste, sewage, recycling and composting (3,68)</li> <li>2. Conservation of biodiversity (3,68)</li> <li>3. Ability to minimise the use and maximise efficiency of energy and water consumption (3,84)</li> </ol>
Training Provision for these skills?	<p>Total number of companies providing environmental skills training in the sector: 13 companies out of 31</p> <p>Total number of companies providing environmental skills training in all sector: 187 companies out of 370</p> <p>Within the Destination Management Organizations 4 out 10 companies provide environmental management training. The propensity is below average in all five sectors and equally limited also within the sector itself as compared to other training areas, especially digital training</p>
Most popular/ three main types of training	<p>On the job (7)</p> <p>Several days on-site training by external provider (4)</p> <p>Online course (3)</p>

### Most important types of training provision

41.9% of destination management companies provide their staff training on environmental skills. It takes place mainly in the workplace (53.8%) or through the use of external trainers for courses lasting several days organized locally (30.8%), followed by online courses (23.1%).

### **Reasons why businesses in this sector do *not* provide Environmental Mgt Training**

The small size of the company (25%) is one of the main reasons why companies do not provide environmental management training to their employees; among the other reasons in evidence the lack of information, the non pertinence with the activity of the company and the little environmental sensibility that limit, respectively, 12.5% of the enterprises.

### **Issues related to environmental skills**

The environmental problems, now more than ever, represent crucial challenges to which each human activity, both individual and organized, must face and which impact in the various economic areas with different levels both of awareness and of sustainable management of its activities. Among the Destination Management Organizations interviewed, one of the first environmental skills shows a fair level of knowledge of climate change (3.26) and of dissemination of activities aimed at promoting specific sustainable practices of the territory that they represent and promote. Whether we are talking about services offered or activities aimed at safeguarding landscape diversity, the highest evaluations are those related to the promotion of activities and products that respect the environment (3.58) and sustainable forms of transport (3.35). They represent starting points to be further improved (growing by over 14% and 19% respectively) and on which to focus, because these skills are still at the top of the list of future environmental skills.

## Personal, Communication and Diversity Skills

<p>Current Level of Proficiency. Three most and three least proficient per category</p>	<p><b>PERSONAL SKILLS- Most:</b></p> <ol style="list-style-type: none"> <li>1. Willingness to learn and to perform (4,39)</li> <li>2. Initiative and commitment (4,26)</li> <li>3. Ethical conduct and respect (4,19)</li> </ol> <p><b>PERSONAL SKILLS- Least:</b></p> <ol style="list-style-type: none"> <li>1. Customer orientation (4)</li> <li>2. Willingness to change (4,03)</li> <li>3. Problem solving (4,13)</li> </ol> <p><b>COMMUNICATION SKILLS – Most:</b></p> <ol style="list-style-type: none"> <li>1. Oral communication skills (4,06)</li> <li>2. Written communication skills (4)</li> <li>3. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (3,97)</li> </ol> <p><b>COMMUNICATION SKILLS – Least:</b></p> <ol style="list-style-type: none"> <li>1. Ability to speak foreign languages (3,32)</li> <li>2. Skills related to intercultural host-guest understanding and respect (3,61)</li> <li>3. Skills related to cultural awareness and expression (3,71)</li> </ol> <p><b>DIVERSITY SKILLS – Most:</b></p> <ol style="list-style-type: none"> <li>1. Age-related accessibility skills (3,71)</li> <li>2. Gender equality skills (3,68)</li> <li>3. Skills related to disabilities and appropriate infrastructure (3,35)</li> </ol> <p><b>DIVERSITY SKILLS – Least:</b></p> <ol style="list-style-type: none"> <li>1. Skills related to diversity in religious beliefs (2,84)</li> <li>2. Diets and allergy needs skills (3)</li> </ol>
<p>Future level of proficiency in 2030. Three most and three least proficient.</p>	<p><b>PERSONAL - Most:</b></p> <ol style="list-style-type: none"> <li>1. Willingness to learn and to perform (4,68)</li> <li>2. Willingness to change (4,55)</li> <li>3. Promoting a positive work environment (4,55)</li> </ol> <p><b>PERSONAL - Least:</b></p> <ol style="list-style-type: none"> <li>1. Initiative and commitment (4,42)</li> <li>2. Customer orientation (4,45)</li> <li>3. Problem solving (4,52)</li> </ol> <p><b>COMMUNICATION – Most:</b></p> <ol style="list-style-type: none"> <li>1. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (4,55)</li> <li>2. Oral communication skills (4,52)</li> <li>3. Written communication skills (4,48)</li> </ol> <p><b>COMMUNICATION – Least:</b></p> <ol style="list-style-type: none"> <li>1. Ability to speak foreign languages (4,23)</li> <li>2. Skills related to intercultural host-guest understanding and respect (4,32)</li> <li>3. Skills related to cultural awareness and expression (4,42)</li> </ol> <p><b>DIVERSITY – Most:</b></p> <ol style="list-style-type: none"> <li>1. Age-related accessibility skills (4,1)</li> <li>2. Gender equality skills (4,1)</li> <li>3. Skills related to disabilities and appropriate infrastructure (4,13)</li> </ol> <p><b>DIVERSITY – Least:</b></p> <ol style="list-style-type: none"> <li>1. Skills related to diversity in religious beliefs (3,77)</li> <li>2. Diets and allergy needs skills (3,77)</li> </ol>

<p>Training Provision for Social Skills</p>	<p>Total number of companies providing social skills training in the sector: 12 companies out of 31  Total number of companies providing social skills training in all sector: 156 companies out of 370</p> <p>The percentage of Destination Management Organizations that provide social skills training is limited, both in the comparison between sectors, and within the sector itself with respect to other training areas.</p>
<p>Most popular/ three main types of training for social skills</p>	<p>On the job (7)  Several days on-site training by external provider (4)  Vocational training (3)</p>

### Most important types of training provision

About 4 destination management organizations out of 10 provide to their staff a preparation on social skills. It takes place mainly in the workplace (58.3%) or through the organization of on-site courses lasting several days (33.3% of companies that organize training courses). One company out of four uses professional courses, while 16.7% of companies in the sector use online or off-site training lasting several days.

### Reasons why businesses in this sector do *not* provide Social Skills Training

Among the reasons why companies do not provide any training in terms of social skills to their employees, there are the reduced company size emerges (23.5% of companies), the non-relevance with the core business of the company and the lack of time and financial resources to be allocated to the organization of courses for this topic (17.6%).

### Issues related to Social Skills

The more important aspects relating to the most widespread personal skills among companies in the Destination Management area are initiative and commitment (4.26) together with ethical respect and conduct (4.19). The picture that emerges is that of a solid sector but also in change and whose staff is willing to learn and put into practice what has been learned (4.39 current). This dynamism is made even more evident by expectations about the future, in fact the companies interviewed put the accent

on a growth in the will to be formed (4.68), in promoting a positive work environment (4.55) and more generally to the change (4.55), recording, the latter, an increase of around 13%.

The communication skills are fundamental for the DOM to take care of the relationships with the whole network of actors involved in the development of the territory they represent. Among the highest current evaluations, both written and oral communication stand out (4), but the projection for the future places greater attention on the knowledge of local traditions (in the future 4.55, up by 14.63%), a true driving force for the promotion of the territory as a showcase of local specialties and uniqueness, and to an improvement in the ability to speak foreign languages, although still not at the top among the most relevant skills, but with a gap of over 27%, a sign of necessity of a greater qualification for a further opening to foreign markets.

In general, the lowest assessments are in the area of diversity management skills, in particular as regards the different religious beliefs (2.84) and the attention to the different dietary needs (3) both growing 33% and 26% respectively. Although with smaller gaps, on the other hand, the issue of accessibility for the future, both for the disabled and the elderly, and gender equality (in the future, all with expected assessments on 4) are very important themes.

<b>Digital Skills</b>	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Operating System use skills (e.g., Windows) (4,16)</li> <li>2. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (4,13)</li> <li>3. Social media skills (4)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Artificial Intelligence (AI) and robotics skills (2,03)</li> <li>2. Computer programming skills (2,35)</li> <li>3. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2,35)</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Online marketing and communication skills (4,39)</li> <li>2. Social media skills (4,35)</li> <li>3. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (4,32)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Artificial Intelligence (AI) and robotics skills (3,19)</li> <li>2. Computer programming skills (3,32)</li> <li>3. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (3,42)</li> </ol>
Training Provision for digital skills?	<p>Total number of companies providing digital skills training in the sector: 24 companies out of 31</p> <p>Total number of companies providing digital skills training in all sector: 226 companies out of 370</p> <p>In the DMOs sector 7 out 10 companies provide digital training. A high propensity, together with travel agencies, in the comparison between sectors. Within the sector itself, it represents the most widespread form of training.</p>
Most popular/ three main types of training for digital skills	<p>On the job (14)</p> <p>Online course (7)</p> <p>Several days off-site training by external provider (6)</p>

### Most important types of training provision

Widely used for digital skills training, in the sector of destination management organizations, the companies that train their employees on this topic amount to 77.4%. It takes place mainly in the workplace (58.3%), through online platforms (29.2%) and with a greater preference for off-site courses organized by external trainers, whether they are multi-day (25%) or one day only (20.8%).

## **Reasons why businesses in this sector do *not* provide Digital Skills Training**

Among the companies that do not provide any training in digital preparation to their employees, the main limit is related to the small size of the company (33.3%) and to the lack of information, time and financial resources to be allocated to this activity ( respectively 16.7% of companies).

## **Issues related to Digital Skills**

Digital skills in the DM sector certainly represent those in which the most important growths are recorded among all the skills examined so far. It starts from a current good knowledge of operating systems (4.16) and the Office package (4.13), widely used competences but, according to the operators' forecasts, not growing much in the future as they will become secondarily important or in any case dates as acquired. The skills that will become increasingly important will instead be those relating to the social media field (current score 4 / future 4.35) and to marketing and online communication (with a gap of over 19%) to emphasize the crucial importance that the new technological tools will have in future in the promotion of the territory, in intercepting the tastes and interests of users and in conveying their choices. This is also thanks to the monitoring of online reviews (4.06), a competence that, although not present on the podium of the first three future skills, will register a growth of over 23%.

Artificial Intelligence, Augmented Virtual Reality and computer programming are the digital skills that are less common among companies in the sector. Although not decisive for the work of the Destination Management Organizations, these skills record the highest growth (respectively 57.14%; 45.21% and 41.10%) to indicate how their continuous future development will affect and involve various sectors, that of the DMO included.

-- END OF VISITOR ATTRACTIONS SECTION --

### 3. TRAVEL AGENCIES / TOUR OPERATORS

Travel agents and T.O. (first 3 current skills)				
<ul style="list-style-type: none"> <li>- Environmentally friendly activities and products</li> <li>- Sustainable forms of transport</li> <li>- Knowledge of climate change</li> </ul>	<ul style="list-style-type: none"> <li>- Ethical conduct and respect</li> <li>- Willingness to learn and to perform</li> <li>- Initiative and commitment</li> </ul>	<ul style="list-style-type: none"> <li>- Oral communication</li> <li>- Written communication</li> <li>- Active listening skills</li> </ul>	<ul style="list-style-type: none"> <li>- Gender equality skills</li> <li>- Age-related accessibility skills</li> <li>- Skills related to disabilities</li> </ul>	<ul style="list-style-type: none"> <li>- Microsoft Office skills</li> <li>- Operating System use skills</li> <li>- Online marketing</li> </ul>
Environmental skill	Personal skill	Communication skill	Diversity skill	Digital skill

Travel agents and T.O. (first 3 future skills)				
<ul style="list-style-type: none"> <li>- Environmentally friendly activities and products</li> <li>- Efficiency of energy and water consumption</li> <li>- Sustainable forms of transport</li> </ul>	<ul style="list-style-type: none"> <li>- Willingness to learn and to perform</li> <li>- Willingness to learn and to perform</li> <li>- Ethical conduct and respect</li> </ul>	<ul style="list-style-type: none"> <li>- Oral communication</li> <li>- Active listening skills</li> <li>- Awareness of local customs</li> </ul>	<ul style="list-style-type: none"> <li>- Age-related accessibility</li> <li>- Gender equality skills</li> <li>- Skills related to disabilities</li> </ul>	<ul style="list-style-type: none"> <li>- Online marketing</li> <li>- Microsoft Office skills</li> <li>- Social media skills</li> </ul>
Environmental skill	Personal skill	Communication skill	Diversity skill	Digital skill

<b>Environmental Skills</b>	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Promotion of environmentally friendly activities and products (3,58)</li> <li>2. Promotion of sustainable forms of transport (e.g. public transport) (3,37)</li> <li>3. Knowledge of climate change (3,26)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Conservation of biodiversity (2,32)</li> <li>2. Ability to manage waste, sewage, recycling and composting (2,58)</li> <li>3. Ability to minimise the use and maximise efficiency of energy and water consumption (3,05)</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Promotion of environmentally friendly activities and products (4,11)</li> <li>2. Ability to minimise the use and maximise efficiency of energy and water consumption (3,95)</li> <li>3. Promotion of sustainable forms of transport (e.g. public transport)/ Knowledge of climate change (3,79)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Conservation of biodiversity (3,26)</li> <li>2. Ability to manage waste, sewage, recycling and composting (3,63)</li> <li>3.</li> </ol>
Training Provision for these skills?	<p>Total number of companies providing environmental skills training in the sector: 7 companies out of 19</p> <p>Total number of companies providing environmental skills training in all sector: 187 companies out of 370</p> <p>A little more than 3 out of 10 travel agencies provide environmental management training. The propensity is below average in all five sectors and equally limited also within the sector itself as compared to other training areas, especially digital training.</p>
Most popular/ three main types of training	<p>On the job (5)</p> <p>Online course (4)</p> <p>One day on-site training by external provider (3)</p>

### **Most important types of training provision**

A little over one third of travel agencies provide environmental skills training to their staff: 71.4% (7 out of 10 operators) provide on-the-job training, while 57.1% organise online courses. There is an above-average propensity to organise on-site training courses over one (42.9%) or more days (28.6% of businesses that organise training courses).

### **Reasons why businesses in this sector do *not* provide Environmental Mgt Training**

The lack of time and economic resources to be allocated to training is almost invariably the main reason why operators have a limited capacity to organise refresher courses. The lack of general information to set up said courses (25%) is another reason that should not be neglected and is a gap that should be filled to promote staff training.

## Issues related to environmental skills

The industry of travel agencies/tour operators is experiencing a stronger growth in environmental skills for the future (+24.06% as compared to a 12.73% average in all the sectors). Among the most proficient skills are the promotion of environmentally friendly activities and products (3.58), which is an ability that operators will keep focusing on (4.11), and the promotion of sustainable forms of transport (current 3.37, 3.79 in the future). These aspects, which are regarded as some of the most important ones, have not experienced a significant growth, as they have been already sufficiently acquired by the sector. However, they show that the respect, protection and promotion of local resources are essential to expand the offering of travel agencies and to meet the needs of a more demanding customer base which is increasingly sensitive to environmental issues.

<b>Personal, Communication and Diversity Skills</b>	
Current Level of Proficiency. Three most and three least proficient per category	<p><b>PERSONAL SKILLS- Most:</b></p> <ol style="list-style-type: none"> <li>1. Ethical conduct and respect (4,53)</li> <li>2. Initiative and commitment (4,47)</li> <li>3. Customer orientation (4,47)</li> </ol> <p><b>PERSONAL SKILLS- Least:</b></p> <ol style="list-style-type: none"> <li>1. Willingness to change (4,26)</li> <li>2. Promoting a positive work environment (4,26)</li> <li>3. Problem solving/Creativity/ Willingness to learn and to perform (4,32)</li> </ol> <p><b>COMMUNICATION SKILLS – Most:</b></p> <ol style="list-style-type: none"> <li>1. Oral communication skills (4,11)</li> <li>2. Written communication skills (3,95)</li> <li>3. Active listening skills/ Ability to speak foreign languages /Skills related to intercultural host-guest understanding and respect (3,84)</li> </ol> <p><b>COMMUNICATION SKILLS – Least:</b></p> <ol style="list-style-type: none"> <li>1. Skills related to cultural awareness and expression (3,58)</li> <li>2. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (3,79)</li> </ol> <p><b>DIVERSITY SKILLS – Most:</b></p> <ol style="list-style-type: none"> <li>1. Gender equality skills (3,84)</li> <li>2. Age-related accessibility skills (3,63)</li> <li>3. Skills related to disabilities and appropriate infrastructure (3,53)</li> </ol> <p><b>DIVERSITY SKILLS – Least:</b></p> <ol style="list-style-type: none"> <li>1. Diets and allergy needs skills (2,95)</li> <li>2. Skills related to diversity in religious beliefs (3,32)</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient.	<p><b>PERSONAL - Most:</b></p> <ol style="list-style-type: none"> <li>1. Willingness to learn and to perform (4,79)</li> <li>2. Customer orientation (4,79)</li> <li>3. Ethical conduct and respect (4,74)</li> </ol> <p><b>PERSONAL - Least:</b></p> <ol style="list-style-type: none"> <li>1. Willingness to change (4,58)</li> <li>2. Promoting a positive work environment (4,58)</li> <li>3. Problem solving/Creativity/ Initiative and commitment (4,68)</li> </ol>

	<p>COMMUNICATION – Most:</p> <ol style="list-style-type: none"> <li>1. Oral communication skills (4,74)</li> <li>2. Skills related to awareness of local customs (e.g., food, arts, language, crafts)/Active listening skills/Written communication skills (4,58)</li> </ol> <p>COMMUNICATION – Least:</p> <ol style="list-style-type: none"> <li>1. Skills related to cultural awareness and expression (4,53)</li> <li>2. Ability to speak foreign languages (4,53)</li> <li>3. Skills related to intercultural host-guest understanding and respect (4,53)</li> </ol> <p>DIVERSITY– Most:</p> <ol style="list-style-type: none"> <li>1. Age-related accessibility skills (4,47)</li> <li>2. Skills related to disabilities and appropriate infrastructure (4,37)</li> <li>3. Gender equality skills (4,37)</li> </ol> <p>DIVERSITY– Least:</p> <ol style="list-style-type: none"> <li>1. Diets and allergy needs skills (4,16)</li> <li>2. Skills related to diversity in religious beliefs (4,16)</li> </ol>
Training Provision for Social Skills	<p>Total number of companies providing social skills training in the sector: 7 companies out of 12</p> <p>Total number of companies providing social skills training in all sector: 156 companies out of 370</p> <p>The percentage of travel agencies/tour operators that provide social skills training is limited, both in the comparison between sectors, and within the sector itself with respect to other training areas.</p>
Most popular/ three main types of training for social skills	<p>On the job (6)</p> <p>Online course (3)</p> <p>Several days on-site training by external provider/Several days off-site training by external provider (2)</p>

### Most important types of training provision

36.8% of travel agencies/tour operators provide social skills training to their staff. In this case as well, they mostly provide on-the-job training (85.7%) or online courses (42.9%). Whether the courses are held on site or off site, approximately 30% of travel agencies prefer training courses that last more than one day (28.6%).

### Reasons why businesses in this sector do *not* provide Social Skills Training

The lack of general information and the lack of time and financial resources to be allocated to the organisation of courses on this topic are the main reasons why travel agencies do not provide social skills training to their staff (27.3%).

### Issues related to Social Skills

The industry of travel agencies/tour operators is highly customer-oriented, as clearly evidenced by the high scores registered, both currently and for the future, in customer orientation skills (4.47 and 4.79 respectively). Other skills that are especially popular among travel agencies willing to face the future by meeting and actively participating in the changes that the dynamism of the sector entails, are ethical conduct and respect (4.53), and initiative and commitment (4.47). It is therefore understandable why willingness to learn is in the top 3 of the personal skills on which to focus in the future and where the highest growth is expected (10.98%).

While written (3.95) and oral communication skills (4.11) are essential to sell tourist packages, the ability to speak foreign languages (3.84) is just as important in the relations with foreign partners or tour operators. All of these skills are and will remain a priority, together with other skills more related to customer approach and the knowledge of tourist destinations. Therefore, skills such as active listening (4.58), useful to understand the customers' needs and to profile them, and the awareness of local customs (4.58) and cultural expression (up by 26.47%) necessary to identify travel destinations that better meet the customers' requirements, will become even more valuable.

Travel agencies serve an increasingly fragmented and demanding customer base. Operators are increasingly focusing on these features, showing the widest gap recorded in all the sectors as regards diversity management skills (+24.7% as compared to an average of 13.32%). This is particularly obvious in relation to gender diversity (current 3.84; 4.37 in the future) and elderly people (3.63; 4.47), while diets and allergy needs skills experience the highest growth (+41.07%).

<b>Digital Skills</b>	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (4,16)</li> <li>2. Operating System use skills (e.g., Windows) (4,11)</li> <li>3. Skills for implementing online safety procedures/ Online marketing and communication skills/ Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems and video projectors (3,63)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Artificial Intelligence (AI) and robotics skills (1,95)</li> <li>2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2,26)</li> <li>3. Computer programming skills (2,74)</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Online marketing and communication skills (4,68)</li> <li>2. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (4,58)</li> <li>3. Social media skills/ Operating System use skills (e.g., Windows) (4,47)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Artificial Intelligence (AI) and robotics skills (3,05)</li> <li>2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (3,53)</li> <li>3. Computer programming skills (3,53)</li> </ol>
Training Provision for digital skills?	<p>Total number of companies providing digital skills training in the sector: 16 companies out of 19</p> <p>Total number of companies providing digital skills training in all sector: 226 companies out of 370</p> <p>In the industry of travel agencies/tour operators, 8 out of 10 businesses provide digital skills training, which is widely spread in all the five sectors.</p>
Most popular/ three main types of training for digital skills	<p>On the job (11)</p> <p>Online course (9)</p> <p>Several days on-site training by external provider (5)</p>

### Most important types of training provision

Digital skills training is widely spread. In the travel agencies industry, the percentage of businesses providing digital skills training to their staff is 84.2%. They generally provide on-the-job training (68.8%), online courses (56.2%), and on-site courses organised by external providers over several days (31.3%).

### Reasons why businesses in this sector do *not* provide Digital Skills Training

Businesses that do not provide any type of digital training to their employees claim that the small size of the company and the lack of information, time and financial resources (33.3% of businesses) are the main limitations.

### Issues related to Digital Skills

Within the industry of travel agencies and tour operators, the most important and widespread digital skills are those that allow operators to streamline booking processes, hence basic Microsoft Office (4.16) and Operating System use skills (4.11), together with a good proficiency of online marketing, data protection and digital equipment adjustment skills (all scoring 3.63). In the future, the businesses of this sector will mostly focus on communication and promotion through digital tools. Being aware of the fact that the growth of their customer base also depends on the use of the Web, they not only expect a higher proficiency in web marketing techniques (4.68), but also a greater focus on social media (4.47), which are useful to share content and monitor new trends. Equally important, although not present in the first positions, are the monitoring of online review to understand the feedback of increasingly connected users, and desktop publishing skills useful to create custom brochures and catalogues. Both types of skills are growing by more than 20%, with expected future scores equal to 4.26.

An analysis of the most significant gaps shows poor proficiency in the use of Artificial Intelligence and Virtual Reality tools (up by more than 56%). Therefore, a greater focus of the operators on these areas is expected, although it appears to be more a willingness to keep up to date than a real opportunity for business development. This is especially obvious if we look at current and future average scores (A.I. current 1.95, future 3.05; V.R. current 2.26, future 3.53), which show that these skills are not considered particularly significant for business activities neither today nor in the future.

If we look instead at the widest gaps between current and future digital skills, the ones that prevail are those related to Artificial Intelligence and the application of digital hardware technologies, such as Augmented Reality. Although their importance is acknowledged, so much so that a 40% increase is expected in the future, they are and will remain at the very bottom of the digital skills list as they are difficult to apply in the daily operations of leisure businesses.

-- END OF VISITOR ATTRACTIONS SECTION --

## 4. FOOD & BEVERAGE

Food and Beverage (first 3 current skills)				
<ul style="list-style-type: none"> <li>- Manage waste, and recycling</li> <li>- Knowledge of climate change</li> <li>- Environmentally friendly activities and products</li> </ul>	<ul style="list-style-type: none"> <li>- Willingness to learn and to perform</li> <li>- Ethical conduct and respect</li> <li>- Creativity</li> </ul>	<ul style="list-style-type: none"> <li>- Awareness of local customs</li> <li>- Intercultural host-guest understanding and respect</li> <li>- Active listening skills</li> </ul>	<ul style="list-style-type: none"> <li>- Diets and allergy needs skills</li> <li>- Skills related to disabilities</li> <li>- Age-related accessibility skills</li> </ul>	<ul style="list-style-type: none"> <li>- Operating System use skills</li> <li>- Microsoft Office skills</li> <li>- Monitoring online reviews</li> </ul>
Environmental skill	Personal skill	Communication skill	Diversity skill	Digital skill

Food and Beverage (first 3 future skills)				
<ul style="list-style-type: none"> <li>- Manage waste, and recycling</li> <li>- Environmentally friendly activities and products</li> <li>- Efficiency of energy and water consumption</li> </ul>	<ul style="list-style-type: none"> <li>- Willingness to learn and to perform</li> <li>- Ethical conduct and respect</li> <li>- Creativity</li> </ul>	<ul style="list-style-type: none"> <li>- Awareness of local customs</li> <li>- Intercultural host-guest understanding and respect</li> <li>- Active listening skills</li> </ul>	<ul style="list-style-type: none"> <li>- Diets and allergy needs skills</li> <li>- Skills related to disabilities</li> <li>- Age-related accessibility skills</li> </ul>	<ul style="list-style-type: none"> <li>- Operating System use skills</li> <li>- Microsoft Office skills</li> <li>- Monitoring online reviews</li> </ul>
Environmental skill	Personal skill	Communication skill	Diversity skill	Digital skill

<b>Environmental Skills</b>	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Ability to manage waste, sewage, recycling and composting (3,84)</li> <li>2. Knowledge of climate change (3,8)</li> <li>3. Ability to minimise the use and maximise efficiency of energy and water consumption/Promotion of environmentally friendly activities and products (3,75)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Promotion of sustainable forms of transport (e.g. public transport) (2,8)</li> <li>2. Conservation of biodiversity (3,41)</li> <li>3.</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Promotion of environmentally friendly activities and products/ Ability to manage waste, sewage, recycling and composting(4,15)</li> <li>2. Ability to minimise the use and maximise efficiency of energy and water consumption (4,11)</li> <li>3. Knowledge of climate change (4,05)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Promotion of sustainable forms of transport (e.g. public transport) (3,46)</li> <li>2. Conservation of biodiversity (3,84)</li> </ol>
Training Provision for these skills?	<p>Total number of companies providing environmental skills training in the sector: 33 companies out of 61</p> <p>Total number of companies providing environmental skills training in all sector: 187 companies out of 370</p> <p>More than half of the companies of the food and beverage industry provide environmental management training. The propensity is above average both when considering the five sectors and within the sector itself.</p>
Most popular/ three main types of training	<p>On the job (31)</p> <p>One day on-site training by external provider (6)</p> <p>Vocational training/ Higher education (3)</p>

### **Most important types of training provision**

More than 50% of the businesses operating in the food and beverage sector provide environmental skills training to their staff. Nine out of 10 companies choose on-the-job training, while a small percentage of businesses (18.2%) prefer other training methods, such as on-site courses held by external providers.

### **Reasons why businesses in this sector do *not* provide Environmental Mgt Training**

The main problems pointed out by businesses that do not organise training courses are mostly related to the lack of information, time and economic resources to be allocated to training activities.

### **Issues related to environmental skills**

One of the key skills within the food and beverage industry is the ability to manage waste, sewage, recycling and composting processes which is currently considered the most important environmental skill (3.84) and will be just as relevant in the future (4.15). Hence, there is a greater awareness of environmental issues, undoubtedly also influenced by the reference regulatory framework, but also a more widespread environmental consciousness among the operators, as shown by the knowledge of climate change which is one of the top 3 skills (3.8). The promotion of environmentally friendly activities and products is another priority for food and beverage companies (3.75) and will be even more so in the future (4.15). The capacity to offer dishes prepared with local ingredients, for example by adopting a ‘from farm to fork’ food production approach, means shortening the supply chain, adopting environmentally sound practices, and promoting the regional agri-food heritage allowing consumers to rediscover the local identity through traditional dishes.

Among the fastest growing skills, special attention is given to the promotion of sustainable forms of transport (+23.57%), showing a wider interest of the operators towards environmental sustainability aspects, wherein mobility plays and will play in the future an increasingly pivotal role.

<b>Personal, Communication and Diversity Skills</b>	
Current Level of Proficiency. Three most and three least proficient per category	<p><b>PERSONAL SKILLS- Most:</b></p> <ol style="list-style-type: none"> <li>1. Willingness to learn and to perform (4,34)</li> <li>2. Ethical conduct and respect (4,33)</li> <li>3. Creativity/Promoting a positive work environment (4,3)</li> </ol> <p><b>PERSONAL SKILLS- Least:</b></p> <ol style="list-style-type: none"> <li>1. Problem solving (3,57)</li> <li>2. Initiative and commitment (4,07)</li> <li>3. Customer orientation (4,15)</li> </ol> <p><b>COMMUNICATION SKILLS – Most:</b></p> <ol style="list-style-type: none"> <li>1. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (4,2)</li> <li>2. Skills related to intercultural host-guest understanding and respect (4,07)</li> <li>3. Active listening skills (4,02)</li> </ol> <p><b>COMMUNICATION SKILLS – Least:</b></p> <ol style="list-style-type: none"> <li>1. Ability to speak foreign languages (3,31)</li> <li>2. Written communication skills (3,67)</li> <li>3. Skills related to cultural awareness and expression (3,69)</li> </ol> <p><b>DIVERSITY SKILLS – Most:</b></p> <ol style="list-style-type: none"> <li>1. Diets and allergy needs skills (4,18)</li> <li>2. Skills related to disabilities and appropriate infrastructure (4,03)</li> <li>3. Age-related accessibility skills (3,93)</li> </ol> <p><b>DIVERSITY SKILLS – Least:</b></p> <ol style="list-style-type: none"> <li>1. Skills related to diversity in religious beliefs (3,84)</li> <li>2. Gender equality skills (3,9)</li> </ol>

<p>Future level of proficiency in 2030. Three most and three least proficient.</p>	<p>PERSONAL - Most:  1. Willingness to learn and to perform (4,57)  2. Creativity (4,56)  3. Ethical conduct and respect/ Promoting a positive work environment (4,52)</p> <p>PERSONAL - Least:  1. Problem solving (4,15)  2. Initiative and commitment/ Customer orientation (4,51)</p> <p>COMMUNICATION – Most:  1. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (4,49)  2. Skills related to intercultural host-guest understanding and respect (4,36)  3. Active listening skills (4,34)</p> <p>COMMUNICATION – Least:  1. Ability to speak foreign languages (4,11)  2. Written communication skills (4,21)  3. Oral communication skills (4,25)</p> <p>DIVERSITY– Most:  1. Diets and allergy needs skills (4,52)  2. Skills related to disabilities and appropriate infrastructure (4,43)  3. Age-related accessibility skills (4,36)</p> <p>DIVERSITY– Least:  1. Skills related to diversity in religious beliefs (4,25)  2. Gender equality skills (4,3)</p>
<p>Training Provision for Social Skills</p>	<p>Total number of companies providing social skills training in the sector: 26 companies out of 35  Total number of companies providing social skills training in all sector: 156 companies out of 370</p> <p>Within the food and beverage sector, 4 out of 10 businesses provide social skills training. A high propensity, together with the leisure industry, in the comparison between sectors, but more limited within the sector itself as compared to other training areas.</p>
<p>Most popular/ three main types of training for social skills</p>	<p>On the job (20)  Vocational training (4)  Online course/ Higher education (3)</p>

### Most important types of training provision

Within the food and beverage industry, 42.6% of businesses provide social skills training to their staff. Training is mostly provided on the job (76.9%) or through vocational training courses (15.4%) also in schools (11.5%).

### Reasons why businesses in this sector do *not* provide Social Skills Training

According to 17.2% of the food and beverage businesses, their limited size hinders the implementation of training programmes focused on the development of social skills. Two out of 10 businesses claim a

lack of time and financial resources, while one fourth have no interest or have never considered courses on this topic.

### **Issues related to Social Skills**

Willingness to learn (4.34), ethical conduct and respect (4.33), creativity (4.3) and promotion of a positive work environment (4.3) are the features that characterise the staff of food and beverage businesses. All of these skills are widespread yet perfectible, although with a moderate increase, and operators will continue to focus on them in the future. Among the most significant gaps, problem solving is especially noteworthy, as it is and will remain at the bottom of the skills list (current 3.57; 4.15 in the future) with an expected growth of 16%.

From the point of view of communication, the strength of food and beverage companies is their qualified staff. Awareness of local customs (4.2) and understanding of the users' needs, through both active listening (4.02) and intercultural respect (4.07), are the skills that make the food and beverage industry a very customer-oriented sector. This is especially true if we look at diversity management skills, where the attention to diets and allergy needs (current 4.18; future 4.52) and the accessibility of people with disabilities (current 4.03; future 4.43), are particularly developed.

The most significant gap can be found within the communication area, especially in the ability to speak foreign languages (+24.26) which appears to be limited (3.31) but hopefully will get a higher score in the future (4.11).

<b>Digital Skills</b>	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Operating System use skills (e.g., Windows) (4,02)</li> <li>2. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (3,87)</li> <li>3. Skills to monitor online reviews (3,69)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Artificial Intelligence (AI) and robotics skills (2,1)</li> <li>2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2,2)</li> <li>3. Computer programming skills (2,36)</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Skills to monitor online reviews (4,08)</li> <li>2. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (4,08)</li> <li>3. Operating System use skills (e.g., Windows) (4,08)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Artificial Intelligence (AI) and robotics skills (2,95)</li> <li>2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (3)</li> <li>3. Computer programming skills (3,02)</li> </ol>
Training Provision for digital skills?	<p>Total number of companies providing digital skills training in the sector: 27 companies out of 61</p> <p>Total number of companies providing digital skills training in all sector: 226 companies out of 370</p> <p>Within the food and beverage industry, 4 out 10 businesses provide digital skills training. The propensity is significantly lower than the other sectors, and also as compared to other training areas within the sector itself.</p>
Most popular/ three main types of training for digital skills	<p>On the job (21)</p> <p>Several days on-site training by external provider (5)</p> <p>One day on-site training by external provider (4)</p>

### Most important types of training provision

Digital skills training is provided by 44.3% of the food and beverage businesses. They generally opt for on-the-job training (77.8% of the companies that provide training to their staff) and on-site training by external providers, over one or more days (14.8% and 18.5% respectively).

### Reasons why businesses in this sector do *not* provide Digital Skills Training

The businesses that do not provide any type of digital training to their employees claim that said skills are not necessary, either because of a lack of interest or because they are not considered relevant for the company core business (this seems to be the case for 48% of businesses). Other reasons are the limited size (10.3%) and the lack of time and resources (10.3%) for training.

### Issues related to Digital Skills

In general, the digital skills available and requested by food and beverage companies are basic skills: good use of Operating System (4.02) and Microsoft Office suite (3.87). These skills will increase in the future but to a very limited extent as compared to other skills and will remain a top priority in terms of operators' digital needs. Much more significant, in terms of visibility and promotion, is the ability to monitor online reviews (3.69), which is useful to measure customer satisfaction, and identify any weaknesses or strengths. Considered a major focus area for the future, it ranks first (4.08) together with basic computer skills.

An analysis of the most significant gaps shows poor Artificial Intelligence and Virtual Reality skills (up by 40.62% and 36.57% respectively). Hence, operators are expected to focus more on these areas, although it seems to be more a willingness to keep up to date than a real opportunity for business development. This is especially obvious if we look at current and future scores (A.I. current 2.1, future 2.95; V.R. current 2.2, future 3), which show that these skills are not considered relevant for business operations as they are not directly applicable.

-- END OF VISITOR ATTRACTIONS SECTION --

## 5. ACCOMMODATIONS

Accommodations (first 3 current skills)				
<ul style="list-style-type: none"> <li>- Knowledge of climate change</li> <li>- Manage waste, and recycling</li> <li>- Environmentally friendly activities and products</li> </ul>	<ul style="list-style-type: none"> <li>- Ethical conduct and respect</li> <li>- Customer orientation</li> <li>- Willingness to learn and to perform</li> </ul>	<ul style="list-style-type: none"> <li>- Awareness of local customs</li> <li>- Oral communication</li> <li>- Active listening skills</li> </ul>	<ul style="list-style-type: none"> <li>- Gender equality skills</li> <li>- Age-related accessibility skills</li> <li>- Diets and allergy needs skills</li> </ul>	<ul style="list-style-type: none"> <li>- Monitoring online reviews</li> <li>- Operating System use skills</li> <li>- Microsoft Office skills</li> </ul>
Environmental skill	Personal skill	Communication skill	Diversity skill	Digital skill

Accommodations (first 3 future skills)				
<ul style="list-style-type: none"> <li>- Efficiency of energy and water consumption</li> <li>- Knowledge of climate change</li> <li>- Manage waste, and recycling</li> </ul>	<ul style="list-style-type: none"> <li>- Customer orientation</li> <li>- Willingness to learn and to perform</li> <li>- Ethical conduct and respect</li> </ul>	<ul style="list-style-type: none"> <li>- Awareness of local customs</li> <li>- Intercultural host-guest understanding and respect</li> <li>- Active listening skills</li> </ul>	<ul style="list-style-type: none"> <li>- Gender equality skills</li> <li>- Age-related accessibility skills</li> <li>- Diets and allergy needs skills</li> </ul>	<ul style="list-style-type: none"> <li>- Monitoring online reviews</li> <li>- Operating System use skills</li> <li>- Microsoft Office skills</li> </ul>
Environmental skill	Personal skill	Communication skill	Diversity skill	Digital skill

Environmental Skills	
Current Level of Proficiency. Three	Most: 1. Knowledge of climate change (3,68)

most and three least proficient	<p>2. Ability to manage waste, sewage, recycling and composting (3,65)</p> <p>3. Promotion of environmentally friendly activities and products (3,58)</p> <p>Least:</p> <p>1. Conservation of biodiversity (2,96)</p> <p>2. Promotion of sustainable forms of transport (e.g. public transport) (2,98)</p> <p>3. Ability to minimise the use and maximise efficiency of energy and water consumption (3,57)</p>
Future level of proficiency in 2030. Three most and three least proficient.	<p>Most:</p> <p>1. Ability to minimise the use and maximise efficiency of energy and water consumption (4,03)</p> <p>2. Ability to manage waste, sewage, recycling and composting (4)</p> <p>3. Knowledge of climate change (4)</p> <p>Least:</p> <p>1. Conservation of biodiversity (3,55)</p> <p>2. Promotion of sustainable forms of transport (e.g. public transport) (3,63)</p> <p>3. Promotion of environmentally friendly activities and products (3,99)</p>
Training Provision for these skills?	<p>Total number of companies providing environmental skills training in the sector: 104 companies out of 201</p> <p>Total number of companies providing environmental skills training in all sector: 187 companies out of 370</p> <p>Half of the businesses operating within the hospitality industry provide environmental management training. The propensity is above average both when considering all the sectors and within the sector itself as compared to other types of training.</p>
Most popular/ three main types of training	<p>On the job (94)</p> <p>One day on-site training by external provider (23)</p> <p>Vocational training (10)</p>

### Most important types of training provision

Half of the businesses within the hospitality industry provide environmental skills training to their staff (51.7% of the interviewees). The most widespread form of delivery is on-the-job training (90.4% of businesses), followed by on-site courses held by external providers (22.1%).

### Reasons why businesses in this sector do *not* provide Environmental Skills Training

The reasons why the businesses interviewed do not provide any type of environmental management training to their employees are related to the small size which is considered a limit by 26.4% of businesses, and to the lack of time, financial resources and general information, pointed out by 28.6% of hospitality facilities.

### Issues related to environmental skills

The skills for the accommodation industry are mostly related to the knowledge of climate change (3.68), followed by the ability to manage waste, sewage, recycling and composting processes (3.65). Both types of skills will remain a focus area also in the future (4). Hence, there is a greater awareness of environmental problems, undoubtedly also influenced by the reference regulatory framework, but

also a more widespread environmental consciousness among the operators as shown by the promotion of environmentally friendly activities and products (3.58) destined to grow in the future (3.99). The ability to minimise the use and maximise efficiency of energy and water consumption will become vital (4.03).

<b>Personal, Communication and Diversity Skills</b>	
Current Level of Proficiency. Three most and three least proficient per category	<p><b>PERSONAL SKILLS- Most:</b></p> <ol style="list-style-type: none"> <li>1. Ethical conduct and respect (4,34)</li> <li>2. Customer orientation (4,27)</li> <li>3. Willingness to learn and to perform (4,17)</li> </ol> <p><b>PERSONAL SKILLS- Least:</b></p> <ol style="list-style-type: none"> <li>1. Problem solving (3,9)</li> <li>2. Creativity (3,9)</li> <li>3. Willingness to change (3,95)</li> </ol> <p><b>COMMUNICATION SKILLS – Most:</b></p> <ol style="list-style-type: none"> <li>1. Oral communication skills (4,06)</li> <li>2. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (4,06)</li> <li>3. Active listening skills (4,03)</li> </ol> <p><b>COMMUNICATION SKILLS – Least:</b></p> <ol style="list-style-type: none"> <li>1. Ability to speak foreign languages (3,63)</li> <li>2. Skills related to cultural awareness and expression (3,74)</li> <li>3. Written communication skills (3,95)</li> </ol> <p><b>DIVERSITY SKILLS – Most:</b></p> <ol style="list-style-type: none"> <li>1. Gender equality skills (3,93)</li> <li>2. Age-related accessibility skills (3,82)</li> <li>3. Diets and allergy needs skills (3,82)</li> </ol> <p><b>DIVERSITY SKILLS – Least:</b></p> <ol style="list-style-type: none"> <li>1. Skills related to diversity in religious beliefs (3,56)</li> <li>2. Skills related to disabilities and appropriate infrastructure (3,74)</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient.	<p><b>PERSONAL - Most:</b></p> <ol style="list-style-type: none"> <li>1. Willingness to learn and to perform (4,5)</li> <li>2. Customer orientation (4,5)</li> <li>3. Ethical conduct and respect (4,48)</li> </ol> <p><b>PERSONAL - Least:</b></p> <ol style="list-style-type: none"> <li>1. Problem solving (4,32)</li> <li>2. Willingness to change (4,37)</li> <li>3. Initiative and commitment (4,39)</li> </ol> <p><b>COMMUNICATION – Most:</b></p> <ol style="list-style-type: none"> <li>1. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (4,4)</li> <li>2. Skills related to intercultural host-guest understanding and respect (4,39)</li> <li>3. Active listening skills (4,38)</li> </ol> <p><b>COMMUNICATION – Least:</b></p> <ol style="list-style-type: none"> <li>1. Ability to speak foreign languages (4,28)</li> <li>2. Written communication skills (4,29)</li> </ol>

	<p>3. Skills related to cultural awareness and expression (4,31)</p> <p>DIVERSITY– Most:</p> <ol style="list-style-type: none"> <li>1. Gender equality skills (4,33)</li> <li>2. Age-related accessibility skills (4,29)</li> <li>3. Diets and allergy needs skills (4,28)</li> </ol> <p>DIVERSITY– Least:</p> <ol style="list-style-type: none"> <li>1. Skills related to diversity in religious beliefs (4,12)</li> <li>2. Skills related to disabilities and appropriate infrastructure (4,22)</li> </ol>
Training Provision for Social Skills	<p>Total number of companies providing social skills training in the sector: 79 companies out of 201</p> <p>Total number of companies providing social skills training in all sector: 156 companies out of 370</p> <p>Within the hospitality industry, approximately 4 out of 10 businesses provide social skills training. The propensity is below average considering all the sectors, and even more limited within the sector itself when compared to other training areas.</p>
Most popular/ three main types of training for social skills	<p>On the job (69)</p> <p>One day on-site training by external provider/ One day off-site training by external provider/ Vocational training (8)</p>

### Most important types of training provision

Approximately 4 out of 10 hospitality facilities provide social skills training to their staff, mostly on the job (87.3%), through one-day courses, which can be held either on or off site (10.1% of the businesses that organise training courses), or alternatively through vocational training courses (10.1%).

### Reasons why businesses in this sector do *not* provide Social Skills Training

25.9% of the businesses that do not provide any kind of social skills training to their employees claim their small size (25.9%) is a limit, while one fourth have no interest or have never considered training courses on this topic.

### Issues related to Social Skills

Ethical conduct and respect (4.34), customer orientation (4.27) and willingness to learn and perform (4.17) are the skills that characterise hospitality staff. All of these skills are widespread yet perfectible, although with a moderate increase, and the operators will continue to focus on them in the future. Among the most significant gaps, problem solving is and will remain at the bottom of the social skills list (current 3.9; future 4.32), together with other important skills such as creativity (3.9) and willingness to change (3.95).

From the point of view of communication, the strength of accommodation businesses is their qualified staff. Oral communication skills, knowledge of local customs (e.g. food, arts, language, crafts) (4.06) and active listening skills (4.03) make the hospitality industry a very customer-oriented sector. This is especially true considering that in the future skills related to intercultural host-guest understanding and respect will add to the aforesaid communication skills (4.39).

The most significant gap within the area of communication is in the ability to speak foreign languages, which seems to be limited (4.28), together with written communication skills (3.95) and skills related to cultural awareness and expression (3.74).

Finally, as regards diversity management skills, the most widespread are gender equality skills (3.93), age-related accessibility skills and diets and allergy needs skills (3.82), all of them destined to grow in the future (4.33, 4.29 and 4.28 respectively).

<b>Digital Skills</b>	
Current Level of Proficiency. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Operating System use skills (e.g., Windows)(3,96)</li> <li>2. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (3,88)</li> <li>3. Skills to monitor online reviews (3,73)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Artificial Intelligence (AI) and robotics skills (2,08)</li> <li>2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2,12)</li> <li>3. Computer programming skills (2,39)</li> </ol>
Future level of proficiency in 2030. Three most and three least proficient	<p>Most:</p> <ol style="list-style-type: none"> <li>1. Skills to monitor online reviews (4,19)</li> <li>2. Operating System use skills (e.g., Windows)(4,18)</li> <li>3. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (4,15)</li> </ol> <p>Least:</p> <ol style="list-style-type: none"> <li>1. Artificial Intelligence (AI) and robotics skills (3,01)</li> <li>2. Computer programming skills (3,05)</li> <li>3. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (3,12)</li> </ol>
Training Provision for digital skills?	<p>Total number of companies providing digital skills training in the sector: 118 companies out of 201</p> <p>Total number of companies providing digital skills training in all sector: 226 companies out of 370</p> <p>Within the hospitality industry, approximately 6 out of 10 businesses provide digital skills training. The propensity is lower as compared to other sectors such as travel agencies, DMOs, and leisure businesses, although it is the most widespread type of training within the sector.</p>
Most popular/ three main types of training for digital skills	<p>On the job (91)</p> <p>Online course (32)</p> <p>Several days on-site training by external provider (20)</p>

### **Most important types of training provision**

58.7% of the businesses interviewed provide digital skills training to their employees. The type of training they provide is quite varied, on-the-job training being the preferred method (77.1% of businesses), followed by online courses (27.1%), on-site training, over one or more days (more than 16% of businesses), and off-site training over several days (14.4%).

### **Reasons why businesses in this sector do *not* provide Social Skills Training**

Among those that do not provide digital training to their employees, 30% do not organise any type of training, partly because it is not required by the central body to which they report (18.6%), and one

third (32.9%) claim their small size is a limit to the implementation of training courses on social skills development.

### **Issues related to Digital Skills**

Generally, the skills available and required by the hospitality industry are basic skills: good knowledge of Operating System (3.96) and Microsoft Office suite (3.88), and the ability to monitor online reviews (3.73). These skills will grow in the future, remaining a top priority in terms of operators' digital needs (4.18, 4.15 and 4.19 respectively).

An analysis of the most significant gaps shows low proficiency in Artificial Intelligence and robotics (2.08), application of digital hardware technologies, such as Real and Augmented Reality (2.12), and computer programming (2.39). Therefore, operators are expected to focus more on these areas in the future, not least because these skills will go up to 3.01, 3.12 and 3.05 respectively.

-- END OF VISITOR ATTRACTIONS SECTION --

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Co-funded by the  
Erasmus+ Programme  
of the European Union