NTG
Next Tourism Generation Alliance

NEXT TOURISM GENERATION ALLIANCE

SURVEY REPORT

SPAIN

MAY 2019

Survey Country Report for Spain

Number of responses for Country:	139
Number of responses per sector:	
Visitor Attractions:	27
F&B:	15
Accommodations:	68
Travel Agencies / Tour Operators:	7
Destination Management Organizations:	22

Purpose of the Country Survey Report

- The key trends should be extracted from the country survey results to establish how each sector, type and size of business are responding to the skill sets, highs, lows, current and future level of proficiency in digital, environmental, social and soft skills sets.
- Explain how businesses are accessing training with evaluation as to why businesses respond as they have and what may be contributing factors.
- Please ensure that an explanation and discussion for the results is according to the different sectors and type of business.
- Where are the gaps in the current and future level of proficiency in environmental, social and digital levels of proficiency across the 5 sectors and overall? Please make comments on specific shortages or excellent/good proficiency in environmental skills and what are the areas of significant weakness?
- Templates should be completed for each of the five sectors

Always ensure that you reflect the Sector, Type and size of business in order for the results to be useful for the next stages of the project as we move into the Skills Matrix phase of the project.

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 Organisatio0n; City Tourism Organisation; Protected Area Organisation
- Tour Operators – Travel Agency; Tour operator; both

Size of Business/Organisation – (Number of Employees)

- Large = 250+
- Medium = 100-249
- Small = 10-99
- Micro = Less than 10

Contents

1. VISITOR ATTRACTIONS

Environmental Skills	
Current Level of Proficiency. Three most and three least proficient	Most: 1.Promotion of environmentally friendly activities and products (3.48) 2.Knowledge of climate change (3.26) 3.Promotion of sustainable forms of transport (e.g. public transport) (3.19) Least: 1.Ability to manage waste, sewage, recycling and composting (2.81) 2.Conservation of biodiversity (2.89) 3.Ability to minimise the use and maximise efficiency of energy and water consumption (3.04)
Future level of proficiency in 2030. Three most and three least proficient.	Most: 1. Promotion of environmentally friendly activities and products (3.89) 2. Knowledge of climate change (3.85) 3. Promotion of sustainable forms of transport (e.g. public transport) (3.74) Least: 1. Ability to manage waste, sewage, recycling and composting (3.41) 2. Ability to minimise the use and maximise efficiency of energy and water consumption (3.48) 3. Conservation of biodiversity (3.52)
Training Provision for these skills?	The 48.15% of the visitor attractions respondents claim that their organisation provides some training for its employees in Environmental Management Skills (internally or externally provided).
Most popular/ three main types of training	1. On the job (40.7%) 2. Online course (14.8%) 3. Apprenticeship (7.4%)

The environmental skills in the visitor attraction sector follow the general trend in Spanish companies that are subject of study, ranking as the least important of the three established skills groups: environmental, social and digital.

Comparing the current situation with the near future, the results indicate that the three most important and least important skills will be exactly the same. although the importance given to them would increase in all cases. The "Promotion of environmentally friendly activities and products" is placed first (3.48 and 3.89: currently and in the future, respectively), while "Ability to manage waste, sewage, recycling and composting" is placed in the last position (2.81 and 3.41, respectively).

The most important gaps in terms of environmental skills are given in the skills of "Conservation of biodiversity" (0.63), "Ability to manage waste, sewage, recycling and composting" (0.6) and "Knowledge of climate change" (0.59).

It is important, therefore, to dedicate efforts in the training of skills for the Promotion of environmentally friendly activities and products since it is the most important skill in the future and the one with the greatest gap. In relation to training in Environmental Management Skills, the 48.15% of the organizations provides some training. The most important type of training is "On the job" (40.7%) followed by "On-line course" (14.8) and "Apprenticeship" (7.4%). The main difference with respect to the training results in Europe is that "One day on-site training by external provider" is the second most popular type of training in Europe, while in Spain it is much less usual. The interviewees also do not use other types of training such as "One day off-site training by external provider", "Vocational training" or "Higher education"

However, nearly half of respondents say that their organization does not provide any Environmental Management Skills training for their employees. Some of the reasons indicated by the respondents are the following:

- The company does not offer training of any kind and the staff is already hired with the training required for each case;
- Many of the jobs do not require that knowledge;
- Lack of: budget, resources, time, information about this type of training or other priorities in the organization.
- We are a solution integration company;

Personal, Communication and Diversity Skills	
Current Level of Proficiency. Three most and three least proficient per category	PERSONAL SKILLS - Most: 1. Willingness to learn and to perform (4.15) 2. "Customer orientation" "Ethical conduct and respect" (4.07) 3. PERSONAL SKILLS - Least: 1. "Creativity" "Willingness to change" (3.81) 2. "Problem solving" "Initiative and commitment" "Promoting a positive work environment" (3.89) 3. COMMUNICATION SKILLS – Most: 1. Written communication skills (4.07) 2. Oral communication skills (4.04) 3. Skills related to intercultural host-guest understanding and respect (3.85) COMMUNICATION SKILLS – Least: 1. "Active listening skills" "Ability to speak foreign languages" (3.70) 2. "Skills related to cultural awareness and expression" "Skills related to awareness of local customs (e.g., food, arts, language, crafts)" (3.81) 3. DIVERSITY SKILLS – Most: 1. Gender equality skills (3.63) 2. Age-related accessibility skills (3.56) 3. Skills related to diversity in religious beliefs (3.52) DIVERSITY SKILLS – Least: 1. Skills related to disabilities and appropriate infrastructure (3.26) 2. Diets and allergy needs skills (3.37) 3.

Future level of proficiency in 2030. Three most and three least proficient.	PERSONAL - Most: 1. Promoting a positive work environment (4.63) 2. Customer orientation (4.52) 3. Ethical conduct and respect (4.48) PERSONAL - Least: 1. Willingness to change (4.22) 2. Creativity (4.26) 3. Initiative and commitment (4.30) COMMUNICATION – Most: 1. Oral communication skills (4.41) 2. Skills related to intercultural host-guest understanding and respect (4.30) 3. "Written communication skills" "Skills related to awareness of local customs (e.g., food, arts, language, crafts)" (4.26) COMMUNICATION – Least: 1. Ability to speak foreign languages (4.15) 2. "Active listening skills" "Skills related to cultural awareness and expression" (4.19) 3. DIVERSITY – Most: 1. Age-related accessibility skills (4.00) 2. Gender equality skills (3.93) 3. DIVERSITY – Least: 1. "Skills related to disabilities and appropriate infrastructure" "Diets and allergy needs skills" "Skills related to diversity in religious beliefs" (3.81) 2. 3.

Training Provision for Social Skills	The 48.15% of the visitor attractions respondents claim that their organisation provides some training for its employees in Social Skills (internally or externally provided).
Most popular/ three main types of training for social skills	1. On the job (25.9%) 2. "Online course": "One day on-site training by external provider" (18.5%) 3. "Several days on-site training by external provider" "One day off-site training by external provider" "Several days off-site training by external provider" "Apprenticeship" "Higher education" (3.7%)

At present and in the future, taking into account the average importance of personal (3.95-4.38), communication (3.85-4.25) and diversity (3.47-3.87) skills, the most important skills would be, in this order the personal followed by communication and, finally, the diversity skills. This order is the same in the future.

Personal skills most and least important not are the same now and in the future: currently, "Willingness to learn and to perform" is the first personal skill and in the future the most important is "Promoting a positive work environment". "Customer orientation" occupies the second position, both today and in ten years because direct personal contact between employees and customers is and will be the cornerstone of tourism services. While the least important are "Creativity" and "Willingness to change". Do not forget that these skills are more valuable in certain positions but not in others more linked to daily operations.

In the case of communication skills, Oral and written communication skills, "Skills related to intercultural host-guest understanding and respect" and, in the future, "Skills related to awareness of local customs (e.g., food, arts, language, crafts)" are the more important. Instead, "Active listening skills" and "Ability to speak foreign languages" are the skills that obtain the lowest ratings both now and in the future.

Regarding the skills related to diversity, it coincides that the most important skills at present and in the future are those related to Age-related accessibility and Gender equality skills. On the other hand, the least important are Skills related to disabilities and appropriate infrastructure, Diets and allergy needs skills and in future "Skills related to diversity in religious beliefs".

In terms of personal skills gap, "Promoting a positive work environment" is the one with the highest gap (0.74). This demand for training is influenced by a new management approach that shifts the focus from the external client to the internal client (considering as such the staff that is part of the company). In communication skills, "Active listening skills", "Skills related to awareness of local customs (e.g., food, arts, language, crafts)", "Ability to speak foreign languages" and "Skills related to intercultural host-guest understanding and respect" are the ones with the highest gap (0.49-0.45). Finally, "Skills related to disabilities and appropriate infrastructure" is the one with the highest gap (0.55) in diversity skills.

It is important, therefore, to dedicate efforts in the training of those skills that are the most important skills in the future and besides present the highest gap. In relation to training in social skills, the 48.15% of the visitor attractions respondents provides some training for its employees. The most important type of training is "On the job" (25.9%) whereas "Vocational training" (0%) is the least important. In Europe, however, "Vocational training" is together with other methods, a type of training for social skills used.

The reasons why the 51.85% of visitor attractions organisations do not provide Social Skills Training for their employees because of the "the company does not offer any type of training"; "lack of resources or time", "lack of budget", "it is not a priority" and "Because personnel with the right profile are hired on time"; etc.

Digital Skills	
Current Level of Proficiency. Three most and three least proficient	Most: 1. Operating System use skills (e.g., Windows) (4.07) 2. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (3.96) 3. Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems and video projectors (3.81) Least: 1. Artificial Intelligence (AI) and robotics skills (2.52) 2. Computer programming skills (2.78) 3. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2.81)
Future level of proficiency in 2030. Three most and three least proficient.	Most: 1. Operating System use skills (e.g., Windows) (4.33) 2. "Online marketing and communication skills" "Social media skills" (4.26) 3. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (4.22) Least: 1. Artificial Intelligence (AI) and robotics skills (3.52) 2. "Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality" "Computer programming skills" (3.56) 3. "Data analytics, business intelligence, big data skills" "Website development skills" (3.89)
Training Provision for digital skills?	The 61.9% of the visitor attractions respondents claim that their organisation provides some training for its employees in Digital Skills (internally or externally provided).

Most popular/ three main types of training for digital skills	1. Online course (40.7%) 2. "On the job"; "One day off-site training by external provider" (22.2%) 3. One day or Several days on-site training by external provider (14.8%) 4. One day on-site training by external provider (12.2%)

The "Operating System use skills (eg, Windows)" are and will continue to be the most important skills, while "Artificial Intelligence (AI) and robotics skills" are placed in the last place by the doubts about what this type of technologies can contribute to sector. For its part, the skills "Online marketing and communication skills" and "Social media skills" are not the three most important today, but they will be in the near future.

Regarding the existing gap, it is positive in all the abilities included, being the magnitude of this mismatch in absolute terms the highest of those found in the three types of skills (environment, social and digital). It will also be in this area where training efforts should be greater, especially in: "Artificial Intelligence (AI) and robotics skills" (gap: 1.00), "Data analytics, business intelligence, big data skills" (0.96) and "Computer programming skills" (0.78). The first because its level of current development is relatively scarce and the other two because of its strategic nature when it comes to competing in the sector since employees must be capable of creating new contents, not only use it.

In relation to training in digital skills, the 61.9% of the visitor attractions respondents provides some training for its employees. The most important types of training are, in order:

1. Online course (40.7%)
2. "On the job"; "One day off-site training by external provider" (22.2%)
3. One day or Several days on-site training by external provider (14.8%)

Some reasons why the 38.1% of visitor attractions organisations do not provide Digital Skills Training for their employees because of "the company does not offer any type of training"; "Lack of time or resources"; "It is not necessary"; "Because the needs are basic and the staff has the necessary basic skills"; "Because personnel are preferably recruited with skills and abilities in other aspects that are more important for the position to be performed"; etc.

Of the skills analyzed, in the visitor attractions sub-sector, in order of importance, social (personal, communication and diversity) would be first, then digital and, finally, environmental.

In the future all present a positive gap so they will be more important than now and, only, digital and diversity exchange their position, digital being those that would be in third place.

Regarding the effort to make for the development of these skills, taking into account the importance they will have and the current allocation, digital will be followed by environmental ones which will focus the maximum interest. The less attention that social skills will demand will not respond to their role in the future, which will continue to be decisive, but rather because they are already well developed among the Spanish companies that have answered.

-- END OF VISITOR ATTRACTIONS SECTION –

2. DESTINATION MANAGEMENT ORGANIZATIONS

Environmental Skills	
Current Level of Proficiency. Three most and three least proficient	Most: 1. Promotion of environmentally friendly activities and products (3.27) 2. Knowledge of climate change (3.18) 3. Promotion of sustainable forms of transport (e.g. public transport) (3.14) Least: 1. "Ability to manage waste, sewage, recycling and composting" "Conservation of biodiversity" (2.59) 2. Ability to minimise the use and maximise efficiency of energy and water consumption (2.73) 3.
Future level of proficiency in 2030. Three most and three least proficient.	Most: 1. Promotion of environmentally friendly activities and products (4.00) 2. Promotion of sustainable forms of transport (e.g. public transport) (3.77) 3. "Knowledge of climate change" "Ability to minimise the use and maximise efficiency of energy and water consumption" (3.73) Least: 1. Ability to manage waste, sewage, recycling and composting (3.45) 2. Conservation of biodiversity (3.50) 3.
Training Provision for these skills?	The 59.09% of the Destination Management respondents claim that their organisation provides some training for its employees in Environmental Management Skills (internally or externally provided).
Most popular/ three main types of training	1. On the job (36.4%) 2. Online course (22.7%) 3. One day on-site training by external provider (13.6%)

In destination management organization, currently, there are three environmental skills that stand out for their importance: Promotion of environmentally friendly activities and products (3.27), Knowledge of climate change (3.18) and Promotion of sustainable forms of transport (e.g. public transport) (3.14). In 2030, these three would add another important skill: "Ability to minimise the use and maximise efficiency of energy and water consumption". On the other hand, the least important skill in the future is "Ability to manage waste, sewage, recycling and composting" (3.45)

The most important gaps in terms of environmental skills are given in the skills of "Ability to minimize the use and maximization of energy efficiency and water consumption" (1.00), "Conservation of biodiversity" (0.91) and "Ability to manage waste, sewage, recycling and composting" (0.86).

Consequently, the greatest training efforts should be aimed at reducing these gaps. At present, the 59.09% of the Destination Management respondents claim that their organisation provides some training for its employees in Environmental Management Skills (internally or externally provided).

However, more than forty percent of the respondents say that their organization does not provide any Environmental Management Skills training for their employees. This is a new field, where, on many occasions, there is a lack of training plans and in which the organizations are beginning to design a strategy. In other cases, do not find experts in environmental issues directly related to tourism.

Moreover, in many cases, these are institutions in which decisions are subject to political and business approval. So, in some cases, so far it has not been considered necessary because the managers, with political criterions, are not sufficiently sensitized, nor trained in these aspects.

Personal, Communication and Diversity Skills	
Current Level of Proficiency. Three most and three least proficient per category	PERSONAL SKILLS - Most: 1. Ethical conduct and respect (3.95) 2. Customer orientation (3.91) 3. Initiative and commitment (3.86) PERSONAL SKILLS - Least: 1. Creativity (3.45) 2. Willingness to learn and to perform (3.55) 3. Problem solving (3.59)

	COMMUNICATION SKILLS – Most: 1. "Skills related to awareness of local customs (e.g., food, arts, language, crafts)" "Skills related to intercultural host-guest understanding and respect" (3.68) 2. Written communication skills (3.64) 3. Oral communication skills (3.55) COMMUNICATION SKILLS – Least: 1. Active listening skills (3.27) 2. "Ability to speak foreign languages" "Skills related to cultural awareness and expression" (3.41) 3. DIVERSITY SKILLS – Most: 1. Age-related accessibility skills (3.59) 2. Gender equality skills (3.55) 3. Skills related to disabilities and appropriate infrastructure (3.27) DIVERSITY SKILLS – Least: 1. Diets and allergy needs skills (2.73) 2. Skills related to diversity in religious beliefs (3.14) 3.
Future level of proficiency in 2030. Three most and three least proficient.	PERSONAL - Most: 1. Ethical conduct and respect (4.55) 2. Customer orientation (4.45) 3. Promoting a positive work environment (4.41) PERSONAL - Least: 1. "Creativity" "Problem solving" (4.05) 2. Willingness to learn and to perform (4.09) 3. Initiative and commitment (4.23) COMMUNICATION – Most:

	1. Written communication skills (4.32) 2. "Oral communication skills" "Active listening skills" "Skills related to intercultural host-guest understanding and respect" (4.23) 3. COMMUNICATION – Least: 1. Skills related to cultural awareness and expression (4.13) 2. Ability to speak foreign languages (4.00) 3. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (3.93) DIVERSITY – Most: 1. "Age-related accessibility skills" "Gender equality skills" (4.18) 2. 3. DIVERSITY – Least: 1. Skills related to diversity in religious beliefs (3.73) 2. Diets and allergy needs skills (3.82) 3. Skills related to disabilities and appropriate infrastructure (3.91)
Training Provision for Social Skills	The 59.09% of the Destination Management respondents claim that their organisation provides some training for its employees in Social Skills (internally or externally provided).
Most popular/ three main types of training for social skills	1. On the job (31.8%) 2. Online course (22.7%) 3. One day on-site training by external provider (18.2%)

Following the trend of the rest of the tourism sectors analyzed, currently and in the future the most important social skills would be the personal skills (actual and future average: 3.72-4.27) followed by communication skills (3.52-4.18) and, finally, the diversity skills (3.26-3.96). However, if we consider the effort

that could be made in the development of these social skills through training, depending on the existing gap, this order is reversed. That is, taking into account the current and desirable level, destination management organizations must improve their level of competence in diversity skills a 21.74%, in communication skills a 18.63% and in personal skills a 14.71%.

More specifically, depending on social skills gap, the effort to develop will be directed, to the following skills: "Diets and allergy needs skills" (diversity) (gap: 1.09), "Active listening skills" (communication) (0.96) and "Promoting a positive work environment" (personal) (0.68).

In Social Skills, the 59.09% of the Destination Management respondents claim that their organisation provides some training for its employees. In these cases, the three main types of training for social skills are: On the job (31.8%), through Online courses (22.7%) and with "One day on-site training by external provider" (18.2%).

However, given the particular public-private reality of this type of organization, in some of them workers are not trained because the managerial and political positions do not worry, they are not sensitized or trained. Also is true that this type of training is considered implicit in the experience of the staff.

Digital Skills	
Current Level of Proficiency. Three most and three least proficient	Most: 1. "Operating System use skills (e.g., Windows)" "Microsoft Office skills (e.g., Word, Excel, Powerpoint)" (3.91) 2. Social media skills (3.41) 3. Online marketing and communication skills (3.32) Least: 1. Artificial Intelligence (AI) and robotics skills (2.09) 2. Computer programming skills (2.18) 3. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2.27)
Future level of proficiency in 2030. Three most and three least proficient.	Most: 1. Online marketing and communication skills (4.32) 2. "Operating System use skills (e.g., Windows)" "Microsoft Office skills (e.g., Word, Excel, Powerpoint)" (4.23) 3. Social media skills (4.18)

	Least: 1. Artificial Intelligence (AI) and robotics skills (3.32) 2. Computer programming skills (3.23) 3. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (3.59)
Training Provision for digital skills?	The 72.7% of the Destination Management respondents claim that their organisation provides some training for its employees in Social Skills (internally or externally provided).
Most popular/ three main types of training for digital skills	1. On the job (40.9%) 2. Online course (36.4%) 3. "Several days on-site training by external provider" "One day off-site training by external provider" (13.6%)

Attending to the digital skills, it is detected that the most and least important skills are the same currently and what is expected in the future. It will still be crucial to be able to manage operating systems (e.g., Windows) or Microsoft Office applications (e.g., Word, Excel, Powerpoint), but also a certain level in social media skills. Additionally, in 2030 online marketing and communication skills will be a key competence too.

Taking into account the gaps in digital skills, companies will have to make a greater relative effort to train their staff in "Artificial Intelligence (AI) and robotics skills" (58,85%), "Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality" (58,15%), "Data analytics, business intelligence, big data skills" (49.62%), "Computer programming skills" (48,17%) and "Website development skills" (42.08%). Considering the complexity and the pace of technology change, this training will be important in all cases in terms of resource investment and continuous updating.

Today, the 72.7% of the Destination Management respondents claim that their organisation provides some training for its employees in Social Skills (internally or provided). This training is internally or externally provided: on the job (40.9%), with online courses (36.4%) and On-day or several-days on-site or off-site training by external provider (13.6%)-

As one might expect, one of the reasons why a third of the companies do not offer training in digital skills is because of the lack of budget or because the administrators are not sensitized, nor informed, nor trained.

As a general assessment we could point out that in terms of environmental skills destination management is a sector that coincides quite a lot in terms of development requirements with that of visitor attractions. On the other hand, social skills will continue to be the skills with the greatest impact in the sector and that is why it is necessary to continue investing in developing and caring for this type of skills.

But possibly the most drastic and substantial changes with respect to the current situation will come with the digital skills and it is in this type of skills where training needs will be most important.

-- END OF DESTINATION MANAGEMENT SECTION --

3. TRAVEL AGENCIES / TOUR OPERATORS

Environmental Skills	
Current Level of Proficiency. Three most and three least proficient	Most: 1. Promotion of environmentally friendly activities and products (3.29) 2. Knowledge of climate change (3.00) 3. Least: 1. "Ability to manage waste, sewage, recycling and composting" "Conservation of biodiversity" (2.29) 2. "Ability to minimise the use and maximise efficiency of energy and water consumption" "Promotion of sustainable forms of transport (e.g. public transport)" (2.71) 3.
Future level of proficiency in 2030. Three most and three least proficient.	Most: 1. Promotion of environmentally friendly activities and products (3.71) 2. Knowledge of climate change (3.57) 3. Promotion of sustainable forms of transport (e.g. public transport) (3.29) Least: 1. "Ability to manage waste, sewage, recycling and composting" "Ability to minimise the use and maximise efficiency of energy and water consumption" (2.86) 2. Conservation of biodiversity (3.14) 3.
Training Provision for these skills?	The 14.29% of the travel agencies/tour operators respondents claim that their organisation provides some training for its employees in Social Skills (internally or externally provided).
Most popular/ three main types of training	1. Online course (14.3%) 2. Several days off-site training by external provider (14.3%) 3. Vocational training (14.3%)

In the travel agencies and touroperators sector the pattern of more ("Promotion of environmentally friendly activities and products" and "Knowledge of climate change") and less (""Ability to manage waste, sewage, recycling and composting" "Conservation of biodiversity" and "Ability to minimise the use and maximise efficiency of energy and water consumption") important environmental skills coincides with that already mentioned in the previous cases (visitor attractions and destination management organizations).

Regarding its future importance, taking into account the level of development currently achieved, the greatest training efforts should be directed towards: "Conservation of biodiversity" (37,12%), "Ability to manage waste, sewage, recycling and composting" (24,89%) and "Promotion of sustainable forms of transport (eg public transport)" (21,40%).

Of the seven companies surveyed, only one of them (14.3%) offers training in Environmental Management Skills, through "online courses", "several days off-site training by external provider" and "vocational training". On the other hand, the 85.71% of the travel agencies/tour operators' organization does not provide any Environmental Management Skills training for their employees. Some of the reasons pointed out by the interviewees are as follows, all reflecting the limited importance granted: "it is not relevant for our activity"; "The organisation has a high volume of work and is focusing its efforts on training its employees in destinations and managing customer demands"; "Within the training in destinations, activities aimed at environmental awareness are promoted, but at the moment they do not cover much market"; "It is not necessary"; etc.

Personal, Communication and Diversity Skills	
Current Level of Proficiency. Three most and three least proficient per category	PERSONAL SKILLS - Most: 1. Customer orientation (4.71) 2. Problem solving (4.29) 3. "Ethical conduct and respect" "Promoting a positive work environment" (4.14) PERSONAL SKILLS - Least: 1."Creativity" "Willingness to learn and to perform" (3.71) 2. Willingness to change (3.86)

	3. Initiative and commitment (4.00) COMMUNICATION SKILLS – Most: 1. Ability to speak foreign languages (4.57) 2. Skills related to intercultural host-guest understanding and respect (4.29) 3. Written communication skills (3.86) COMMUNICATION SKILLS – Least: 1. "Skills related to cultural awareness and expression" "Skills related to awareness of local customs (e.g., food, arts, language, crafts)" (3.29) 2. "Oral communication skills" "Active listening skills" (3.86) 3. DIVERSITY SKILLS – Most: 1. Gender equality skills (4.86) 2. 3. DIVERSITY SKILLS – Least: 1. Skills related to disabilities and appropriate infrastructure (3.00) 2. Diets and allergy needs skills (3.14) 3. "Age-related accessibility skills" "Skills related to diversity in religious beliefs" (3.43)
Future level of proficiency in 2030. Three most and three least proficient.	PERSONAL - Most: 1. Customer orientation (4.86) 2. "Problem solving" "Initiative and commitment" (4.71) 3. Promoting a positive work environment (4.57) PERSONAL - Least: 1. Willingness to change (3.71) 2. "Creativity" "Willingness to learn and to perform" (4.14) 3. Ethical conduct and respect (4.43)

	COMMUNICATION – Most: 1. "Ability to speak foreign languages" (4.57) 2. "Skills related to intercultural host-guest understanding and respect" (4.29) 3. "Written communication skills" (3.86) COMMUNICATION – Least: 1. "Skills related to cultural awareness and expression" "Skills related to awareness of local customs (e.g., food, arts, language, crafts)" (3.29) 2. "Active listening skills" "Oral communication skills" (3.71) 3. DIVERSITY – Most: 1. Gender equality skills (5.00) 2. Age-related accessibility skills (4.29) 3. DIVERSITY – Least: 1. "Diets and allergy needs skills" "Skills related to disabilities and appropriate infrastructure" (3.86) 2. Skills related to diversity in religious beliefs (4.00) 3.
Training Provision for Social Skills	The 57.14% of the travel agencies/tour operators respondents claim that their organisation provides some training for its employees in Social Skills (internally or externally provided).
Most popular/ three main types of training for social skills	1. Online course (42.9%) 2. Several days off-site training by external provider (28.6%) 3. "On the job" "One day on-site training by external provider" "Several days on-site training by external provider" "One day off-site training by external provider" "Apprenticeship" (14.3%)

Comparing the current situation with the near future, the results indicate that the most important and least important personal skills will be exactly the same. The most important skills are "customer orientation" and "problem solving", while the least important are "Creativity" "Willingness to learn and to perform" and "Willingness to change". In addition, among the personal skills is the only item with a negative gap: "Willingness to change" and that, therefore, we could understand would be developed in excess for future needs.

In communication skills, the ability to speak foreign languages will remain key (4.57), but the relative gap with respect to the current situation is minimal, implying that current training mechanisms are sufficient.

Finally, with respect to diversity skills, in future the most important skill is "Gender equality skills" (5) the current skill proficiency.

From the results obtained it can be deduced that the greatest efforts should be directed to the development of "Initiative and commitment" (personal) (17,75%), "Oral communication skills" (communication) (19,41%) and "Skills related to disabilities and appropriate infrastructure" (diversity) (28,67%).

The 57.14% of the travel agencies/tour operators respondents claim that their organisation provides some training for its employees in Social Skills (internally or externally provided). This training is provided in different scenarios and the most important one is through online courses (42.9%).

Digital Skills	
Current Level of Proficiency. Three most and three least proficient	Most: 1. "Operating System use skills (e.g., Windows)" "Skills for implementing online safety procedures" (4.14) 2. "Microsoft Office skills (e.g., Word, Excel, Powerpoint)" "Online marketing and communication skills" "Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems and video projectors" (4.00) 3. "Desk top publishing skills (for designing brochures, catalogues, etc.)" "Website development skills" (3.86) Least: 1. "Artificial Intelligence (AI) and robotics skills" "Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality" (2.57) 2. "Social media skills" "Skills to monitor online reviews" (3.57) 3. "Computer programming skills" "Data analytics, business intelligence, big data skills" (3.71)
Future level of proficiency in 2030.	Most: 1.Skills for implementing online safety procedures (4.86)

Three most and three least proficient.	2. Operating System use skills (e.g., Windows) (4.57) 3."Microsoft Office skills (e.g., Word, Excel, Powerpoint)" "Online marketing and communication skills" "Website development skills" (4.43) Least: 1. "Artificial Intelligence (AI) and robotics skills" "Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality" (3.14) 2.Desk top publishing skills (for designing brochures, catalogues, etc.) (3.86) 3. "Computer programming skills" "Social media skills" (4.00)
Training Provision for digital skills?	All the organizations (100%) provides some training for its employees in Digital Skills.
Most popular/ three main types of training for digital skills	1. Online course (57,1%) 2. On the job (42.9%) 3. "One day on-site training by external provider" "Several days on-site training by external provider" and "Several days off-site training by external provider" (28.6%)

Within the digital skills, the Skills for implementing online safety procedures occupy a relevant position and its development will require an important effort. However, it is striking that the two skills that will be less important today are those that absorb greater interest in their future development: "Artificial Intelligence (AI) and robotics skills" and "Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality " (relative efforts: 22.18%).

All the organizations (100%) provides some training for its employees in Digital Skills because the digitalisation has increased very quickly and the trend nowadays is to be more and more digital. The needs will be focus on digital skills. People will need to specialize in some issues of the firms. They will need to know how to manage the data, through analysis, and interpret the results attending to different aspects of the business (customers, revenue, services, etc).

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

4. FOOD & BEVERAGE

Environmental Skills	
Current Level of Proficiency. Three most and three least proficient	Most: 1. Ability to manage waste, sewage, recycling and composting (3.4) 2. Ability to minimise the use and maximise efficiency of energy and water consumption (3.27) 3. Knowledge of climate change (3.20) Least: 1. Promotion of sustainable forms of transport (e.g. public transport) (2.73) 2. Conservation of biodiversity (2.87) 3. Promotion of environmentally friendly activities and products (3.00)
Future level of proficiency in 2030. Three most and three least proficient	Most: 1. Promotion of environmentally friendly activities and products (4.07) 2. Knowledge of climate change (4.00) 3. Ability to minimise the use and maximise efficiency of energy and water consumption (3.87) Least: 1. Promotion of sustainable forms of transport (e.g. public transport) (3.40) 2. Conservation of biodiversity (3.47) 3. Ability to manage waste, sewage, recycling and composting (3.80)
Training Provision for these skills?	The 66.67% of the food & beverage respondents claim that their organisation provides some training for its employees in Environmental Management Skills (internally or externally provided).
Most popular/ three main types of training	1. On the job (53.3%) 2. One day on-site training by external provider / Several days on-site training by external provider / One day off-site training by external provider / Several days off-site training by external provider (13.3%)

It is surprising that the most important skill at the present time (Ability to manage waste, sewage, recycling and composting) is the least important in the future. And the least important skill nowadays (Promotion of environmentally friendly activities and products) is the most important in the future. This may be due to the change in consumer habits. The tendency is that consumers demand products of proximity (of km 0), eco-friendly, organics, etc. And in the future the firms should develop this ability to promotion environmentally friendly activities and products. The activities of recycling, management waste, etc., are presupposed in the company. They are more internalized, so this may be the reason why this ability loses importance in the future.

The rest of the more and least important skills now and in the future are the same. "Knowledge of climate change" is one of the most important both now and in the future while "Promotion of sustainable forms of transport" and "Conservation of biodiversity" are the least important.

The most important gaps in terms of environmental skills are given in the skills of "Promotion of environmentally friendly activities and products" (1.07), "Knowledge of climate change" (0.80) and "Promotion of sustainable forms of transport (e.g. public transport)" (0.67).

It is important, therefore, to dedicate efforts in the training of skills for the Promotion of environmentally friendly activities and products since it is the most important skill in the future and the one with the greatest gap. In relation to training in Environmental Management Skills, the 66.67% of the organizations provides some training. The most important type of training is "On the job" (53.3%) whereas "On-line course", "Apprenticeship", "Vocational training" and "Higher education" are the least important (6.7%). The main difference with respect to the training results in Europe is that "On-line course" is the second most popular type of training in Europe, while in Spain it is among the least used in training environmental skills.

The 33.33% of the food & Beverage organization does not provide any Environmental Management Skills training for their employees. The reasons are "because it is not necessary" and the "lack of resources".

Personal, Communication and Diversity Skills	
Current Level of Proficiency. Three most and three least proficient per category	PERSONAL SKILLS - Most: 1. Customer orientation (4.33) 2. Ethical conduct and respect (4.20) 3. Promoting a positive work environment (3.87) PERSONAL SKILLS - Least: 1. Willingness to learn and to perform (3.53) 2. Creativity (3.60)

	3. Problem solving (3.73) COMMUNICATION – Most: 1. Skills related to intercultural host-guest understanding and respect (3.73) 2. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (3.67) 3. Oral communication skills (3.40) COMMUNICATION – Least: 1. Written communication skills (2.87) 2. Active listening skills (3.20) 3. Ability to speak foreign languages (3.27) DIVERSITY SKILLS – Most: 1. Diets and allergy needs skills (4.07) 2. Gender equality skills (3.67) 3. Age-related accessibility skills (3.67) DIVERSITY SKILLS – Least: 1. Skills related to diversity in religious beliefs (3.07) 2. Skills related to disabilities and appropriate infrastructure (3.27)
Future level of proficiency in 2030. Three most and three least proficient	PERSONAL - Most: 1. Customer orientation (4.60) 2. Ethical conduct and respect (4.33) 3. Promoting a positive work environment (4.20) PERSONAL - Least: 1. Willingness to learn and to perform (3.53) 2. Creativity (3.60) 3. Problem solving (3.73) COMMUNICATION SKILLS – Most:

	1. Skills related to cultural awareness and expression (4.13) 2. Ability to speak foreign languages (4.00) 3. Skills related to intercultural host-guest understanding and respect / Active listening / Skills related to awareness of local customs (e.g., food, arts, language, crafts) (3.93) COMMUNICATION SKILLS – Least: 1. Written communication skills (3.60) 2. Oral communication skills (3.80) DIVERSITY – Most: 1. Diets and allergy needs skills (4.40) 2. Skills related to disabilities and appropriate infrastructure (4.13) DIVERSITY – Least: 1. Skills related to diversity in religious beliefs (3.67) 2. Gender equality skills / Age-related accessibility skills (3.87)
Training Provision for Social Skills	The 66.67% of the food & beverage respondents claim that their organisation provides some social skills training for its employees (internally or externally provided)
Most popular/ three main types of training for social skills	1. On the job (46.7%) 2. One day on-site training by external provider (40%) 3. Several days on-site training by external provider (13.3%)

Personal skills most and least important now and in the future are the same: "Customer orientation", "Ethical conduct and respect" and "Promoting a positive work environment" are the most important while the least important are "Willingness to learn and to perform", "Creativity" and "Problem solving".

In the case of communication skills, it is surprising that the ability to speak other languages today appears to be one of the least important, but in the future, however, it is one of the most important.

Regarding the skills related to diversity, it coincides that the least important at present and in the future is that related to religious beliefs. While the most important is the ability to adapt the product to special needs in the diet or for reasons of allergy.

The product of these companies is not adapted to the client's religious beliefs but to its culture. From the client's point of view, gastronomy adapts to different cultures rather than to different religious beliefs. Therefore, perhaps companies in this sector do not give much importance to this aspect. It could be important in terms of respecting different beliefs of the workers. But perhaps this aspect would be included in other skills that have turned out to be very important related to ethical conduct and respect, cultural awareness, etc.

In terms of personal skills gap, "Creativity" and "Willingness to change" are the ones with the highest gap (0.47). Skills related to "Cultural awareness and expression" (0.80), "Written communication skills" (0.73), "Ability to speak foreign languages" (0.73) and "Active listening skills" (0.73) are those that present a higher gap in terms of social communication skills. On the other hand, "Skills related to disabilities and appropriate infrastructure" (0.86) and "Skills related to diversity in religious beliefs" (0.60) are those that present a higher gap in relation to Diversity Skills.

It is important, therefore, to dedicate efforts in the training of those skills that are the most important skills in the future and besides present the highest gap. In relation to training in social skills, the 66.67% of the food & Beverage organizations provides some training for its employees. The most important type of training is "On the job" (53.3%) whereas "Apprenticeship" (0%) and "Vocational training" (0%) are the least important. In Europe, however, "Apprenticeship" appears as one of the most used types of training for social skills.

The 33.33% of the food & Beverage organization does not provide any training. The reasons why organisations do not provide Social Skills Training for their employees are because of the "lack of resources", "it is not necessary", "it is not a priority" and the "high seasonality".

Digital Skills	
Current Level of Proficiency. Three most and three least proficient	Most: 1. Operating System use skills (e.g., Windows) (2.93) 2. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (2.73) 3. Social media skills / Skills to monitor online reviews (2.60)

	Least: 1. Artificial Intelligence (AI) and robotics skills (1.80) 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (1.80) 3. Computer programming skills / Data analytics, business intelligence, big data skills (1.93)
Future level of proficiency in 2030. Three most and three least proficient	Most: 1. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (3.60) 2. Operating System use skills (e.g., Windows) (3.47) 3. Skills to monitor online reviews (3.33) Least: 1. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality / Artificial Intelligence (AI) and robotics skills (2.40) 2. Computer programming skills (2.47) 3. Website development skills (2.53)
Training Provision for digital skills?	The 53.3 % of the food & beverage respondents provides some training for its employees in Digital Skills (internally or externally provided).
Most popular/ three main types of training for digital skills	1. On the job (33.3%) 2. Online course (20%) 3. One day on-site training by external provider / Higher education (13.3%)

In this case, the most important digital skills coincide today and in the future. Surprisingly, the skills related to artificial intelligence, such as big data, are not considered important when today we are already seeing how restaurants are betting on the use of these tools to build customer loyalty. Besides, basic skills such as operating Microsoft Office or Operating Systems such as Windows are the most important both now and in the future.

"Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems and video projectors" (0.93), "Microsoft Office skills (eg, Word, Excel, Powerpoint)" (0.87) and "Data analytics, business intelligence, big data skills" (0.87) are the most gap present regarding digital skills. So, the training programs must be oriented to provide these digital skills.

Regarding training in digital skills, the 53.3% of food & beverage organisations provide some training for the employees. "On the job" is the most common type of training in digital skills (33.3%), followed by "Online course" (20%), "One day on-site training by external provider" and "Higher education" (13.3%).

The least popular are "One day off-site training by external provider" and "Vocational training" (0%). The reasons why the 36.7% of the Food & Beverage organisations do not provide any digital skills training program are: because "It is not necessary"; "The lack of resources or time"; "It is not the main need for my business" or "The lack of knowledge".

It is surprising that this sector is the only one that has indicated as one of the main types of training the higher education. This may be due to the fact that digital skills required by the food & beverage sector (a higher knowledge of IT tools and specialization in Social Networks, Marketing tools, CRM, ERP, Payment Systems, Mobile Applications, Online Security, Cloud, Connectivity, Business Intelligence…) need a higher level of education that cannot be achieved through another type of training.

In general terms, environmental and digital skills are the ones with the highest gap in the Food & Beverage sector (0.69 an 0.67, respectively) followed by social skills of communication (0.55), diversity (0.44) and personal skills (0.33). The food & beverage organizations begin to give a value to aspects of environmental management, environmental protection, gastronomy of km 0, products of proximity…looking for a competitive differentiation and attract the clients who identify with those values. In the future, will be necessary to develop more in depth these skills. Regarding digital skills, in the future the customer will be absolutely digitized. Therefore, the sector must introduce the digital aspects in their model. Technologies such as big data, Internet of things, block chains, etc., are already being incorporated. Therefore it is very important training programs in these new technologies. On social issues, training efforts should be done in promote leadership, gender equality and teamwork because these skills will be valued in the future.

-- END OF FOOD & BEVERAGE SECTION --

5. ACCOMMODATIONS

Environmental Skills	
Current Level of Proficiency. Three most and three least proficient	Most: 1. Knowledge of climate change (3.56) 2. Promotion of environmentally friendly activities and products / Ability to minimise the use and maximise efficiency of energy and water consumption (3.34) Least: 1. Conservation of biodiversity (2.76) 2. Promotion of sustainable forms of transport (e.g. public transport) (2.94) 3. Ability to manage waste, sewage, recycling and composting (3.07)
Future level of proficiency in 2030. Three most and three least proficient	Most: 1. Knowledge of climate change (4.23) 2. Promotion of environmentally friendly activities and products (4.00) 3. Ability to minimise the use and maximise efficiency of energy and water consumption (3.97) Least: 1. Promotion of sustainable forms of transport (e.g. public transport) (3.72) 2. Conservation of biodiversity (3.79) 3. Ability to manage waste, sewage, recycling and composting (3.84)
Training Provision for these skills?	The 41.18 % of the Accommodation organisations provides some training for its employees in Environmental Management Skills (internally or externally provided).
Most popular/ three main types of training	1. On the job (36.8%) 2. On day on-site training by external provider (11.8%) 3. Online course (7.4%)

The most and least important environmental skills coincide today and in the future. The most important skills are "knowledge of the climate change", "promotion of environmentally friendly activities and products" and "ability to minimise the use and maximise efficiency of energy and water consumption". While the least important at present and in the future are "Promotion of sustainable forms of transport (e.g. public transport)", "Conservation of biodiversity" and "Ability to manage waste, sewage, recycling and composting". Perhaps this is because manage waste, wastewater and recycling are activities that are taken for granted. That is why efforts should be directed towards other skills.

The most important gaps in terms of environmental skills are given in the skills of "Conservation of biodiversity" (1.03), "Promotion of sustainable forms of transport (e.g. public transport)" (0.78) and "Ability to manage waste, sewage, recycling and composting" (0.77). Therefore, it is necessary to provide training on better management of natural resources, promotion of public transport on clients, electric vehicles, staff qualified on EMAS certificate, etc.

Regarding training in Environmental Management Skills, the 41.8% of the Accommodation organizations participants provides some training for their employees. The most popular types of training in Environmental Management Skills are "On the job", "One day on-site training by external provider" and "Online course". This result is similar to those obtained at European level. On the other hand, the least popular types of training are "Several days off-site training by external provider" (1.5%), "Apprenticeship" (1.5%), "Vocational training" (1.5%) and "Higher education" (1.5%). It is surprising that more than half of the Accommodation organizations (58.2%) do not provide any training in Environmental skills. The main reasons are: "No current requirement"; "We have no employees as such, but as owners we have an interest and knowledge of environmental issues"; "Cleaning staff do not particularly need environmental management skills"; "Lack of resources or time"; "Lack of interest"; "Adapting to the information that is sent and trying to include environmental sustainability in the day to day"; "Lack of promotion and offer by public entities". "The private training companies do not put much emphasis on this plot either because the current demand is more focused on other fields of the hospitality industry"; "Lack of awareness and lack of specific training"; "Because the knowledge we have is enough for us"; "Because it has not developed an integrated strategic plan for environmental action and management" and "Small company".

Personal, Communication and Diversity Skills	
Current Level of Proficiency. Three most and three least proficient per category	PERSONAL SKILLS - Most: 1. Customer orientation (4.15) 2. Willingness to learn and to perform (4.10) 3. Ethical conduct and respect / Promoting a positive work environment (4.07) PERSONAL SKILLS - Least: 1. Problem solving (3.75)

	2. Creativity (3.81) 3. Initiative and commitment (3.82) COMMUNICATION SKILLS – Most: 1. Skills related to intercultural host-guest understanding and respect (3.93) 2. Written communication skills (3.88) 3. Oral communication skills (3.79) COMMUNICATION SKILLS – Least: 1. Skills related to cultural awareness and expression (3.44) 2. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (3.62) 3. Active listening skills (3.65) DIVERSITY SKILLS – Most: 1. Gender equality skills (3.96) 2. Age-related accessibility skills (3.69) 3. Diets and allergy needs skills (3.63) DIVERSITY SKILLS – Least: 1. Skills related to disabilities and appropriate infrastructure (3.29) 2. Skills related to diversity in religious beliefs (3.41)
Future level of proficiency in 2030. Three most and three least proficient	PERSONAL - Most: 1. Customer orientation (4.60) 2. Ethical conduct and respect (4.56) 3. Promoting a positive work environment (4.38) PERSONAL - Least: 1. Willingness to change (4.16) 2. Creativity (4.25) 3. Problem solving / Initiative and commitment (4.29)

	COMMUNICATION – Most: 1. Skills related to intercultural host-guest understanding and respect (4.46) 2. Oral communication skills / Active listening skills (4.32) 3. Ability to speak foreign languages (4.28) COMMUNICATION – Least: 1. Skills related to cultural awareness and expression (4.09) 2. Skills related to awareness of local customs (e.g., food, arts, language, crafts) (4.24) 3. Written communication skills (4.25) DIVERSITY – Most: 1. Gender equality skills (4.41) 2. Age-related accessibility skills (4.25) 3. Diets and allergy needs skills (4.22) DIVERSITY – Least: 1. Skills related to diversity in religious beliefs (3.94) 2. Skills related to disabilities and appropriate infrastructure (4.03)
Training Provision for Social Skills	The 54.41% of the Accommodation organisations provides some Social Skills Training for its employees (internally or externally provided).
Most popular/ three main types of training for social skills	1. On the job (38.2%) 2. Online course (29.4%) 3. On day on-site training by external provider / Several days on-site training by external provider (11.8%)

The most important personal skill both now and in the future is "Customer orientation" while "Solving problems" or "Creativity and initiative and commitment" are the least valued skills.

In terms of communication skills, the most important one at present and in the future is "Skills related to intercultural host-guest understanding and respect". It is surprising that currently "Written communication skills" is the second most important skill while in the future it is the least important.

Finally, the diversity skills coincide. The most important at present are also the most important in the future. "Gender equality skills" is the most valued along with "Age-related accessibility skills". Accommodations will have to be able to meet expectations of older people, as population is getting older year by year (improved life expectancy). While the least important now and in the future are "Skills related to diversity in religious beliefs" and "Skills related to disabilities and appropriate infrastructure".

The "Skills related to Problem solving" (0.54), "Ethical conduct and respect" (0.49) and "Initiative and commitment" (0.47) are those that present a higher gap in terms of personal skills. "Skills related to Active listening skills" (0.67), "Cultural awareness and expression" (0.65) and "Skills related to awareness of local customs (e.g., food, arts, language, crafts)" (0.62) are those that present a higher gap in relation to communication skills. Finally, "Skills related to disabilities and appropriate infrastructure" (0.74) and "Diets and allergy needs skills" (0.59) are the highest gap presented in terms of Diversity Skills. In the future will be necessary understand the diversity at all levels (functional diversity, different nationalities, etc.), as well as the interest in promoting gender equality, and improving experience accessibility for physical and sensorial limitations. The adaptation for people with disabilities will be a must, even though it currently seems difficult.

Efforts in training must be focused on those skills that will be more important in the future and that have a greater gap. Regarding training, the 54.41% of Accommodation organizations provide some social skills training for its employees. The most popular types of training are "On the job" and "online course", as at European level. On the other hand, the least important are the "Higher education" (0%), "Apprenticeship" and "Vocational training" (2.9%). The 45,59% of the Accommodation organizations participants do not provide social skills training for your employees due to "There is no training"; "No credit for bonus training"; "We are working on it"; "Because we have not received an offer" and "Small company".

Digital Skills	
Current Level of Proficiency. Three most and three least proficient	Most: 1. Operating System use skills (e.g., Windows) (3.94) 2. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (3.87) 3. Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems and video projectors (3.63) Least:

	1. Artificial Intelligence (AI) and robotics skills (2.07) 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (2.16) 3. Computer programming skills (2.46)
Future level of proficiency in 2030. Three most and three least proficient	Most: 1. Skills to monitor online reviews (4.18) 2. Operating System use skills (e.g., Windows) (4.15) 3. Microsoft Office skills (e.g., Word, Excel, Powerpoint) (4.12) Least: 1. Computer programming skills (3.16) 2. Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality (3.31) 3. Artificial Intelligence (AI) and robotics skills (3.34)
Training Provision for digital skills?	The 54.41% of the Accommodation organisations provides some Digital Skills Training for its employees (internally or externally provided).
Most popular/ three main types of training for digital skills	1. On the job (30.9%) 2. Online course (29.4%) 3. Several days on-site training by external provider (14.7%)

It is surprising that the least important skills at present are also the least important in the future. The issue of Artificial Intelligence (AI) is still not considered important for companies in the accommodation sector, nor is the use of virtual reality tools or programming skills. The most important skills at present are as basic as Operating System use skills (e.g., Windows), Microsoft Office skills and Skills to adjust digital equipment such as Wi-Fi connectivity, sound systems and video projectors. In the future, although these skills are still important, the most important skill is Skills to monitor online reviews, may be because of the importance that social networks have for the reputation of companies.

"Skills related to the Artificial Intelligence (AI) and robotics skills" (1.27), "Skills related to applying digital hardware technologies, such as Augmented and Virtual Reality" (1.15) and "Data analytics, business intelligence, big data skills" (0.97) are those with a higher gap in the digital field.

In relation to training, the 54.41% of the Accommodation organisations provides some Digital Skills Training for its employees (internally or externally provided). The most important types of training in digital skills are "On the job" (30.9%), "Online course" (29.4%) and "Several days on-site training by external

provider" (14.7%). The least popular are "Higher education" (0%), "Apprenticeship" (1.5%) and "Vocational training" (2.9%). These results are similar to those obtained at European level. The 45.6% of the Accommodation organisation do not provide any digital skills training. The main reasons are: "No requirement: leaning staff do not necessarily require digital skills to clean a shower"; "No employees"; "We train ourselves"; "Hires people with these skills but does not train internal staff"; "We are evaluating some of the skills raised"; "Lack of interest"; "Lack of awareness"; "It is not sued by workers"; "We have external companies with this competence"; "Small company" and "I cannot find compatible courses".

In general terms, environmental skills (0.74) are the ones with the highest gap in the accommodation sector, followed by digital skills (0.72), social skills related to diversity (0.57), communication (0.56) and, finally, personal skills (0.40). Perhaps it is due to the fact that few accommodation organizations (only 40%) give training in environmental issues. Moreover, digital skills will be very important in the future due to changes in the behavior of tourists, as they are becoming more digitized. Therefore, more efforts should be made in training in environmental and digital skills but also in human needs closeness, communication and listening skills, commitment and generosity).

-- END OF ACCOMMODATIONS SECTION --

CONSORTIUM MEMBERS

FEDERTURISMO CONFINDUSTRIA

TU DUBLIN — OLLSCOIL TEICNEOLAÍOCHTA BHAILE ÁTHA CLIATH — TECHNOLOGICAL UNIVERSITY DUBLIN

UNIONCAMERE

UNIVERSITAS SOPRONIENSIS · ANNO 1735 ·

EUROGITES

Cardiff Metropolitan University | Prifysgol Metropolitan Caerdydd

DSFT

Universitat d'Alacant Universidad de Alicante

people 1st international

Breda University OF APPLIED SCIENCES

VIMOSZ TURISZTIKAI ÉS VENDÉGLÁTÓ MUNKAADÓK ORSZÁGOS SZÖVETSÉGE

VARNA UNIVERSITY OF MANAGEMENT

CEHAT CONFEDERACIÓN ESPAÑOLA DE HOTELES Y ALOJAMIENTOS TURÍSTICOS

ATLAS ASSOCIATION FOR TOURISM AND LEISURE EDUCATION AND RESEARCH

WWW.NEXTTOURISMGENERATION.EU

WWW.FACEBOOK.COM/NEXTTOURISMGENERATION

WWW.TWITTER.COM/NTGALLIANCE

WWW.LINKEDIN.COM/GROUPS/13595036

NTG Next Tourism Generation Alliance

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