NEXT TOURISM GENERATION ALLIANCE

INTERVIEW REPORT

GERMANY

MAY 2019

NTG ALLIANCE

COUNTRY INTERVIEW REPORT

GERMANY

Author:

Deutsches Seminar für Tourismus (DSFT) Berlin e. V.

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Contents

Background

A general overview of the Next Tourism Generation Alliance project, and the number of interview participants per subsector in this country report.

The **Next Tourism Generation Alliance (NTG)** is the first European partnership for improving a collaborative and productive relationship between education and industry, funded by European Union. The NTG Alliance has partners from 8 countries (Spain, UK, Hungary, Netherlands, Italy, Bulgaria, Germany, Ireland), and will provide employees, employers, entrepreneurs, teachers, trainers and students with a set of Core NTG modules in digital, green and social skills.

Goals of the NTG Alliance are:

- To establish a Blueprint Strategy for Sectoral Skills Development in Tourism to respond to the fast changing and increasing skills gaps in digital, green and social skills sets;
- To define a scalable mechanism and model for sustainable and digital curricula between the industry and education providers at regional, national and European level;
- To create transformative cooperation in five key tourism sub-sectors: hospitality, food and beverage operations, travel agencies and tour operators, visitor attractions and destination management;
- To develop, deliver and test Next Tourism Generation (NTG) Skills Products for professionals, trainers, students, university tourism departments, local authorities, companies to respond to the fast changing and increasing skills gaps in digital, green and social skills sets.

Should you wish to know more about the Next Tourism Generation Alliance project, please visit **www.nexttourismgeneration.eu**

For getting involved in the project (as a community member, affiliate partner or associate partner), please visit **nexttourismgeneration.eu/contact/**

Sample

Number of respondents interviewed for this report: 40

- Tour operators / travel agencies: 5
- Destination management organizations: 6
- Attractions: 7
- Accommodation: 7
- Food & beverage: 6
- Training and education   9
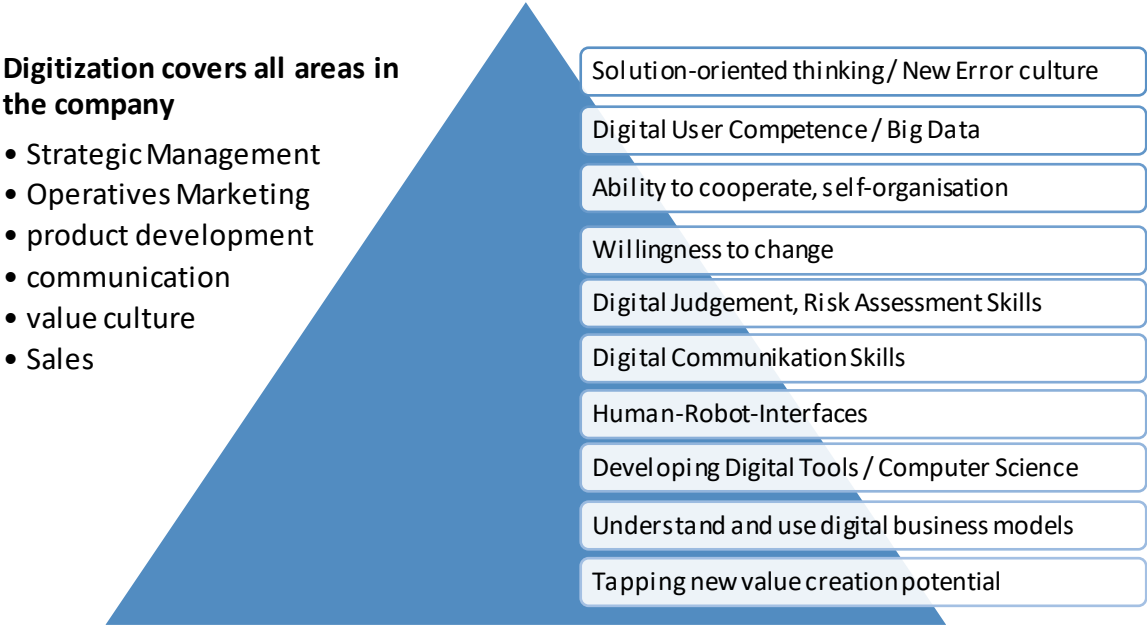
Theme 1: NTG Skills Sets

A summary of respondents' ideas of current skills needs (green, social, digital), current shortage of skills, current training provision.

In summary, it can be said that there is a differentiated picture with regard to the significance of the fields of competence examined here.

The current high demand for competence is associated with digital change. However, the experts distinguish between the levels of management and operational activities.

The user-related knowledge is – currently and probably also in the future – realized by in-house trainings, since many solutions are specifically adjustable to company requirements. The integration of industry-specific basic knowledge about current digital solutions into vocational training is regarded as important in order not to start from scratch.

Digitization has a great influence on the organization and leadership of a company. From the experts' point of view, the associated competencies should already be anchored in management training.

Digitization covers all areas in the company

- Strategic Management
- Operatives Marketing
- product development
- communication
- value culture
- Sales

Solution-oriented thinking / New Error culture

Digital User Competence / Big Data

Ability to cooperate, self-organisation

Willingness to change

Digital Judgement, Risk Assessment Skills

Digital Communikation Skills

Human-Robot-Interfaces

Developing Digital Tools / Computer Science

Understand and use digital business models

Tapping new value creation potential

The need for "green skills" is currently not considered to be as urgent as other competences. In the travel industry, the targeted demand for sustainable products and services is still estimated to the extent that specialized tour operators can satisfy it. Tour operators with "classic" products are not necessarily dependent on appropriate knowledge. In destinations, tasks in the area of sustainability are accociated rather with protected area administrations.
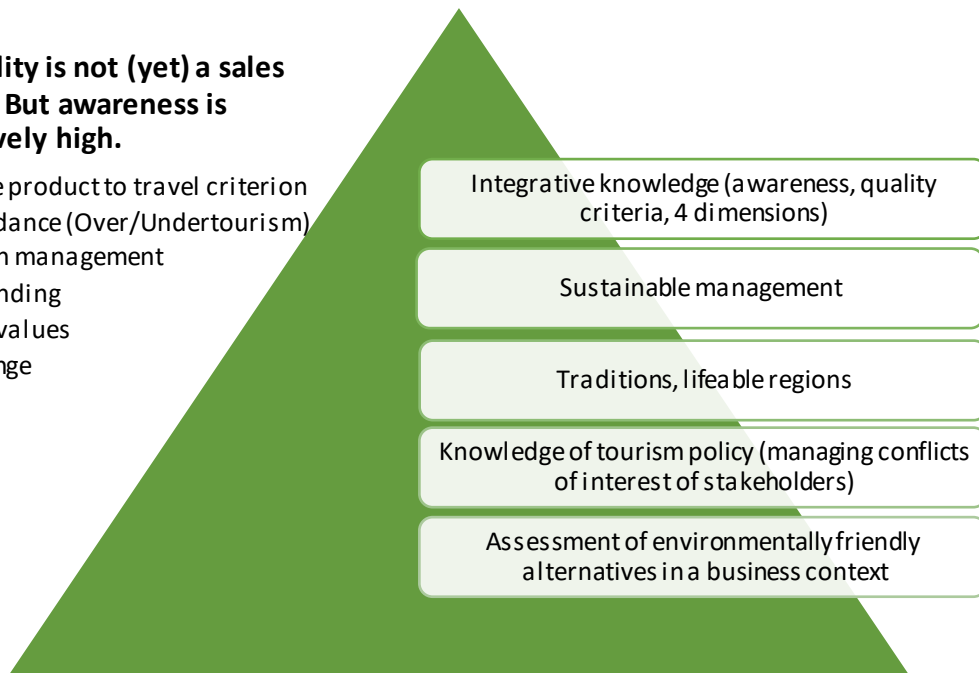
There is no noticeable demand pressure on leisure attractions that companies need to change their strategic actions. In the host industry, too, current knowledge is regarded as sufficient. At the same

time, the experts make clear that the need for action will increase in the coming 10 years in view of changing social and political developments. "Green skills" can therefore be regarded as a future strategic field of competence.

Irrespective of the occupational profile, the following "green" competences will play a role for the experts in the future:

Sustainability is not (yet) a sales argument. But awareness is comparatively high.
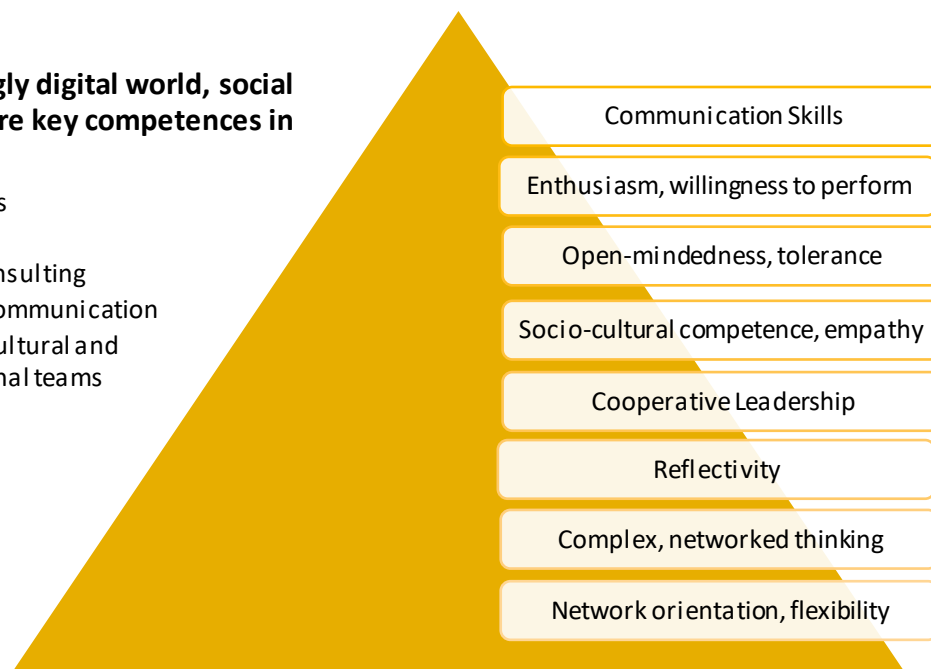
- From niche product to travel criterion
- Visitor guidance (Over/Undertourism)
- Destination management
- Image/branding
- Corporate values
- Social change

Integrative knowledge (awareness, quality criteria, 4 dimensions)

Sustainable management

Traditions, lifeable regions

Knowledge of tourism policy (managing conflicts of interest of stakeholders)

Assessment of environmentally friendly alternatives in a business context

In the expert's opinion social competences in personal tourism services are of central importance. At the same time, they noted that this importance was not given adequate weight in dual vocational training and higher education. The interview partners see a considerable need for a change here. The field of social competence is also regarded as a field of lifelong learning, i.e. continuous further training during the work life is regarded as compulsory.

In an increasingly digital world, social competences are key competences in tourism.

- Leadership Skills
- Human factor
- Added value consulting
- Interpersonal communication
- Work in multi-cultural and multi-generational teams

Communication Skills

Enthusiasm, willingness to perform

Open-mindedness, tolerance

Socio-cultural competence, empathy

Cooperative Leadership

Reflectivity

Complex, networked thinking

Network orientation, flexibility

In summary, the range of competencies required in the area of operational activities and management tasks can be presented as follows:

	Operational activities	management responsibilities
Green Competences	Internalizing "green" topics, such as CO2 balance, energy efficiency, waste separation	Deep understanding of holistic, environmentally friendly management / sustainable development dimensions
	Application of techniques for environmental and resource protection / behavior	Knowledge of certificates and strategic benefits
	Awareness of sustainability and social change (changing customer requirements)	Information / motivation of employees / partners
	Knowledge of sustainable products in our own portfolio and with partners	Management of appropriate teams
Digital skills	User knowledge of common digital solutions (CMS, opera etc.)	Decision-making authority as to which application is the most suitable
	Data handling (data security, reliability)	Awareness of data ethics (Big Data, Customer Data, etc.)
	Mastering media competence and digital communication	Understanding digital business models, using them sensibly and tapping new value creation potential
	Man-machine interfaces (human-robot-interfaces) meaningful/intelligent operation	Data management customer data and offer data
	Data Protection / Online Law	Data Protection / Online Law
	Handling of digital processes (booking, payment)	Business Intelligence / Digital Process Control
Social skills	Communication skills (spoken and written) and creativity	"modern leadership competence", flat hierarchies, motivation, team organization
	Consulting and sales competence (knowledge of how to talk about tourism and tourism services / products)	Knowledge of tourism policy / dealing with the diversity of interests of stakeholders
	service mentality	Leading mixed-age and multicultural teams
	Teamwork, reflection on one's own role in the team, cooperation	Instructing employees
	Target group-oriented communication	Transfer of knowledge / Consulting

Current needs are primarily trained via in-house seminars (coaches), on-the-job training and online training/webinars.

Theme 2: The future of tourism.

A summary of respondents' ideas of tourism and the tourism industry in general and his/her company in particular in ten years' time (2030).

The experts surveyed all agree on the following central, industry-independent megatrends:

- Technological change and digitization

- Social change (demography, values).

There is a broad consensus among the interviewees that digitization will continue to drive change in tourism. In particular, digitization is associated with an innovation boost in the direction of new services and products. At the same time, it is noted that new developments so far rarely come from tourism. On the one hand, global technology companies currently seem to be determining the direction (e.g. google); on the other hand, large investment companies are promoting tourism-relevant start-ups (e.g. AirnBnB).

The majority of the experts surveyed see the change in value of the younger, i.e. today's generation of school leavers (generation X, Y, Z) as a future challenge. While some of the experts tend to view the current generation of apprentices as negative, others see the generational change as a positive impulse and derive changes / innovations in their own management from it. From the point of view of the experts, changed competencies at management level are needed to accompany, lead and shape the teams that are increasingly interdisciplinary, international and mixed-age. In future, these skills would have to be taught more intensively both at universities and within the framework of career advancement training (e.g. supervisors, businesspersons).

There is almost unanimous agreement that future forecasts for the skilled labor market are worrying. The negative image of the tourism industry, or rather of the accommodation/hospitality industry, as a "ret article" is cited as one of the causes, aggravated by the poor earnings situation compared with other occupational fields, lower career opportunities and poorer working conditions. The interview participants agree that the tourism industry must position itself much more strongly as an attractive employer in the future. In view of the "full employment" to be expected in the future, competition for bright minds will increase, both among employees and among entrepreneurs. Decisive here are not least ideas on how to win over employees with the help of attractive bonus systems (e.g. sponsoring) and how to successfully bind them to the company in the event of further development wishes, i.e. how to enable individual qualification.

It is conspicuous that, with the open question of future trends and their effects on the industry or the company, few of the surveyed experts brought sustainable development issues into the discussion. This topic is of particular interest to the tour operators surveyed, as natural disasters or epidemics have a negative impact on the range of destinations on offer. There is a stronger perception of aspects

of sustainable development among experts of companies that have already integrated the aspect of sustainability as social responsibility into their corporate vision.

It quickly becomes clear from almost all expert discussions that the concrete effects of megatrends on tourism, the respective industry or the specific company are difficult to assess in their manifold dimensions. To explain this fundamental uncertainty, a surveyed expert uses the term VUCA World, which is widely used in the theory of strategic business management:

- **V** = Volatility. The nature and dynamics of change, and the nature and speed of change forces and change catalysts.
- **U** = Uncertainty. The lack of predictability, the prospects for surprise, and the sense of awareness and understanding of issues and events.
- **C** = Complexity. The multiplex of forces, the confounding of issues, no cause-and-effect chain and confusion that surrounds organization.
- **A** = Ambiguity. The haziness of reality, the potential for misreads, and the mixed meanings of conditions, cause-and-effect confusion.

The experts' assessments of future relevant trends and factors influencing tourism are summarized in the following table:

Overview of estimates for the future of the tourism industry (2030) and the structure of future enterprises

	Future Tourism (2030)	Future Company (2030)
Tour operators Travel agents	Generation of digital travelers / digital natives / digital innovations	
	Negative changes in social and ecological stability; resulting short-term change in demand for target areas	
	Fundamental change in values (work-life distance)	
	Mobile communication, bookability and travel planning increasingly important	
Destination Management	Short-term changes in demand influenced by digital communication	Clear division of tasks between destination marketing and management
	Internationalisation of tourism demand	Travel inspiration and booking almost exclusively online
	Over-tourism versus Under-tourism	No "digital department", but digital applications integrated in all areas / every employee is a "digital specialist
	Fundamental change in values (work-life distance)	Managers are data specialists, operational staff focus on customer care and retention

	Mobile communication, bookability and travel planning increasingly important	
	Climate change and ecological changes	
	Mobility in rural areas (acceptance or e-mobility)	
Accommodation / Food & Beverage	Centralization of vocational training (migration to cities) means greater distances between schools and training companies	Training associations between companies
	Lack of skilled workers encouraged by negative image	Team structures become "more colourful" in terms of age, cultural and religious background
	Experience orientation / Emotionalization	Employees are professionals as hosts
	Gap between high quality and low cost standard will increase	Business intelligence simplifies many processes (e.g. procurement)
	Mobile communication, bookability and travel planning increasingly important	Core product "Accommodation/Eating" remains, upgraded with quality and profile
	Fundamental change in values (work-life distance)	Booking and distribution almost exclusively online
	Internationalisation	Use of translation apps
Attractions	Internationalisation	Team structures become "more colourful" in terms of age, cultural and religious background
	Experience orientation / Emotionalization	Digital leisure attractions, technical innovations
	Fundamental change in values (work-life distance)	Consistently played on Theme worlds
		Automated standard processes (ticketing, cash register, interfaces to sales partners)
Training Institutions	Fundamental change in values (work-life distance)	Training according to T-Model (Mc Kinsey)
	internationalisation	Digitization of training (blended learning concept)
	Centralization of vocational training (migration to cities) means greater distances between schools and training companies	Dual education also in the academic field
	VUCA-World - Training has to convey not only subject-specific contents but also the understanding and handling of complex facts and contexts.	

	The gap between scientific education and practice in particular is widening	

Tour operators / travel agents: what will the industry look like around 2030?

Future challenges in the tour operators/travel agencies segment will primarily result from shifts in demand, mainly caused by a changed security situation in the destinations due to political, social or ecological developments. The megatrends "individualization and personalization" have further influence on the composition of travel products and communication. The experts also agree that future research, information and booking behaviour will become increasingly digital and mobile along the entire service chain. Today, users no longer book a trip without having acquired online recommendations, information, opinions and background knowledge in advance. Due to an increasingly flexible and technological working and living environment, travel decisions are made more spontaneously and at shorter notice.

Although the experts see a need for action in the area of sustainability in view of changing social values and ecological framework conditions, in many cases the price is decisive from the perspective of the experts surveyed.

For the experts surveyed, these trends have a considerable impact on sales & marketing, the actual product design, the internal organization and the qualification of employees. According to the experts surveyed, the main directions of development are as follows:

- More flexible product design, responsive to short-term demand trends

- simplification of products for better communication via social media and digital technologies, e.g. language assistants

- Use of block chain technology to automate and simplify services, e.g. baggage tracing

- Automation of standardized processes, e.g. booking - payment

- Development of employees' skills in the direction of individualized travel advice and knowledge of sustainable product alternatives

Destination Management: what will the industry look like around 2030?

From the experts' point of view, the relevant challenge of the future is a reorientation of the task performance in destination management: concentration of destination marketing on a national level, increasing perception of destination management tasks on a regional or local level.

The future tasks of destination management will include above all the following:

- Support and advice for local companies, e.g. in the direction of product innovation, target group orientation, digitization

- Creation and moderation of provider networks, e.g. for solving mobility problems for tourists in rural areas

- Qualification of tourism service providers in important future topics, e.g. data acquisition

- Acquisition, structuring and analysis of customer data

- Creation and moderation of expert networks for the management of tourism demand (over-tourism / under-tourism, sustainable development), e.g. in cooperation with protected area administrations

Attractions: what will the industry look like around 2030?

The leisure industry as a whole is a very heterogeneous field of providers.

The amusement park sector is currently undergoing a positive change, which is leading, among other things, to an increase in the range of products on offer (hotels, products, themes, season extension). Innovation takes place very strongly in the technical field, but also in the gastronomy, which is also technically changing. The parks, which also offer overnight accommodation, are currently enjoying above-average occupancy rates and in some cases are not lagging behind with the construction of new hotels.

The trend towards "experience" is generally noticeable. For a better profile, a holistic theming within the leisure offer becomes increasingly important (e.g. individual theme worlds within a park with corresponding gastronomy/accommodation offer).

Many leisure companies are still very conservative in their organizational structure. In addition, the vast majority of them are small and medium-sized and therefore have few hierarchical levels. Especially with a view to younger employees or an upcoming generation change, there are currently major challenges in the management area, especially for larger, traditional companies. Other, smaller companies can react more quickly to current demand and, for example, are already positioning their teams much more broadly and internationally in line with demand trends.

The shortage of skilled workers is already having a problematic effect on the operative area and service. Especially in semi-skilled professions (e.g. candy floss seller, operator roller coaster…) bottlenecks and deficits in qualification are noticeable.

In the opinion of the experts surveyed, one important task for the future is to position the leisure industry and the event industry as equal tourism partners.

Food & beverage / accommodation providers: what will the industry look like around 2030?

For the predominantly small companies, the shortage of skilled workers and the declining number of trainees in the hotel and restaurant sector are a particular challenge. Particularly in rural regions, the density of services will decline in the coming years due to a lack of business succession and skilled workers.

In the future, the interview partners see a decline in the quality of potential new employees as well as a decreasing level of skilled workers. The experts consider the currently valid minimum school-leaving qualifications to be problematic. This means that basic knowledge of German and mathematics is much

less pronounced. From the experts' point of view, this structural starting position will lead to even more lateral entrants than before. According to the experts, it can be observed that unskilled workers from other European countries are employed in areas with low qualification requirements. The need for qualification in technical skills will increase accordingly.

Depending on the location of the company in a rural or urban environment, there are different challenges in the industry. Municipal hotel operators are facing growing competition due to further new openings. The experts interviewed fear an increase in price competition. Opportunities for positioning exist in a more individual product design compared to the chain hotel industry. For entrepreneurs in rural, partly structurally weak areas, the challenges arise to create an attractive living environment for young people in order to attract new skilled workers. The migration of vocational schools to urban centers is also viewed with concern, as it is often impossible for non-motorized trainees to manage the distance between vocational school and training company.

Some experts see a possible solution in organizing training through regional business associations. This means that joint services (shuttle to vocational school) and a broader range of training can be offered.

Training Institutions: what will the industry look like around 2030?

For the future, the experts surveyed see decisive tasks in adapting training to the accelerated pace of change in the tourism industry - also due to digitization - at the same pace.

From the point of view of many interview participants, adaptation and advancement training in dual vocational training will play an increasingly important role in the future. They see one reason for this in the fact that, particularly in dual vocational training, the adaptation of teaching content is associated with a high expenditure of time. New job profiles, such as e-commerce managers, will also emerge because of digitization in the economy.

For many of the practitioners surveyed, the quality of dual vocational training also depends on the extent to which the companies providing training are able to impart important, forward-looking competences relevant to the sector (digitization, sustainable development, new management styles). The experts interviewed see a future challenge in the generational difference between trainers and trainees, both in terms of the skills they bring along and their values. The need for action is also called for in the qualification of vocational school teachers, some of whom are not familiar with the subject and others do not have up-to-date knowledge. For the future, further training formats for company trainers and vocational school teachers are assessed promising.

Higher education is seen as being far more flexible in terms of adapting its courses of study, as they have a broader scope for action. At the same time the number of tourism specific study programmes is decreasing again. The educational landscape at universities is already rather confusing for first-year students. It is becoming increasingly difficult to assess for which occupations the programme qualifies. Some experts see a future development direction in the agreement of common core contents of the tourism specific university education.

From the experts' point of view, another trend-setting path lies in the closer integration of scientific education with practice. Closer cooperation between universities and companies will be crucial for the quality of education in the future.

In addition, new formats of knowledge transfer (e-learning, blended learning) can be a solution. However, these would have to be integrated into in-house training and not result in learning time in leisure time. According to expert opinion, however, corresponding learning formats cannot replace the basic in-house dual training (vocational school and placement in the workplace), but can only be a sensible supplement.

Important tasks of training in the future:

Dual Training	• Extension of promotion and additional qualifications • Development of new job profiles • Qualification of teaching staff and in-company trainers • Modernisation of equipment • New formats of knowledge transfer
University Degree	• Define Core Contents • Stronger cooperation with practitioners • Lifelong learning opportunities • T-model Career

Theme 3: Digital skills

A summary of the digital skills rated as the most important in ten years' time by interview participants.

The respondents working at tour operators / travel agents consider the following digital skills as the most important in ten years' time:

From the point of view of the experts surveyed, digitization primarily influences operational processes. Digitalization already has a decisive effect on the inspiration, information and booking phases of the customer journey. The interviewees consider the development of corresponding online services and digitized processes to be largely completed. Currently, activities are increasingly focused on the development of mobile services and the integration of language assistants.

The digitization of more complex service processes via technical solutions (block-chain technology) as a future field of action was mentioned less frequently by the experts surveyed.

All experts agreed that the basis of the actual process of travel consulting will continue to interpersonal communication, which cannot be replaced by robots and digital solutions. Digital technologies can offer additional services in the context of travel advice or on-site travel, e.g. virtual reality presentations of inaccessible attractions such as caves.

Digitalisation will have a positive impact on the travel agency industry. The diversity of information on the Internet tends to lead to a subjectively perceived oversupply and a lack of orientation. Here the personal consultation in travel agencies can give decision assistance. Confidence in booking through a travel agency is also tending to increase, even among younger target groups.

"Big Data" already plays an important role in product design and marketing in the tour operator industry. Therefore, competencies in data management are already in demand today (validation, structuring, interpretation).

In the future, data management and business intelligence will be part of the core business of middle and senior management. Competences in dealing with people will be particularly in demand at the operational level (sales, travel consulting).

The experts could not estimate to what extent smaller tour operators can withstand the digital development. In particular, the strong specialization of smaller tour operators was seen as more of an opportunity for the future. Risks in the special tour operator market are rather associated with the question of unsecured company succession.

Possible future strategies aim in two directions: to open up tourism companies more to IT specialists and at the same time to integrate the transfer of digital knowledge into existing vocational training. It is generally assumed that the share of "tourism-distant" professions such as computer scientists, programmers and data managers will gain in importance. The reason for this is that it is easier to impart basic knowledge of tourism than IT-specific specialist knowledge.

Especially the sales-oriented professions (e.g. tourism management assistants / tourism and leisure management assistants) therefore need from an expert's point of view a regular adjustment of their competences in order to keep up with the increased role of mobile and language-supported communication and to be able to take up future developments of digital technologies. It should also be taken into account here that experience has shown that the contents always reach the training regulations with a certain time delay.

The following areas were identified as areas of particular future need:

- Mastering digital Communication
- meaningful/intelligent operation of Human-robot-interfaces
- Media competence and data handling (data security, reliability)
- Developing digital tools / Software + Computer Science
- Understand and use digital business models in a meaningful way and tap new value creation potential

The respondents working at <u>destination management organizations</u> consider the following digital skills as the most important in ten years' time:

According to experts, digitization will lead to the information and booking phase taking place almost exclusively online in the future. Communication will therefore take place even more strongly via digital media than today. Accordingly, marketing activities are and will be adapted to the various digital communication channels. At the same time, communication via print products will continue to be given high priority in the future.

Required competencies are the ability to assess and decide which digital solution can effectively and sustainably support the strategic objectives of the DMO. In addition, specific user competencies are important.

Already today, the DMOs surveyed are recruiting young, digitally affine employees who have user skills of their own.

Up to now, the strategy of resorting to lateral entrants with corresponding IT knowledge or specialist knowledge in the field of digital communication has been widespread. In the meantime, the awareness has grown to equip all employees at all levels of destination management with the corresponding basic knowledge and understanding of digital communication.

In particular, small and medium sized businesses rarely have the human and financial resources to turn their employees into digital literacy. The function of the Tourist Information must therefore change in the future. Employees need to do much more to support and advise local businesses to keep pace with digital development. To this end, employees need the appropriate basic knowledge and understanding.

The central field of action in the near future, from the experts' point of view, is the question of how to digitally record the data on tourism offers, bundle them sensibly and make them available to visitors both in the inspiration phase and during their stay on site. The future challenge lies in making all DMO services available digitally in the highest quality. While future inspiration will be via analogue channels, pre-information and follow-up will be predominantly digital.

Parts of the holiday planning (e.g. booking / reservation restaurant on site) will be increasingly digital. However, the actual holiday experience will continue to be analogous, with the focus on emotionality and personal experience.

Another important field of action is the future organization of customer data with the help of Big Data and AI solutions. A significant benefit is associated with this for marketing, a task area with limited predictability (e.g. development of target group demand). At management level in particular, skills in handling data will be required in the future (data validation, data interpretation, data backup, data systematization). Digital business models will also gain importance in destination management. This is where the future competence requirements for tourism managers lie, on the one hand in deciding on the right technical solution and its application.

The most important future competence requirements differentiated according to management tasks and operational activities:

Management Skills	Operative User Knowledge
Decision-making authority with regard to the strategic relevance of digital solutions	Online and social media communication
Data management customer data and offer data	Data maintenance in databases
Data Protection	Content Management
Business Intelligence / Digital Process Control	Handling of digital processes (booking, payment)
Transfer of Knowledge / Consulting	Online Regulation
	Data Protection

The respondents working at <u>attractions</u> consider the following digital skills as the most important in ten years' time:

The experts see opportunities in the company organization in digitization, such as simplification of standardized processes and automation of payment and check-in processes. With regard to the internal organization, for example, workflow planning is supported by digital technology, so-called "share points". The processes can thus be made more efficient and simplified. The information process between individual areas is organized more smoothly.

Innovations in the development of products and services are also recognized and implemented. Some event formats are already digitally today. It is assumed that e.g. meetings, meetings, conferences are supported by digital solutions, e.g. in the form of video conferences, telephone conferences. At the same time, it is emphasized that networking and social contact will continue to play an important role in the future.

From the point of view of the museums and science centers surveyed, digitization will play a major role in the conception of exhibitions and the presentation of exhibits. Here the "playful" motive of "approaching topics by trying them out" can be supported. At the same time, the high importance of personal support as added value for visitors is emphasized.

In the segment "leisure parks / theme worlds" digitization is seen as a way to become even "cooler", even "more exciting". According to experts, the current digital tools (VR glasses in roller coasters) are not products of the future, but of the present. This development will continue. Decisive factors for future development are the investment opportunities and the general (theme) framework of the park.

The strategy is to either purchase digital experts or hire IT specialists for the implementation. Basic understanding and knowledge must be available in varying depth, especially among the staff in visitor support or technology.

The situation is different with digital solutions for corporate organization and process design. On the one hand, knowledge of corporate management about developments and their strategic relevance is required. In the operative area, the corresponding user knowledge is necessary.

The respondents working in the <u>food & beverage / accommodation sector</u> consider the following digital skills as the most important in ten years' time:

The expert interviews make clear that digitized booking processes are already largely implemented in the hotel industry. So that the possibilities of digitalization for the small houses are exhausted, since a further automation for the very service-oriented houses rather means a quality regression. In addition, especially in smaller hotels there are personnel limits for further activities, e.g. social media communication. It can be assumed that the perception of the already widespread digital change, especially among micro-enterprises, is not present in all consequences.

These scissors are much larger in gastronomy. There is a wide range between digital pioneers experimenting with digital formats, such as innovative payment or order systems, and owner-managed smaller companies in rural areas, where even a professional cash register is almost impossible.

From the point of view of the experts surveyed, digitization will play a rather subordinate role in the design of the services offered. The service concept and the personal care of the guests are in the foreground here. However, it is assumed that more advanced digital solutions will be implemented in individual hotel categories (e.g. business hotels) (e.g. self-check-in, automatic displays).

Future opportunities will be linked to digitization in better services (e.g. dismantling language barriers) and more efficient staff deployment (digital room service, robotics in room cleaning). The surveyed experts hope that this will help to ease the current staffing situation, as employees can be deployed more strongly in the core business of customer service.

Larger companies have already begun to standardize internal processes in order to cope with the often significantly higher volume of guests.

For the future, the experts assume that there will be progressive structural change and that small businesses in rural areas will have to close. Digitization plays an essential, if not the only, role in this process. Medium-sized companies without specialization in a certain clientele/product will not survive if they do not join the digital change. At the same time, digital change creates scope for a new generation of entrepreneurs and employees to create something new.

From the point of view of the experts, the following competencies / skills, differentiated according to management and operational tasks, are required above all:

Management	Operational Activities
Ability to recognize and use digital solutions as innovation drivers	User knowledge depending on the task (reception = reservation systems; gastronomy = mobile payment, kitchen = digital quality control HACCP or smart logistics)
Digital Ethics	Data protection and other legal bases

The respondents working in the <u>training institutions</u> consider the following digital skills as the most important in ten years' time:

With regard to dual vocational training, the expert survey conveys a differentiated picture: One group calls for a clear adaptation of curricula in the direction of digital developments and, in principle, greater flexibility through modular training provision. The other group, on the other hand, is of the opinion that the definition of competences in the curricula leaves sufficient room for manoeuvre for the teaching of user-related knowledge.

Representatives of the university education report that the adaptation of the tourism specific courses of studies to the digital development has already taken place and will be continued continuously.

However, the experts surveyed make it clear that the quality of training depends decisively on whether the relevant technical prerequisites are met at the vocational schools or are already in use at the companies providing in-house vocational training. It is also problematic that the qualification of teaching staff at vocational schools and training staff in companies is not keeping pace with current developments in some cases. A further limiting factor is the personnel situation in the training companies; in one case, no trainees could be accepted in the new occupation of commercial clerk e-commerce due to personnel bottlenecks.

Optimization is therefore desired in the school framework conditions. Important aspects are up-to-date technical equipment in the schools and regular further training opportunities for trainers / teachers. The problem is that the further qualification of vocational school teachers and in-company trainers is not compulsory. There are clear differences between the federal states that are responsible for implementing or digitally qualifying and equipping their training companies.

Theme 4: Environmental management ('green') skills

A summary of the environmental management skills rated as the most important in ten years' time by interview participants.

The respondents working at <u>tour operators / travel agents</u> consider the following environmental management skills as the most important in ten years' time:

From an expert's point of view, the competence field of sustainability is as rather subordinate now. "Green tourism' is therefore still seen as a niche market from a demand perspective, because price is the decisive criterion. Certain sub-sectors see little pressure to act because demand for conventional services remains strong or is even increasing (e.g. cruises, mountain tourism).

At present, the actual proportion of trainees looking specifically for "green" companies appears to be very low and therefore plays no role in the competition for applicants.

In the future, however, there will be greater pressure to act, above all due to a clearly discernible change in values among the younger generation (x, y, z) and a changed political framework. The "scarce resource of beautiful destinations" will bring the topic of sustainability more into the focus of both travellers and the industry.

Aspects of environmental management are already integrative anchored in the training regulations for commercial professions, as these are mostly younger professions. Some aspects of sustainable management have now been added.

The problem is not so much the imparting of knowledge itself. Rather, there is a larger gap in the transfer into practice, since there is a wide range in the operational implementation. It will also be necessary to convey the practical relevance of the complex impacts of environmental change.

From the point of view of the interviewees, the <u>following three strategies of</u> environmental orientation must be integrated into vocational training:

- the avoidance of negative environmental impacts by creating environmentally friendly alternatives,
- the reduction of negative environmental influences by optimizing products with the aid of technical measures or process optimization, and
- the compensation of negative environmental impacts through financial contributions for environmental protection measures.

According to the experts, "green competences" are management competences. These must be related to the 4 dimensions of sustainability - ecological resource management, social competences in the team and socially acceptable travel arrangements with partners, fair economic management - and trained accordingly. The main tasks of management are to harmonize these dimensions. Accordingly, "green management" is seen as an important component of quality management. This means that "managers" must be able to comprehensively sensitize and inform their employees in product development and customer consulting about the topic.

With regard to the design of the range, it becomes clear that suitable service modules are the prerequisite for an environmentally friendly product portfolio. According to the experts' estimates, corresponding offers are also available with an upward trend. However, the knowledge of travel agency travel agents and product development about the range of services available is incomplete. In future, employees will therefore have to be better able to assess and evaluate environmentally friendly alternatives in the corporate context.

The certification of environmentally friendly suppliers offers a good decision-making aid for travel agency employees. At the same time, not all employees are aware of the relevant certificates and the eco-label market is very confusing. There are competence gaps here.

The respondents working at <u>destination management organizations</u> consider the following environmental management skills as the most important in ten years' time:

For the experts at the DMOs, the future tasks of destination management geared to sustainable development will essentially lie in

- the control of guest flows

- the promotion of regional economic cycles or authentic tourism offers

- the creation of sustainable mobility opportunities.

At the same time, many of the respondents stressed the need for a division of tasks with the protected area administrations, where they exist in the destination. Here the necessity of stronger cooperation was pointed out, e.g. through joint project projects, in order to jointly realize the tasks mentioned.

From the experts' point of view, important future competences of destination managers lie in basic knowledge about sustainable development of regions and CSR management of companies.

It is considered important to empower employees in the DMO and the local tourism offices to promote environmentally friendly alternatives and to encourage companies to adopt environmentally oriented management. An important task is seen in creating networks to bring gastronomes and producers of the region into exchange and to establish joint projects, such as a regional menu.

The interview participants agree that the corresponding theoretical basics are taught at the universities. At the same time, they would like to see stronger cooperation in order to test the practical application of this theoretical knowledge, e.g. within the framework of student projects in the region.

The respondents working at <u>attractions</u> consider the following environmental management skills as the most important in ten years' time:

The expert interviews show that the need for "green" competences is clearly linked to the strategic orientation of the institution. For visitors to the facilities, the focus is on the experience, not on sustainable corporate management and product design. At present, the companies seem to follow the legal requirements more closely. Companies strategically oriented towards sustainable corporate

management, on the other hand, use a variety of solutions in environmentally friendly resource management (use of alternative energy, energy saving, reduction of water consumption, reduction of waste volume). It also became clear that in the case of publicly financed leisure facilities, local politics can set impulses towards sustainable management.

The heterogeneous structure of providers and offers means that a wide variety of occupational fields can be found in leisure attractions. The experts were therefore unable to make a fundamental assessment of the extent to which the existing training courses already include "green skills" or need to be supplemented. At the same time, it was made clear that sustainable corporate management is seen as a management task. Accordingly, the business management courses at universities should offer more in-depth knowledge of CSR management and sustainable corporate management.

The respondents working in <u>the food & beverage / accommodation sector</u> consider the following environmental management skills as the most important in ten years' time:

In general, environmental management in hotels and restaurants is largely determined by legal regulations. This means that the topic has already arrived in the companies. According to the experts, this will become more important because the demand for sustainability will increase in the younger generations - both on the demand side and on the employee side.

From the experts' point of view, important fields of action are the use of environmentally friendly materials (construction, furnishing), the sustainable use of resources (energy, water, waste) and the use of regional products (regional economic cycles).

Although dual vocational training for the catering professions has integrated "environmental protection" and "sustainability", experts believe that a new focus is needed here. Individual interview partners see a positive opportunity in the changed values of current and future trainees, who demand these contents in their training.

According to the experts, "green skills" must be anchored both, at the management level and in the operative task areas.

Already today, there is a so-called standard vocational position to integrative teach environmental protection in all dual training occupations for more than 20 years. There is still an open discussion process on prioritization here, as the topic of "sustainability" is very broad. The question is which contents and depth of mediation prospective cooks, restaurant specialists etc. really need on this topic.

Certificates and awards provide important incentives for the industry to introduce environmentally oriented business practices in the company. Positive image effects are associated with appropriate labelling. However, the lack of clarity is criticized both for companies and for guests. In the future, employees will need specialist knowledge and decision-making authority to select the appropriate certification processes for their own company, to introduce them in a way that is comprehensible to the employees and to use them as a quality seal for marketing.

The respondents working in the training institutions sector consider the following environmental management skills as the most important in ten years' time:

In dual vocational training, environmental management skills are already integrative anchored in the training regulations for commercial occupations, as these are mostly younger occupations. Environmental protection is also a key competence in training for gastronomic professions. According to the experts, this content should be geared more towards sustainability.

At universities, the topic of sustainability is increasingly finding its way into curricula. At the same time, however, there are currently considerable gaps in knowledge about ecological impacts. Experts also call for an expansion of research with a subsequent transfer to training and knowledge transfer. There is also a gap in the transfer of theoretical knowledge into practice. From the experts' point of view, it is also stated that environmental changes have different effects in each destination and on each industry. The study considers the developments scientifically abstract. Concrete effects are used as examples in teaching. More than ever, students should learn tools and methods that enable them to apply solutions to specific developments.

Theme 5: Social skills

A summary of the social skills (i.e., personal-, communication/cultural-, and diversity skills) rated as the most important in ten years' time by interview participants.

The respondents working at <u>tour operators / travel agents</u> consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

From the experts' point of view, important competencies of the future are among them:

- Enthusiasm

- Sales expertise

- Target group specific written communication

- Intercultural Competences / Communication

- Flexibility

- Empathy

There is disagreement about the extent to which these competences can be taught in education / training if they are not already anchored in the personality. The recruitment of the right employees plays a central role in this and requires a correspondingly aligned application process.

In some cases, tour operators are already deciding today to fill their corporate communications tasks with career changers from other professions (journalists, etc.). They also confirm this approach for the future. In general, there is also talk of "competence bundles". From an expert's point of view, the topic of "intercultural communication" must be taught more strongly in the subject-specific training in the dual training courses and at universities.

The respondents working at <u>destination management organizations</u> consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

The tasks of destination management organizations are changing from a marketing organization to the role of a regional network moderator. In addition to basic tourism knowledge and good regional knowledge, social skills will play a much more important role in the future (e.g. the "role of the caretaker").

From the point of view of the destination management experts surveyed, the following competencies are relevant for the future:

- Communication Skills

- Willingness to compromise

- Dealing with different target groups / stakeholders

- Ability to communicate at eye level and not to teach from the top down

- Competence to empathize with other people and their goals and ideas (empathy)

- Personal initiative and responsibility

- Courage to try things out / curiosity about new topics

- Open-Mindedness

- Enthusiasm

The experts are aware that many of these competences can only be acquired during their professional careers. Higher education can, however, support the development of these competences through stronger project cooperation with destinations and provide practical examples during training.

The respondents working at <u>attractions</u> consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

From the point of view of the representatives of leisure attractions surveyed, "social skills" are essential because the product experience is very emotional. Nearly all employees outside the administration work directly at the customer and are therefore an important part of the overall result.

Important employee competencies depend on the orientation of the company:

- Curiosity / Open-mindedness

- Reliability / work attitude

- Service orientation / passion for hosts

- Target group specific communication

- Foreign language skills

- Joy of imparting knowledge

- Ability to work in a team

According to the experts, various factors play a role in promoting these skills. On the one hand, the recruitment of new employees must use methods that are suitable for sounding out social skills. On the other hand, an open, transparent and appreciative corporate management is required. These prerequisites must be supplemented by continuous training measures to optimise these skills and by team-building measures to promote cooperation and communication within the team.

Accordingly, vocational training must start with the development of appropriate leadership and management skills in order to enable management trainees to develop the social skills of their employees.

The respondents working in the <u>food & beverage / accommodation sector</u> consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) skills as the most important in ten years' time:

Social competences are and will remain the core competences in the accommodation segment and in gastronomy. According to the experts, these skills are difficult to acquire. In addition, the role of host

must be internalized and accepted by the person. Friendliness, openness, cordiality will continue to be important - even if the terms change over time. In essence, it is about the guest feeling perceived as a person and being welcomed and said goodbye in a friendly manner.

For good service, employees need room for manoeuvre, which is becoming smaller and smaller in view of the increasing workload. The quality of an inn can therefore also be measured in the future on the basis of how it is possible to combine daily service and work processes with a friendly and humane guest atmosphere. Increasing shortage of skilled workers aggravates the personnel situation.

The degree of social competence for many experts depends on the individual personality. At the same time, however, it is important to integrate the topic more closely into vocational training than in the past.

Two directions have to be taken under consideration:

- **Service staff** in hotels or restaurants need comprehensive training in communication skills, both verbally and in body language. It is important to improve self-perception as a host continuously. A training of the attention and/or attentiveness for itself and in handling guests plays thereby an important role.

- **Senior staff** in hotels or restaurants, on the other hand, require training in leadership. Various topics play a role here, such as personnel deployment planning, instruction / instruction of employees, employee or feedback interviews, employee motivation, awareness of role models, etc.

management level	Operative area / service personnel
Training in the field of personnel management. Various topics play a role here, such as personnel deployment planning, instruction / instruction of employees, employee or feedback interviews, employee motivation, awareness of role models, etc.	Comprehensive training in communication skills, both verbally and in body language. It is important to improve self-perception as a host continuously. A training of the attention and/or attentiveness for itself and in handling guests plays thereby an important role.

Therefore, it is considered necessary to adapt the dual vocational training system in the following areas of competence in particular:

- Teamwork, reflection on one's own role in the team, cooperation

- Customer contact, selling (clear objective) will get a stronger presence

- Communication

- Instructing employees

Within the framework of higher education, the experts would like to see greater cooperation between companies and universities, as special social skills can only be learned in practical cases.

The respondents working in <u>training institutions</u> consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

From the perspective of the experts surveyed, the future of companies lies in open structures with agile leadership and leadership principles that promote the independence and autonomy of employees. These competences must be taught in both training systems (dual vocational training, higher education) for careers at operational level as well as at management level.

For this to succeed, "leadership competence" must be trained in small teams (SMEs dominate in tourism), focus on the competence to determine in flat hierarchies and to decide who is most suitable for which tasks with which talent. In this context, it is equally important to be empowered to generate motivation so that everyone can perform well while enjoying his or her work. Generations Y and Z in particular are increasingly looking for meaning and fulfilment in their professional activities.

The experts are also of the opinion that intercultural competences are becoming more important in view of current trends in tourism. Tourism professionals generally are "ambassadors for the coming together of people from different social and cultural backgrounds".

In the context of higher education, it is considered important to train social competences using "real" examples. Experience has shown that such a realistic awareness of one's own abilities can arise and the transition to practice is facilitated. This calls for companies that are available for such training measures - at best as long-term, reliable partners.

EXTRA

A summary of relevant additional comments by interview participants.

1. Digital Skills:

Bavaria: Tool "digital driving license" (app-based training in quiz format) is made available to all employees for imparting basic digital knowledge.

Brandenburg: Workshop series digital consulting hour Brandenburg - for all, which look for orientation with digital possibilities for the own enterprise, 2019 different Workshops in all travel areas of Brandenburg are offered.

Schwarzwald: Schwarzwald-Tourismus has developed the course "Digital Tourism Coach" together with the IHK. All employees of the office took part in a 6-week training course and completed it with exam and certificate as "Digital Tourism Coach".

Hamburg: An example of a current adaptation is a "digital media test class" set up at the vocational school for gastronomic professions. Here the knowledge transfer takes place exclusively via Smartboard and Tablet.

2. Green Skills:

German Tour operator association: The Green Counter imparts knowledge about sustainability in tourism, including uniform labelling of sustainably certified hotels. In addition, concrete starting points for customer advice are communicated. Travel agencies learn, for example, which criteria they can use to identify how hotel operators can make their accommodations sustainable and how customers can contribute to climate protection by making voluntary compensation payments when booking a trip.

Lübecker Musik- und Kongresshalle: 10 years ago, environmental management activities started with external support. The findings were presented to the entire team. An "environmental group" has emerged from this event on a voluntary basis, which today consists of representatives from all areas of the company. New ideas and projects are created year after year.

Studiosus Reisen: The company's mission statement and understanding of its values are based on travel being oriented towards the principles of sustainable development. An internal environmental committee, an environmental committee for travel and a committee for socially responsible travel support the company's work. In addition, the company works with a certified environmental management system. When new employees are hired, they sign an agreement to pay attention to the environmental aspects of the trips. Agreements are also concluded with hotels and service partners.

3. Social Skills:

Atlantic Hotel Bremen: During the first 12 months, trainees receive accompanying supervision to manage the transition from family to school to working life. The support is individually adapted to the needs of the trainees (biography work, conflict management, teamwork).

Hotel in Berlin: In order to develop social skills, employees are provided with mentors from their own department who are to promote social / leadership skills as well as technical skills. These are individually developed, compiled programs by the Training Manager, which are based on the competencies of the employees. Target agreements, regular staff appraisals and a final audit are also planned.

Phaeno Wolfsburg: The selection process for the tour guides is geared towards determining the communicative and social skills of the applicants. On two days, interactive situations, role plays and similar tools will be used to determine communication skills.

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