

# PANORAMA

## Trends and skill needs in tourism



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Olga Strietska-Ilina  
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(eds)

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A great deal of additional information on the European Union is available on the Internet. It can be accessed through the Europa server (<http://europa.eu.int>).

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# Foreword

Perspective-oriented research and analysis of new and changing skill needs in the labour market demands research and analysis at various levels: macroeconomic, regional, local, sectoral, occupational and enterprise levels. Nowadays we hear more about European research into early identification of skill needs but this is still fairly limited and mostly concentrated in specific sectors, trades and occupations characterised by internationalisation, where the mobility of people, jobs and services are high. Tourism is one such sector.

Tourism is very important for the European economy. It accounts for 5 % of direct employment and proportion of European GDP and has a tremendous multiplying effect over other economic sectors, enjoying forecast stable growth for the future. Tourism has one of the highest labour mobility rates across Europe, permitting discussion of the emergence of a truly European economic sector and a labour market with a truly European dimension. Thus, the discussion about new occupations and future skill needs for the sector in Europe has a particular significance.

This publication is based on the proceedings of the international workshop *Trends and skill needs in the tourism sector* held in Halle, Germany, 29-30 April 2004.

The workshop was jointly organised by several institutions and networks. The European Centre for the Development of Vocational Training (Cedefop) took the initiative in preparing the workshop, discussing the content with Cedefop partner institutions within the framework of the newly created international network Skillsnet (register at <http://www.trainingvillage.gr> and look for 'Skillsnet' under 'Projects and Networks'). The network was created in early 2004, bringing together experts, policy-makers and practitioners in early identification of skill needs to present and discuss outcomes and methods of research and analysis on new and changing skill needs and medium to longer-term prospects for skills in the labour market.

The organising partner in Germany was the research network FreQueNz, supported by the Federal Ministry of Education and Research (BMBF) and coordinated by the Fraunhofer Institute for Industrial Engineering (Fraunhofer IAO), which took an active part in planning and organising the event. The Institute of Structural Policies and Economic Development (isw) – a member of FreQueNz – with several years of research experience in identifying skill needs in tourism, organised and hosted the workshop in Halle. The European Training Foundation (ETF) supported the travel needs of several workshop participants from south eastern Europe and Morocco.

The workshop highlighted the latest trends and skill needs in the hotel, catering and tourism sector from an international perspective. Speakers and participants from 13 countries (Europe, North America and Africa) took part in the event, which took place on the last two days of EU15 and just before the entrance of 10 new Member States to the European Union. The discussion, therefore, touched on many important issues for the new EU Members States and

also those who aspire to become members in the future. Developments in Europe were compared with changes taking place in North America, demonstrating many similarities and, in some cases, helping to identify possible future trends and useful solutions for Europe.

This publication is divided into three parts. The first part looks at social trends (e.g. demographics, leisure patterns) and economic aspects (e.g. penetration of ICTs, changing distribution channels) which determine the future demand for skills and competences. It discusses the question of skills and qualifications needs for tourism in general. The second part looks at occupational fields and new types of skills demanded by these trends. Here several specific occupational fields have been identified and discussed, such as various occupations in barrier-free tourism, tourism wellness services, revenue management, etc. Finally, the third part looks at the transfer of research results into policy and practice, particularly concerning the identification and exchange of examples of good practice, which allow all interested parties to learn from each other and meet the respective challenges in the best possible way.

The publication also includes several contributions from experts who, for various reasons, could not participate in the workshop but nevertheless prepared the papers. We would like to take this opportunity to thank them and all other contributors to the publication and organising institutions for their work and their willingness and interest in developing the field of early identification of skill needs. The workshop was the first in a range of sectoral events planned by Skillsnet. We hope it proved to be a good start.

Stavros Stavrou,  
Cedefop Deputy Director

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## **Part I:**

# **Identifying general trends and skill needs in tourism in the European Union and beyond**



# General trends and skill needs in the tourism sector in Europe

Piet Jonckers

*European Commission, DG Enterprise, Tourism Unit*

*This is a paper version of the keynote speech on the current situation, general trends and skill needs of tourism in Europe. The general outlook for this very dynamic sector is, in relation to other economic sectors in Europe, positive and quite optimistic for the coming years. Tourism is generally and globally acknowledged as one of the few economic sectors that has more than significant growth prospects and is characterised as a catalyst for peace and prosperity.*

*At the same time, this sector is known for its high turnover of staff, persistent lack of qualified personnel and rapidly changing skill needs. If Europe wants to stay the number one tourist destination in the world, much will depend on the quality of the services and the people who deliver them.*

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When discussing the trends and skill needs in tourism, it is always interesting to start with some facts and figures on the current situation of European tourism. The general outlook for this dynamic sector is, in relation to other traditional European economic sectors, positive and quite optimistic for the coming years. Tourism is generally and globally acknowledged as being one of the (very) few economic sectors that has more than significant growth prospects and is characterised as a catalyst for peace and prosperity.

Despite the increasing competition in overall world tourism, Europe is still the number one destination. It has the highest density and diversity of tourist attractions. If Europe wants to hold this position, the general trends and the skill needs in this sector are very important.

The capacity for tourist accommodation in Europe exhibits differences between hotels and campsites. Generally speaking, the hotel sector dominates in most destinations, except some regions in the west and south of France, the north-east of Spain, the coastal areas of Belgium, the Netherlands and the UK. In 2000 there were nearly 200 000 hotels in the 15 Member States of the European Union (EU).

Tourism in Europe accounts for more than EUR 800 billion expenditure a year by EU citizens. It constitutes 30 % of the EU's external trade in services and creates potential for up

to three million additional jobs<sup>(1)</sup>. Tourism is one of the most important sectors of the European economy; GDP generated by tourism represents already 5 % in the core industry with another 7 % in the related economy. With two million enterprises in Europe, the tourism sector is responsible for seven million jobs in the core industry (or 5 % of the total workforce) and 20 million jobs in total with the related economy (or an additional 8 % workforce). This means that the tourism sector is also capable of creating 100 000 new jobs per year<sup>(2)</sup>. A significant part of consumer expenditure (12 %) is earmarked for tourism. Tourism, however, is still an internal European phenomenon as 87 % of the tourists who visit Europe come from EU countries. Although most travel is still undertaken for leisure, 20 % is for business.

Certain trends in European tourism have been identified, suggesting that tourist arrivals will double in the next 25 years and that this doubling will take place in Europe. This will mean that by the year 2020 more than 720 million cross-border tourists per year will arrive in Europe<sup>(3)</sup>. At the same time there will be a large increase in elderly tourists, the cultural and natural heritage tourism will be the fastest growing segment and some of the driving forces of the EU such as liberalisation, the internal market and the euro will only gain more importance for the further evolution of tourism.

Nevertheless, decisions taken by individual tourists are mainly subjective and thus sensitive to external influences. Recent history in this regard shows us that tourists are highly sensitive to conflict scenarios and violence, health risks and increasing environmental accidents. The whole decision-making process is made even more complex through changes in habits. The possibility of Internet booking and consequent individual travelling, the trend towards late and flexible travel decisions, and the availability of low-cost carriers and intensified search for price advantages makes tourism one of the most volatile and dynamic economic sectors.

In discussing trends or general societal changes, new forms or themes of tourism are also of great influence for the further development of this sector:

(a) tourism and sustainability:

- a seismic shift in people's awareness of the environmental impact of mass tourism;
- a new social awareness-interest in authentic, small and local holiday experiences;
- the new tourist (would eat in a local restaurant, would use local guides, would look for the true story behind the destination);
- more do-it-yourself travellers (more demanding and at the same time taking responsibility);

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<sup>(1)</sup> EU15.

<sup>(2)</sup> Figures until 2000 show a 3 % annual growth for the tourism sector.

<sup>(3)</sup> World Tourism Organisation.

- (b) tourism and accessibility: almost 40 million people in Europe are handicapped and they are tourists too; from a commercial point of view alone these consumers are not to be neglected;
- (c) tourism and rural and cultural heritage: there is a clear and growing market for non-traditional tourist destinations;
- (d) tourism and peace: tourism is associated with tolerance, cultural exchange, learning to know each other, creation of welfare and friendship;
- (e) tourism and sports: this goes far beyond the Olympic Games, as it is a rapidly growing segment for individual and group tourism;
- (f) tourism and health:
  - a healthy lifestyle and promoting a healthy diet among customers will become a priority for travel companies;
  - holiday companies will work more closely with the medical professionals;
  - travellers will be better educated about holiday health risks in general;
- (g) tourism and technology:
  - broadband will revolutionise communication culture and boost e-commerce; it will directly affect how we take holidays;
  - mobile phones will be our personal holiday organisers;
  - artificial intelligent agents in our computers will act as personal holiday tour operators;
  - virtual holidays will become a reality.

Tourism is still a very specific sector, so specific knowledge about the sector is required. For the workforce, however, there are still general and basic skill needs for everybody. For example, lack of knowledge of foreign languages has been recently recognised by national tourism organisations of some European countries as a lasting problem and even as a competitive disadvantage. Entrepreneurship – a concept still vaguely defined – is taken more actively on board by education providers who are working on this notion and thinking of implementing this even at the compulsory school level.

There are also specific skill needs defined by labour category. At management level, these are rather transversal skills, hence tourism managers often have an educational background in accountancy, marketing, law, economics, etc. Nevertheless, managers are expected to possess the following skills and competences: computer skills, business and strategic planning, strategic alliances, management skills, management through visions and values, yield management, accounting, product development, innovation, human resource management, destination management, project management, management skills to cope with globalisation influences, change management, marketing and sales skills (EC, 2001, p. 26).

Other labour categories can be defined: supervisors, skilled craft workforce and the semi-skilled. Supervisors in tourism need basic computer skills, human resource management, hygiene and HACCP <sup>(4)</sup>, accounting, supervision and training skills.

Personal skills, problem solving and basic computer skills are especially important for the skilled craft workforce.

Nowadays, further demands are placed on semi-skilled tourism staff in terms of both personal skills and specific technical knowledge (e.g. bar attendance, cleaning, catering).

Being aware of challenges and trying to overcome them are essential to successful training or education. Some useful suggestions for tourism include (Junggeburdt, 2004, p. 32-34):

- (a) make the learning process job-related;
- (b) where possible, apply the mentor model;
- (c) get strong support from both management and workers;
- (d) try to integrate learning in the career path of the employee;
- (e) embed the learning process in a strong framework supported by the organisation or company;
- (f) include basic skills (language, behaviour, culture, organisation) in this learning process;
- (g) the whole process needs passion, or at least motivation, with continuing stimulation from both sides;
- (h) learning plans need to be transparent to the users;
- (i) learning (still) needs to be fun for everybody;
- (j) it is very important to establish goals and measures to evaluate results and outcomes;
- (k) importance of social dialogue is not to be neglected;
- (l) partnership in general is crucial for the success of every kind of learning process.

Looking at the European Commission's work on this topic so far, we have to start by mentioning the High Level Group on Tourism and Employment. One result of their work was the creation in 1998 of five thematic working groups to boost tourism and employment.

Working group B, Improving training in order to upgrade skills in the tourism industry, came up with three relevant conclusions. The main conclusion was to attract skilled labour and support micro-enterprises in the tourism sector.

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<sup>(4)</sup> Hazard Analysis and Critical Control Point is an internationally recognised food safety methodology.

A second proposal consisted of the creation of a permanent observatory on learning, employment and labour environment of the tourism industry. This proposal has, in the end, not been retained by the European Commission although this was, and still is, seen as a very valuable idea.

The development of a *Handbook on learning areas for the European tourism industry* was the third proposal of working group B and has been taken up and we are currently working on this.

The aim of the Tourism Unit of the Enterprise Directorate-General of the European Commission was to present the handbook by the end of 2004.

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Junggebur, J.H.F. et al. *Training and development under construction. Hospitality and the changing environment*. The Hague: Hotelschool the Hague, 2004.

# Tourism in Germany: trends, facts and figures

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*Tourism in Germany is a growth industry, despite recent problems such as the latent risk of terrorism, economic uncertainty, etc. In 2003, the German holiday travel market was relatively stable, at its habitually high level. Many Germans consider their annual vacation an essential as opposed to a luxury. Germany itself is the most popular holiday destination for Germans, accounting for almost 33 % of the market. However, trip length has decreased steadily; in 2003 the average was 12.8 days. Travel costs per vacation day have gradually increased in recent years.*

*Investigations to determine trend qualifications in tourism have demonstrated that the sector's development is mainly shaped by social aspects such as changes in leisure time preferences, increased individualisation, demographic shifts and improved health consciousness. These trends, and their impact on tourism, are reflected in different tourist products and services as well as in changing occupational activities for people working in the sector.*

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## 1. Social megatrends and their impact on tourism in Germany

This article presents some of the findings of the project *Trend qualifications as a basis for early identification of qualifications developments*, sponsored by the Federal Ministry of Education and Research (Abicht et al., 2002). The study focused on the tourism sector. isw's research into trend qualifications in tourism revealed that development in this service sector<sup>(5)</sup> is primarily dictated by social trends such as changed leisure behaviour (Opaschowski, 1997 and 2000a), increasing individualisation, demographic shifts (German Federal Office of Statistics, 2002) and growing health awareness (Mühlhausen, 2000; Horx-Strathern et al., 2000).

The leisure time boom precipitated by the constant reduction of working hours is one social trend affecting tourism. The average working week in 1950 was six days/48 hours. Now the average person works a six to eight hour day and a 35 to 38 hour week (Opaschowski, 1997, p. 28 et seq.). Attitudes towards free time, which was previously viewed as being for

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<sup>(5)</sup> The term 'tourism' (*Tourismus* or *Fremdenverkehr* in German) refers to people staying at places away from their own home for relaxation, recuperation, education or business purposes.

after-work rest or renewal of working energy, have changed dramatically since the early 1980s. Leisure time is still used to recuperate but this is no longer regarded as its sole purpose. The overwhelming majority of German citizens have assigned a new role to free time. They use it primarily for recreation, pleasure or just switching off. Leisure time now, more than ever, provides an opportunity to satisfy the core human need to find meaning in life. One's occupation, once a working person's *raison d'être*, now plays second fiddle to family, friends and free time (Opaschowski, 1997, p. 259 et seq.).

The elevated status of leisure has led to a shift in recreational patterns and the growing commercialisation of free time. Free time has become an important component of quality of life; entire industries have sprung up offering ways to spend it. Leisure activities must be fun and provide that special 'buzz'. People want to experience things and are always looking for something new. Tourism is profiting from this focus on 'a good time'. Adventure holidays and event tourism offer travellers more and more action, attractions, sensations and memorable experiences in shorter and shorter periods of time.

Heightened health consciousness is another factor influencing leisure behaviour. Fitness and wellness are important considerations when choosing leisure activities and selecting travel products and services. Aspiration towards physical and mental health and well-being can be regarded as the leitmotif of the 21st century. This new awareness of health, the body and the environment among the majority of the population is rooted in the realisation that increased stress, lack of physical movement on the job and poor nutrition have led to burgeoning so-called diseases of civilisation. Another aspect is the increasing proportion of elderly people. They want to enjoy and utilise their additional autumn years as independently as they can. Taking responsibility for one's health and enhancement of one's physical and spiritual well-being expands demand for tourist services. This explains the boom in wellness tourism. Wellness seems to be a magic formula for travel agencies, who deal not only in transport and accommodation, but also in well-being and *joie de vivre*. Vibes and impressions have become more important criteria for selecting a holiday than hard facts and brochure boasts. The German tourism analysis of 2002 recorded that vacations are now inspired more by wellness than by wealth.

The state of the German economy has reinforced this shift. Persistent recession, mounting unemployment and a generally uncertain labour market conspire to raise cost consciousness. From the 1960s to the 1990s most people applied the principle that their vacation was the last thing they would scrimp on. Germans – the world's tourist champions – were willing to invest a lot of money in their vacations. Holidays, which are seen as a prerequisite for quality of life, still rank higher as a consumer priority than the status symbol of a car (German Tourism Analysis, 2002).

However, now that most Germans' budgets have become tighter, they prefer tourist products and services which are not only good value for money, but also contain some sort of bonus. This value-added may be a special wellness programme or the opportunity to develop personal or career-based skills. Many people are eager to use their holiday, or free time in

general, for personal skills development and continuing training. The increasing blurring of the boundaries between work and leisure time, i.e. the lack of a strict delimitation between work and play, and the growing significance of personal self-fulfilment are behind this trend. Tourist services such as language and educational holidays, cultural trips, etc. are therefore on the increase. Lone travellers with special interests often take advantage of such offers.

The increase in the number of lone travellers taking theme-based holidays, where they can join groups of like-minded people to become acquainted with foreign cultures, attend courses, learn languages, etc., demonstrates the growing individualisation and pluralisation of lifestyles in our society. The lifestyle types have clearly differentiated travel philosophies, behaviour patterns and holiday interests. Evidence is available in tourist brochures that target specific groups. For example, families and young people usually prefer package tours, more wealthy customers often tend to choose luxury trips such as cruises.

Demographic trends also have a decisive influence on the type of tourist products and services on offer. Pensioners and people with reduced mobility as a consequence of age or disability are a steadily growing target group. In Germany the number of working age people (20 to 59), currently 45 million, will be just over 31 million by 2050, whereas the number of over-60s will rise from 18.8 million to more than 23 million. By 2050, 58 to 63 year olds will be the largest age group in the country (German Federal Office of Statistics, 2002). The target group includes people whose mobility is not permanently restricted but who by no means intend to forego their vacation. Examples are pregnant women or people with temporary impediments as a result of illness or accident. Tourism is compelled to tailor its services more and more to the wishes and needs of this target group. Market adaptation is evident in various sector trends. These are described in detail later with a brief overview below:

- (a) short breaks and ‘grounded’ trips, i.e. with destinations easily reached by car, coach or train, are on the increase. These reflect the needs of elderly and/or physically challenged people, who like their journeys to be comfortable and uncomplicated;
- (b) tour operators are devising a growing number of special offers directed at pensioners and people with restricted mobility. These tourist packages combine a well structured travel programme with complete care and consultation. Organisers ensure that tourists have access to doctors and pharmacies during the trip to respond to any medical requirements;
- (c) travel agencies are also designing more and more deals for lone travellers; these also target senior citizens and people with restricted mobility since older people are often widowed. Themed trips such as educational and cultural tours, language holidays and city breaks are experiencing an upsurge. Lone travellers are particularly enthusiastic consumers.

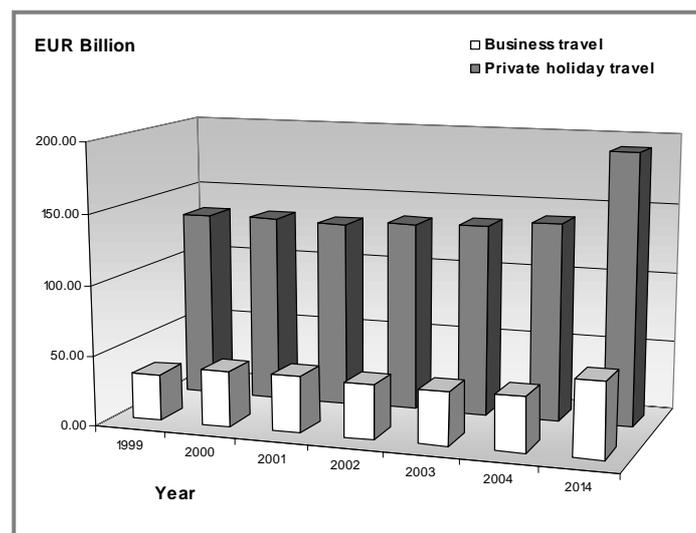
The tourism business is worth billions and, in some regions of Germany, it is the only employer. Tourism is not just fun and games, relaxation and recuperation, well-being and wonderment; it is also the backbone of many local economies.

## 2. The significance of tourism for economic and labour market policy

In recent decades a fully fledged industry has grown up around tourism. Companies reap significant revenue from the holiday passion, as do national economies. The World Travel and Tourism Council (WTTC, 2004, p. 6) estimated that global demand for tourist services would be worth USD 5 490.4 billion in 2004. This figure is set to rise 4.5 % to USD 9 557.5 billion by 2014. According to the WTTC study, 2.8 % of the world's labour force work in the tourism industry, totalling almost 74 million jobs (WTTC, 2004, p. 6). The industry may have become confident about its success, but ultimately it must prepare itself for slower growth. Even the terrorist attacks of 11 September 2001, which resulted in severe losses for the sector, did not quench the thirst for travel. However, the worldwide recession has had an effect. Consumers are protecting their pockets and postponing trips abroad because they fear potential job loss or income reduction. But most of them do not want to stay at home on their vacation so 'grounded' trips – journeys by car, train, coach or ship – are becoming more popular. More people are choosing to take vacations in their own country.

Despite the sharp reduction in bookings, which seems set to continue in 2004, tourism<sup>(6)</sup> is still one of the fastest growing sectors in the world and is one of the most important sectors in Germany. WTTC (2004, p. 10) found that 10.7 % of the German labour force works in tourism. That corresponds to 4 057 360 jobs. The tourism industry earns over 8 % (EUR 140.6 billion) of GDP. It is the most important service sector in the country. But tourism is not only important at the macroeconomic level; travel is also very significant microeconomically. It has a high priority in household budgets, even during slumps.

Figure 1: Tourism in Germany



Source: World Travel & Tourism Council, 2004.

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<sup>(6)</sup> Businesses in the tourism sector include hotels, bars and restaurants, travel agencies, tour operators, travel companies, spas, health resorts and souvenir manufacturers and retailers.

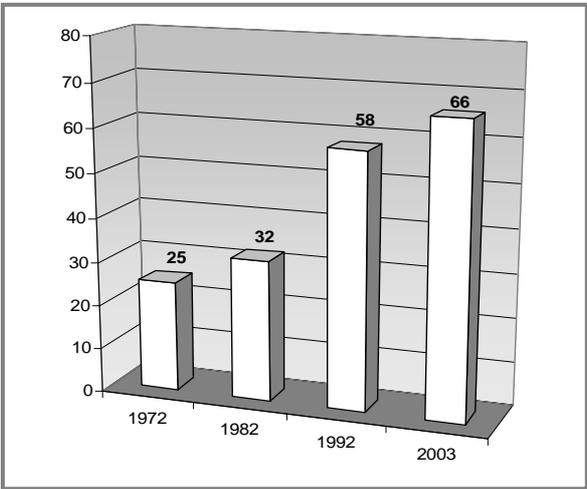
At the moment the sector is undergoing a structural metamorphosis. The German market is dominated by vertically integrated travel companies which cover virtually the entire value-added chain. They have their own travel agencies, tour operators, airlines, etc. The largest German companies are increasingly turning their attention to the rest of Europe and are evolving into global players.

However, despite the heavy concentration, niche firms will maintain their position in the market. Over 240 small and medium-sized companies have a market share of 16 % and turnover of EUR 2.9 million. Medium-sized enterprises in particular offer a more diverse and targeted range of tourist services. The tourism industry in Germany is shaped mainly by its medium-sized businesses which include 180 000 restaurants and cafés, 55 000 hotels and guesthouses, 20 000 travel agencies and 6 000 coach companies.

### 3. German holiday patterns

Little appears to stop the Germans going on holiday, not even economic insecurity and terrorism fears. The stability of tourism consumption can be explained by the large number of travellers ‘who consider their annual vacation an essential’ (FUR, 2004, p. 2). In 2003 almost 50 million Germans went away on a holiday lasting at least five days. Travel intensity was 76.8 %. A total of 66 million vacations was recorded.

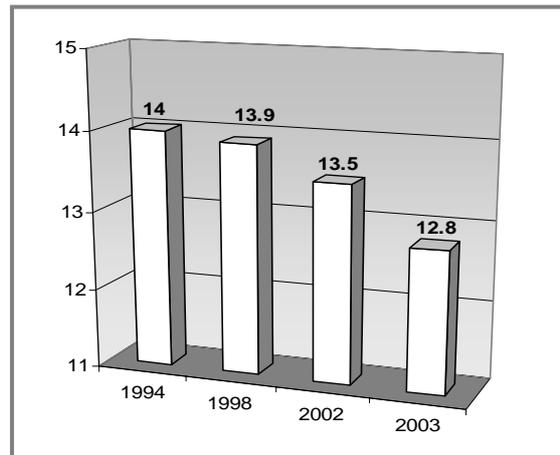
Figure 2: Travel intensity of Germans (holiday trips taken by Germans from 1992 including East Germany), in millions



Source: FUR, 2004, p. 2.

With its market share of almost 33 %, Germany is the main tourist destination for Germans. However, only five German states account for over three-quarters of domestic vacations. Bavaria has held first place for years. Mecklenburg-West Pomerania is second (FUR, 2004, p. 2 et seq.). In general, vacation length has decreased continuously in recent years. In 2003 the average was 12.8 days (Figure 3). However, spending per day has risen. In 2003 Germans spent EUR 62 per day; over EUR 10 more than in 1996 (FUR, 2004, p. 5).

Figure 3: Average vacation duration in days



Source: FUR, 2004, p. 5.

## 4. Tourism sector trends

Tourism is a growth sector, characterised by constant evolution. The following will provide details of some of sector trends revealed by the isw study.

### 4.1. Short breaks inspire boom in cultural, event and city tourism

The travel market reflects German jobs and incomes. Increasingly, Germans cannot afford, or choose not to afford, to indulge in a traditional three-week vacation. But their limited budgets are not the main reason for their reluctance. Lack of time resulting from job commitments has at least equal impact. The principle is clear: shorter, cheaper trips.

The tendency to take short breaks and to divide annual leave from work in order to have a second or third vacation favours internal travel destinations. The result is a tourism boom in Germany and its neighbours. The popularity of short breaks is benefiting city tourism. Cities with good, value-for-money transport links and accommodation and attractive cultural facilities are top draws.

Nationwide cultural tourism is also profiting from the penchant for short stays. Points of interest, historical sites and local attractions are luring ever more German and foreign visitors. An associated development is the increasing appeal of adventure holidays and event tourism; vacationers want to experience more. Leisure parks and theme parks can deliver guaranteed excitement. Event tourists will go the extra mile for major sporting and cultural events and shows featuring superstars and celebrities.

## **4.2. New tourism targets**

Getaways and domestic holidays are of more interest to older travellers. The ranks of elderly holidaymakers are swelling. At the moment they constitute the most interesting target group for the tourism trade of the future; the one with the best growth potential (Hübner, 1999). These consumers are not necessarily frail or less mobile. On the contrary, the 'new old-timers' have money and are willing to spend it on stimulating recreation activities. They prefer health and wellness holidays; the 'day out' cliché is a thing of the past. Elderly people are demanding a range of new, individually tailored choices. They are prepared to spend a considerable amount of money if they feel the vacation is worth it, but they place higher demands on accommodation, service, staff, cleanliness, food and the availability of social, cultural and sporting activities. Another demanding, high-potential target group is people with temporary or permanent mobility restrictions (NatKo, 2002). The *Deutscher Tourismusverband* (German Tourism Association) estimates that in 2020 around 30 % of the travel market will have impaired mobility caused by age or infirmity.

Single people or lone travellers are another important target group. There are around 30 million one person households in Germany. Travel agencies offer a huge choice of special holidays for single people/lone travellers. Their needs include single accommodation at no extra charge, athletic facilities, entertainment and opportunities to meet people. Travel agencies offer special holidays with themes such as 'learning', 'sport' or 'fun'. Educational trips and themed holidays often overlap with vacations for singles. They are a good way for like-minded people to meet and enjoy their shared interests together.

The trend towards customised holidays is also striking. The individual tourism target group features the following groups: people who enjoyed backpacking alone when they were younger and who would now like to have a similar experience in the company of their families; small groups who like exploring scenic routes by bicycle or motorbike; and individualists who want to see as much of a certain country as possible in a limited time. More and more people are demanding quality, perfectly-catered individual holidays which take their personal preferences and time constraints into consideration, whether they are travelling alone or in small groups.

The number of group holidays is also rising. Some travel agencies specialise in packaging group tours for people with similar interests, who are interested in taking a special themed trip together. Group holidays appeal to many different clienteles. They offer the tourist trade many new niches; bowling clubs are just as keen on travelling as political organisations, companies and sports teams.

## **4.3. Health consciousness changes tourism**

Generally increased awareness of the individual's responsibility for his or her own physical and spiritual health and well-being has influenced developments in tourism. The greater demand for health, wellness and spa holidays demonstrates that self-diagnosis, self-medication, self-financing and investing in one's own health go beyond the framework of Germany's

health reform. The chief concern of people who book these holidays is usually to restore or maintain their health.

Wellness tourism is a thriving new branch of health tourism. Wellness includes everything which nurtures and promotes health, beauty, well-being, vitality and zest for life (Abicht et al., 2001, p. 77 et seq.). Wellness programmes first appeared in German holiday brochures in the mid-1990s. What began as luxury product for an upscale market is now an integral part of any vacation catalogue. Travellers are motivated by a desire for rest and relaxation, the chance to unwind, do something for their bodies, detoxify, get fit, eat sensibly, improve their looks or just indulge themselves.

#### **4.4. Business travel as a force for success**

Business travel may not be tourism in the strict sense, but it is nonetheless a very important segment (Otto-Rieke, 2001). In the age of business globalisation and internationalisation, commercial travel is also expanding. Business trips account for a considerable share of the turnover of airlines, hotel chains and car rental firms. The main reason for work-related trips is attendance at industry meetings, contract negotiations and company talks. Trade fairs and exhibitions are other goals.

Germany is also a leading destination in this segment. Two thirds of all top-ranking international trade fairs take place in Germany. The country hosts 150 international and interregional fairs per year. Over 140 000 exhibitors participate; 45 % of them come from abroad. Around nine million people, including 1.5 million foreigners, go to the events (DZT, 2004, p. 12). The visitors and exhibitors come to Germany from over 180 different countries. The huge potential of the business travel market is evident: in 2001 around one third of all journeys to Germany by outsiders were for business reasons. A year earlier approximately 11 000 venues such as congress centres, hotels and museums welcomed 63 million attendees to 1.15 million events, yielding a total sales volume of EUR 43 billion (DZT, 2004, p. 12).

## **5. New occupational profile for tourism**

The trends described above not only affect tourist products and services, they also influence the work of tourism employees. Changes in leisure travel segments focus on vacation design, travel organisation, consulting and sales and sightseeing guide services. In business travel, trip organisation and processing is undergoing profound change. Until now the main task of travel agency employees had been to offer customers fixed tourist products and services from holiday catalogues, to book transport and accommodation and, last but not least, to sell a package. Travel agents also used to be there to field customer questions about the deal and the destination. The duties of travel agency employees have adapted to the increasingly individual travel wishes and diversified demands of various consumer groups. Tour operators and their sales personnel are now required to tailor and arrange holidays according to specific customer preferences. *Trend qualifications in the German tourism industry* (Abicht and Freikamp, in this volume) describes the types of concrete skill developments observed and the new skills demanded.

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# Factors shaping occupational identities in the tourism sector: research in Spain, the Czech Republic and Greece

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*This contribution provides results from research into formation of occupational identities in tourism conducted in regions of Spain, the Czech Republic and Greece. Research discovered that the sectoral conditions have a direct impact on occupational identities and behavioural patterns of workers in tourism. Extensive demands for functional flexibility of personnel in tourism come into tension with objective requirements for higher qualifications and better and more flexible skills. Skill gaps and labour shortages manifest the failure of initial education to meet changing requirements in the sector. Continuing training and human resource development is not granted a necessary importance. The sector suffers from the labour-market segmentation: the more dynamic element provides better and stable jobs and thorough human resource development strategies; the secondary segment, with high job insecurity and labour turnover, sees its main competitive advantage in low labour costs and thus does not invest in human capital. The working conditions result in deteriorating effects in occupational identity. Social dialogue needs promotion at all levels.*

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## 1. Introduction

The contribution is based on a research project <sup>(1)</sup> covering a number of European countries and sectors. Tourism was a subject of investigation in three countries – Spain, the Czech Republic and Greece – with in-depth interviews conducted with owners, human resource managers and employees of different tourism businesses.

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<sup>(1)</sup> FAME (Vocational identity, flexibility and mobility in the European labour market), funded under the 5th Framework Programme of the EU, contact number HPSE-CT-1999-00042. Available from Internet: <http://www.itb.uni-bremen.de/projekte/fame/fame.htm> [cited 11.3.2005].

In Spain we focused on the quality hotel sub-sector in the region of *Comunidad Valenciana*. We also conducted research in the schools that offer post-secondary vocational education and training (VET), for either catering or accommodation, where we used questionnaires as well as case studies and classroom debates. In addition, we performed a questionnaire survey among teachers.

In the Czech Republic we conducted a questionnaire survey in the region of north-west Bohemia among tourist information offices, travel agencies and hotels, followed by in-depth interviews with employees in the same companies. A number of focus groups included social partners, education and training providers and regional policy actors.

In Greece, we concentrated on small businesses in the island of Crete <sup>(2)</sup>.

Input from workers, in different positions and with different responsibilities, in relation to their educational background, working conditions and corporate environment shed light on factors which shape their occupational identity. A more detailed explanation of the methodology of the project can be found in Kirpal (2004) and, specifically about tourism, in Marhuenda et al. (2004).

## **2. Trends and challenges across the three countries**

Tourism is a very important sector in national economies in these three countries, where its share in national employment is high, as along with its growth potential and added value. Yet the sector's future steady growth is subject to external factors due to general vulnerability of the sector across continents. The challenges the sector has to face in all three regions have many commonalities: wages in hotel and catering are far below national averages; there is a high labour fluctuation; seasonal variation is a very important feature of the tourism offered.

It should be noted, however, that tourism in these countries is of a different character. While both Spain and Greece are among the most popular world recreational destinations, Czech tourism is of the urban type, with spa tourism also having an important role to play, and is less affected by seasonality.

There is a high proportion of external labour (immigrant workers, mostly temporary) and of the grey labour force. The weight of micro companies, often family owned, in the sector is predominant in all three countries. However, merges and acquisitions are becoming common practices in recent years, especially in Spain. Overall, we may well identify a double characteristic of sectoral trends: the human touch of tradition versus the technological effect of modernisation.

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<sup>(2)</sup> The Greek partner in the project was Laboratory of Sociology and Education, University of Patras, represented by Prof. Nikitas Patiniotis.

Spain and Greece report very good growth indicators in the sector, with arrivals growing by around 10 % in both countries. Tourism receipts, already initially comparatively high in Spain, enjoyed growth of 9-10 % for several years in Spain, whereas in Greece, where the volumes of receipts were modest, the growth was over 10 % (CSO, 2000). The development of previous years pushed Spain up to second place among tourist destinations in Europe with the number of arrivals the highest after France. Greece came 13th in the world ranking of tourist destinations. The contribution of tourism to Spanish GDP reached a peak of 12.1 % in 1999 enjoying a high growth rate between 1996 and 1999 (INE, 2002). In Greece the tourism sector contributed around 8 % to GDP.

The rapid increase in the number of international tourist arrivals in the Czech Republic, and the volume of receipts from tourism, in the first half of the 1990s was caused by the opening of borders and the curiosity of many foreign tourists about the situation in the post-communist states. Once the initial interest was satisfied, the next period (from 1996) was marked by a decline in the number of arrivals. Still, the Czech Republic had the second highest number of international arrivals among central and eastern European countries, and it was eighth among all European countries, demonstrating rates comparable to those in Austria and Germany, enjoying 12th place in the world ranking of tourist destinations (Mag Consulting et al., 1999). Tourism receipts in the Czech Republic recorded steady growth until 1998. Although a decline was in evidence in the last few years, the net contribution of the tourism industry foreign currency revenues to GDP in 2000 was still 5.6 % and the share in national exports was around 10 % (CSO, 2000).

Tourism in these regions represents a sector with exceptional demands in terms of functional flexibility and mobility of the personnel. However, the sector hardly offers fair compensation mechanisms for such requirements, not only in terms of financial remuneration but also job security, career development and training provision.

Among many challenges within the sector, the following are particularly important due to their direct influence on work and the way it is understood: workforce shortage, service quality and the integration of new technologies. The image of the company depends on the quality of service provision and influences the level of customer satisfaction. In this sector the tourist or customer identifies the product with the company that provides the service and, at the same time, the destination visited. Company competitiveness is linked to and affects the competitiveness of tourist areas. The chain of relationships from the worker to the tourist destination is clear and direct, and this is why the definition of work and the way it is understood are so important in this sector. Despite this, neither business owners and managers nor society seem capable yet of giving the necessary importance to this aspect: tourism lacks a clear sectoral identity, a circumstance which partly explains its low political visibility, and the fact that it does not occupy a place which corresponds to its vital economic importance (ILO, 2001b, p. 91).

### 3. Qualifications and flexibility

We observed a broad agreement among employers and human resource managers about the lack of adequately qualified labour available for recruitment in the tourism sector. Personal and social skills are requested most frequently with additional capacity to learn and to work independently are gaining in importance. Knowledge of foreign languages and specific knowledge and skills linked to technological innovation and information technologies penetration of the sector are often listed as lacking.

The demand for flexibility is seen in growing pressure for multiskilling where a combination of different qualifications, or a combination of specific skills typical for various qualifications, is required from staff, leading to emergence of new – hybrid – occupations. This is especially typical for small and micro enterprises with limited personnel and consequent demands for mutual *ad hoc* substitution across occupations. Another type of multiskilling was observed at individual level due to high horizontal mobility in the sector (both geographical and cross-occupational) and due to high staff turnover. Especially typical for temporary workers is engagement in different occasional jobs and professions, leading to different professional and occupational experiences not recognised formally. Skills and qualifications normally available from VET for other sectors, but with certain skills necessary to perform a job successfully in tourism, are increasingly in demand (e.g. IT professions, managers, medical doctors and nurses in spa tourism).

The demand for flexibility, however, is not limited to skills. Temporary and unstable employment structures link with human resources management strategies that rely on a high level of personal flexibility under pressure of *ad hoc*, frequent deployment of staff and little social security. Part-time work centred on temporary workers; overloaded permanent staff; irregular working hours including frequent work on holidays and weekends; these and other demands for personal flexibility are largely taken for granted by employers and not reflected in the remuneration policy. Unfavourable working conditions and lack of professional development prospects cause high staff turnover and outflow of skilled personnel from the sector. The demand for personal flexibility, therefore, comes into direct conflict with the demand for skills flexibility: the former based on the minimal labour costs and no interest in human capital investment, the latter requiring thorough training and human resource development policy from employers. Moreover, participation in training is hindered by the workload and extra working hours, and often means for employees an even greater sacrifice of personal time.

In the attempt to reduce labour costs employers often seek to employ cheap personnel. They apply informal recruitment mechanisms not acknowledging previously acquired qualifications or deliberately hire non-qualified workers as a cheaper solution in comparison with those trained for the sector (particularly in Greece). As a consequence, initial vocational preparation in tourism is less valued than work experience, practical training and personality, especially in Greece and Spain. It is, however, important to note that the stronger the role and tradition of formal initial vocational education in the country, the better recognition and the higher the

demand for workers with formal qualifications in the sectoral labour market. The latter was observed in the Czech Republic where those trained in tourism technical and vocational schools have an advantage over individuals who do not have such qualifications. In all countries, middle management is increasingly expected to have a formal qualification, including university degrees. Both employers and employees broadly agree that personnel with higher levels of qualification adapt more easily to changes and transformation in the market and especially to changes induced by new technologies (Marhuenda et al., 2004).

In all three countries, systems of initial vocational education are not prepared to meet the skill requirements of the sector. Therefore, continuing training combined with practical work experience and training on-the-job supports skill development more effectively. Although employers regard continuing training as important for promotion, mobility and flexibility of staff, most of them do not invest in training. In addition to employer preference for work experience over formal training, companies, especially small ones, do not have the means and financial resources to invest in training for their employees. Furthermore, the limited opportunities for internal promotion constitute a major hindrance to motivating employees to pursue – and employers to provide – training opportunities.

In all three countries, there are two clearly differentiated labour-market segments: a more stable primary segment and a temporary, insecure secondary segment. The former tries to minimise negative effects of seasonality and labour fluctuation. There, one can observe complex management strategies and active investment in human capital. This segment is largely represented by hotel chains, tour operators and travel agencies: all large companies. Although not yet typical for the sector in general, the size of the segment is steadily growing. The secondary segment (still more widespread and typical of the sector) is characterised by low qualification, little recognition of previously acquired experience, scarce learning opportunities and lack of career prospects. These result in instability and low prestige, elements that could not provide an anchor to vocation, and hence weak occupational identities in the segment.

#### **4. Discourses on work: employers, employees, teachers and students**

Changes in work imply difficulties for people in giving a meaning to their experience. Workers must deal with instability, fragmentation or uncertainty, which are typical of work nowadays as has been shown by Sennett (1998), Dubar (2000) or, for the specific area of tourism, Mériot (2002) and Martínez (2003).

Identity processes are shaped in the interaction of oneself with others. These processes happen through common experiences and practices, through formal and informal learning processes, competence acquisition and shared meanings. Identity is linked to representations and conditioned by the cultural dominant model. Representations are types of knowledge, socially constructed and shared, with an underlying practice which allows a common reality for a social group, a sector in our case. Socialisation processes and skill acquisition are fundamental to

occupational identities, insofar as they are responsible for the learning and relational influences that an individual assumes within a professional context and group. Competence, thus, includes procedural, technical and conventional knowledge, but also semantic knowledge shared by the members of a restricted group which forms the profession or occupation. All skills are adapted, according to the specific working context and to the judgement by the community of practice relevant to the individual. That is why the working context is very important in order to identify the conditions which contribute to shaping identities. These are defined not only by objective conditions but also by how they are perceived and understood, read by individuals.

For these reasons, our research tried to identify the different patterns of discourse, the different understandings which were shared by groups of workers, in order to find different types of workers, all of them trying to adapt to the conditions of the sector. There was also another issue: whether dominant positions in the sector were transmitted via formal or informal ways, particularly through socialisation as well as training processes (Criado, 1999). Do learning processes, education and training provision, play a role in identifying workers' discourse with those of managers and employers?

The research helped to identify five different conditional identity patterns among tourism workers:

- (a) the devoted professional,
- (b) the 'high flyer',
- (c) the conciliated worker,
- (d) the dissatisfied active seeker,
- (e) the newcomer or unconsolidated worker.

These have been explained in greater detail in Marhuenda et al. (2004) and we offer here a very brief summary.

The devoted professional is a competent and well-trained worker, satisfied with his work – a clear vocation – whose extreme dedication to work is compensated by the sense of professionalism which is the axis of his vocational identity. The 'high-flyer' is focused on career, with expectations of vertical mobility, hence the availability to assume responsibilities and a high corporate identification. The conciliated worker shows a compromise with the company and its demands for high availability by finding his/her place in a functional way with identity focused on customer orientation. The dissatisfied active seeker is so because of the lack of recognition of his/her skills and training, as well as career expectations. Working conditions, workload and lack of perspective cause dissatisfaction and make him/her look for an alternative job. The unconsolidated worker is often a young person with an unstable work situation, changing jobs frequently and without a clear prospect in the trade.

All of these types have been constructed around seven different categories which surround occupational identity in tourism. The same factors were used to develop a typical discourse of employers, teachers and students:

- (a) involvement in the profession (stability and satisfaction);
- (b) the significance of work;
- (c) group or corporate references;
- (d) personal labour capital, skills, knowledge;
- (e) perception of the hierarchy;
- (f) sense of involvement of the product in one's work;
- (g) education and training.

In searching for the interactions that might happen among different actors, we relied very much on the belief that occupational identities are negotiated. This is clearly the case between employers and employees, as it is certainly also the case for teachers and students.

Different sources determine a collective identity, elements of which in tourism apply to how they perceive the changes and challenges in the sector, how they face them and what expectations are raised in each group. The important issue here is that negotiation around those aspects takes place in the processes of training, while people acquire their professional skills, be it initial or continuing training.

The most important issue we have been able to identify among different positions (managers, employees, teachers and students) are common elements in their discourses, which shows that learning and training practices have an impact on developing a projected identity, a common set of elements towards which those willing to be part of the sector look. These are the features of such a construction:

- (a) pride in working for the sector, and this is a topical justification of sector's peculiarities and conditions;
- (b) students and teachers are aware of the sectoral trends as perceived by managers and employees;
- (c) students and teachers are aware of working conditions in the sector, which they have sometimes experienced, as this is also the experience of managers and all other workers;
- (d) the role of teamwork is important in the sector, in that 'we are all in the same boat';
- (e) because of the emotional aspects of discourse, socialisation is a very strong factor;
- (f) there are opportunities in the sector and therefore professional expectations are raised at all levels.

The reference group is important in many discourses: the community model is widely extended. Yet, the hierarchies are very well defined and each one addresses immediate superiors or people below. There is more division of labour than real teamwork, yet the discourse of the teamwork is the one that dominates.

The justification of extra tasks and hours is explained via the ethic of work, but that extra work also compensates for insufficient earnings in the original wage.

At lower levels the employee typology involves fewer vocational elements and more inner obligations and assumed duties: it is here that the community model vanishes. Not surprisingly, there is more talk of continuing than initial training.

The employer only considers staff who are valuable to the company for their expertise, seeming to ignore in his discourse the existence of the non-qualified workforce which is part of the secondary labour market. It is not strange either that the employer tries to foster the professional model among all workers. There are certain constant elements in how workers see their roles, but this does not apply in the case of peripheral workers. We do not know how the corporate culture deals with those 'down the ladder'.

In summary, we may conclude that there seems to be a strong influence of employer discourses embedded in all other agents. Such dominant discourse provides elements anchoring workers' identities: it is not strange that the discourse is named as the 'professional' in the employee's typology. Socialisation is purposefully promoted in both formal and informal ways, particularly fostering the notion of the 'professional' and what being a professional in the sector means: carrying it with you. The occupational role and the position in the hierarchy have an impact on identity discourses, as is clearly the case with cooks. Strong tensions exist between sources of satisfaction and dissatisfaction. Anchors to solve those tensions are the calling, the occupation ethics, common effort, and identification of all with the service provided. We therefore perceive a growing importance in formal education, and of acknowledgement and accreditation of previous learning (formal, informal and non-formal), though experience is what counts more and there is little recourse to continuing training.

## **5. Conclusions and recommendations**

We consider that sustainability of tourism in the EU has to start taking into account employment relations, and training and socialisation practices. Statements often made such as 'the need for motivation', 'to feel the profession', 'the fun of the profession' conflict in trying to foster strong identities that working conditions do not help to develop, resulting in difficulties in attracting and retaining skilled labour and fostering learning practices that find a recognition in the workplace. Obviously, this is not just a matter of curriculum standards, training gaps or accreditation of existing skills. It is not even an issue of identifying the skills needed. Rather, it implies taking into account that if the sector really demands a differently skilled workforce, it has to offer them appropriate working conditions; otherwise people will consider the sector as a transition into something else where they can develop their own career prospects. If this is not possible, those remaining in the sector below the level of management will probably suffer tensions along their career. Wage policies and working conditions conciliated with family life are needed to guarantee the retention of those workers who have the appropriate skills and vocation. Education is still a very relevant source for breeding occupational identity and work ethics, and these are the source for motivation, involvement and quality of work.

Tourism is a growing industry with many small companies and with competitors in other areas of the world; global players are rooted in Europe and act elsewhere. Because of its potential to

generate employment, EU policies regarding tourism are addressing the sector, to which much attention has been paid in the last decade. Most of the resulting documents have been mainly oriented to employers. While flexibility and, in a very particular way, mobility have been considered as intrinsic features of work, their impact upon occupational identities has received little attention.

The marked segmentation of the sectoral labour market and its seasonal character pose a risk that improvements will only reach certain parts of the workforce. The rest could remain unaffected, low qualified, with no career prospects other than being called again for the next season. Improvements in one segment may bring worsening of the conditions and experiences of workers in the ‘outside’ segment. The gap between the segments is widening (the opening scissors effect).

Therefore, we think it is sensible to ask for a greater effort in promoting the importance of social dialogue at all levels and in learning processes. This seems difficult because of the fragmentation that exists, the trend towards the individualisation of labour relations, and the demands of some managers and employers to reject collective bargaining in the sector or to reduce it to an internal affair of each company. Other reasons are the burden of extra hours and economic incentives in this sector and prospects, especially in large companies, to make a career based upon exclusive fidelity to the company and the service provided.

Mobility and flexibility are intrinsic features, in a very particular manner, to working days, working hours, seasons varying with the time of the year, and so they are assumed as ‘natural’ by the workers. These aspects are not something new for them, yet they bring problems for which appropriate solutions have not been found, such as the constant issue of conciliating working time with personal and family life, with an important mix of priorities and sources of satisfaction arising from both. This, however, is ignored in training processes and causes problems for retention.

Alternatively, it is substituted by something else: working and living in this sector relies very much upon identity or the ‘call’; it draws upon ‘pride’, ‘work well done’, the ‘artisan’ service in some cases, and the mission of caring about people, common to many service professions. This is something that will increase with customers among people of higher age and with certain disabilities.

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# **Skill needs in the French hotel and catering industry: a prospective analysis based on a comparative approach**

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*The hotel and catering industry is the core activity in tourism. In order to analyse the skill needs arising in this industry, avoiding the pitfalls of using either an over-general approach neglecting the specificities of the jobs involved or an over-detailed approach neglecting the contextual information, I adopted a sociological method called ETED<sup>(3)</sup>. The American advance in the rational analysis of work in this field also provides us with an opportunity of taking a prospective look at employment.*

*In France, where the tradition of self-run hotel and catering firms is still strong, the numbers of salaried jobs available, especially those involving management skills, can be expected to increase in the near future. For more basic jobs, however, segmented managerial practices are tending to develop, generating mainly odd jobs for students and low-skilled employment for a needy labour force, and only a few positions with real career prospects.*

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In many countries, tourism is regarded as a means of developing wealth and creating employment, especially when traditional activities are on the decline. It is expected to contribute significantly to increasing GDP but identifying skill needs, especially prospectively, causes major problems due to the absence of any consensual definitions in tourism. Do tourism activities necessarily include air, rail and other modes of transport, including car rental activities? Do travel agencies work more for foreign visitors than for local inhabitants? And who are the main customers of recreation and entertainment facilities such as casinos?

The core activity in tourism is the hotel and catering industry, which includes both business and leisure tourism, as well as the everyday business and leisure activities of local inhabitants. This accounts for the specific focus in this paper.

In line with the Cedefop recommendations for the building of societal frameworks (Box 1), we need to analyse closely the employment and skill requirements in this field. The method used here was designed to avoid the pitfalls of using either an over-general approach, neglecting the specificities of the jobs involved, or an over-detailed approach consisting, for example, of

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<sup>(3)</sup> ETED – *Emploi-type étudié dans sa dynamique* (typical employment studied via its dynamic aspects).

defining the highly specialised qualifications assumed to be emerging without giving an overall picture. Taking an inter-organisational approach, comparisons were made between France and the US to develop a prospective picture based on the situation in a developed country where work rationalisation is already fairly advanced, especially in this activity.

*Box 1: Cedefop recommendations (abstracts)*

‘The challenge of globalisation emphasises the building of societal frameworks which focus on new forms of inter-organisation cooperation and alliances between enterprises and knowledge producers. In this view, the neo-liberal solution must give way to the promotion of learning by people, firms and regions and to creating appropriate learning environments’ (Descy and Tessaring, 2001, p. 23).

‘One aim, therefore, should be to develop at least those framework competences that seem likely to prove durable and to provide the best basis for subsequent further training’ (ibid., p. 27).

The approach to employment adopted here is in line with the principles of the ETED method (Mandon, 1998). The ‘typical employment’ units correspond to statistical facts, and the skills they require are often obtained by taking a two-year course certified by a diploma. Each ‘typical employment’ is described and analysed in terms of the competences mobilised (Mériot, 1998; Mériot, 2002b). This enables didacticians and teachers to design relevant training programmes and it can promote social dialogue about training, not only in terms of disciplinary fields but also in terms of highly specific actions, learning conditions and vocational objectives, which are the three prerequisites of a competence based programme.

After giving an overall definition of the field and identifying the range of occupations involved, I propose to adopt an analytical dynamic approach to the managerial practices used and to suggest some lines on which training policies could be based. Skill needs will be the main focus of this paper, however. The above quotations (Box 1) suggest the need for a simple method of identifying skills needs, using a comparative approach.

## **1. Overall aspects of the hotel and catering industry**

In France, restaurants and cafés are the industry’s main employers, providing 48 % of the jobs in the field, while hotels and accommodation of other kinds account for only 22 % of the jobs. The number of hotel and catering jobs is generally underestimated owing to the large number of canteens run by private and especially public operators: canteens actually account for 30 %

of the jobs <sup>(4)</sup>. France is the European leader in canteens, but this field, known as ‘institutional food services’, is not very visible in statistical breakdowns since it is generally classified not along with the hotel and catering sector, but in the same category as hospital, school, prison, military and other employment. Nevertheless, when the new VAT policy is applied, the predominance of canteens may decrease while the other kinds of restaurant activities such as fast food establishment are liable to increase sharply. In the US, restaurants and cafés have already generated more than 74 % of the employment in this sector, while hotels and accommodation of other kinds account for 16 %, and canteens only 10 % <sup>(5)</sup>.

Placing French institutional food services in the same category as the hotel and catering industry accounts for nearly one million jobs. More than one-third of the restaurants are traditional-style and only one-quarter are fast food restaurants or cafés. Serving traditional-style meals to customers tends to be associated with the idea of traditional employment, but this does not give any definite idea about the place where the cooking is organised: on the spot or by external food production firms. As in many other service-based sectors, the staff employed are becoming less qualified, since most restaurants are tending to reduce their prices to attract the less affluent customers.

If we include institutional food services such as canteens in the hotel and catering sector in the US, the total number of jobs in that sector is nearly 10 million (although there are only about seven times more inhabitants). Only half of the restaurants give table service, which is less commonly provided than in France because of the growing numbers of limited-service eating places and take away shops. Only one-tenth of all the companies with more than 100 full-time employees provide eating facilities for their staff, who have to find cheap, fast ways of getting their daily lunch themselves.

The US has 2.6 times fewer hotels and 1.5 times more restaurants than France. The hotel trade is much less developed than the catering industry and generates fewer employment opportunities. However, on average, Americans take one out of every five meals outside their homes, which is nearly twice as often as the French.

Another important feature of employment in this sector is the fact that in France, 25 % of the hotel and catering staff are self-employed, compared with less than 5 % in the US. Catering is still perceived as an opportunity available to people of all ages which does not require much capital investment or many qualifications. Anyone can open a restaurant, and in the US, only some of the States require those working in the trade to take a basic training course in hygiene. But, in both countries, the development of hotel and restaurant chains is gradually increasing the amount of wage-earning jobs available, which may come to reduce the prospects of those setting up their own business.

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<sup>(4)</sup> Business survey by the National Institute for Statistics and Economic Studies among hotels and restaurants, 1998; survey among canteens by Gira-Sic, 1997.

<sup>(5)</sup> The survey among restaurants and hotels by Bureau of Labor statistics, US Department of Labor, 1997; the survey among canteens by the National Restaurant Association, 1998.

## **2. Range of occupations and the initial positions held**

The French hotel and catering industry is characterised by a high turnover and a workforce that is largely young and unskilled. In this respect, it tends to follow the American model: one third of the population of the US has worked in a restaurant at one time or another. The workforce at operational level is exposed to direct communication with customers and thus recruited mainly on the basis of a behavioural assessment.

In the hotel industry, the majority of the jobs involve cleaning, which can either be carried out by the staff or outsourced to specialised companies. Jobs involving personal services such as receptionists and night janitors are less numerous. Deluxe hotels also employ porters, doormen and bell-boys. Some members of the staff might manage to be promoted to supervisory or managerial posts, but the high-level jobs are increasingly reserved for those with specialised diplomas in business, accounting, management, company strategy and so on. The career prospects of operating personnel are therefore often limited, especially in reception-desk functions, making the hotel industry above all a means of entering the labour market before making a change of profession.

Catering is also a two-tiered industry. Cooks, despite their subordinate role, often have real scope for advancement. It is true that cooking is still largely the work of skilled personnel with diplomas and experience, unlike waiters and the initial hotel positions, which are often occupied by very young members of staff (under 25 years of age), who are not specialised and who are employed on a part-time basis.

For a long time, Americans viewed the hotel industry as an essentially non-specialised sector of activity associated with the cleaning and personal services, while food services were classified as part of retail food. Since 1997, hotel and catering activities have been included in the same services sector, under the heading of accommodation and food services. This change is more indicative of a concern for harmonising international statistics sources than linking up the two activity fields and their common competences. Nonetheless, the way the workforce is managed in hotel and catering activities is fairly similar in the US to what goes on in France: apart from the supervisory staff, who are generally properly qualified and employed full time in the US, the only competences really recognised in that country are those involved in culinary production. American employers even tend to maintain a three-tiered system in managing their operating personnel.

Two distinct populations occupy the subordinate posts. There is a large population of students who work part-time on an hourly basis to help pay for their expensive studies, and who generally do jobs which bring them into contact with the customers. Then there is a population consisting mainly of minority groups who hold less prestigious full-time jobs doing work such as cleaning and caretaking in the hotels and dishwashing, basic cooking and baking in food-serving establishments.

Only the large hotels and gourmet restaurants engage staff with a reasonably good level of general training to work as waiters or in other service jobs, while insisting that these

employees are ‘educated but not skilled’ in the jobs they hold. They do, however, require their young cooks, whose expertise is recognised, to have a specialised diploma. The occupation of cooks is becoming more commonplace in the US. Restaurant chains in particular, whose menus are often based on a single theme, require their cooks to produce only standardised dishes for which only a few set techniques are required, and these can be quickly learned. The numbers of short-order and fast-food operators’ jobs are therefore increasing sharply and they are now equal to the numbers of jobs held by traditional cooks.

### **3. Managerial trends and qualifications prospects**

Apart from managerial positions, most of the jobs in the hotel and catering industries consist in serving food (fast food operators and waiters), cooking and housekeeping. In France, these three main jobs (cooks, waiters and housekeepers) are estimated to account for 230 000, 170 000 and 90 000 people, respectively, but the last figure is an underestimate: many hotels use outsourced workers to clean their rooms and buildings (outsourced cleaners working for industries of all kinds have been estimated to number 360 000) <sup>(6)</sup>. Another important fact is that cleaners, and especially waiters, are often employed on a part-time basis. These figures are not as meaningful as the full time employment figures (full-time work is the norm in the case of French cooks).

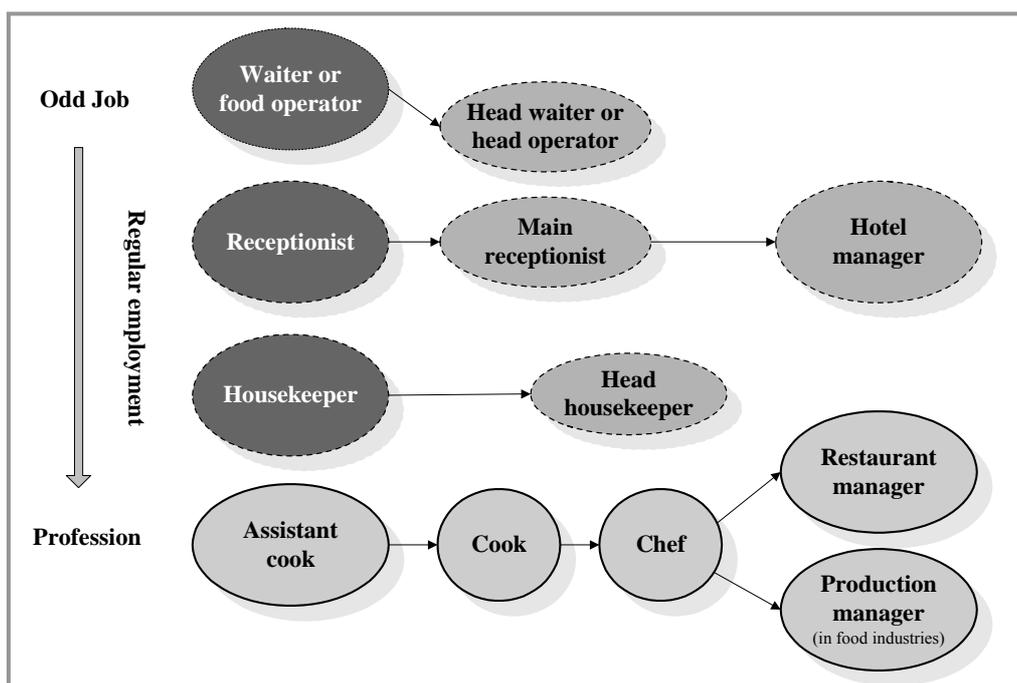
One specific of the hotel and catering industry is its use of category-based workforce management, which is particularly widespread in the US, reflecting the value attached by employers to skills. This system may increase the inequalities in terms of opportunities for promotion (Figure 1):

- (a) cooks, whose skills are recognised (they are required to have initial training or relevant work experience), are considered in human resource management practices a profession with regular opportunities for promotion;
- (b) housekeepers and cleaners, who are not specifically trained for the hotel and catering industry and often include members of unqualified minority groups, often get regular employment with little opportunity for promotion;
- (c) waiters, fast-food operators and sometimes hotel receptionists are often only doing odd jobs, which are taken by students and newcomers who will soon be leaving the hotel and catering industry.

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<sup>(6)</sup> National Institute for Statistics and Economic Studies (INSEE) business survey 1999.

Figure 1: Typical occupations in hotel and catering industries



These managerial practices are typically American because France still has a relatively small number of wage-earning students (only 10 % of those in the 15-19 age group take jobs, as compared with 50 % in the US). But the downgrading of some jobs in the French culinary professions and the tendency for these jobs to be increasingly taken by unskilled recruits is already gaining ground, especially among large catering firms in urban areas.

#### 4. A critical look at training policies

French hotel staff training, which started off mainly in the context of the luxury hotels and was then extended, began with a large number of fields which were basically intended to satisfy a prestigious, independent hotel and catering industry. Over the past 30 years, this training system has been restructured around a few basic fields: cooking, table service and hotel management. Recently, moreover, its level has been improved to meet management requirements of hotel chains and catering companies providing services that are often standardised but relatively diversified in range, thus reaching a wider range of clientele. Culinary education is still dominated by an artistic ideal, however, in the case of both the initial types of vocational training, which begin at around the age of 15 (*CAP, certificat d'aptitudes professionnelles/vocational aptitude certificate* and *BEP, brevet d'études professionnelles/vocational studies certificate*). This idealistic picture may explain the dissatisfaction frequently felt by cooks when they actually enter the labour market and discover very different professional realities.

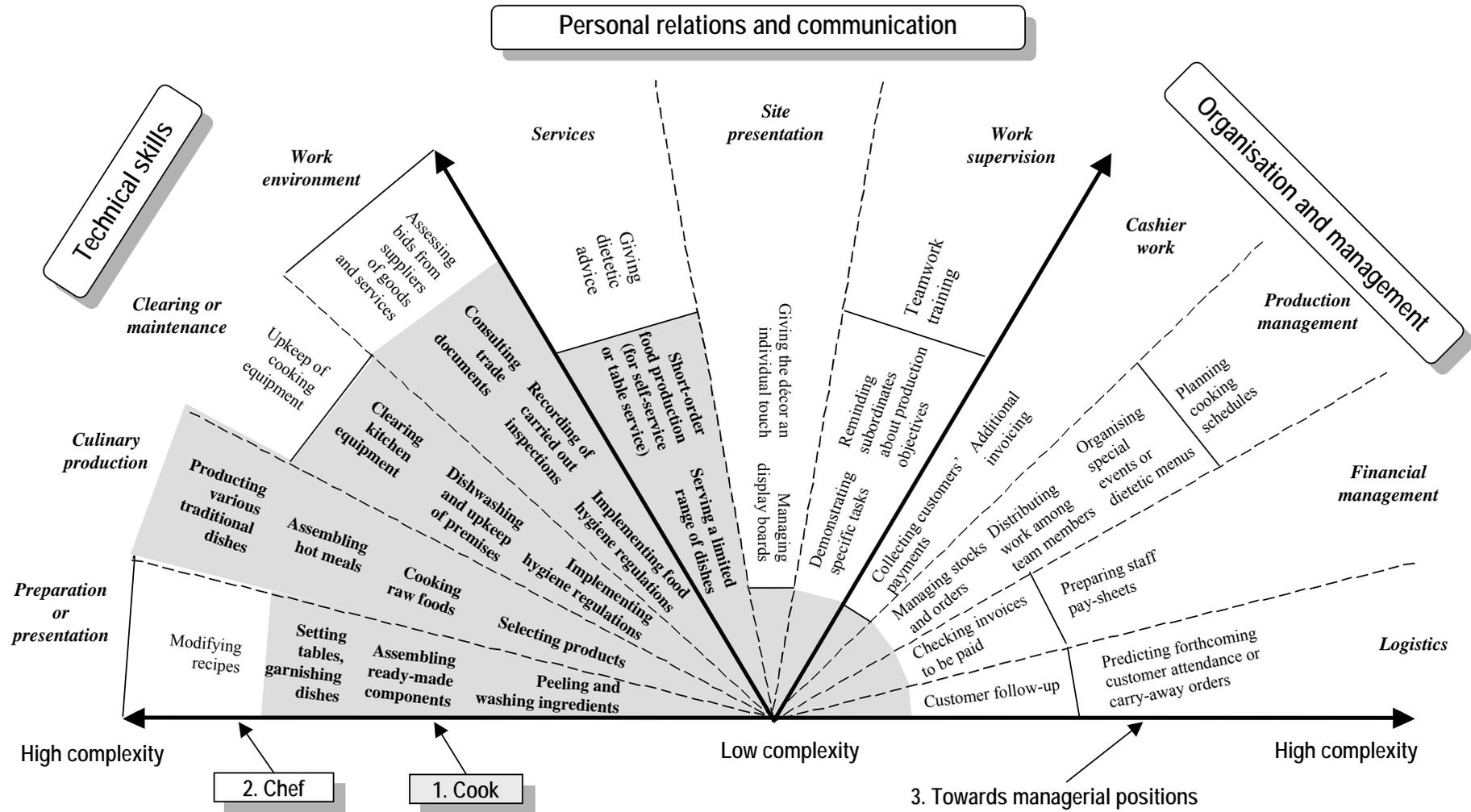
The populations of France and the US both include the same proportion of high school graduates, currently totalling 62 %. But the American educational system is more oriented than the French to higher-education diplomas. In the US hotel and catering industry, however, there is no real professional recognition for low-level operational fields such as cleaning, food service or assembly cookery (which consists of producing simple food preparations using semi-prepared products supplied by the food processing industry). Specialisation comes into play only after the first two to four years of higher education and the possibilities are therefore fairly limited: they include only the culinary arts and hotel management. These are generally recognised in terms of job status. Full-time posts are more frequently available with better career prospects and wages are more attractive. Some hotel schools subsequently propose narrower managerial fields of specialisation, distinguishing, for example, independent hotel management from that of chains, and restaurant management from that of canteens, while these options do not yet exist in France.

Despite the differences between these two educational systems, the structure of employment is similar in both countries. With the exception of gourmet cooking, the traditional sector is still fairly indifferent to most diplomas and on-the-job training is generally preferred. In contrast, there is great demand in the hotel and restaurant chains for higher education graduates. These chains are more widespread in the US, where they represent 27 % of the restaurants and 20 % of the hotels and employ half of the industry's employees. In France, less than 4 % of the restaurants and only 7 % of the hotels belong to chains. Restaurant activity is, therefore, still being carried out in France on quite a small scale, and most of the restaurants are SMEs. Only the canteens generally belong to very large structures, with several thousand employees each.

In both countries, those working for chains and large employers generally have stronger trade unions and better conditions of employment, with possibilities for promotion to supervisory and management posts. In France, however, apart from these advantages, working for chains which provide such run-of-the-mill services is viewed as so socially degrading and technically deskilling that these establishments often have difficulty in recruiting professional cooks.

French professionals are so attached to the image of gourmet cooking that they are more sensitive to the socially prestigious nature of the services provided than to the objective working conditions involved. In fact, the technical contents of their jobs often mean that comparable skills are required of cooks and chefs, whether they are working in restaurants or canteens (Figure 2). In a trade that counts on its traditional skills and the personal commitment of its individual members, the move to work in canteens and hotel or restaurant chains tends to be perceived as a 'comfortable' decision, but one that cannot be reversed. The French educational system often describes the culinary industry as a prestigious, creative, artistic activity rather than an efficient commercial activity serving a broad public. On the other side of the Atlantic, working in this sector is simply viewed as a passing event in the context of a constant process of occupational mobility.

Figure 2: From cook to chef: activities and skill requirements



## 5. Conclusion

For the last 35 years, France and the US have been carrying out competence transfer in the hotel and catering industry. France has been exporting its gastronomic expertise and receiving in return, not without some resistance, hotel and catering chains from which it has learned new management methods and a new approach to serving large numbers. Nowadays, the chains are improving their foothold in both countries. The main area where growth is expected to occur in France is in the fast-food outlets, at the very time when these are slowing down in the US in favour of restaurants providing moderately priced table service.

France, where the tradition of self-run enterprises still predominates in the hotel and catering industry, will probably see an increase in the numbers of wage-earning jobs available, especially those involving supervisory, management and marketing skills. As far as the more basic jobs are concerned, segmented managerial practices are tending to develop, generating odd jobs for students, low-skilled employment for a needy labour force and only a few positions with real prospects for career advancement. The American advance in this area thus gives us an opportunity of taking a prospective look at employment, while recognising France's seniority in the constitution of the various occupations and hotel management training.

But can we expect to change the quality of employment and managerial practices simply by improving training programmes? Or can we dream about achieving a better social dialogue in a field still dominated by SMEs? Nowadays, the work available in the main part of the tourism sector, the hotel and catering industry, is mainly for complete beginners who want to discover this sector without having any long-term expectations. Even skill shortages may be difficult to solve by providing stable employment to those who have already decided to leave this field after their first professional experience. In view of this situation, might it not be possible for vocational training to take the shortness of this initial period of professional experience into account, by giving students a broader general knowledge of fields other than tourism? This could help to prepare them for their future employment (in administration, business and sales, information technology, etc.). Especially in the food sector, why do we still train large numbers of students for one or two years to become waiters or receptionists, knowing that they will not have access to these jobs any longer after the age of 30 or 35?

Analytical and operational approaches using tools such as the framework proposed here can often help to trigger a consensual social dialogue about training programmes and policies between the actors in vocational training and employment. In the context of new lifelong learning expectations, this should make it possible for workers who wish to evolve to discover what they have learned from past experience and what their future opportunities for promotion may be, as well as pinpointing their further training requirements and planning their own pathways.

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# General trends and skill needs in tourism in Canada

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*Tourism in Canada accounts for close to 11 % of total employment. In spite of an occasional decline caused by various political, economic, medical and natural events, it is anticipated that the country will face a labour shortage in key sectors, aggravated by the staffing needs attributable to the 2010 Olympics. Other factors that contribute to this situation are retirements within the baby boom generation, forcing other industries to compete for the all-important youth market. In this competition, the labour practices and image of the tourism industry as an employer will play increasingly important roles.*

*The Canadian Tourism Human Resource Council has established national occupational standards that describe the skills, knowledge and attitudes necessary for competent performance in a specific tourism occupation, using subject experts. Professional certification has also been pursued. The hospitality talent network has created even more detailed job profiles that allow for great variety in job descriptions and can be an excellent way of tracking changes in occupations.*

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## 1. Tourism in Canada

Tourism in Canada is an important and growing industry, in spite of temporary setbacks between 2001 and 2003. Generating over USD 50 billion in revenues and accounting for 10.7 % of total employment in Canada, the industry has registered growth above the national average for the past 20 years. A series of events, starting on September 11, 2001 and culminating in 2003 with the outbreak of SARS <sup>(1)</sup>, west Nile virus, massive forest fires, floods and hurricanes, led to a decline in those years. SARS alone has been estimated to have caused over USD 1 billion in losses in the six major Canadian cities in 2003. However, strong growth in the order of 8-10 % until 2006 is anticipated to reverse that trend. Thereafter, growth in the industry is expected to slow down to 1-2 % per annum by 2015. Since the fall in employment was considerably less than the fall in revenues, because businesses were reluctant to shed their workforce, employment growth will only be 2-2.5 % until 2006, falling to about 1 % per annum over the next decade. However, the Olympic Games, scheduled for the winter of 2010 in British Columbia, and its attendant major construction projects will put significant pressure on employment growth during 2008-10.

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<sup>(1)</sup> Severe acute respiratory syndrome.

Total direct and indirect employment in the tourism industry in 2003, by sector, stood as follows (Table 1):

*Table 1: Direct and indirect tourism employment in Canada, 2003*

Food and beverage service	766 100
Recreation and entertainment	379 400
Transportation	272 300
Accommodation	206 900
Travel services	41 200
<b>Total</b>	<b>1 665 900</b>

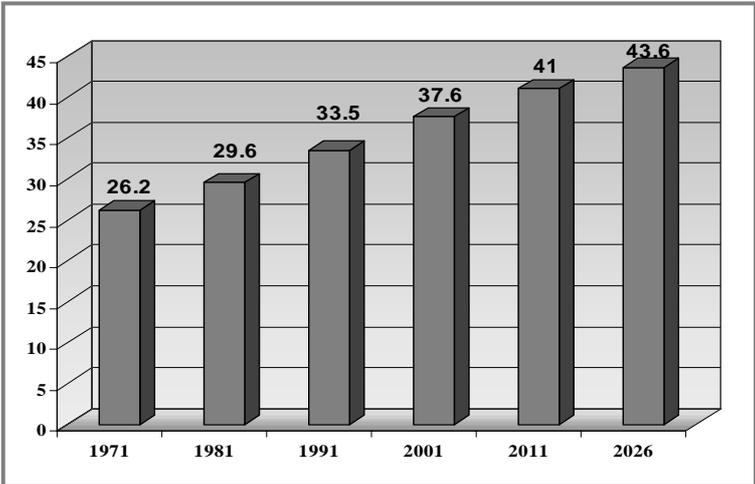
## 2. Skill shortages and their causes

Three occupational categories in particular are expected to encounter skill shortages over the next decade:

- (a) managers in food service and accommodation,
- (b) chefs and cooks,
- (c) occupations in food and beverage services.

While the shortage in managers will be quite severe, exacerbated by the demand generated by the Olympic Games, it will ease after 2010. In contrast, the shortage in chefs, cooks and other occupations in food and beverage services will be much less severe but longer term. Accounting for 46 % of total employment in the industry and heavily dominated by a workforce that is under 25 years old, the food and beverage sector is particularly impacted by the ageing of the Canadian population, one of the most severe in the world and exceeded only by that encountered in Germany (R.A. Malatest and Associates, 2003). The median age of Canadians stood at 37.6 in 2001, above the average for developed countries at 37.4, and is expected to increase rapidly to reach 43.6 by 2026 (Figure 1), based on current trends.

*Figure 1: Median age of total Canadian population (1971-2026)*



Source: R.A. Malatest and Associates, 2003, p. 5.

This trend raises a dual concern for tourism. The industry has a much lower percentage of workers aged 45 and over at 22 %, compared to 40 % for the goods-producing sectors and 35 % for other services-producing sectors. While this means that the industry will not be confronted directly by the significant number of retirements anticipated as a result of this trend, it reinforces its reliance on young employees. Indeed, as other sectors attempt to replace their retirees, the industry will face huge competition for its prime labour market, namely workers aged 15-24 years old. This segment currently accounts for 46 % of the workforce in the tourism-related sectors, compared to 13 % for the goods-producing sectors and 19 % for other services-producing sectors.

This competition will increase considerably, so that the industry faces not only a recruitment problem, but also a challenge in retaining these young workers. Some of the major reasons for the increasingly severe retention problems faced by the tourism industry are closely linked to the ebbs and flows of its business cycle. Seasonality, reinforced by the academic school year, heightens the peaks and troughs even further. This leads to a substantial number of part-time, temporary and casual workers in the industry. Much of this is beyond the control of the operators, but the working conditions – notoriously difficult, especially for the low skilled, front line workers – cause many young workers to leave the industry when given an opportunity elsewhere. Other employment practices, such as last minute scheduling of hours while expecting workers to keep themselves available, and sending them home early when not required, contribute to this effect..

When it comes to recruitment, the image of the industry, largely shaped by its retention problems as well as the notorious salary and wage disparity with other professions, even at more senior levels, contributes greatly to its difficulties. In addition, the skills of workers in tourism are easily transferable and much prized by other industries, who are willing to pay for them. As a result, a recent study has shown that only 50 % of tourism graduates in the labour market are actually working in tourism (CS/Resors Consulting and Bird, 2002).

Recruitment and retention difficulties, coupled with insufficient internal efforts to train and develop staff, result in internal skill gaps of varying severity, depending on the employment practices of individual organisations. Skill gaps have been shown to be most severe for the following:

- (a) information technology skills;
- (b) literacy and numeracy;
- (c) communication/presentation skills;
- (d) customer handling/service;
- (e) problem solving and critical analysis;
- (f) leadership skills;
- (g) financial management and cost control;
- (h) project management.

These skill shortages cannot be addressed through traditional forms of education because, as Michael Riley (1995 as quoted in CS/Resors Consulting and Bird, 2002) has pointed out, the tourism industry has a weak internal market, that is to say that:

- (a) few professions require certification of any kind;
- (b) pay and promotion have a tenuous link with credentials;
- (c) few occupations have set educational requirements for employment;
- (d) many graduates from non-tourism programmes are hired into tourism occupations.

The search for alternate sources of workers, whether through immigration, or by tapping into populations that are underrepresented in the tourism workforce such as First Nations people, disabled, older workers (particularly early retirees) or social assistance recipients, has only had limited success.

### **3. Actors in the human resource sector**

Canada's political system, as set up by the British North America Act of 1867 and later confirmed in its repatriated Constitution, splits the human resource policy function between the federal and provincial/territorial governments. The recently formed federal department Human Resources and Skills Development Canada is responsible for several partnership initiatives and funding programmes, including those for literacy, skills development and interprovincial standards (Red Seal). It also attempts to harmonise its employment initiatives with provincial ones to ensure that there is no unnecessary overlap or duplication. In addition, the Government of Canada's Sector Council programme works to enable partnerships that address skills and human resource issues by establishing, developing and supporting national partnerships and the capacity of partners to address both pressing and emerging skills and human resources issues (HRSDC, 2004). One of these councils was set up specifically to address the needs of the tourism industry (discussed below).

In addition, the federal government transfers considerable amounts of funding to the provinces and territories to support education, particularly at the post-secondary level and for university research.

Few professions require certification of any kind and, where they do, the requirements are set at the provincial level. This is the case for apprenticeship programmes, such as those that apply to chefs and cooks, although these are not mandatory. However, travel agents and health related occupations, such as massage therapists that work in spas, must meet certain licensing or certification requirements. Post-secondary education is made up of two types of publicly funded institutions: colleges and universities. Colleges have historically offered two- and three-year diploma and certificate programmes, although the province of Ontario has recently introduced four-year applied degrees offered through colleges that are very similar in nature to some of the university degrees. Universities offer not only four-year undergraduate

degrees, but also master's and doctoral programmes. In addition, there are a number of private training institutions that offer a wide range of technical and skill-based programmes. However, in tourism, most training is done by the industry itself, particularly for front line employees.

#### **4. The Canadian Tourism Human Resource Council**

The Canadian Tourism Human Resource Council (CTHRC) is a national non-profit organisation that promotes and enhances professionalism in the Canadian tourism industry. Similar to other 28 sector councils, it is made up of a network of partners. The CTHRC brings together representatives from tourism businesses, labour unions, provincial, territorial and national associations, education/training providers and government to address the tourism industry's human resource needs. It also works closely with its partners, the provincial/territorial tourism education councils across the country (CTHRC, 2004a).

The CTHRC was set up as a national organisation that facilitates and coordinates human resource development activities which support a globally competitive and sustainable Canadian tourism industry. Its objectives are to:

- (a) lead tourism human resource development in Canada;
- (b) set a national vision and direction;
- (c) coordinate and facilitate establishment and maintenance of national occupational standards, training resources and professional certification;
- (d) promote a training culture;
- (e) act as advocate nationally and internationally on tourism human resource issues;
- (f) support and encourage efforts to attract people to establish careers in tourism;
- (g) act as a clearing-house and forum for information sharing and research.

#### **5. National occupational standards and certification**

Among the activities of the CTHRC is developing national occupational standards. These are documents describing the skills, knowledge and attitudes necessary for competent performance in a specific tourism occupation.

Standards are a job analysis or job profile that contains criteria-based performance statements, knowledge requirements of the job and contextual information. Standards are benchmarks against which occupations (or a set of skills) and the proficiency of people in those occupations are assessed.

Many of the national occupational standards also contain essential skills profiles associated with the specific occupation. Essential skills are ‘enabling skills’ or underpinning skills that provide a foundation for learning occupation-specific skills and enhancing people’s ability to adapt to workplace change. Essential skills have been defined by the department of Human Resources Development Canada as follow (CTHRC, 2004c):

- (a) reading text;
- (b) document use;
- (c) writing text;
- (d) numeracy;
- (e) oral communication;
- (f) thinking;
- (g) problem solving;
- (h) decision-making;
- (i) job task planning and organising;
- (j) significant use of memory;
- (k) finding information;
- (l) working with others;
- (m) computer use;
- (n) continuous learning.

Since each job profile contains criteria-based performance statements, the knowledge requirements of the job, and contextual information, they can serve as effective benchmarks for assessments to be used by individual employers and education/training providers.

Subject matter experts are essential to setting a national occupational standard, since they can describe their job better than anyone else. ‘The subject matter experts are recruited from across Canada, representing the complete range of the occupation. These experts participate in a formal job analysis process. The process begins with a profile meeting which is drafted and then sent to a larger group of subject matter experts and other stakeholders for input. Additional data to support the draft Standards is obtained through a variety of approaches such as observation, interviews, literature reviews, and surveys. Once changes are made, the Standards undergo a formal validation process by the industry. This process includes translation, editorial and validation procedures. The process results in measurable, competency-based standards designed by industry’ (CTHRC, 2004c). To date, over 50 national occupational standards have been developed, ranging from door staff to golf club general manager. Each one addresses portable skills that are both basic and workplace specific, and many lead to formal certification.

Taking the example of front desk agent, the national occupational standard covers the following topics:

- (a) interpersonal skills;
- (b) guest services;

- (c) reservations and sales;
- (d) arrivals and departures;
- (e) departmental operations;
- (f) safety and security;
- (g) legislation.

This standard, like many others, leads to professional certification. While not required to work (i.e., it is not a regulation or control practice), it is an industry recognised credential of an employee's competence. 'The CTHRC Certification credential is awarded to candidates based solely on achieving a successful pass result on the certification examinations and on having met the specified experience requirements. The certification examinations are built directly from the National Occupational Standards following generally accepted testing principles. The National Occupational Standards have been built with industry input, and are designed to indicate the level of performance required to be recognised as Certified according to CTHRC guidelines' (CTHRC, 2004b).

## **6. HTNCareerNet.com**

The hospitality talent network, referred to as HTNCareerNet.com, is a job website that builds on the skills and qualifications identified through national occupational standards. Accessed through the website of its partners, including educational institutions, it has over 1 000 pages of job specific profiles, making it probably the most comprehensive job matching service in the world today. While employers can post available positions using the unique profile and matching technology that automatically pinpoints, ranks and compares the top candidates from a global talent pool, employees can create detailed profiles, receive automatic e-mail job notification, and monitor employer interest.

It is possible to view the list of profile attributes by entering the website through one of the partner portals <sup>(2)</sup>. After creating a login name and password, and completing the employer profile, a new profile can be created.

A position can then be specified (e.g. guest services agent) and a detailed profile completed. By entering the position name in the keyword search and selecting the specific role (in this example, both would be 'guest services agent'), a number of alternate role names appear which allow for greater specification of the tasks the potential candidate would be expected to fill (Figure 2). The level of experience to complete the job successfully can also be specified.

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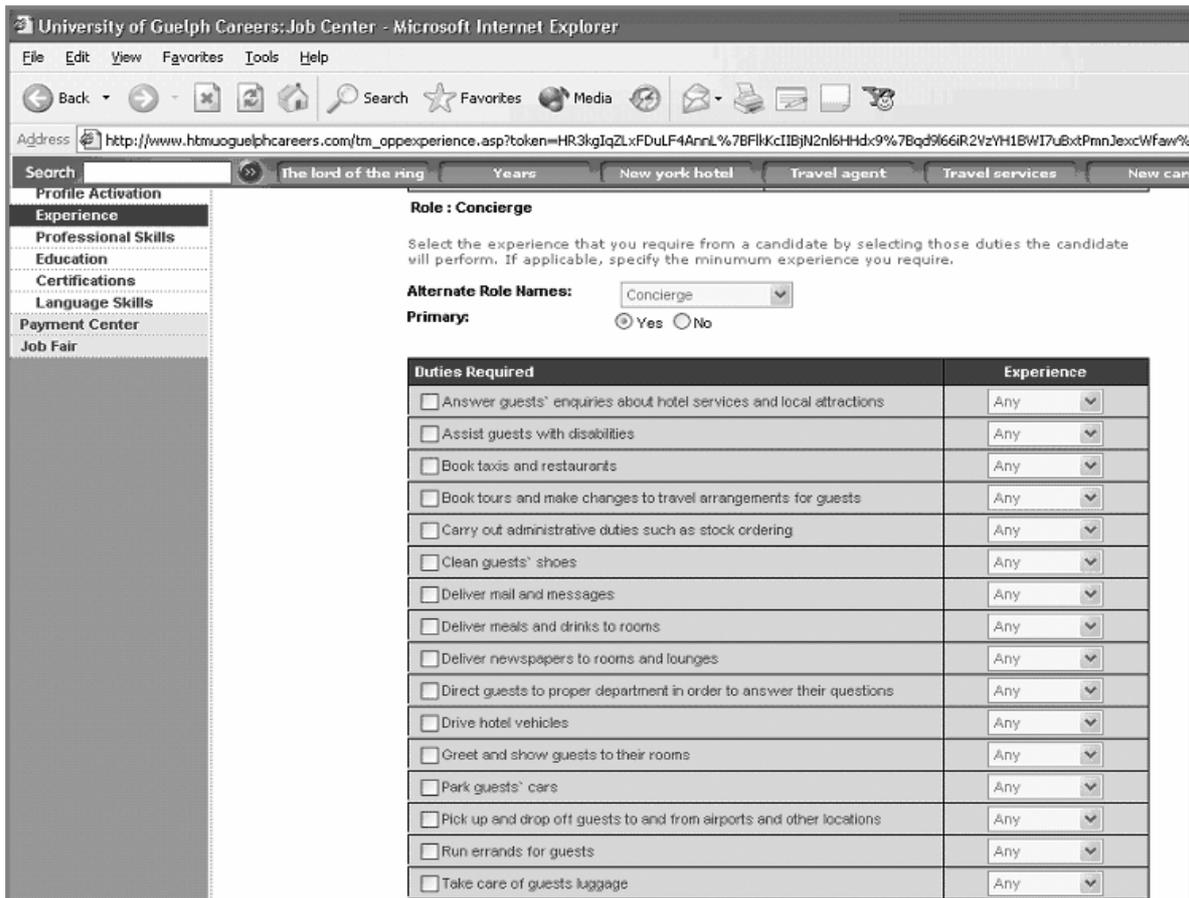
<sup>(2)</sup> For example: <http://www.htmuoguelphcareers.com/login.asp?CE=E> [cited 15.10.2004].

Figure 2: Defining the position



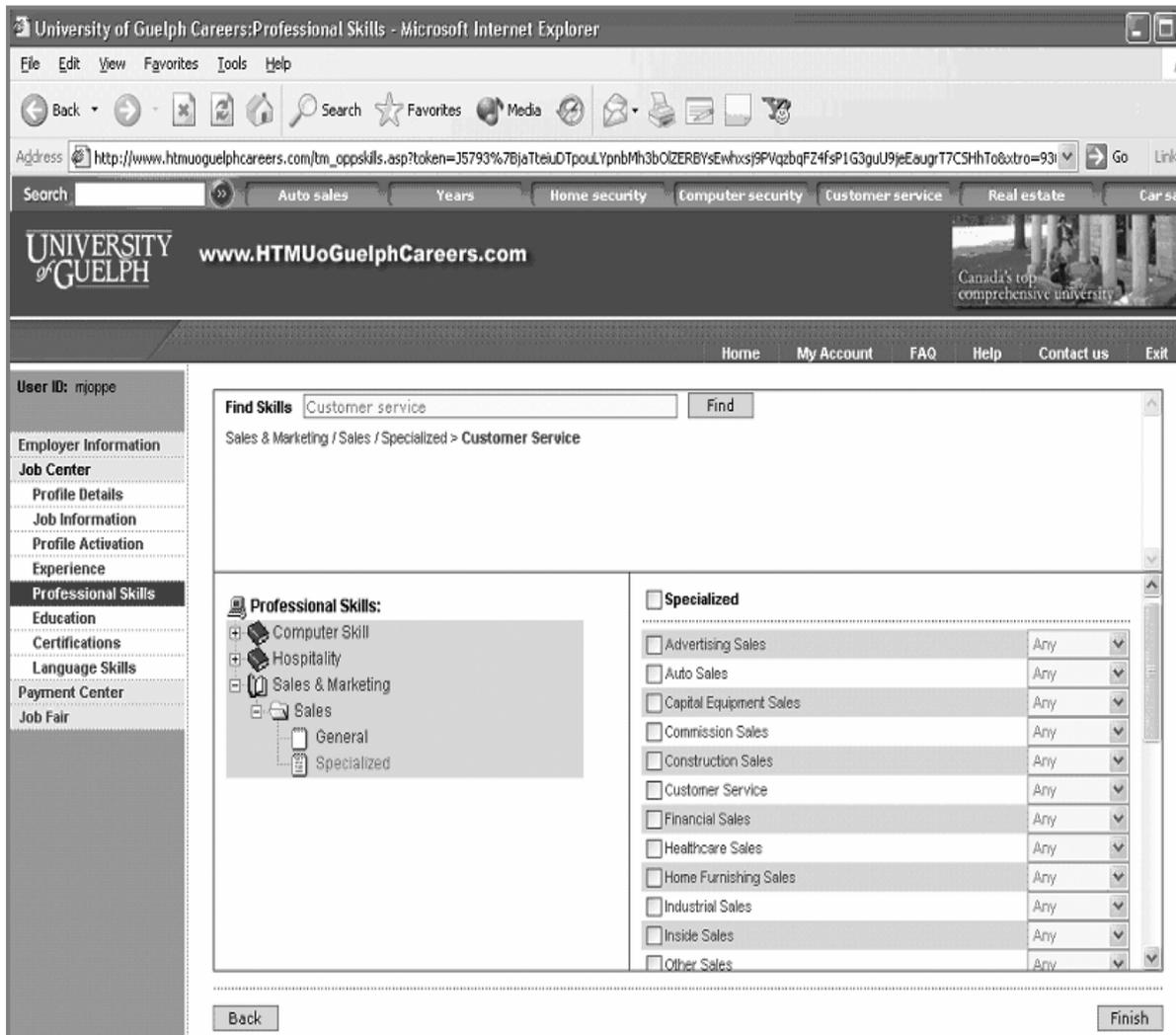
The next window allows for an even greater precision in stipulating the duties required as well as the experience for each one (e.g. 'concierge' in addition to 'guest service agent') (Figure 3).

Figure 3: Duties and experience



Other duties and roles can be added, as appropriate. Specific skills can be added next, for example ‘customer service’, which produces a long list of related professional skills. Each one again allows for the experience level to be specified (see Figure 4).

Figure 4: Skill levels



Education and certifications required, as well as language skills, can also be specified in a similar manner.

## 7. Research in British Columbia

In Canada, the province of British Columbia has probably the longest history of focusing on professionalism in tourism. Tourism is a key sector of its economy, to a greater extent than in many other parts, and the British Columbia government has set aggressive growth targets for this sector. With the decline in its primary industry, tourism is seen by many as the best option for growth.

British Columbia also has the most advanced integrated education system in Canada, providing a seamless transition from one level of education to the next. It has also been the

province that has been most committed to occupational standards and certification. As a result, getting a better understanding of the trends, causes and systemic obstacles to improving the professionalism of the industry has been a major focus of its policy-makers. Recent research has also focused on the potential impacts of the 2010 winter Olympic Games, to be held in Vancouver and Whistler.

Although province-specific, there is little doubt that the following findings would apply largely to all of Canada. Canada-wide research will unfortunately not be available before late 2004.

British Columbia conducted a survey of 1 319 employees hired in 16 national occupational categories which showed that only 23 % came from tourism related programmes. The exceptions were chefs (69 %), cooks (52 %) and outdoor recreation guides (47 %) (CS/Resors Consulting and Bird, 2002). Key tourism occupations were also shown to have a workforce with significantly lower educational attainment than the general population. Only a few occupations had educational levels that exceeded the mean for all occupations (these are mentioned in Table 2).

*Table 2: Educational levels for key tourism occupations*

<b>University (all occupations: 17 %)</b>	
Conference and event planners	27 %
Tour and travel guides	19 %
<b>Some post-secondary (all occupations: 45 %)</b>	
Travel counsellors	67 %
Tour and travel guides	60 %
Chefs	59 %
Conference and event planners	58 %
Ticket and cargo agents (not airline)	57 %
Programme leaders/instructors in recreation/sport	57 %
Hotel front desk clerks	55 %
Food service supervisors	50 %

*Source: CS/Resors Consulting & Bird, 2002*

Similar to studies in other parts of the developed world, general training gaps were identified. These skills were considered essential across all occupations and include:

- (a) communication: reading, writing and oral skills;
- (b) customer service,
- (c) numeracy;
- (d) problem-solving;
- (e) decision-making;
- (f) risk management;
- (g) finding information;
- (h) job task planning and organising;

- (i) working with others;
- (j) computer use;
- (k) practicing sustainability;
- (l) language proficiency.

In addition, there were profession specific training gaps, particularly related to high growth tourism sectors:

- (a) adventure tourism/outfitting related;
- (b) ecotourism related;
- (c) health and wellness related;
- (d) casino management;
- (e) entrepreneurship.

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## **Part II:**

### **New skills and new occupations in tourism**



# Trend qualifications in German tourism

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*Training adapts to changing job profiles and working process requirements. It evolves within a turbulent atmosphere and is directly or indirectly dependent on numerous interlocking variables and trends also undergoing constant change. Shifts occur in technology, business organisation, the political and economic environment (e.g. the progress of globalisation) and in the needs of individuals and society. Certain developments, the Internet for example, can revolutionise entire sectors within a few years, triggering massive demand for new skills.*

*The project 'Determining trend qualifications as a basis for early recognition of qualification developments' draws its findings from surveys of trendsetting companies in selected industries. One field of enquiry is the tourism sector. Tourism creates more employment and demand for new skills and qualifications than almost any other economic sector in Germany. This article presents developments and research findings on trend qualifications in tourism. Taking the social context as a starting point, we discuss related changes in employee skills and qualifications. We describe what trend qualifications have emerged for the case study of tour representative services. The project 'Determining trend qualifications as a basis for early recognition of qualification developments' forms part of FreQueNz, the early identification initiative run by the Federal Ministry of Education and Research (BMBF).*

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## 1. Introduction

Swift scientific and technological advances are creating new demands on employees and necessitating rapid skill enhancements. To keep pace, the Federal Ministry of Education and Research launched the Initiative for Early Identification of Qualification Needs and called for implementation of an appropriate early warning system. The aim is to identify skill need trends as soon as possible, particularly at the microlevel of work practice. The project *Determining trend qualifications as a basis for early identification of qualification developments* is part of the initiative, which has been using 'sector scouting' to examine various fields since 1999. The tool has been applied to retailing, IT/multimedia, financial services, life sciences and wellness and tourism. This article focuses on determining trend qualifications in tourism, particularly at intermediate level (Abicht et al., 2002).

## **2. Qualification developments in tourism: field of enquiry and approach**

### **2.1. Sector scouting: a tool for determining qualification requirements at the microlevel of individual enterprises**

The qualitative study conducted by isw on early identification of skill and qualification developments is based on the hypothesis that new qualifications – so-called trend qualifications (Abicht et al., 1999, p. 11 et seq.) – can theoretically be recognised and described in the embryonic stage. Trend qualifications describe training requirements which are often only just beginning to emerge, but which may herald an up-and-coming demand trend. Such trend qualifications within the tourism sector were both subject and goal of the research.

New skills or trend qualifications develop in the course of specific work processes, particularly in the wake of innovative technological, organisational and customer-oriented changes, i.e. at the microlevel of enterprises. Studies of tourism focused on:

- (a) innovative enterprises, in such areas as travel agencies;
- (b) key suppliers, such as booking and reservation software providers;
- (c) sector insiders and experts, e.g. industry associations.

Trendsetting companies, key suppliers and experts are specially selected and committed to active participation in the project.

The emergence of new qualifications in trendsetting companies is almost a natural process, i.e. employment areas and operations within tourism evolve and automatically call for new or adapted skills from employees. Since companies tend to express concern about the lack of suitably qualified workers rather than perceive the appearance of a new type of requirement, open dialogue between researchers and enterprises is a key to identifying trend qualifications.

Describing and analysing work processes is a more effective way to track trend qualifications than traditional survey methods. Enterprises often only learn or recognise that their activities are innovative and that they are themselves trendsetters when their evolving processes are scrutinised.

The underlying research approach (Abicht et al., 1999, p. 36 et seq.; Abicht et al., 2000, p. 45 et seq.) combines stringent logic with experience-based intuition. A strict methodical sequence involving various investigation levels allows eventual identification of concrete trend qualifications. Following the chaos theory (<sup>1</sup>), individual stages of the procedural model are

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(<sup>1</sup>) The search for a scientific basis for certain characteristics of the evaluand (trend qualifications) – infinite complexity, dependency on descriptions of system elements from the observer's perspective, holistic nature, not divisible into separate elements, non-linear processes in the development of training which cannot be reduced to mere cause-and-effect relationships – has led to an application of chaos theory. The central

understood as complex dynamic systems which interact in many different ways. Specifically, these are:

- (a) social systems (e.g. that of the Federal Republic of Germany) as the top investigation level; trends which accompany the development of a social system and affect corporate systems are examined in the light of expertises and publications, particularly findings on trends and futurological research;
- (b) corporate systems (tourism companies in Germany) as components of the social system;
- (c) operating systems (e.g. corporate departments such as sales and marketing of tourist products and services, etc.);
- (d) occupational systems encompassing the tasks of people within an operating system and the necessary credentials, knowledge and skills; examples are advising on and selling tourist products and guiding tours.

Hypotheses on potentially qualification-relevant trends result from social system investigations. The subsequent approaches for empirical research in the enterprise (corporate systems) derive from the hypotheses obtained. The empirical research in the enterprise chiefly utilises the sector scouting method (Abicht et al., 2000; Bärwald/Freikamp, 2003). This market research tool, which the authors pioneered in training research, pursues the basic principle of mobilising employees who have extensive insider knowledge and contacts within the surveyed sector and who are able independently to implement and document the prescribed empirical procedures. These sector scouts are capable of uncovering important details and nuances and elucidating complex interrelations in direct talks with sources, to empathise with their thought patterns and to blend into the corporate 'scene' to determine trend qualifications.

Further processing of the empirical data, i.e. the concrete description of the trend qualifications, their justification and classification in larger social and sector-specific interrelations, takes place in cooperation between sector scouts and experienced researchers of training needs.

## **2.2. Tourism: field of enquiry and approach**

The investigations into the sector followed the procedural concept on determining potential trend qualifications outlined at the beginning of this article. The object under investigation is approached systematically via the perusal and analysis of comprehensive specialist literature on leisure, tourism, wellness and other related topics, hypotheses from trend and futurological research, and evaluation of newspaper and journal articles (BAT Germany, 2002; DRV, 2002; FUR, 2003; Krupp, 2002; WTO, 2002).

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features of chaos theory are holistic thought and method approaches and the recognition that 'unity' lies in 'diversity', that order is only a temporary state in a world of constantly changing and interactive structures (Mittelstaedt 1997, p. 34) and that complex non-linear systems can never be predicted with any certainty in the long term and are only given as probabilities (Abicht et al., 1999, p. 27 et seq.).

The initial focus was on the following questions:

- (a) What does the term tourism encompass, and might it be necessary to limit the field of enquiry?
- (b) What societal trends influence tourism or the narrower field of enquiry?
- (c) What bearing does tourism have on economic and labour market policy?

After these general questions were answered, we studied more specific ones:

- (a) What main trends are already emerging in tourism?
- (b) Who are the trendsetters?
- (c) What qualifications already exist in tourism or the narrower field of enquiry?
- (d) What trend qualifications are already discernible?

Our investigator, who served as the main sector scout in tourism, has had many years of experience as a trainer in the cosmetics sector. Her extensive contacts with tourism insiders provided widespread access to fruitful research opportunities. She visited travel agents, tour operators, hotels, travel companies, continuing training institutions, associations, etc. A total of 75 enterprises and experts were contacted during this phase. The most important providers and trends were soon identified. It became necessary to restrict the field of enquiry <sup>(2)</sup>.

This made the empirical investigation more specific and targeted. We were able to persuade more than 30 trendsetting companies and experts to collaborate with us. Several discussions took place with most of them. Written programme concepts were evaluated and, in some cases, onsite work processes were observed. The discussions were accompanied by continuing Internet research, monitoring of daily newspapers and trade journals and participation in conferences and trade fairs. The interim findings were discussed and verified in a sectoral workshop attended by corporate partners and experts.

### **3. The social context and its impact on qualification developments in tourism**

Investigations to determine trend qualifications in tourism have demonstrated that the development of this service sector is mainly shaped by social trends such as changes in leisure time preferences, increased individualisation, demographic shifts and greater health consciousness. These trends and their impact on tourism are reflected in different products and services as well as in changing occupational profiles for people working in the sector. The article *Tourism in Germany: trends, facts and figures* (Abicht and Freikamp, in this volume)

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<sup>(2)</sup> The survey covered holiday booking and holiday design, travel guiding, business trip organising and travel agency support. The hotel sector, catering and the large segment of holiday transport (coaches, railways, airlines) were initially omitted as the subject of a separate investigation.

provides a detailed picture of social conditions and their influence on German tourist industry trends.

### **3.1. Tourism qualification trends**

The trends outlined above not only affect tourist products and services. They also have an impact on the work of tourism employees. The evolution of tourism has been constantly accelerating. New tourist trends, new technologies and the growing requirements of an increasingly individualised clientele have generated altered demands on tourism employees. Competition within the industry has become tougher. Service, and hence customer orientation and professionalism, are priorities.

According to our sources, the tourism sector lacks well-trained intermediate-level staff. Insufficient basic knowledge and skills in tourist products and services, target areas, marketing, sales, customer orientation, electronic data processing and computerised booking and reservation systems are oft-cited weaknesses. Employees also often lack interpersonal skills, particularly when advising and dealing directly with customers.

In addition to general skill requirements, every individual segment surveyed – travel bookings, holiday design, tour guiding, business trip organisation and travel agent support – has specific skill requirements.

## **4. Trend qualifications in the tourism sector**

The scopes of the new occupations and the related skill requirements identified in the study were delimited following division into the individual areas of holiday booking and holiday design, tour guiding, business trip organisation and travel agency support. The project identified the following new complex skill packages:

- (a) travel designer, online travel agent and event designer in holiday booking and design;
- (b) tour representative for people with restricted mobility, animateur and guest relations and travel services representative;
- (c) business travel manager for business trip organisation;
- (d) agency consultant for travel agent support.

### **4.1. Tour representatives**

This article has restricted its focus to a detailed description of tour guiding as an occupational field. An in-depth description of all skill packages can be found in Abicht et al. (2002, p. 44 et seq.).

Tour-guided holidays offered to various target groups, e.g. single people and lone travellers, are becoming more and more customised. Growing numbers of people are employed to

occupy, entertain and communicate with these guests. The task of tour representatives or *animateurs* on site is to help guests get to know each other, to communicate with them, ensure they have everything they need, provide entertainment, make them overcome social inhibitions, encourage interaction between holidaymakers and motivate them to participate in a range of sport and leisure activities. According to our sources, these tasks are currently being performed mainly by people who are highly motivated and good at communicating but who have other occupational backgrounds and are thus not sufficiently qualified.

Staff for this tourist service ought to have educational and psychological qualifications and creative, theatrical, communication and sports skills. Travel representatives need to be helpful, friendly, enthusiastic, independent, and communicative and to possess organisational skills, considerable initiative and the ability to foresee potential difficulties, maintain an overview and work under pressure. Additional requirements are general (job-related) knowledge and skills in their specific area of activity, such as: sales and customer advice; awareness of legal matters; familiarity with destinations, tourist products and services and extras; computer and Internet skills; ability to use various holiday booking and travel reservation software; basic educational and psychological training. Other prerequisites are business sense and skills in areas like economics, marketing, public relations, cost-benefit accounting, auditing and statistics. Skills in foreign languages, communication and presentation techniques, discussion leading and rhetoric are other essentials.

Tour guiding encompasses the following skill packages. Tour representatives accompany organised trips to provide information and coordinate the holidaymakers at the destination. They must be competent, knowledgeable contacts and advisors who can provide background information on the destination, offer guided tours, give travellers an accurate picture of the location and insider tips on sightseeing, etc. They are responsible for clarifying issues regarding accommodation, food, medical care, travellers' financial needs and events on site, and must ensure that their charges are comfortable and well cared for.

Tour representatives for people with restricted mobility accompany and support travellers on trips outside their familiar surroundings, taking their limitations into consideration (see more in Section 4.2).

*Animateurs* work in hotels, holiday clubs and complexes and at sport and leisure centres. They are contacts and entertainers for various groups. They often team up with other *animateurs*. They encourage tourists to participate in specially organised entertainments, sports events, contests, courses, etc., to get involved, have fun and enjoy themselves.

Guest relations and service representatives are primarily employed by trade fair organisers or upmarket hotels. They act as contacts and provide all-round care for guests at hotels, wellness resorts, spas, trade fairs and business occasions. Guest relations and service representatives support their customers from the point of booking right up to planning daily and evening programmes.

#### **4.2. Tour representatives for people with limited mobility**

Tour reps require increased professional and social qualifications and personal skills, particularly when the target group is older or disabled people. This clientele needs a different form of tour guiding. They require people to provide continuous personal attention from the planning stage through to onsite supervision. Planning for this target group demands high levels of special knowledge and careful preparation, as spontaneity is not feasible. For example, wheelchair users need extra-wide doors, accommodation with ramp access and/or a user-friendly lift. Tour representatives for people with restricted mobility accompany and support travellers on trips outside their familiar environment, taking the travellers' limitations into consideration. They are responsible for providing information and organising the holiday on site. Tour reps must be competent, knowledgeable contacts and advisors for the elderly, accident victims, pregnant women, disabled people or those with restricted mobility. They can provide background information on the destination, offer guided tours, give travellers an accurate picture of the location and insider tips on sightseeing, etc. They are responsible for clarifying issues regarding accommodation, food, medical care, travellers' financial needs and events on site, and must ensure that travellers are comfortable and well cared for.

In the trendsetting companies surveyed, these tasks have, until now, been performed by staff whose personal abilities and interests have equipped them with the necessary competence or who have acquired skills through experience or training. However, our project partners believe that serving this specific target group demands basic training which incorporates not only rudimentary knowledge of destinations, tourist products and travel law but also medical and nursing skills. Workers in this field require further personal skills in addition to the ones mentioned in Section 4.1. They should be patient, sympathetic, communicative and conciliatory. They should possess other basic, job-related knowledge and skills such as medical and nursing qualifications and rudiments of health, legal, social, insurance and senior citizen policy and of tourism *sans frontières* (standard norms like the German DIN system <sup>(3)</sup>, available aids, construction consultancy, etc.). Business skills are also required, as described in Section 4.1.

## **5. Conclusions and outlook**

The research to determine trend qualifications in tourism resulted in an industry report containing short descriptions of skill packages as well as the findings presented here. The skill packages have been elaborated, discussed and verified with the sources. The descriptions only contain tasks and skills which are already discernible in trendsetting companies or which corporate representatives and experts have identified. They do not claim to be comprehensive or universally applicable. The structure and division of the skill packages generally corresponds to the brief descriptions of occupational profiles, which the German Federal

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<sup>(3)</sup> DIN – Deutsches Institut für Normung e.V. (German Institute for Standardisation).

Labour Office, for example, employs <sup>(4)</sup>. We must reiterate that the specifications do not involve new occupations but constitute additional ideas and material to stimulate discussion of the existing initial and continuing training systems in the tourism sector. The study findings help initial and continuing training decision-makers in tourism, particularly the social partners, to improve existing training and update various occupational profiles. Decisions on regulating discernible or suspected skill requirements, by adapting existing initial and continuing training courses or creating new ones, remain the brief of policy-makers. These issues must be negotiated and settled by the stakeholders.

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<sup>(4)</sup> Cf. the brief occupational descriptions at <http://berufenet.arbeitsamt.de>

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# **The role of ICT in tourism and related changes in skills: electronic commerce and revenue management**

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*Tourism is a highly information-intensive industry, so information and communication technology (ICT) has a great impact on the tourism business. Electronic commerce and revenue management are heavily influenced by ICT. Changes in skill requirements in these fields are discussed in this paper.*

*Traditional tourism value chains evolved into tourism value net. In this new environment tourism professionals need skills to identify opportunities for cross-promotion, skills for finding efficient combination of distribution channels, skills for managing sales across several distribution channels and making profit out of this process. In the tourism value net, revenue management becomes as important and challenging as never before. Effective revenue management requires skills to combine several knowledge areas persistently and creatively.*

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## **1. The role of information and communication technology in tourism**

Information is lifeblood of tourism (Poon, 1993) and, therefore, ICT has a great impact on the tourism industry. ICT enables direct communication with clients and improves efficiency and effectiveness of customer service, trading and product design related processes. At the same time ICT makes competition harder and demands continuous investments.

ICT provides new tools and enables new distribution channels. It supports tourism innovations and vice versa. ICT development has created a new business environment, e-tourism. These continuous developments require new skills.

In this contribution the following two areas, which are heavily influenced by ICT development and related skill needs, are discussed: electronic commerce and revenue management.

## 2. Electronic commerce

### 2.1. Changes in tourism value chains

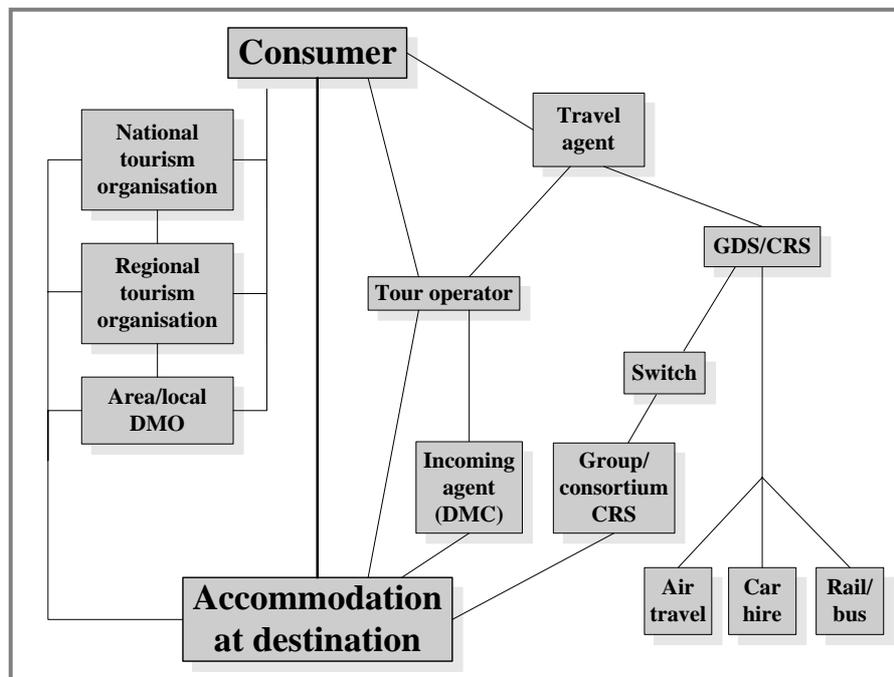
Rapid development of ICT has affected the way information is exchanged among tourism industry players. Electronic commerce (e-commerce) can be defined as a secure exchange of information, products and services via computer networks.

E-commerce can be divided into the following categories:

- (a) business to client;
- (b) business to business;
- (c) business to government;
- (d) client to client;
- (e) research to business;
- (f) business to client communication.

ICT provides tools for direct communication with clients; the Internet is revolutionising distribution and sales. The shape of travel and tourism value chains (taken here to include distribution of information as well as transactions) is changing in a fundamental way (WTO, 2001). Figure 1 provides a presentation of the traditional value chains.

Figure 1: Traditional value chains

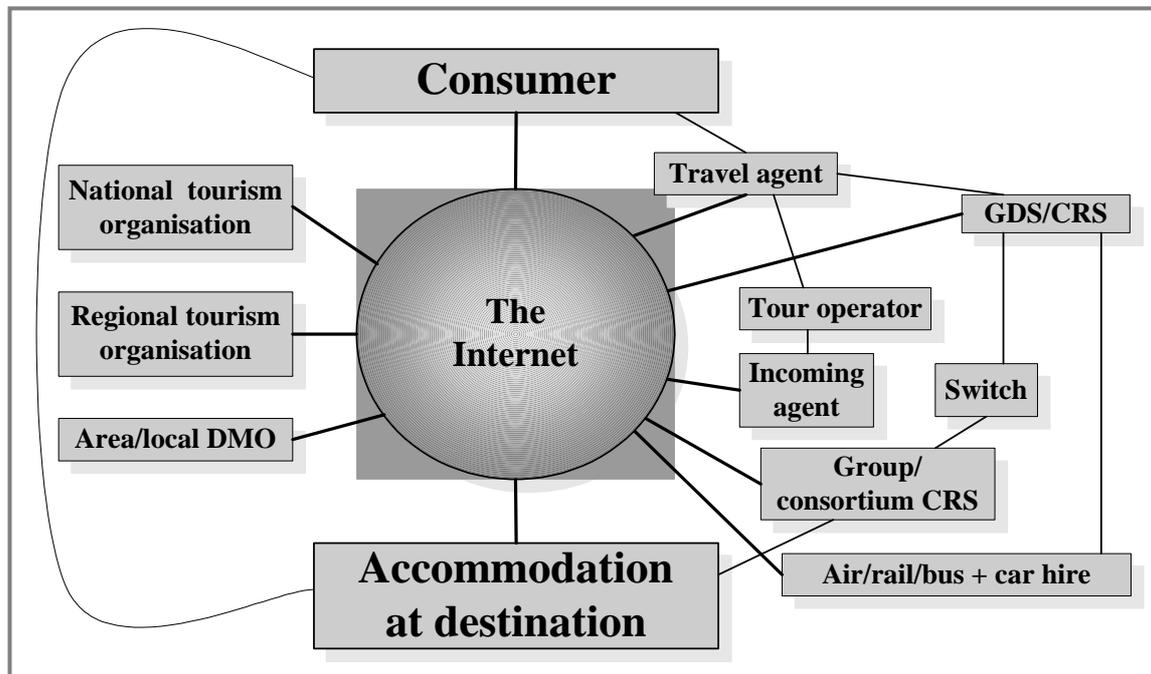


Source: Associates of Tourism Enterprise and Management (TEAM)  
– adapted from Werthner and Ebner

Notes: GDS – global distribution system  
CRS – central reservation system  
DMC – destination management company  
DMO – destination marketing organisation

The situation is now changing, as the overall structure moves towards an Internet-based value net <sup>(5)</sup>, as represented in Figure 2.

Figure 2: Emerging value net (or Star)



Source: TEAM 2001

It is now possible for any player within the system to communicate electronically with any other. Direct selling to the customer has increased. There are many new intermediaries such as Internet portals specialising in selling tourism products. Furthermore, distribution channels traditionally used by tour operators or travel agencies are now available for customers via the Internet. Additionally, tourism suppliers have established direct channels to clients.

Tourism professionals have the challenge of finding, among all available communication and distribution channels, the right channel to the right customer segment which would be cost- and effort-efficient at the same time.

Furthermore, ICT development has made customer relationship management more visible and efficient. ICT enables companies to interact with clients and continuously alter products and services in order to meet, and exceed, customer expectations.

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<sup>(5)</sup> Tourism value net represents new ways of workflow between suppliers, intermediaries and customers. Tourism value net participants can distribute tourism information products and services directly to each other; the value net is characterised by high variety of participants and distribution channels.

## **2.2. Business to business communication**

The large number and variety of distribution channels is a challenge for business to business communication as well. Distribution cooperation is expanding across different tourism industry sectors: transportation companies are providing the opportunity to book accommodation and tourism destination management organisations are developing Internet portals to distribute tourism information as well as tourism products and services. As a result, tourism value net is even more complicated and challenging for both suppliers and intermediaries.

In the tourism value net, companies cooperate with several distribution channels. Since distribution channels are usually not fully integrated to the company's own inventory management system, seamless online real-time distribution requires considerable effort to manage availability and rates in different distribution channels.

Success in tourism demands rapid and efficient communication. The volumes of information analysed and exchanged by tourism professionals are huge and clients expect fast responses and real time confirmations. All these require tourism professionals to be familiar with many ICT tools, systems and information sources. Furthermore, tourism professionals must have excellent communication and networking skills.

Business to business and business to client communications are the core of the tourism value net. However, business to government, client to client and research to business information flows have to be taken into account too.

In business to government communication tourism is influenced by government regulations and policies (visa regulations, food standards, etc.). Electronic interactions between business and government organisations increase the awareness and effectiveness.

With client to client communication, travellers tend to exchange travel experiences among friends, colleagues, relatives, etc., and this information has impact on the individual's consumption decisions. The Internet increased the opportunity for exchanging travel experiences. Many companies have recognised this and turned the trend into a new sales opportunity by providing customer feedback features on their websites.

In research to business communication, ICT tools provide new opportunities to collect and analyse tourism information as well as exchange knowledge and publish trends.

## **3. Changes in tourism inventory management**

Information is a strategic resource for tourism companies. ICT provides new means to analyse this information, providing new concepts and tools for efficient inventory management. Revenue management concepts and tools have been designed to improve and support bottom-line oriented decision-making. For tourism companies that cooperate with several distribution channels, revenue management becomes more important and challenging than ever before.

Revenue management has the following objectives:

- (a) maximise yield (price x units sold) or minimise lost revenue per available product unit in view of average cost per available product unit;
- (b) control availability of price products by customer revenue potential and forecast segment mix;
- (c) control daily availability of price products lower than full price, based on unsold inventory, time left to sell and segment total demand.

To fulfil these objectives, tourism professionals need strong knowledge in the following areas: marketing, finance management, statistics, customer service principles and distribution trends. Effective revenue management requires skills to combine these knowledge areas persistently and creatively.

Revenue management may sound like a (top) management need, but most European tourism companies are small and medium size enterprises where every employee is a revenue manager. Thus, it is important to provide a knowledge base for the revenue management at all levels of tourism education institutions.

## **4. Conclusions**

Trends described above require skills not only to handle different ICT tools, but also to choose the right ICT tools. Furthermore, electronic distribution requires not only awareness of different information sources and distribution channels but also the ability to evaluate them. Tourism professionals need skills for successful navigation in tourism value net: skills to identify opportunities for cross-promotion and cross-selling, skills for finding efficient combination of distribution channels, skills for managing sales across several distribution channels and making profit from the process. Many of these skills develop with work experience but tourism educational institutions must provide sufficient knowledge and practice on these topics to meet emerging skill requirements in the tourism labour market. ICT courses can no longer be completely separate study entities; instead ICT must be studied in the context of its application: as a part of marketing, customer service, revenue management and other courses.

In addition to these new skills, the traditional skills such as customer service, legal aspects, cross-cultural communication are an important part of the skill base for navigation in the tourism value net.

In order to develop and maintain the skill base for successful navigation in the tourism value net, active networking among tourism educational institutions, tourism organisations and industry players such as suppliers, intermediaries, government offices and technology providers is needed.

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# **New trends, skill needs and developing services in luxury tourism. A case study**

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*Today's luxury traveller has changed both in behaviour and in values and this demands certain changes in the product hardware and software. This can be especially observed in the luxury, golf and spa business, but also in corporate travel. Consequently, recruitment and training demands have changed as well and training methods have to be adapted to scarce time and budget in the fast-moving environment. While training can be comprehensive and intensive, the fundamental challenge is that genuine interest and caring cannot be taught.*

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The Marbella Club Hotel, Golf Resort and Spa is a leading luxury resort in Spain, member of the Leading Hotels of the World Ltd, competing in the global five star market, serving an international, individual and exclusive small incentive clientele.

The year 2004 is a year of festivities at the Marbella Club, celebrating the resort's 50th anniversary. To mark this important anniversary, a history of the Marbella Club has been written and a bust of the founder Prince Alfonso has been unveiled.

What was once Prince Alfonso's private holiday residence, Finca Santa Margarita, within 42 000 m<sup>2</sup> of olive and vine lands, the Marbella Club was founded in 1954 with only eight rooms. Now it is known as one of the most exclusive beach, spa and golf resorts in Europe, with 121 rooms and suites and 16 private luxury villas, some with a private heated pool, as well as eight restaurants and bars. These range from the gastronomic grill restaurant to the contemporary Marbella Club café, allowing for al fresco dining, breakfast and lunch throughout the year.

The main market challenges observed over the past years, partly as a consequence of world events, are the decline in popularity of conventional destinations, increase of multiple residences and fractional ownership offer, a general crisis in the service industry as well as the increasing cost of consumer acquisition.

## **1. Changes in luxury tourism: the client**

Today's luxury customer is very price-quality conscious and highly educated as to options and quality attributes. A brand should no longer be flashy but substantial. Guests today seek a multi-level experience, a one-of-a-kind holiday where family travel and children as discerning designer brand clientele are becoming increasingly more important.

Consequently, value is attributed to spending more on an experience being the new 'currency' rather than on objects, as well as spending time alone with the spouse or family, seeking privacy and intimacy, value and authenticity. Information and communication technology (ICT) should not be visible, but an option if requested. Most importantly, technology is expected to be used as a way to improve, not replace, the human touch. Personalisation and time are highly valued, as well as security, credibility and disclosure.

While business hotels are expected to provide latest generation advanced in-room technology, one of the buzz concepts is 'barefoot luxury', also known as 'no news – no shoes', relating to tropical island luxury resorts that offer the highest standard of services in unique natural surroundings and most comfortable accommodation, but no electronic devices unless specifically requested. Many individuals, suffering from today's fast-moving and highly demanding everyday life, seek locations without mobile telephone coverage in order literally to disconnect.

## **4. Changes in luxury tourism: product hardware**

With regards to the product hardware, much emphasis is placed on guest rooms; more specifically, bathrooms are becoming increasingly more spacious and equipped with large, luxury furniture and fittings, albeit functional. As for design, local artefacts are preferred over mass produced room design and natural window treatment with an open view over the traditional net curtains.

Golf (18 hole designer course) and spa (professional spa) have become facilities that are expected from a luxury resort rather than additional extras, as well as designer brand boutiques within the complex.

## **5. Changes in luxury tourism: product software**

Consequent to the changes in clientele and the ever-growing expectations, knowledge has become of a key importance for all staff. Generally expected basic standards are growing ever more complex. Leading Hotels of the World Ltd expect to fulfil over 1 500 minimum standards from member hotels and their staff. The most important of these are languages and making the impossible possible, to create the ultimate guest experience (from swimming with dolphins to finding a lost civilisation).

For spa resorts, there are certain decisions to be taken early, as health and hospitality have become intertwined in a way that they cannot be distinctly separated any longer. Naturally, destination spas have a number of requirements and the fundamental decision is whether to take the holistic approach or even plastic-aesthetic surgery on the treatment menu. Very popular are alternative medicine and age management. Taking this one step further, a spa hotel of the future should be prepared to offer purified air and water systems, non-toxic paint, fabric and cleaning products. Rooms should offer colour and aromatherapy features, restaurants and immune boosters should offer organic and local products on their menu, and food and beverages staff need to be trained on dietary options. Nature has become an important feature as well as awareness and integrity in business ethics.

## **6. Recruitment: how to prepare for the different/unique/memorable/customised delivery of services in the future**

Recruitment methods that have proven successful for leading hotel chains and international luxury groups are hand-shake followed by in-depth interviews and multiple assessments (at least three interviews with department heads). This is a way to seek ambassadors inside out, with a clear focus on hiring for attitude, not aptitude, commitment and confidence. The assumption is made, and proven, that genuine caring cannot be taught.

Although the following, applied by Marbella Club, may seem evident, experience has proven that they are not and that these 10 commandments of hospitality offer a good base for developing a professional and positive conduct in client presence:

1. smile and be positive;
2. greet all you meet: 'good morning/afternoon/evening', 'you are welcome', 'my pleasure', 'excuse me', etc.;
3. the answer is 'yes', never 'no';
4. a guest's concern is your concern;
5. an absolute level of cleanliness and security is each one's responsibility;
6. escort guests, do not point;
7. assist your colleagues;
8. do not eat, drink, smoke or chat with colleagues in guest areas;
9. enjoy your work, treating guests and colleagues with respect and dignity;
10. act as an ambassador of your hotel inside and outside.

Once recruitment has occurred, regular but intense, brief training must be planned and monitored in the following areas: language and product knowledge, training on the job on over 1 500 minimum standards, telephone training and etiquette, ICT (e.g. a reservations system such as Fidelio as well as the relevant billing systems). Another very important area is

complaint handling with a focus on the opportunity to create loyalty. Service is not defined by not making mistakes, but much rather how these are handled. Naturally, every company should have the specific ‘credo’ (such as Marbella Club hospitality basics) or employee handbook where the company’s philosophy and their dos and don’ts are outlined.

With training, the main issue is normally time or money. In order to maximise resources, including time, energy and attention to the matter while minimising budget, we suggest short and intensive (half-day, full-day or one-and-a-half-day) training. Courses can also be offered optionally in employee personal time or as an incentive and motivation. However, for those employees requiring training, the emphasis should be on short and intensive courses with periodical repetitions or addition of modules. This increases the individual’s attention to the matter and motivations, and becomes more realistic time- and cost-wise as well as giving better outcomes.

Naturally, such departments as spas require specific training beyond the general, administrative and hospitality basics. This includes additional spa-specific product and treatment knowledge, medical training with regular up-dates and technical training, as well as product sales and service philosophy.

Four concepts that can be useful to deliver excellent services and professionalism in a nutshell are:

- (a) friendly without being familiar;
- (b) always one step beyond expectations;
- (c) good enough is the enemy of excellence;
- (d) success is a journey, not a destination.

# Barrier-free tourism for all: the need for know-how

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*Elderly and disabled people constitute a large, economically significant and steadily growing section of the population. However, the number of accessible travel and tourism facilities available to them is small. As a result, 37 % of people with a disability have, at some time, abandoned the idea of travel (BMWA, 2003).*

*This considerable potential for the tourist industry is far from being exhausted. Training and qualifications for those employed in branches of the industry such as services, planning and marketing are key factors for successful penetration of this market segment. Central training topics here are the needs of guests with disabilities, communication, the market potential, barriers existing along the service chain and how they can be overcome, marketing and programme design. The German National Coordination Office of Tourism for All (NatKo) has produced documentary training material which is being used in training courses in Germany. Elderly and disabled guests rely on the availability of barrier-free tourist facilities, while travellers with heavy luggage or families with children in pushchairs also stand to benefit from better accessibility.*

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The qualifications required of employees in the tourist industry are now very wide-ranging. The economic significance of barrier-free tourism is on the increase. Know-how relating to barrier-free tourism for those working in the various sectors enables them to deal competently with, and hence satisfy the requirements of, elderly and disabled customers. Awareness of the needs of such travellers is frequently lacking and there is sometimes a reluctance to tackle the difficulties involved. The number of those who stand to benefit from the availability of barrier-free tourism is large. Many disabled people rely on the availability of accessible holiday facilities while elderly people, families with children and people with heavy luggage find such facilities a great help and advantage.

The German National Coordination Office for Tourism for All (NatKo) was created in 1999 to combine and coordinate the activities of a variety of self-help organisations working towards this end, to act as their joint spokesman and thus help to improve travel facilities for disabled people. Its members are the various German associations for the disabled. NatKo's tasks are very wide-ranging. It takes part in all the main tourism fairs, organises conferences and workshops, cooperates with the tourist industry and its specialist associations, and does a great deal of consultancy and training work for tour organisers and travel agencies. It is also represented on the relevant policy-making bodies. NatKo is the central representative body for barrier-free tourism in Germany.

The potential market represented by travellers whose mobility is restricted has, in the past, been seriously neglected and little attention has been paid to them in tourist industry market research. We present below a selection of findings of a study to show the importance of training to be able to meet the needs and wishes of this target group.

In 2003 the Federal Ministry of Economics and Labour (BMWA) in Germany commissioned a study on *The economic impulses of accessible tourism for all*. The results give food for thought.

Some 20 000 disabled people were asked to complete a questionnaire; over 4 000 were returned for processing. Other material used for the study included a survey, questions posed through the Internet and oral reports from tourists and those providing tourist services in five German holiday resort areas.

These showed the potential market to be considerable. There are 6.7 million people living in Germany who are registered as severely disabled, equivalent to 8.1 % of the population. Half of them are over 65 years of age and the proportion of elderly people is on the rise. In due course, over a third of the German population will be over 60. The overall proportion of people with restricted mobility will become between 30 and 35 %.

The results of the study on travel and tourism showed clearly that what the market is currently offering falls short of meeting the needs and wishes of people whose mobility is restricted:

- (a) the proportion of such people travelling is lower than in the case of those whose mobility is not restricted – 54.3 % against 75.3 %;
- (b) travel is largely undertaken regardless of season;
- (c) the proportion of tours within Germany is high at 41.2 % compared with 30.5 % outside Germany;
- (d) 37 % of those questioned had already abandoned plans to travel because of a lack of barrier-free facilities;
- (e) 48 % would travel more often if the available offers were more plentiful.

Currently, net sales of holidays and short tours amount to EUR 2 500 million and this group of travellers still offers potential for growth of EUR 620 to EUR 1 930 million. This, according to the BMWA, could mean up to 90 000 new full-time jobs (BMWA, 2003).

The conclusion reached by the study is that elderly and disabled people constitute a large and attractive market. The potential number of customers and actual demand is increasing yet there is a shortage of barrier-free facilities throughout the service chain. Quite apart from the requirements for buildings used by disabled people, the service on offer is still inadequately designed for people whose mobility is restricted. Full information on accessibility at a given travel destination is hardly ever available.

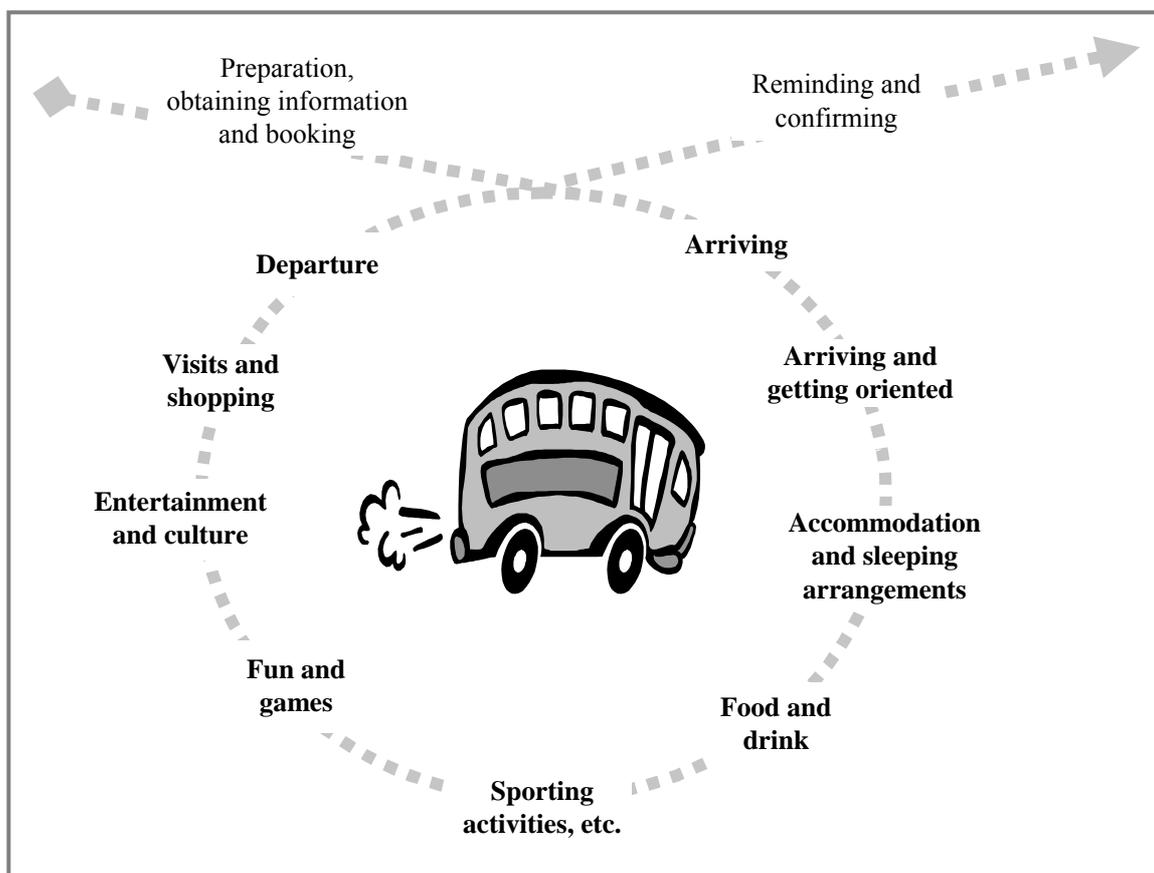
The study made various recommendations for establishing barrier-free tourism in Germany. One important recommendation was the creation of a nation-wide training programme for those working in travel and tourism.

Ensuring that employees in a barrier-free tourism industry are professionally qualified is one of NatKo's chief areas of activity. It has designed a training programme for barrier-free tourism with training material prepared during workshops by those actually working in tourism in collaboration with representatives of organisations of disabled people.

The material includes sections on the following subjects:

- (a) basic information concerning disabled travellers and their needs;
- (b) contact and communication between people with and without disabilities;
- (c) data concerning the barrier-free tourism market;
- (d) barriers existing along the tourism service chain and how they can be overcome;
- (e) marketing barrier-free programmes;
- (f) sources and addresses;
- (g) a comprehensive appendix of checklists, practical tips and relevant legal points.

Figure 1: The tourism service chain



Source: NatKo 2002, p. 47.

All the material is highly practice-related with no essential aspects omitted; a large number of practical examples make for easy understanding. The section *Barriers along the tourism service chain and ways of overcoming them* deserves particular mention. A holiday is made up of a variety of tourist offerings and services and a number of obstacles lie in wait for the disabled holidaymaker (Figure 1). They begin with the information available concerning the holiday. All too often it is impossible to discover anything about accessibility from travel brochures and other material and a would-be traveller frequently has to go to a great deal of trouble to discover, for example, whether they can use the means of transport provided, whether the hotel has suitable provision, and whether the leisure activities on offer have been designed with disabled people in mind. Some difficulties are easily solved but, in the long run, the aim should be for all travel on offer to be barrier-free.

The training material focuses on four groups of people with restricted mobility:

- (a) people with walking difficulties and those who are confined to wheelchairs;
- (b) the blind and visually handicapped;
- (c) the deaf and those with impaired hearing;
- (d) people with understanding difficulties.

Elderly people often come into these categories with difficulties in walking, seeing, hearing or understanding and therefore also need the benefits of barrier-free tourism.

Training can be provided on a modular basis. Seminars can be designed for people in specific occupations, such as those whose work brings them into direct contact with guests; this includes service personnel in hotels and restaurants and the like. Here the topic *Disabled people's needs and communication* is of particular importance. Those responsible for planning travel and tours have to receive information on *Barrier-free building and planning* and *Programme design and marketing*.

Seminars can also deal with particular aspects of a given tourist region.

We always recommend that the panel of speakers for every seminar includes a person who is disabled since they can state the message more effectively, speaking from their own experience. This brings life to the seminar.

We also recommend that seminars for all occupational groups should include the actual experience of using a wheelchair and/or blindness simulation glasses. Participants are then able to understand their customers' needs far better than when explanations are purely theoretical.

The training material described is being used with success throughout Germany. NatKo organises seminars, provides trainers and makes the training material available.

A considerable amount of training on barrier-free tourism is being carried out in Germany. The German Railways trains its employees to deal with disabled people. A number of tourism organisations run training courses: Lower Saxony has run a whole series in its various

regions, Mecklenburg-Vorpommern has made the subject part of a training campaign and Rhine Hesse, which is actively working towards barrier-free tourism, offers training to all those employed in tourism in the region. The State of Brandenburg has a comprehensive programme of training, consultancy and coaching as part of its campaign for qualifications in tourism which is part of the Innopunkt 6 project.

All those taking part have understood that know-how is one key to success in barrier-free tourism for all.

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# Trends and skills needed in the tourism sector: 'tourism for wellness'

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*Wellness has become an expression representing a new way of life. Once used solely for its catchiness, the term – and what it stands for – has become a serious trend and important factor in tourism. Some of the reasons for this are that people are generally more conscious about their health and are defining what quality of life means in new ways. Nevertheless, in tourism there is still a major misunderstanding as far as wellness is concerned.*

*The danger truly exists that so-called wellness tourism could easily become an empty marketing label, a superficial and passing trend with no content and quality criteria. This contribution attempts to describe what wellness stands for, making clear that wellness can no longer only serve as a marketing tool for tourism. It is essential that tourism must serve the needs of wellness to profit from it.*

*We are only at the beginning of lasting and major changes in tourism; the megatrend is tourism for wellness and there is significant need for completely new occupational profiles and qualifications to achieve this megatrend in a qualified manner.*

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## 1. The wellness trend

### 1.1. The confusion about wellness

Wellness has become an expression representing a new way of life. Once used solely for its catchiness, the term – and what it stands for – has become a serious trend. Some of the reasons for this are that people are generally more conscious about their health and are defining what quality of life means in new ways. People also have more free time.

But if we take a look at the market, we see the term 'wellness' everywhere we look. As with most new words, we tend – against our better judgement – to assume that this word stands for something concrete every time we see it.

Slowly, however, it has become clear that this is not true at all. The word 'wellness' seems to have drastically reduced meaning because it can mean anything. It seems to be either an empty expression or a hobby. It could be what the difficult hotel boss recommends his guests to do when there is snow in summer or none in winter. It is the word that zealous travel agents

use to lure customers to distant locations where there is nothing to see and even less to do. It is the word used to conceal bad service and lack of imagination.

Wellness does not seem to be connected with any place or time; one can indulge in wellness anywhere, anytime.

Tourism and recreation have taken over wellness. It is in hotels, fitness studios, beauty farms, hot springs, spas and saunas. It comprises massage, vegetarian diets, fresh air, ayurveda and aromatherapy, analogous to the citation of historic architectural styles from all epochs and parts of the world. There's always a touch of *Thousand and one nights* as well as a little *Kneipp*.

Somehow, wellness seems to be the lazy sister of fitness, enriched with a little hedonism and sensuality. If fitness means suffering, sweating and fighting one's sense of inertia, wellness could rightly be called the tender loving care of this inert, sluggish self.

Wellness is, as it were, esotericism in the flesh: the melding of occident and orient, pleasure and nuisance, sport and fun, hot and cold, and old and new. It is amazing that we have managed to get along without wellness for so long.

## **1.2. The wellness market**

But let us put cynicism aside and take a slightly more serious look at the situation. Wellness is now an established term, a word used in everyday speech. It has developed into a megatrend as well as one of the media's favourite terms. It is no longer something which only belongs to a minority.

Today, 'wellness' is generally used in connection with a moderate amount of exercise combined with an enjoyment-oriented lifestyle. The term and label 'wellness' is extremely open and liberal, meaning that the so-called wellness sector has grown quickly in a very short period of time.

In this form, however, my opinion is that wellness as a trend has reached the highest point of its ascendancy. It may well be taking a downturn. The question now is where does wellness go from here?

I believe there is still a major misunderstanding where wellness is concerned. The danger is that wellness could easily become an empty marketing label, a superficial and passing trend with no content or quality criteria.

However, I also believe that the wellness of the future – we could call it 'Wellness II' – holds much realistic promise. Wellness could stand for the path to well-being and health; perhaps even happiness. It could also stand for a high quality of living and a positive lifestyle. It could be the basis for breaking into the next higher level of sustainable products and services for well-being, health and possibly even happiness. It could stand for, as well as convey, the vision of a calculable, sustainable market of the future.

The idea of wellness, as it was originally conceived, could finally be established as a comprehensive answer to the changes and deregulation in our various spheres of life – that is, our jobs, our personal lives, etc. – and serve as the basis of a corresponding philosophy of life. Wellness could be the path to sustained well-being and happiness.

At this point, a few general thoughts on health, life and wellness, as well as a view of their background and what is currently going on in these areas, are of value.

### **1.3. Health**

One of the most well-known advocates of the theory of long waves, and one of the most important mentors of the information society, is Leo A. Nefiodow. He suggests that information technology has now ceased to be the worldwide motor for growth (Nefiodow, 1999). The end of the 5th Kondratieff cycle clearly shows that the new motor for economic growth is the elementary human need for well-being and health, closely followed by – or we might even say, in preparation for – the development of a new age of spirituality. This age will serve as a regulatory element for all aberrations of previous economic cycles and their basic innovations.

Well-being and health are far more than simply the absence of illness. The World Health Organisation defined health as a state of complete mental and physical well-being (WHO, 1986 and 1988). The term ‘health’ was later expanded to include other factors: health as the state of optimal biological, psychological and social well-being. This definition corresponds to a modern, holistically-oriented view of humans as biological systems located within a network of other biological, social and ecological environments.

The balance between body, soul and mind is at the centre of the discourse. Empowerment and self-realisation are new subjects in the health sector. Nutrition, old age and quality of life have become a cult. Health is truly a question of productivity.

### **1.4. The healthcare system**

Unfortunately, we still have not succeeded in making health the basis of medical thinking and action. Every day, doctors treat their patients in hospitals and practices from a sickness-oriented point of view. Preventative measures stand on the sidelines; health-promoting measures are hardly ever spoken of.

Unfortunately, the same is true of naturopathic doctors. Even they think primarily in terms of illness. There is almost an impression that the only difference between them and allopathic MDs (Doctors of Medicine) is that naturopaths substitute so-called natural medications for allopathic ones.

In the public mind as well, the perspective of fostering and maintaining health has nowhere near the significance that treating illness does. Politicians, the media, insurance carriers and patients all use the term ‘health’ to mean the absence of illness. Patients go to their doctors

with their symptoms, expecting these to be eliminated. Doctors cure illnesses or, at the most, worry about early detection. Insurance companies reimburse doctors for treating diseases. Together with regulatory bodies and politicians, what they administrate is much more an ‘illness system’ than a ‘healthcare system.’

Preventing illness and promoting health play hardly any role in Europe. Medical treatment still dominates and the necessary personal initiative for maintaining one’s own health is rarely found. Basically, therapy still dominates (that is, the doctor or therapist steers events). A lifestyle geared to avoiding illness (including personal initiative, and going to a doctor or therapist to learn or get advice) is starting to be seen, but still exists only in the shadows. A health-promoting lifestyle is a rare and tender young plant, even though it should be the other way around. Only a healthy lifestyle can lead directly to well-being and happiness.

### **1.5. Salutogenesis**

Actually, we should worry less about factors which cause illness and turn our attention to those which promote health.

The word ‘salutogenesis’ comes from both Latin and Greek. The Latin word ‘salus’ means healthy; the Greek word ‘genesis’ means creation. Salutogenesis defines health-promoting factors as powers which help people develop and maintain health.

The medical sociologist Aaron Antonovsky developed this concept based on numerous empirical studies of the widest possible variety of population groups. Antonovsky wanted to answer the questions: ‘Who gets sick?’ and ‘Who stays healthy?’

According to salutogenesis, individuals and groups, even those under high stress, tend to remain healthy when they have a fundamental trust in the world which expresses itself in the following three characteristics:

- (a) comprehensibility: the events in life are structured, that is, predictable and understandable;
- (b) manageability: resources are available which help meet the requirements for dealing with these events;
- (c) meaningfulness: these requirements are challenges which are worth the time and effort.

These three factors contribute to a person’s sense of coherence, the feeling that he/she lives in an understandable world which he/she is personally able to influence.

As a rule, the more developed a person’s sense of coherence, the greater is their ability to remain healthy or withstand stresses which might tend to make others sick.

A sense of coherence is neither inborn nor determined for the whole of one’s life by early childhood socialisation. Empirical results on perception, attitudes and behaviour, as well as theories of social learning, show much more that coherence and its practical consequences are constantly influenced during the course of a lifetime. This type of thinking is slowly finding

its way into medicine and extending its boundaries, slowly transforming medicine into the science of health.

Salutogenesis is related to today's most important sociopolitical developments, including resource orientation, holism, skill acquisition, accentuation of environmental aspects, criticism of pathology concepts and a positive definition of health.

Salutogenesis, as well as the entire spectrum of social, emotional and mental competences, is continually finding more acceptance in health-based initiatives within enterprises as well as outside of them.

## **2. Definition of wellness**

### **2.1. Wellness**

The term 'wellness' was coined during the 1950s in the US by those in health sciences and medical sociology. They took half of the words 'well-being' and 'fitness' to create 'wellness'. They meant this term as an individual, many-sided, interdisciplinary expression for the human need for health and well-being.

According to this scientific definition, wellness is not a product. It cannot be bought; it is not a branch of the economy. This is precisely what limits wellness as the basis for a superficial marketing concept.

Scientifically defined, wellness stands for a personal, individual lifestyle. Such a lifestyle is based on health-promoting factors and salutogenesis. It requires such core competences as recognising one's own tensions and anxieties as well as proactively dealing with one's mental, emotional, social and physical needs.

These skills, or core competences, can be subdivided into four areas:

- (a) mental competences include learning and growth, creativity and intuition as well as a sense of significance and pursuit of self realisation;
- (b) emotional competences include how one sees oneself, as well as confidence, self respect, self esteem and stress management;
- (c) social competences include how one deals with others, conflict and relationship management and communication skills;
- (d) physical competences include fitness and health, exercise and mobility, breathing and nutrition, pampering oneself and relaxation.

This means that the actual content and goal of wellness is increasing individual and collective quality of life, achieving and maintaining health, and comprehensive well-being and happiness.

Wellness is a response to the needs, desires and values of our customers. These result from the situation in the healthcare system and from current societal developments, which are examined below.

## **2.2. Wellness and the economy**

We know that our well-being has its price, the well-known balance-sheet deficit. Annual reports, balance sheets, profit and loss accounts, classically and conventionally attuned to record hard data, simply do not cope with soft data, i.e. relationships, or what we might call the human factor. But this soft data accounts for at least 70 % of the economic success of any enterprise.

We are all caught up in an industrial, highly communicative, mobile, fast society in which top performance is demanded. Lack of well-being in the individual inevitably leads to disturbances in enterprises and in entire economic systems. Incidents of mobbing are on the increase. In Germany for instance, they cost the economy at least EUR 15 billion per year. Fear costs another EUR 50 billion per year. Every third marriage ends in divorce; 40 % of employees have mentally quit their jobs and only do what is absolutely necessary; 60 % of those in management suffer from neuroses; and every third patient who goes to the doctor has a psychosomatic illness (BMBF, 1997).

At the same time, human talent and lasting creativity and health have become the resources which are the most difficult – and expensive – to find. Human talent and skills decide the fate of many enterprises; motivation and self realisation are decisive for increasing productivity.

The economy is experiencing a paradigm change. Wellness is becoming a key to the corporate culture.

## **2.3. Wellness and the new essentials**

We are becoming a learning society. The ego, the ‘I’ – previously the ideal of the industrial society in its idea of a ‘finished personality,’ that is, the person whose personality was formed and finished by his/her school and college training and marital circumstances – no longer exists.

A new learning paradigm has developed in our knowledge society. A culture of ‘becoming’ has developed, learning has freed itself from the confines of established institutions. It takes place increasingly on the job and in practice, and in one’s private life as well. Performance no longer means solely persistence, but is now interpreted as creative, personal self-transformation.

Thanks to the knowledge society, an evolution in consciousness has developed which focuses on systemic thinking and the ability to understand complex systems. A new ‘win-win’ approach is beginning to penetrate both private relationships and the business world, an approach which starts beyond old antagonisms.

We have evolved from a society of plenty to a society of satiety. Slowing down and simplifying our lives is becoming a very powerful cultural trend. Asceticism has become the new luxury, the restoration of spiritual and material balance. Time is a luxury which is more important than material consumption.

### **3. Tourism for wellness**

#### **3.1. Real wellness tourism is tourism for the wellness**

The last few years have seen rapid growth of a highly developed general Wellness II, a real contrast to the wellness misunderstanding.

The Wellness II customer is already a reality and cannot be simply included in any other target group. Both in daily life and on vacation, such customers want support in all wellness areas. They expect and pay for qualified services, associating clear needs, desires and values with wellness.

If service providers in wellness or tourism accept this premise, they can only earn a great deal of money over the long term when they:

- (a) recognise this fact and also have the correct understanding of wellness;
- (b) can offer proven and qualified wellness services;
- (c) help clear up current misunderstandings about wellness as well as the current confusion in the market;
- (d) establish business concepts for wellness based on salutogenesis;
- (e) place the person – i.e. the customer – at the centre of their attention.

It is not the number and type of areas, treatment rooms, devices and furnishings, nor the number of consultants, planners, construction companies, suppliers or marketing concepts which is the measure of all things. It is the development, realisation and establishment of a wellness concept developed solely from the perspective of the customer's needs, desires and values. Especially in regard to the last of these, the service provider must also live the same values as the customer expects.

Wellness can no longer serve as a superficial marketing tool for tourism; tourism must serve the needs of wellness to profit from it. Wellness tourism is no longer the trend. The new megatrend is 'tourism for wellness'.

### **4. Needed skills**

To realise this megatrend in a qualified manner, completely new occupational profiles and qualifications are required.

These must be highly interdisciplinary, because the future of wellness requires cooperation between fields which have, until now, existed on parallel tracks. This includes providers of recreational activities, vacation and sports as well as providers of medical, curative and preventative concepts. Cultural and educational offerings will supplement this mix.

There are significant deficits with regard to occupational profiles and qualifications for wellness and wellness services. These deficits exist in both top management and at the operational level where concrete offers and products are developed and realised.

In recognition of this, work has begun with partners on pilot training projects, two of which are described below.

#### **4.1. MedicWell®Trainer**

This course of training, whose graduates are certified by various German States, was developed in cooperation with the Sebastian Kneipp School, my Relax Group and the Association for Physical Therapy, all of whom share responsibility for it. The programme has been designed to give massage therapists, medical bath attendants and physiotherapists additional professional qualifications and to let them attend it alongside their jobs.

After successful completion, the new MedicWell® trainers have well-founded medical knowledge enabling them to use proven wellness treatments and applications within the framework of health promotion and illness prevention.

This programme consists of approximately 600 course-hours and contains the following modules:

- (a) wellness management;
- (b) communication and health;
- (c) massage;
- (d) hydro-balneo and nature;
- (e) psychology;
- (f) relaxation;
- (g) wellness-based fitness;
- (h) wellness through eating and drinking;
- (i) wellness design;
- (j) body care and aesthetics.

Within these, attention is paid to competences in the following areas:

- (a) creating wellness concepts and developing the corresponding marketing strategies;
- (b) assembling meaningful wellness programmes together, carrying out and monitoring treatment;
- (c) critically assessing wellness trends and translating these into suitable offers;

- (d) leading, guiding and training employees;
- (e) advising guests and customers on wellness topics and putting together individual programmes for them.

The content of this course is based on Sebastian Kneipp's holistic health concepts, which revolve around the five elements water, exercise, nutrition, healing plants and lifestyle. Kneipp's thinking, however, is not dogmatically followed.

#### **4.2. Health Management University (HMU)**

Another pilot project under way, together with partners at the University of Passau, is establishing a nationally certified private university for the health industry. This entity would serve 500 students who would graduate with a Bachelor of Science in business administration after six semesters and a Master in Business Administration after additional four semesters. Three different tracks are planned:

- (a) health care management;
- (b) wellness and spa management;
- (c) culture and sustainable development management.

The HMU's international claim lies in the worldwide validity and significance of preventative healthcare and sustainable development. Its courses are being designed to foster mutual understanding among peoples, respect for those of different races and religions, and thus, peaceful coexistence in the world.

The high standing of wellness at the HMU lies in the interpretation of the different branches of study. Graduates of the HMU will be able to use what they learn as a maxim in their later activities in the health and wellness industry or medicine.

The HMU's intention is to transmit a concept of service and wellness which focuses on the individual, through course content, campus ambience and cooperation with regional and internationally operating institutions. By the time they are through with their degree, students should have internalised these concepts to the greatest possible extent.

To conclude, in respect to the megatrend 'tourism for wellness', we are only at the very beginning of lasting and major changes in the health and tourism sectors. These are an overdue answer to confusion on wellness and have launched a new drive for innovation and quality in the wellness branch.

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## **Part III:**

### **Transfer of research results to policy and practice**



# Skills forecasting and development in Portugal's tourism sector

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*This article provides an overview of human resources development in Portugal's tourism sector. We will be presenting the results of a study into the sector undertaken by Inofor's 'Skills trends and training needs diagnosis' project, briefly explaining the methodology used, and referring to some of the interim results achieved. We will also look at the 'Strategic workforce development plan for the tourism sector' produced by the partnership formed by public administration departments, employers' confederation and trade unions to define medium to long-term strategies for the sector's workforce development.*

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It is imperative that Portugal has an up-to-date comprehensive knowledge infrastructure on the skills needed to boost the country's competitiveness and employment, just as in other European countries (France, Italy, the Nordic countries, Spain and the UK), Canada and the US.

Skills identification and forecasting for an integrated intervention in VET to address specific competitiveness goals, has been the subject of much debate among EU countries. Sector based intelligence that would enable the right pre-emptive measures to be devised to adjust the labour market and VET system was not, however, available in Portugal. Therefore, Inofor was charged with undertaking studies and developing tools that would help anticipate skills and training needs and identify trends.

Within the scope of the project *Skills trends and training needs diagnosis*, in 2002 Inofor embarked on a tourism sector study. As with its study into the hotel sector in 1999, the new study will broaden understanding of the sector in a more in-depth and systematic perspective, and provide key reference data on skills identification and forecasting, together with diagnosis of the sector's training needs.

Like Inofor's previous sector studies, the study is based on social methodology and technical methodology.

The social methodology enables the formation of knowledge networks that connect stakeholders<sup>(1)</sup>, resources and activities, and bring together sector and occupation related knowledge that is current, diversified, and socially and economically useful.

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<sup>(1)</sup> Enterprises, industrial associations, trade unions, occupational associations, education and training establishments, technology centres, sector specialists, etc.

It ensures key sector players are involved, and the gathering of reference data, which is directed at, and may be accessed and used by, a wide spectrum of stakeholders:

- (a) entrepreneurs and industrial/trade associations: to orient enterprises better in the face of competition and economic and social, domestic and international contexts; to assist them with visualising future scenarios and making better informed choices, and recognising and equipping themselves with strategic skills;
- (b) education and training institutions: to undertake appropriate and well-timed revision of resources and reference data in line with any quantitative and qualitative changes to occupational structure; to rationalise training provision for priority intervention areas and strategic profiles;
- (c) labour-market management: to promote and add value to jobs, and channel towards emerging jobs and growth areas in the sector; to support the management of mobility and training in the case of declining jobs;
- (d) trade unions and branch associations: to foresee occupational trends and improve negotiation and preventive action capacity; to detect skills shortages and training needs.

The technical methodology, based on a series of analyses, enables:

- (a) socioeconomic characterisation of the sector (national and international perspectives, analysis of corporate strategies relating to markets, products, technologies and organisation, leading to identification of strategic clusters of enterprises);
- (b) characterisation of sector employment, from both qualitative and quantitative perspectives (new, growing and declining occupations; changing job contents and skills), and identification of the main influencing factors;
- (c) construction of long-term sector scenarios (10-year forecasts), examining contingencies and prospects, and what the sector could or should be in the medium-term future, forecasting corporate and employment behaviour in different contexts and in relation to specific sector variables;
- (d) construction of forward-looking and dynamic occupational profiles to identify and forecast skills needs, broaden and enrich profiles, facilitate professional mobility, and explore inter-sector capacities;
- (e) identification of skills and training needs, and proposals for changes to training provision with a view to developing the skills of young people, retraining workers, and attracting high value-added skills to the sector.

It is on the basis of these tools, fine-tuned to the specific needs of tourism, that skills shortages can be detected and training and employment measures devised, thus ensuring more favourable evolution scenarios at different levels by:

- (a) engaging and skilling a segment of the young workforce in specialised areas that respond to the industry's current needs and, above all, to the future needs of the economy, and that are geared towards higher and broader technical and cognitive skills (in such areas as golf, eco-tourism, health tourism, etc.);

- (b) retraining workers, given the need for new social and relational types of activity and skills (conflict management, organisation, communication, etc.), or the likelihood of exclusion from the labour market or long-term unemployment, seeking to facilitate alternative training and vocational pathways.

Using these methodologies, the tourism sector study got underway in 2002. It addressed such diverse areas as accommodation, catering, entertainment/attractions, distribution, which may be regarded as falling within and outside the tourism sector. There was systematic analysis to reach a better understanding of how these different activities develop and complement each other, and how they contribute to building tourism that is of a high standard and competitive. It is important to understand how Portugal's leisure and tourism provision has adapted to changing demands, and what impact the adjustments have had on the sector's vocational skills and profiles.

In terms of the sector's occupational structure, we found that no major changes had affected accommodation and catering activities. When any changes had occurred in the character of employee skills, they were found to be closely linked to the tourism/product concerned (rural tourism, golf, health and fitness, etc.).

In relation to other sector activities, major changes have so far been detected in distribution, where there is a growing tendency to separate design and sales of travel products, and for holiday consultancy departments to emerge. This is impacting on skills insofar as:

- (a) among tourism operators, skills in areas such as market analysis, and mass and tailored travel product design are needed;
- (b) among travel agents, there is a need for increased skills in customer relations, building customer loyalty and travel organisation.

In recreational and leisure activities, which play an important role in offsetting the effects of sector's seasonality, enhancing the appeal of regions, and diversifying existing products we found new skills needed in designing entertainment products. This exists particularly, in the use of the suppliers' network and package products design, and in defining and implementing marketing strategies, and their promotion in different contexts (cultural, sports, casinos, hotel units).

The study also addresses central and local administration authorities' activities because of their impact on sector policy-making and regulation, and their links with players and activities associated, directly or indirectly, with the tourism sector. We found skill gaps in areas such as facilitation, promotion, territorial marketing, environmental policy, history, culture, handicrafts, gastronomy, etc. These are all important aspects in the design of tourism products that will help energise and develop the regions.

While this study was underway, a *Protocol for strategic workforce development planning for the tourism sector* was devised. Investment in tourism has followed the government's prioritisation of tourism as a key driver of the country's economy, and recognition that

workforce development is vital to securing the sector's sustainability and to providing high quality services. Defining a medium- to long-term strategy is, therefore, imperative for the sector.

An alliance between public bodies (Institute for Innovation in Training; General Directorate for Vocational Training; Institute of Employment and Vocational Training; Tourism Training Institute; General Directorate for Higher Education), the employers' confederation (Confederation of Portuguese Tourism) and trade union confederations (General Confederation of Portuguese Workers and General Union of Workers) was formed for the purpose of designing the strategic plan.

The strategic plan's objectives were:

- (a) to structure training provision to meet current and future training needs identified for the tourism sector;
- (b) to raise continuously workforce skills standards;
- (c) to increase transparency and mobility of qualifications in the labour market by means of professional certification based on identified skills and qualification standards.

An external consultancy firm was hired to energise and mediate in the process, using its own interactive learning based methodology. Individual and group reflection processes were part of this methodology based on a participative working method.

To reach a diagnosis, the strategic tourism sector study began with an appraisal of the current situation and present training provision (initial and continuing, public and private sector training). Diagnostic and strategic reflection led to the identification of a range of critical issues that the group agreed were priorities. The outcome was agreement on a three-year and a 10-year strategic vision.

The three-year strategic vision identifies the need for action in specific areas of the VET system:

- (a) broad needs:
  - articulation between government departments/bodies;
  - harmonisation of training provided by different operators on the basis of a multiannual action plan (to be drawn up);
  - strengthening initial VET leading to double qualification <sup>(2)</sup>;
  - widespread use of ICT in classroom instruction and online learning;
  - development of training standards, approved by the VET system, to which all training providers must adhere;
  - development of sector specific teaching tools and material;

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<sup>(2)</sup> Qualification levels here are defined according to the EU Council Decision 85/368/CEE of 16 July 1985.

- improvement of the system of recognition, validation and certification of academic and vocational skills;
  - making compliance with approved standards compulsory for all training providers.
- (b) specific needs:
- initial training
    - adoption of a sequential training structure (vertically coherent curricula and coherence between objectives and contents);
    - adoption of Level III as a minimum qualification standard;
    - maintaining territorial coverage of initial training provision, fine-tuning it to suit regional needs;
  - continuing training
    - structuring training provision in accordance with demands for skills, and lessening emphasis on general training;
    - greater enterprise involvement/responsibility in further training and re-training programmes.

The 10-year strategic vision identifies the need for action in certain areas:

- (a) making level III a prerequisite standard for accessing tourism-related occupations;
- (b) articulation of all formal and non-formal learning modalities in an open and flexible curricular model that allows for transition between the different training systems;
- (c) development of a skills portfolio for all workers in the sector to ensure transparency of skills;
- (d) organising competence-based continuing training;
- (e) increasing participation in training to catch up with the European average by adopting/spreading a culture of lifelong learning.

In the framework of the institutional cooperation that steered this initiative, the key issues identified led on to seven *Priority action plans* (PAPs) being drawn up. Coordinators and teams were appointed to elaborate and develop the PAPs, which consisted of operational objectives, actions to be undertaken, and the respective timetables. The seven priority action plans cover the following themes:

- (a) occupation and qualification standards and certification;
- (b) communication and interaction among stakeholders;
- (c) tripartite regulation and functioning of the training and qualification system for tourism;
- (d) consultancy and in-house training;
- (e) social image of tourism occupations;
- (f) promotion of training;
- (g) multiannual training plan for tourism.

# A regional approach to forecasting: skill needs in hotel and catering

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*The region has become a key unit in vocational training policy in France. The approach described consists of preparing agreed objectives with the regional public authorities and occupational bodies in response to questions raised by the shortage of labour and training needs in the hotel and catering industry. This is the approach adopted by the Regional Employment and Training Observatory of Burgundy, and it demonstrates the potential and problems of achieving a diagnosis that is shared by public bodies and occupational organisations within a given region.*

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## 1. Introduction

All legislative texts in France show evidence of the desire to establish a system of shared responsibility for developing vocational training. This requires cooperation and a variety of complex procedures for consultation between the State and decentralised services, local government and professional organisations. If responsibility is transferred, local decision-makers are encouraged to find out more about their areas so that their decisions and choices are well-founded and they can put forward the most appropriate solutions for the situation on the ground. Adequate diagnosis is essential to planning for the future and suggesting training strategies.

The scheme described falls within the framework of preparing agreed objectives <sup>(4)</sup> for the hotel and catering industry in the Regional Employment and Training Observatory (*Observatoire régional emploi formation*, OREF) of Burgundy, in response to questions raised by the shortage of labour and training needs. It may be regarded as an example of public agencies using quantitative and qualitative data on training, employment and

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<sup>(3)</sup> Céreq/Iredu is a regional centre associated with the Centre for Research on Education, Training and Employment (Céreq), the Institute of Research in Education (Iredu) and is a member of the Regional Employment and Training Observatory (OREF) network since it was set up in 1989 in Burgundy.

<sup>(4)</sup> The Apprenticeship Act of 23 July 1987 created a scheme of agreed (regional and occupational) objectives to coordinate intervention by the State, the Regional Council and sectors of industry for the purpose of developing different training paths, notably block/release vocational training. A fresh impetus was given to agreed objectives by the *Five-year act* of 20 December 1993.

job-finding in the relevant economic sector, and as demonstrating the potential and difficulties of regional public authorities and professional organisations in producing a shared diagnosis.

The approach adopted can be described as follows: ‘forecasting the future pattern of jobs and skills means examining how changes in the job structure and in the training system fit together. It brings together two evolving systems which are to some extent autonomous but necessarily interdependent.’(*Commissariat Général du Plan*, 1991). The general principle is that forecasting should be based on a diagnosis which combines quantitative and qualitative data and serves as a common thread in discussion of the future and in proposals for action strategies. The information is brought together so that the common pool of knowledge can be expanded and regional agencies can be helped to reach agreements and make modifications based on a shared ‘world view’, a shared diagnosis.

## **2. From national forecasting to a regional observatory**

Originally, the task of the national planners in France was to anticipate jobs and recruitment in various occupational sectors by comparing numbers leaving education at different levels of training with jobs occupied and foreseeable developments, extrapolating medium-term needs. As a result of a growing mismatch between forecasts and the true situation, the hope of controlling the relationship between training and employment through national planning was abandoned in the late 1970s. Today, however, France is once again attempting to forecast, but in a different way. There has been renewed interest in forward planning since the mid-1980s. A macroeconomic framework has been established at national level, fixing the main trends in skills development. At sectoral level, contracts for agreed forecasts (*Contrats d'études prospectives*, CEP) <sup>(5)</sup> and agreed objectives (*Contrats d'objectifs*, COT) have been drawn up with a score of occupations to encourage pooling of public and occupational expertise on employment and skills. At the regional level, locally agreed arrangements have been introduced for forecasting and helping regional decision-making. The OREF of Burgundy is one example.

OREF Burgundy was set up in 1989 with the aim of organising the information available on employment and training to facilitate decision-making by local and regional bodies. The *raison d'être* of OREF Burgundy is the belief that no regional institution on its own can claim to master all employment and training. Institutions, therefore, need to work together to reach a shared understanding and to undertake concerted action.

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<sup>(5)</sup> The CEP were introduced by the public authorities in late 1988 with the aim of creating a common diagnostic and forecasting tool to serve as a point of reference for all those involved in managing human resources, employment and training.

*Box 1: A network for Burgundy*

The OREF was set up under the State-regional 1989-1993 planning contract. It coordinates regional partners, takes the form of a network and brings together the following range of agencies: the National Employment Agency, the Association for Adult Vocational Training, the Regional Employment and Vocational Training Department, the Regional Agriculture and Forestry Department, the Céreq/Iredu, the Regional Council, the regional department of the Ministry of National Education and the National Institute of Statistics and Economic Research. Since 2002 it has been supported by a Regional Resource Centre. From the organisational point of view, a steering committee and a scientific committee decide on the programme of work and the lines of enquiry and are made up of the heads of regional services in the fields of training and employment; a technical group comprising resource persons from these same institutions and technicians feeds into the general discussion and carries out the research programme.

Regional observatories were set up in France in the 1980s, a period marked by the beginning of decentralisation. This movement led to the gradual transfer of responsibility for training to regional authorities and to the need to ensure coherence and complementarity with central government services. At the technical level, there are new needs for information. In order to avoid redundant duplication of research, the aim is to make use of the data available throughout the various services and to encourage the services of national and regional government to work together.

The work of OREF Burgundy covers four broad areas: provision of initial and continuing vocational training, the regional aspect of the relationship between employment and training, the career paths of those leaving training, and changes in skills. Since it is a network of institutions, its aim is to ensure that the institutions and research bodies in the region work in concert. The main purpose of OREF Burgundy is to try to foster and support a discussion process by developing analytical and diagnostic tools which bring together the various services of national and regional government.

Drawing up the agreed objectives has made it possible to bring together representatives of the commercial economy and public decision-making bodies in employment and training (central government, the regional department of the Ministry of Education and occupational sectors). OREF has provided all partners with information for discussion which takes into account the main circumstances and changes in the sector, the jobs available, employers' recruitment practices, the career paths of young people when they leave education and training, and so on. The role of OREF is to use its close examination of the situation to put forward indicators that will help decision-making and encourage forward planning. The OREF network does not produce statistical information itself but uses data on training, employment, unemployment and labour market entry from the various institutions that make up the network. Furthermore, in the case of the hotel and catering industry, a qualitative survey of some 50 enterprises <sup>(6)</sup> has added to the data available.

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<sup>(6)</sup> The survey was carried out by telephone interviews with a panel of enterprises in Côte-d'Or, one of the four *départements* in the Burgundy region.

### **3. Analysis of the needs of the hotel and catering industry**

To evaluate training needs, it is necessary to find out about current recruitment and training policies, to identify profiles of expected skills and abilities, and to target technical and organisational developments at work. In the case of the hotel and catering industry, OREF forecasting is structured in four stages. Stage one is finding out about past quantitative changes by means of chronological analyses of labour supply and demand over 10 years; this can establish whether the situation is becoming worse or not, and whether the phenomenon is structural or a result of temporary economic conditions. Stage two sheds light on the career paths of people leaving training, revealing the links between training received, job occupied and sector of activity. The purpose of stage three is to record recent qualitative changes through interviews with senior staff in enterprises, to establish factors affecting job developments in the sector and the skills and abilities expected. Stage four is examination and in-depth study of the diagnosis by a working group made up of the public authorities, trade unions and OREF.

If quantitative and qualitative statistical data from a variety of sources are combined, the particular features of the sector and of the associated jobs can be highlighted. Our approach is not limited to showing a few percentages or figures but draws the attention of decision-makers and others involved to certain weaknesses and strengths. The exercise does not merely consist of handing out information but reuses a range of data relevant to the issue, throwing up specific queries. This document presents the main questions drafted by OREF Burgundy from shared information and knowledge, and the answers given by professionals in the hotel and catering industry.

At a discussion day with various regional bodies, the OREF network put forward conclusions and queries drawn from analysis of quantitative and qualitative developments, and from the career paths of those completing training courses in the hotel and catering industry. The aim of this meeting of partners was to examine changes in training, employment and skills by pooling knowledge and points of view so that future problems and opportunities could subsequently be indicated to various interested parties, and decisions clarified.

From analysis of the quantitative and qualitative data, OREF drew up seven findings and queries and asked partners to respond. These partners were representatives of the Regional Council (i.e. regional government), central government (Ministry of Labour and Ministry of National Education), professionals in the hotel and catering industry, national professional bodies (National Hotel Industry Training Fund) and the four *départements*, as well as trade unionists and managers from training agencies and support bodies.

#### **3.1. Finding 1**

The figures did not suggest genuine lack of interest in these occupations among young people, and this was evident from the rise in numbers in training (from 1 000 to 1 500 completing courses) and requests from young people for advice on taking such courses. This was confirmed

by the fact that around 1 000 young people had trained in the hotel and catering industry in the Burgundy region, either at upper secondary school or through apprenticeship, and had entered the labour market. Were there any signs pointing to a change in trend?

All partners agreed on the various specialist training courses to be taken into account, and on the numbers involved. The conclusion was that young people were not averse to hotel and catering jobs.

### **3.2. Finding 2**

In establishments employing 10 or more people, two thirds of employers said that they were recruiting paid staff for unskilled jobs. Only about 24 % of former apprentices were taken on by the enterprises where they had trained (the lowest recruitment rate was 10 %). After leaving vocational upper secondary school, almost a third of former pupils were recruited as apprentices rather than as 'paid staff'. Was it clear how the hotel and catering industry recruited staff? How was it possible to reduce the very large gap between the image of the profession which young people had when they started training and the real conditions under which they subsequently worked?

There was total bafflement at the statistics provided on unskilled jobs, even though they were based on statements by employers.

Some professionals believed that the low rate of recruitment of apprentices in the enterprises where they had trained was explained by the tradition of moving from one enterprise to another to gain practical experience. One professional said: 'It is a well-known tradition in trades that apprentices have to pack up and move on when they finish their apprenticeship if they want to be trained thoroughly. It would be a shame for this custom, this tradition to be lost.' But this explanation did not satisfy all participants: the national decision-maker spoke of hidden reasons that ought to be brought into the open, and mention was also made of the importance of the personality of the boss and of the influence of the workplace setting. The rate of drop-out from apprenticeship contracts (around a third) was pointed to as suggestive of difficulties in this regard.

However, no analysis was put forward to clarify the role of apprenticeship after vocational upper secondary school.

As for the gap between the image that young people had of the profession and the real conditions under which people worked, no immediate answer was forthcoming. However, during actual negotiations on a reduction in working hours, the issue of working conditions, previously considered taboo, was addressed. The difficulty lay not in attracting more young people but in stopping large numbers of people leaving the industry.

### **3.3. Finding 3**

Far from being explained by a lack of people trained in hotel and catering jobs, the problems of recruitment appeared to be recurrent <sup>(7)</sup> and coexisted with more training provision and relatively high unemployment. Moreover, many young people and adults found themselves unemployed after taking a vocational training course in this field. How could this apparently paradoxical situation be explained, given the shortage of labour complained of by employers?

Employers appeared completely puzzled by the unemployment situation. Nonetheless, the beginnings of an explanation were noted: according to the Ministry of Labour, half the job-seekers would rather look for catering work outside hotels and restaurants (school canteens, retirement homes, hospitals, etc.) because of the difficult working conditions and hours.

### **3.4. Finding 4**

Over the next few years, hotels and restaurants should still be creating jobs and taking on young people. Young people who went on working in this sector (four to five years after finishing training) quite quickly gained access to skilled jobs. In other words, career trajectories pointed to the existence of a ‘hard core’ of individuals who put the knowledge acquired through training into practice in their occupation. How could this hard core be expanded, thereby reducing the volatility and drop-out witnessed in the industry?

The trade unions were aware that hotels and restaurants were creating jobs and taking on young people but, according to the Ministry of Labour, there was still a huge problem of financially rewarding length of service through pay. At the end of the session, the representative of the national occupational trade union put forward a topic for future discussion: ‘we have to work towards lower drop-out of professionals, we are thinking about professional development, horizontal careers and waymarking career paths so that young people who will be cooks and waiters all their lives can have a career which will enable them to choose, to have a sense of purpose by experiencing new attractions that will enrich their working lives’.

### **3.5. Finding 5**

There was a modest return to continuing training (similar to the findings of the *National forecasting contract* of 1995). Three reasons were put forward by the managers of enterprises questioned: the difficulties of replacement, lack of time, and inadequacy of training. Which of these seemed the most significant, and which the least? What developments could be expected, and what factors for change?

No reaction to the questions asked was forthcoming.

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<sup>(7)</sup> A recurrent theme in the building industry, for example (see Amar and Viney, 2000).

### **3.6. Finding 6**

According to the national survey, a number of managers of small establishments stated that their permanent staff took on multiple roles, doing two jobs (e.g. chambermaid + waiter, waiter + cashier, etc.). Was the possession of two skills an increasing requirement in small establishments, and would it become more widespread in future?

A single answer was given by the representative of the national trade union: ‘doing everything will continue, but it could be treated differently. People required to carry out multiple tasks need to have an all-round basic competence in the hotel and catering industry, as cook, waiter, and other skills. This may mean multiskilling in fields that are quite far apart’.

### **3.7. Finding 7**

The dominant idea was that changes to come would not lead to a radical transformation of jobs although some changes would be noticed: the need to adapt to new demands, particularly from the clientele, to new standards (hygiene and food safety), to working conditions (in food preparation, hours of work, etc.) and to the emergence of new skills, especially those brought about by the development of information technology. Was this list of main factors complete? What new knowledge and skills would have to be acquired? What would have to be added to the content of the training currently given?

Only the national representative of the occupational trade union spoke about developments: ‘The future will increasingly be on the distribution side and much less in production. The young people of tomorrow will need to be willing to work more often in customer services and not in producing meals. Of every 10 jobs, 4 will be out front in the dining room, 3 in the kitchen, 2 in reception and 1 other’.

## **4. Conclusions**

These various analyses show that problems of training, and then of finding jobs and recruitment, cannot be treated independently of labour market policy, nor of the tensions which may exist in the labour market (such as the huge turnover in hotels and restaurants). ‘The aim is to work with the professionals to arrive at a number of reliable conclusions about the employment situation in the sector, and then to find ways of improving this, in terms of career support, training, tutorship, etc. (Regional Council responsibilities). One paradox: many young people join and few stay, a situation which does not match stated needs in terms of jobs. On the basis of a reliable diagnosis this will mean finding medium-term areas for forward-looking improvement and progress, which is the precise purpose of objective contracts.’ These words, spoken by the representative of the Regional Council responsible for drawing up the agreed objectives, sum up the state of the debate at the end of the discussions between the regional partners.

Our approach combines quantitative analysis, using statistics on training, employment and labour market entry by people completing training, with qualitative analysis using surveys of senior staff at the workplace. These investigations among professionals elucidate, complement and validate the statistical findings. From this approach it is evident that the notion of finding a complete match between training output and employers' skills needs is a myth. It is difficult to measure employers' needs, those leaving the education system are not the only people looking for work, training may lead to different kinds of job in a variety of sectors, a given job may be occupied by people from a range of training backgrounds, and demand for training and work from individual young people and adults changes in accordance with social representations and economic requirements. A mechanical, quantitative relationship between requirements and training needs to be replaced by a quest for points of adjustment between these two elements.

Similarly, this approach clearly demonstrates that one single indicator cannot sum up the complexity of a situation. Indicators are only one way of raising questions in order to channel continuing discussion with regional parties. By contrasting and comparing a variety of information it is possible to gain a better understanding of the true situation, to reveal employers' local recruitment practices, and to identify certain imbalances between the structure of employment and that of training. Forecasting has to be based on a detailed diagnosis of the current situation and on comparison of the points of view of different interested parties. The purpose of this approach is to generate action and depends on its capacity to develop a diagnosis based on agreement among those involved as to priorities and common principles for action.

## **5. Questions still remain**

This diagnosis, which is the result of a comparison of information, should improve dialogue and discussion of choices between the different parties involved. Trade unions and occupational bodies have a national vision of the sector and the jobs within it. Generally, national bodies nearly always try to lay down various ways of matching employment to training, using the agreed objectives as a tool for coherence and negotiation at regional level. The agreed objectives, therefore, set out to combine two different kinds of approach: one sectoral and national, and the other regional. How far can regional bodies share information when their interests are sometimes guided by contradictory objectives?

Agreed objectives would seem to be drawn up on the basis of various imperatives which do not necessarily follow the same lines of thinking: the public-service administrative principle (the need to provide all children with education according to national objectives), the regional development principle (choosing between specialisation fields and their geographical spread), the sectoral principle, and so on. Given the different ways in which those involved think (central government, Regional Council, trade unions, training providers, etc.), is shared diagnosis a realistic goal?

The agencies involved in employment and training, national government, the regional authorities, employers and individuals, have a freedom of manoeuvre which they sometimes use in a way that may not be fully consistent or coordinated with their partners. It is a long process to persuade institutions that are sometimes in competition to pool certain points of view in order to carry out concerted action. Furthermore, this shared diagnosis at a given moment obviously does not stand still and requires further discussion and evaluation over the years. How can regular dialogue be ensured between the economic and social actors in a given region?

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# Research on tourism trends in Hungary and their transfer into tourism education

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4P4U, Hungary

*The contribution presents the results of research on tourism trends in Hungary. The trends show that this country, in the very middle of Europe, is one of the most visited areas of the world, yet has only a very low share of tourism revenues. The facts urge a change of paradigm, a new strategy with exclusive tourism in the foreground: quality approach instead of quantity approach, with perhaps fewer visitors but higher revenue per tourist. A good opportunity to seek a new position and qualitative changing of tourist supply may well be enhanced by the EU accession.*

*It is very important to assure the financial basis of those changes by State subsidy and creating good economic surrounding; moreover, the transfer of researched tourism trends into tourism education is at least of the same significance. Consequently, more practical training programmes will be introduced to create the human capital of the renewed Hungarian tourism.*

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## 1. Research of tourism trends in Hungary

Hungary joined the EU on 1 May 2004. Hungarians are commonly referred to as a spicy people so hopefully they will bring a little more spice to the EU, not only from the hot Szeged paprika in cooking but also in tourism. The Hungarian language, origin and the incidental relationship with Attila's Huns (Cf. the name of the country), Hungarian folklore and traditions make Hungary perhaps a little bit mysterious. In the language of marketing that becomes a niche product for the rest of Europe and the world, so we should make a unique selling proposition of it. At the same time our people are regarded as a hospitable people and now one of the most welcoming ones in the EU, according to international surveys. This seems the most important aspect, on the basis of which we can look forward with faith to the future of Hungarian tourism.

According to the data of the World Tourism Organisation (WTO) for the year 2002, Hungary still occupies the 13th place, a high international rank in the number of incoming tourists (Annex 1). Yet in tourism revenues Hungary can only be found at the 31st place in 2001 (Annex 2).

As estimated by the World Travel and Tourism Council (WTTC) the contribution of the tourism sector to the GDP of Hungary in 2003 (taking into consideration multiplying impacts) is EUR 7.5 billion, or 10.4 %. Every 10th job is related to tourism.

With EU accession, Hungary becomes part of the biggest tourism market in the world. The figures for the first years of the new millennium well illustrate the extent of market expansion brought about by the accession process, benefiting entrepreneurs and undertakings involved in tourism.

Two thirds of EU citizens spend their holidays in the EU, with approximately 50 % of the revenues from world tourism raised in the EU market. Some 50 % of Hungarian tourists are also most likely to travel to other Member States. Almost 70 % of tourist nights at Hungarian accommodation establishments are spent by guests coming from the EU.

There is no uniform European level tourism policy and the legislation on tourism varies in the Member States. Because of the contribution of tourism to the national economy, government ideas on development strategy and the development level and traditions of the particular countries, Member States have different views on legislation for tourism.

Consequently, there is no uniform or adoptable recipe for the Hungarian administration. After the accession, Hungary may count on the Mediterranean countries as allies in developing tourism. This group of Member States normally receive large numbers of tourists. They are urging an increase in tourism competence and activities in the EU. They need resources to develop their neglected regions and their tourism in general as well as to increase their competitiveness. Such resources are available within EU structural and cohesion funds. The interest of the members of the group is to receive more targeted funding for tourism development from the funds mentioned above.

The importance of tourism in Hungary is not only in its economics. While revenues produced by tourism are important for the country, its main significance lies in social and environmental impacts. Tourism facilitates recreation for people, thus contributing to establishing a healthy way of living and playing a mediator role between different cultures; it also strengthens tolerance. Tourism may facilitate employment, regional balancing and increased knowledge among the people. Nonetheless, the economic impacts of tourism are also important due to its capacity to cover trade deficit. Although the tourism trade suggests that over 10 % of the GDP are provided by tourism, the data are not necessarily accepted in other fields of public administration in absence of appropriate and exact survey figures.

A basic problem in Hungary is the weakness of the tourism trade in lobbying skills, although this is not a characteristic of this country alone. A good illustration is the provision concerning structural funds, which had to provide the basis for the *National development plans* of the countries accessing to the EU, and which contains the word 'tourism' only once in 94 pages (Council Regulation, 1999). In Hungary the State subsidy for tourism (or rather let us call it an excellent investment) of EUR 22.5 million in 1998 rose to EUR 115 million by 2002. From this, particularly on the basis of our thermal waters, health tourism started to grow significantly. Currently, due to the economic constraints the State subsidy targeted to tourism decreased to EUR 42.5 million, 37 % of the 2002 figure (Panoráma Bulletin, 26 April 2004).

Despite the advantageous facilities of the Hungarian tourism and the high number of visitors, the sector is struggling with several other problems:

- (h) revenue per tourist is fairly low, the main reason being primarily services of an inappropriate price/value rate and the lack of complex products;
- (i) regional concentration is strong. Budapest and the region of Balaton represent nearly half of the Hungarian tourism;
- (j) seasonal concentration is strong. The country has few attractions suitable for extending the season, so the actual high season is fairly short, which results in short term profits maximised by those involved in tourism services.

Similarly to other sectors, tourism also started becoming 'green'. While the term 'sustainable tourism' is now becoming obsolete, few people are aware of its particular content. Sustainability will mean that the resources providing the basis for tourism, as well as those involved in tourism, will not be subjected to effects in their use that start some irreversible negative processes.

From 1993, domestic tourism was marked by an almost continuous increase. Quality changes are more significant than quantitative changes; the majority of domestic tourists are increasingly looking for services of higher standards. The number of domestic tourist arrivals doubled by 2002 compared to 1990, with turnover in three or four star hotels continually rising. There was also an increase in the popularity of making several shorter trips, with the average stay for domestic tourists considerably decreasing in the past decade, from 5.5 days in 1990 to 2.6 by 2002.

The main countries providing tourists to Hungary comprise three different groups:

- (a) first, a high number of groups of relatives and friends primarily from the Hungarian regions of the neighbouring countries, generating significant excursion turnover;
- (b) Austria is an exception from the neighbouring countries group, occupying a significant place in the number of tourist nights. Austria is included in the second group constituting the main traditional originating countries for Hungary: Belgium, Germany, Italy, Luxembourg, the Netherlands, Poland and the US. Germany has for decades traditionally been considered to be the most important tourist originating country for Hungary. However, the rate is so high that it also suggests dependence, with tourism sensitive to changes in the German economy and in demand, which many competitors can satisfy;
- (c) the third group of countries consists of dynamically developing, new originating areas such as France, Portugal, Russia, the Scandinavian countries, Spain, the UK and areas outside Europe such as Canada, Israel or Japan. These countries currently do not have a significant share in use of public accommodation establishments but the trends of the past five years suggest opportunities for development.

Currently, there is no tourism research organisation to assist strategic planning which would entirely satisfy all national and regional demands as well as those of enterprises. At national level only the Hungarian National Tourist Office is involved in tourism-specific research programmes, primarily supposed to satisfy its own demands as well as occasionally those of

the State Secretariat for Tourism. One of the research programmes of the Hungarian National Tourist Office covers the travelling habits, motivations and financial spending structure of visitors from the main originating countries, as well as those of the Hungarian population. Results have been acquired so far on the basis of secondary analysis of guest turnover data, and primary surveys are under way in Denmark, Finland, Russia and Sweden, and expected in the Czech Republic and Switzerland in 2005.

The Hungarian Central Statistics Office (HCSO), in accordance with EU provisions, is currently adjusting its data registration system for tourism, in which the tourism targeted consumption/spending of the Hungarian population and foreign tourists visiting Hungary are regularly examined. These surveys will also provide information on tourism demands concerning Hungary, which will be the basis for the marketing activity of the Hungarian National Tourist Office and will also be indispensable for its efficiency measuring activities.

Special attention will be paid to the research of the demand and supply of specific tourism products by applying primary and secondary, as well as qualitative and quantitative, survey methods.

The main directions of the product-specific survey are as follows:

- (a) exploration and continual monitoring of the national and international trends of supply and demand;
- (b) analysis of supply of main originating countries and competitors;
- (c) survey of the special needs, travelling habits and spending structure of the particular market segments;
- (d) examination of ways of acquiring or sources of information used by tourists;
- (e) survey of the potential demand in the originating countries for certain products;
- (f) analysis, qualification of products, elaboration of development proposals.

It is a severe deficiency that the results of the central survey do not assist activities in the regions. At regional level no survey results are available which would be suitable for thorough marketing activities. However, in 2003 the Hungarian Central Statistics Office launched two periodical data recording programmes, which will continually provide information on Hungarian travelling habits (quarterly) as well as those of foreign tourists visiting Hungary.

## **2. Transferring tourism trends into tourism education**

Tourism basically demands a considerable labour force and offers a high job supply for both highly and less qualified manpower. An indispensable factor in developing the tourism sector is a professional client-oriented attitude, a basic product component being personalised service. Currently, however, some deficiencies may be observed both in skills and in handling clients. It is, at present, a quite common contradiction that young people graduate from schools involved in tourism education, whereas businesses need qualified professional

manpower with practical experience. Hungarian tourism training and education opportunities are continually expanding and training programmes performed in foreign languages are also available in secondary and tertiary education. Tourism education, however, became student market oriented, which resulted in overeducating in certain fields with shortages in others.

The number of those graduated in tourism tertiary education exceeds labour market demand, explained by the interests of the institutions being maintained on a market basis as well as by the inflexibility of the education sector. Nevertheless, tourism is still a fashionable profession; it is also quite popular among those young people who wish to carry on with their studies but do not have a specific choice of profession. A considerable number of qualified tourism experts continue their careers outside the profession.

In Hungary, tourism education is absent from formal university education. Six institutions carry out college level training in the major subjects of catering and hotels, and tourism and hotels. The education system has not yet reacted to the demands emerging from EU accession. The training programmes are still catering and hotel dominated, while no progressive programmes have so far appeared capable of keeping pace with the demand trends across the world.

The survey results draw our attention to the fact that education and training programmes must be rearranged in accordance with the changing supply of products. There is a gap between the labour force demand for tourism and the supply of those graduating from schools.

Consequently, more practical training programmes must be introduced. Systems of exchange, facilitating acquisition of practical experiences abroad, must be developed, since tourism expects its manpower to be familiar with as many cultures and languages as possible. With the rapid growth of health tourism, 1 500 animators and wellness specialists will soon be needed. It seems a grave mistake not to provide the qualifications appropriate to the everyday practice of tourism and give trained students to other economic fields.

EU accession and the expansion of the labour market will, it is hoped, bring about the alignment of tourism education principles within the EU.

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## Annex 1

Table 1: The most visited destinations throughout the world in 2002

Order		International tourist arrivals (million people)		Change (%)	Market share (%)
		2001	2002	2002/2001	2002
1	France	76.5	76.7	+0.3	10.7
2	Spain	49.5	51.8	+4.6	7.2
3	US	45.5	41.9	-7.9	5.9
4	Italy	39.0	39.8	+2.1	5.6
5	China	33.2	36.8	+10.8	5.1
6	UK	23.4	23.9	+0.5	3.3
7	Russia	-	21.2	-	3.0
8	Canada	19.7	20.0	+1.5	2.8
9	Mexico	19.8	19.7	-0.5	2.8
10	Austria	18.2	18.6	+2.2	2.6
11	Germany	17.9	18.0	+0.6	2.5
12	Hong Kong (China)	13.7	16.6	+21.2	2.3
13	Hungary	15.3	15.9	+3.9	2.2
14	Poland	15.0	14.0	-6.7	2.0
15	Greece	-	13.1	-	1.8

Source: Data of the World Tourism Organisation, calculation by the Hungarian National Tourist Office

## Annex 2

Table 2: The world's top 15 earners from international tourism in 2001

Order		International arrivals (USD billion)		Change (%)	Market share (%)
		2000	2001	2001/2000	2001
1	US	82.0	72.3	-11.9	15.6
2	Spain	31.5	32.9	4.5	7.1
3	France	30.7	29.6	-3.7	6.4
4	Italy	27.5	25.9	-5.7	5.6
5	China	16.2	17.8	9.7	3.8
6	Germany	17.9	17.2	-3.7	3.7
7	UK	19.5	15.9	-18.8	3.4
8	Austria	10.0	12.0	19.7	2.6
9	Canada	10.7	-	-	-
10	Greece	9.2	-	-	-
11	Turkey	7.6	8.9	17.0	1.9
12	Mexico	8.3	8.4	1.3	1.8
13	Hong Kong (China)	7.9	8.2	4.5	1.8
14	Australia	8.0	7.6	-4.8	1.6
15	Switzerland	7.5	7.6	1.6	1.6
	...				
31	Hungary	3.4	3.8	9.8	0.8

Source: Tourism highlights, WTO, 2003.

# Distance learning for professional education in tourism

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*Distance learning, with its time flexibility and ability to fulfil individual preferences, is one of the most appropriate tools for vocational education in tourism. This contribution describes typical functions of distance learning courses, the role of distance learning in tourism at university education level, modified Jafari's education model and some aspects of distance learning in tourism at Hradec Králové University. Examples illustrate the importance of unifying course structures, time and content planning.*

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## 1. Introduction

New technologies (predominantly transportation, and information and communication technologies, ICTs), an increasing amount of free time, tourist motivation in looking for new experiences, economic growth in many countries are among the factors that cause changes in tourism and substantially increase human mobility. Nowadays, tourism is changing rapidly in terms of quality and types of services, methods of management and marketing, the need for cooperation in the public and private sectors and for new sustainable framework of activities (long-term planning, fundraising, education, application of de-marketing, set of sustainable indicators for environmental impacts monitoring). Temporal and spatial differentiation of tourism activities (mass versus individual tourism), globalisation, etc. have their effect, as do ICTs. The latter offer communication and promotional applications (especially multimedia and pseudo-virtual reality), direct-services (e-business – reservation, home-banking; safety services – biometry applications; transport management) and information potential (local based services, GIS <sup>(8)</sup> applications, huge meta-informational services) and are very important as one of the driving forces of change.

New technology driven product development and the international labour market are changing the demands of professional education for tourism. The following basic questions can be asked of educators:

- (a) what should education content be for different professional segments? <sup>(9)</sup>;
- (b) what is the best education technology for different professional segments?

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<sup>(8)</sup> Geographic information system.

<sup>(9)</sup> Segmentation is mainly into business segment, region (cultural and local specific), previous education, student age, personal preferences and opportunity to study.

## **2. Distance learning**

Distance learning transforms the role of the teacher as a direct educator (and also in higher education as a creator of study materials) to the role of tutor as a consultant, study materials creator, organiser and educated user of ICT (developing and design of study materials). Implementation of distance learning can generally use a combination of different technical tools: video, data carriers (CD-ROM, DVD), different applications on the Internet, and exploitation of existing Internet resources. These technical tools can offer the following functions:

- (a) authorisation of students and tutor;
- (b) accurate information on course content, time plan, demands for courses admission and completion (methodology of tests and written and oral exam evaluation, specification of entrance knowledge from other fields, exam questions, illustrations of credit and exam tests);
- (c) study materials, including topics, texts or summaries of lectures, lists of recommended literature, lists of other information resources, overview of information resources on the Internet and their annotation and revision, other study materials (legislation, course outlines, professional publications by tutors, etc.);
- (d) programming, including content and instruction for single tasks, topics and content of course projects;
- (e) communication between student and tutor, personal consultation;
- (f) discussion among students, with tutor moderation, of professional topics, revision of course projects, public consultation;
- (g) overview of individual study, including meeting credit prerequisites, results of credit tests and exams, revision of course projects and training;
- (h) stimulation of students, with presentations of the best students projects;
- (i) introduction and profile of tutor, including photograph, professional profile, interests;
- (j) management of bachelor and diploma projects; topics and their content, overview of tutor, consultation.

The Internet is a natural technical tool for distance learning in tourism and has broad potential for tourism education. Direct use of the Internet in tourism has increased considerably as a medium of service presentation and marketing, marketing research, electronic searching services and of electronic business.

## **3. Distance learning in tourism at university level**

The demands of graduate study can be described on the basis of a graduate profile. The travel and tourism university graduate should be an independent person demonstrating initiative in

his/her field of study. There should be an ability to apply skills immediately, or after short professional training and self-study at any position in an organisation, institution or tourism company, in the European or international labour market. The graduate's professional career is based on:

- (a) personal profile and appropriate behaviour in different situations;
- (b) communication, organisation and project skills;
- (c) knowledge and skills in fields closely connected to solid basis of social and natural sciences;
- (d) information intelligence.

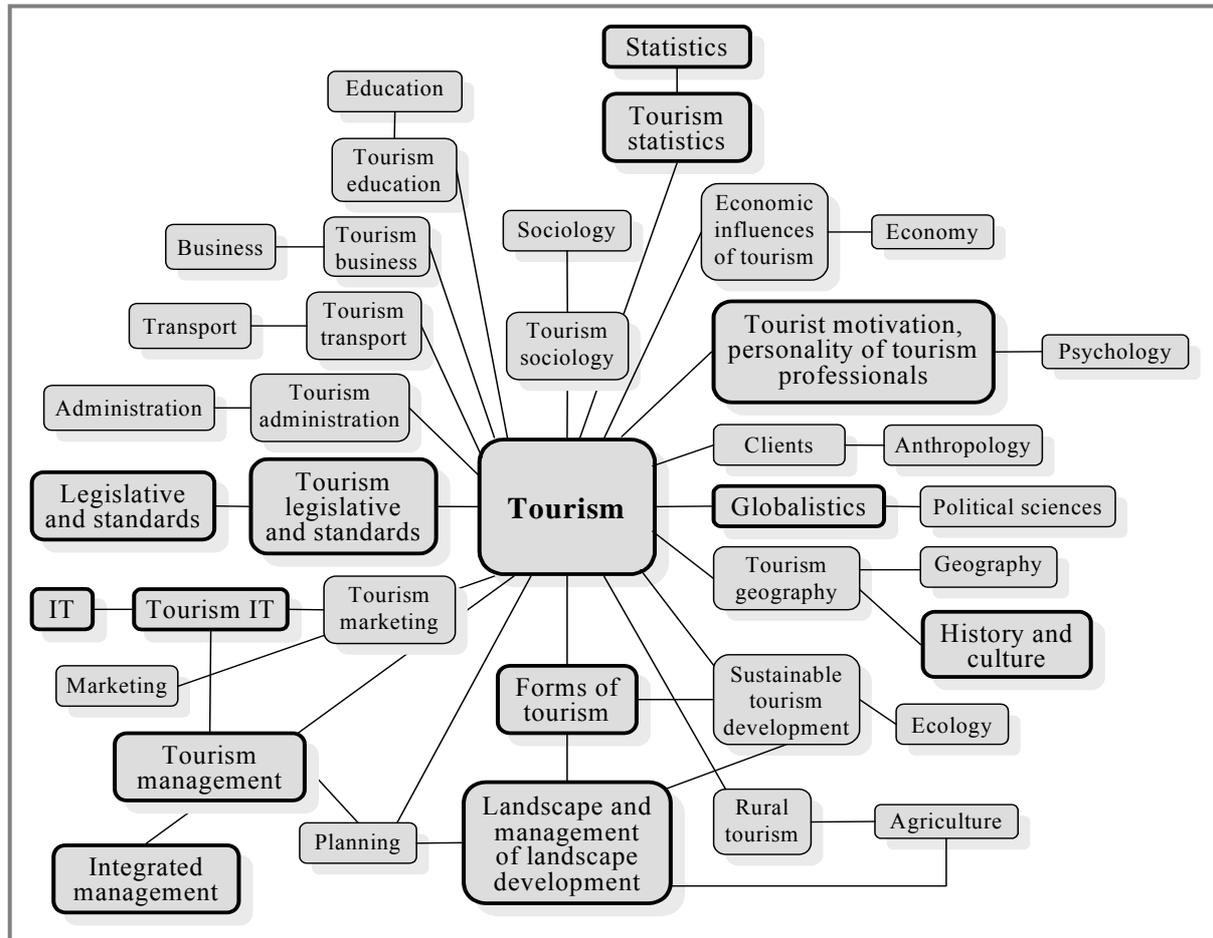
Knowledge and skills are acquired in a comprehensive and open system which is gradually completed in the course of the professional life. The competitive potential of a company increases significantly through employee activities and self-confidence based on knowledge and skills, application of modern methods and approaches, orientation towards the customer and product quality. The university graduate should fully respect the principles of sustainable tourism development and apply these principles in a system of values, behaviour and products. The appropriate knowledge structure is shown in the Figure 1.

Distance learning is a modern form of education for tourism, most suitable for retraining or upgrading knowledge in certain fields. Distance learning in tourism is often proposed as a modular programme and can be built on the following modules:

- (a) economy and accounting, economy and tourism;
- (b) informatics: basic module;
- (c) tourism informatics;
- (d) local cultural: historical geography;
- (e) cultural: historical geography of Europe;
- (f) cultural: historical geography of the world;
- (g) management: basic module;
- (h) tourism marketing;
- (i) international tourism;
- (j) tourism management;
- (k) legislation of tourism;
- (l) guides and delegates in tourism;
- (m) psychology: basic module;
- (n) tourism psychology;
- (o) regional development and creating regional products;
- (p) statistics: basic module;
- (q) tourism statistics;
- (r) tourism technology;

- (s) tourism theory;
- (t) tourism trends and new products;
- (u) sustainable tourism;
- (v) world language 1, world language 2.

Figure 1: Model of tourist education: modified Jafari's scheme



Source: An introduction to TEDQUAL, A methodology for quality in tourism education and training, WTO 1997, ISBN 92-844-0211-5

#### 4. Distance learning in tourism at Hradec Králové University

Distance learning or, more accurately, computer-supported tourism education (distance learning is in the preparatory stage) has been in use at Hradec Králové University for 10 years. Nowadays, it is based on WebCT software and there are more than 30 courses prepared for tourism. The examples described below illustrate some interesting aspects of distance learning courses: standardisation (unification) of their structure (Example 1), and a possible method of course implementation (Example 2).

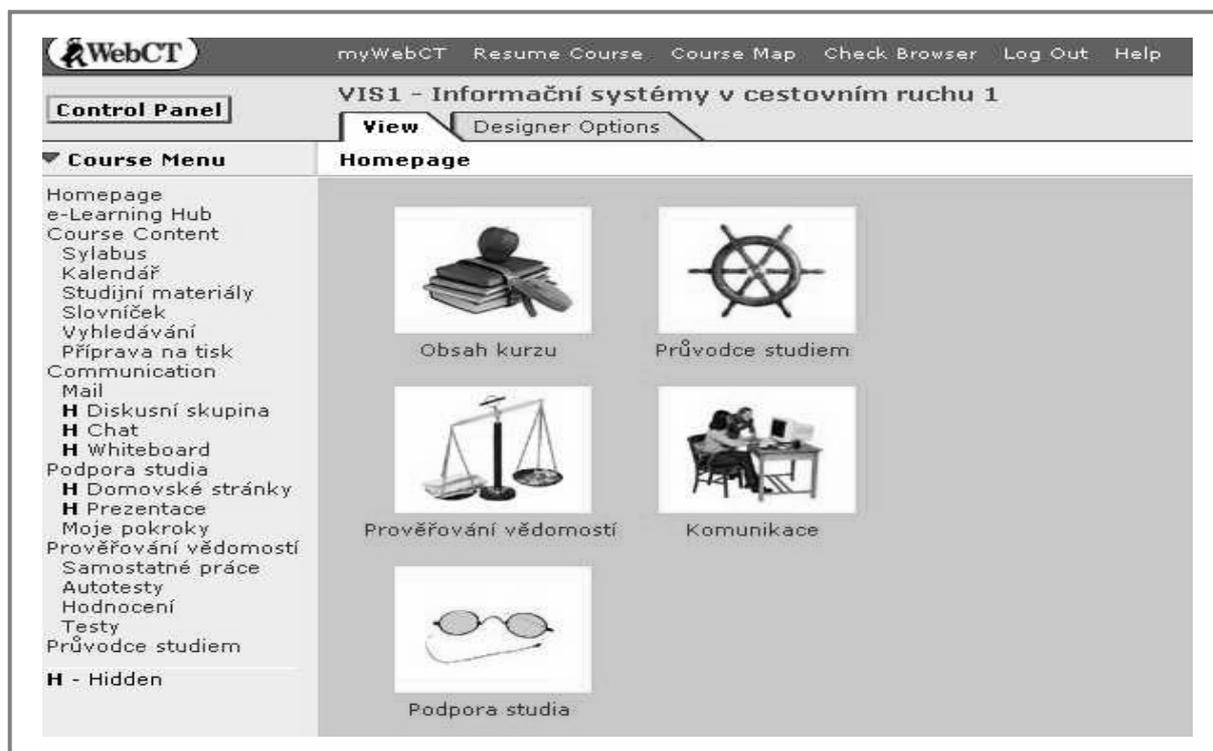
#### 4.1. Unification of course structure

Unification of the course structure aids student orientation throughout the course and effectiveness of study.

A home page provides visible basic course structure (Figure 2):

- (a) course content;
- (b) study guide (detailed description of course targets and how to reach those targets, past tests, test questions);
- (c) evaluation (self-testing, questions to modules, seminar works);
- (d) communication (e-mail, chat, white board);
- (e) study tools (student web pages).

Figure 2: Home page – basic structure of the course



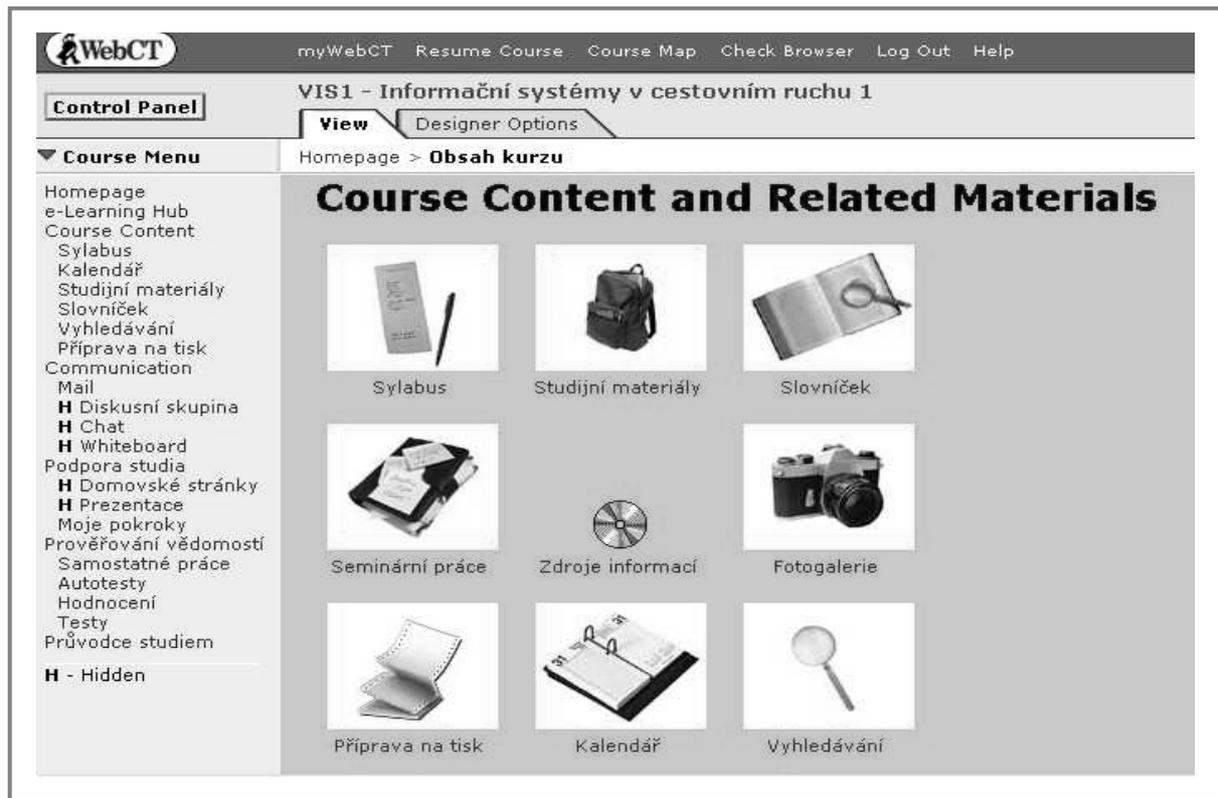
Source: <http://oliva.uhk.cz> (available only in Czech)

The course content is the basic information resource for study (Figure 3). It contains:

- (a) the syllabus;
- (b) study materials (texts of lectures, questions, other lecture materials);
- (c) comprehensive explanatory dictionary with hyperlinks;
- (d) information resources (online textbooks, connection to information server, full-text articles, examples of resources, etc.);

- (e) seminar works (examples of the best student work, methodology of creation and evaluation, themes for small and large student groups);
- (f) photo gallery (as a support for discussions, thinking);
- (g) calendar (what and when);
- (h) a search engine.

Figure 3: Course content



Source: <http://oliva.uhk.cz> (available only in Czech)

#### 4.2. Implementing the course *Informatics for tourism* in the framework of distance learning

Below is a short extract of the content of the module *Informatics for tourism* in the framework of distance learning:

- (a) usage analysis of ICT in tourism and the hotel industry: the analysis is based on projects using ICT, practical training on a wide spectrum of products from all fields of the tourism and hotel industry, with the accent on information and reservation systems for travel agencies, tourism information centres and among different tourism subjects and target customers;
- (b) coordinated tourism information system and standards for Internet pages;

- (c) analysis of important products (two products as minimum for every type of business in tourism and hospitality);
- (d) case studies of ICT use by different subjects;
- (e) assessment of individual problems in trainee knowledge profiles.

*Box 1: Module 'Informatics for tourism' (web-based)*

**Time plan**

Total length of education: five months.

**1st month**

Overview of subject content, entrance demands, demands on credits, exam questions, time plan.

Study of recommended literature, mainly textbooks, list here.

Overview of Internet resources, list here.

Consulting of individual problems of knowledge of IT of students – table with overview of demands, creating individual plan to eliminate individual problems getting familiar with topics of semester projects (list), choice of two topics, consulting their working up with tutor.

**2nd month**

Elaboration of course projects with support of the Internet resources, consultation with tutor.

Installation of software, downloaded from www pages here.

Elaboration of exercise 1–5, content here.

Getting familiar with resources on www pages according to list.

Discussing content of literature recommended – discussion group, individual consultation.

*Source: distance learning project, designed by Zelenka, Jozef.*

## 5. Conclusion

Tourism can make use of distance learning, which can satisfy different student and professional groups. The quality of distance learning is based mostly on online applications created by professionals and can be considerably improved through online textbooks, unified course structure, detailed study time plan, different communication tools, student motivation and an information server. It is advisable to combine distance learning with face-to-face consultations and seminars to ensure personal and language skill development.

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# Development of tourism in Montenegro and future labour force needs

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*Montenegro, the smallest republic of former Yugoslavia, has a big potential and big plans for tourism development. According to the Masterplan of tourism development, a document officially accepted by the present Government, at the beginning of 2020 tourism will be major sector of the economy with its share of 20 % to 25 % in GDP and around 50 % in total employment.*

*In order to achieve such ambitious goals, it is essential to diversify and upgrade the quality of the entire sector. One crucial factor is the quality of the labour force, which is evidently low. A shortage of competent professionals can be a major obstacle for rapid development. To reduce this obstacle it is essential to intensify reform of education at all levels, to develop new programmes and to increase investment in education and training.*

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## 1. Introduction

In this contribution (<sup>10</sup>), unfortunately, we can not offer much on the main issue of the seminar, new trends in tourism development in Europe. The Montenegro case is of interest in two respects: what strategy of development should be chosen by a small and underdeveloped country at the starting point of intense development of tourism, and how it is possible that an underdeveloped country with a high number of unemployed people can experience a shortage of labour. In this article I would like to show that skill shortages, both quantitative and qualitative, can be a main obstacle to the ambitious development of tourism. Recommendations to reduce the labour shortage will be proposed in the final part of the contribution.

## 2. Background information

Montenegro is a Mediterranean country occupying 13 800 km<sup>2</sup>. Montenegro was the smallest and least developed republic in the former Socialist Federal Republic of Yugoslavia. According to the Census undertaken in October 2003, the population of Montenegro was 617 740.

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(<sup>10</sup>) The basis for this paper was a presentation at the seminar Trends and skill needs in the tourism sector in Halle, April 2004. I take this opportunity to thank officials from the European Training Foundation (ETF) for the financial support which was crucial for my attendance at this very useful seminar.

The length of the Montenegrin coastline is 293.5 km, out of which 117 km are beaches. There is a huge variety: high rugged mountains and deep ravines alternate with expansive plains and a fascinating coast.

Montenegro is one of the most beautiful countries in the Mediterranean. As was noted by TUI/Touropa: 'Montenegro is probably the brightest hope for Yugoslav tourism'. The latent resources have not been used to the full so far and the SFRY's 'cheap vacation' strategy had produced little value, either in terms of quality or quantity.

### **3. Tourism in Montenegro: historical background**

To understand the present situation and future plans better, it is important to give a short historical background of tourism development in Montenegro.

In the past, there were two distinctive periods of tourism development, while the third one has just started. Roughly speaking, the first period covers two decades from the beginning of the 1970s until the end of the 1980s, i.e. the development of former Yugoslavia (SFRJ); the second covers the 1990s (from 1990 to 2000/01) in a country called the Federal Republic of Yugoslavia. A new phase has started (beginning 2002) in a new country called Serbia and Montenegro.

#### **3.1. Development between 1970 and 1989**

In former Yugoslavia, Montenegro was a late-comer in tourism development. Tourism started to evolve at the beginning of the 1970s, with especially intense development in the 1980s. As a result of significant investment, quite impressive capacities in tourism were built before the break up of former Yugoslavia at the end of 1990.

In former Yugoslavia, Montenegro's share of GDP and of total population, was around 2 %; its share in tourism accommodation capacities in 1989 was 8.5 % and its share of income from tourism was 10 %. At the end of this period, tourism has become an important sector of the economy, with around 10-12 % share of GDP and employment.

Montenegro followed general trends in tourism development strategy. In former Yugoslavia and Montenegro alike, between 90 % and 95 % of capacities were intended for 'mass inexpensive tourism'. Only 1 % of hotels were of A (highest) category, around 77 % of B, and around 3 % of lowest C and D categories. The share of foreign tourists in the total number of tourists at the end of the 1980s was little over 30 % (DEG, 2001, p. 7-8).

#### **3.2. Development between 1990 and 2000/01**

This period can be characterised as a period of stagnation and deterioration. War and political instability in the region, then UN sanctions and NATO intervention caused long absence of foreign tourists and a decline in product quality.

One of the main characteristics is domination of private low standard rooms, most of which are unregistered and function in the informal (grey) economy <sup>(11)</sup>. Of an estimated 95 000 beds available, hotels account for 26 000 (27.5 %), of which 82 % belongs to the official B category (equivalent to 2 stars), camping 18 500 (19.5 %), other types of accommodation – for example young people’s hostels of an elementary standard – for 30 000 (31.5 %) and registered private lodgings for about 20 000 (20 %).

The extent of decline can be illustrated in simple figures. In the 1990s, the total number of nights spent in accommodation capacities by tourists declined from around 11 million at the end of the 1980s to 5 million.

A decade-long absence from the foreign market and a sharp shrinking of the domestic market caused the shortage of funds even for elementary hotels and basic infrastructure maintenance (roads, airports, railway lines, water supply, sewage disposal) as well as for training the workforce. Objectively speaking, Montenegro’s tourist product is at a lower standard than 10-12 years ago. There are practically no 5-star hotels and only a few of 4-star category. Out of 26 000 available hotel beds, just 1 000-3 000 meet the modest standards of the international market. The hotel sector is a low earner, under-utilised and standards are far too low for demanding guests.

### **3.3. Beginning of a new era**

In the past two to three years, the tourism industry in Montenegro has slowly started to recover. In 2003, Montenegro’s travel and tourism economy directly and indirectly accounted for 22 077 jobs (directly for 11 892), EUR 190.9 million income (directly 102.8), EUR 173.1 million of export. In this way tourism became an important sector of the economy, representing 14.4 % of GDP <sup>(12)</sup>. However, in real terms, this is still quite far from the 1980s level and faces many problems and limitations to growth.

## **4. Plans for future development: two strategies for tourism**

Both national and foreign experts, as well as all politicians, agree that tourism is a sector of strategic importance for future development in the short and in a longer run. Having in mind that Montenegro is practically starting intensive tourism development, it is of strategic importance to choose a right initial concept.

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<sup>(11)</sup> According to Ministry of Tourism estimates, the number of unregistered private beds is almost 60 000, and in addition 90 000 of available but statistically unrecorded beds exist in so-called summer vacation houses. If these figures are added to registered capacities then hotel capacities constitute only 10.5 % and the hotel rooms of higher categories only 0.4-1.2 % beds). This is definitely not a good basis for developing high quality and high earnings in the tourism industry.

<sup>(12)</sup> This figure represents direct and indirect effects calculated according to travel and tourism satellite methodology. According to old methodology, the share of tourism in employment and GDP is around 8 %. But this is in the situation when GDP is only 50 % of the last year of stability in former Yugoslavia (1989).

#### **4.1. National masterplan**

In order to get a more objective picture about the real potential and what strategy to choose, the German Investment and Development Company (DEG) was hired to undertake research. As a result of this research, a comprehensive and detailed study was prepared (DEG, 2001). The masterplan comprises detailed studies of development strategy, market development, regional planning, environment and transport infrastructure, management and waste (sewage) infrastructure, institutional infrastructure and training. The plan was completed and accepted by the Government in 2001 and became an official document.

In the masterplan it is proposed that tourism in Montenegro should develop as a combination of the mainstream mass tourism with gradually more emphasis on alternative tourism: eco-tourism, cultural, nature, rural, health, and numerous other specialities. It has to adapt to new market developments to move in a new, innovative, direction. Montenegro's aim is to become 'high-quality Majorca' for the summer season and, in winter, a qualified niche provider with special products. This will secure the country an exclusive market position in the Mediterranean. At the same time it is emphasised that Montenegro should draw on the experience gained, and particularly the mistakes, from other Mediterranean destinations, especially Majorca.

The masterplan is both an inspiring vision for the long-term development of Montenegrin tourism and a great challenge for overall national development. In the plan, Montenegro is seen as a country with considerable potential for tourism development. If the right strategy is chosen, and the right measures undertaken, by the end of 2020 tourism will earn more than EUR 2.2 billion. It will create about 75 000 new jobs, compared with 12 500 in 2001. In this way tourism will become the leading industry in the national economy (in terms of GDP, national income, foreign exchange revenue, employment, etc.), making up 20 to 25 % of GDP and around 50 % of total employment (<sup>13</sup>).

To achieve these ambitious goals it is planned to build an impressive accommodation capacity of 280 000 beds, of which 100 000 (or 35.7 %) will be in high-quality hotels and 110 000 (or 39.3 %) in suites, aiming at 25.9 million nights, of which 70 % will be in hotels, mostly used by foreigners. Parallel to new capacity building, it is proposed to reorganise and upgrade all accommodation capacities by setting quality standards.

#### **4.2. Sustainable tourism development strategy**

In the meantime, with the help of UNDP and foreign experts, a new document *Framework for development of sustainable tourism in Northern and Central Montenegro* (UNDP, 2004), has been produced. As indicated in the title, this document is of much more general nature, '[...] it is in some way a roadmap for thinking strategically about what steps need to be taken to fulfil the potential for alternative tourism in the Centre and the North' (UNDP, 2004, p. 3).

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(<sup>13</sup>) In this paper we only state what is written in the masterplan, without discussion of how much these goals are attainable and, if achievable, how useful and advisable it is for a small country to be so dependent on one sensitive sector.

The document stresses that Montenegro has a significant share of Europe's last great unspoiled wilderness within close proximity of the main population centres of the continent and practically demands sustainable tourism as a development model. These indicate that Montenegro has the potential to become Europe's leading destination for alternative, high value-added tourism.

The main difference between the two strategies is that the masterplan insists on the mainstream of tourism, introducing alternative tourism as a supplement to the tourist product, while the framework, taking a Costa Rica case as a benchmark, emphasises relevant niches of global tourism.

The emphasis is based on the fact that there is new territory to be claimed in the global tourism marketplace, a destination that has exceptional natural and cultural beauty and that is serious about environmental protection and reinforcement of that cultural heritage. This can be translated into an enormous economic gain for Montenegro. Based on the current market forces, recommendations are made on how to access the high-end market and how to position, present and package what Montenegro has to offer to the world market.

In the framework it is emphasised that developing mainstream tourism strategy, dominated by large, integrated companies, historically offered emerging destinations the opportunity to develop tourism flows, but at a significant economic, social and ecological price. Also, these companies gain dominating market power in such destination markets over time, such that a significant portion of the value added from tourism is 'leaked' out of the destination. At the same time, to meet the requirements of these companies, infrastructure typically grows at a speculative pace to accommodate projected rapid growth in visitation, putting pressure on the social fabric and ecosystems of the destination due to often overburdened planning and regulatory mechanisms; the result is tourism infrastructure 'sprawl' that scars the environment. This happens even in the context of the best tourism masterplans in countries where the emphasis is placed on rapid growth rather than sustainable development (UNDP, 2004, p. 5).

## **5. Labour force and tourism development**

In the last two to three years it was noticed that, in spite of the high number of registered unemployed and the high rate of unemployment (<sup>14</sup>), an increasingly higher number of people in tourism and some other industries are hired from outside Montenegro (<sup>15</sup>).

To learn more about these problems and to see what should be done to improve the situation, the Employment Agency of Montenegro undertook two extensive surveys. The first – more

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<sup>14</sup>) The number of registered unemployed is around 75 000, and unemployment is between 20 % and 30 %, depending on the methodology of calculation, i.e. registered unemployment or the Labour Force Survey.

<sup>15</sup>) In 2003 around 25 000 non-residential people were employed in Montenegro, the highest number of them (15 000) in the sector of tourism.

general – refers to employment and training needs for 2004 in all sectors of economy, all governmental and non-governmental institutions and organisations. The second refers to employment needs for seasonal workers in tourism for 2004.

The first survey (<sup>16</sup>) covered nearly 10 000 businesses and other entities in the state and private sector, which constitutes around 50 % of the total number of registered units and more than 90 % of total registered employment (<sup>17</sup>). The second (<sup>18</sup>) was undertaken among larger tourist enterprises and among private entrepreneurs which employ more than 10 seasonal workers. The main aim of this survey was to find out the number and profile for seasonal workers. Both surveys have shown that there is a workforce shortage and that employers are not satisfied with workforce quality, mainly because of outdated educational programmes and lack of capacity for practical training.

There are many reasons why unemployed people do not accept jobs in tourism: low wages, unfavourable working conditions, short duration of season and thus short hiring period (2-3 months), possibility to earn more in the informal sector, etc. At the same time, the Employment Agency identified, on the basis of discussions with representatives of the tourism industry and with entrepreneurs, that the educated labour force has low relevant competence and is of practically no use without additional education and training. Complaints focused on basic skills and competences: communication, use of ICT technologies, foreign languages, team work and competences among the narrowly specialised occupations such as cooks, waiters, tourist guides, front desk workers, etc.

Although not expressed in the surveys, the most important labour shortage in tourism is of managers (top and middle management) and entrepreneurs. There are several reasons for this. For a long time, Montenegro's tourist industry was dominated by large public enterprises. Most often, top and middle management were not appointed and promoted according to their education and capabilities but according to other non-professional criteria. Education at all levels, especially higher and university education, has not been producing a competent labour force. Management education has been especially weak, with no specialised education for management in tourism. Some available programmes were of too general a nature and with little practical training. In the last decade, the best people left the country, or left the sector, to survive and some of them left the public sector to start a private business.

Montenegro's tourism private sector is without tradition, weak and disorganised. As such it could not produce a greater number of either capable entrepreneurs or top and middle managers. For a long time the dominant idea was that tourism development was the responsibility of the people who work directly in the industry. Partnership and cooperation

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(<sup>16</sup>) *Anketa poslodavaca o zaposlenosti i zaposljavanju* [Survey on employment and training needs in Montenegro]. Podgorica: Employment Agency of Montenegro, January 2004.

(<sup>17</sup>) The applied methodology did not allow identification of the shortage of entrepreneurs and top managers.

(<sup>18</sup>) *Sezonska radna mjesta u turizmu i ugostiteljstvu Crne Gore* [Seasonal workforce in tourism and catering in Montenegro]. Employment Agency of Montenegro, 2004.

among different stakeholders and across various sectors allowed regional development and town planning, infrastructure management, and management of national parks to be carried out.

Even if the growth rate in tourism is more modest than foreseen in the masterplan, tourism in Montenegro will require large number of new competent workers. It is not only the workforce directly engaged in tourism that requires improved competences but broad segments of the population in other related fields:

- (a) marketing;
- (b) the hotel business;
- (c) landscape management and national parks;
- (d) environment, regional planning and transport;
- (e) architecture and regional design;
- (f) building and hotel engineering;
- (g) waste management;
- (h) culture and education,
- (i) economics, labour and social policy;
- (j) law and administration.

Being aware of this, Montenegro started to reform education, especially VET. This is a significant challenge for the entire education system. Nominally there are schools and faculties which provide education in the above fields. However, there is a need to establish new courses and to reinvigorate most of the existing ones. Although there are several institutions of higher education which provide education for tourism, all of them need to modernise their programmes with a greater emphasis on management, foreign languages, ICT, and practical training. Also there is a need to improve research, which Montenegro cannot achieve alone. Montenegro has already received support through EU CARDS programme, from the German Government and from individual schools. This support was for developing national occupational standards, curricula design, teacher training, development of the certification system, establishment and equipment of training centres for tourism (in Herceg Novi), etc. However, this is just a beginning, and much more needs to be done. This can be achieved only with substantial financial and technical support for education and training from the international community and donors.

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# Summary and conclusions

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## 1. Tourism in Europe

Tourism is an important sector in the European economy. It accounts for almost 5% of direct employment and produces 5 % of European GDP (ETC, 2004). The sector is expected to demonstrate stable growth in the next decades with the volume of European tourism doubling and sector employment rising by about 15 % (EC, 2001). The spin-off effects to other economic sectors should not be underestimated: stable growth in tourism can also boost employment in the sectors which benefit indirectly from tourism.

However, European tourism is growing at a lower rate than world tourism on average. Although Europe has been the number one destination in the world, it is – for various reasons, price levels and exchange rates included – expected to lose its position in the future, giving way to China and the US. European tourism remains largely internal with 88.1 % of visitors coming from Europe (WTO, 2004). To retain its unique position in global markets, European tourism has to compete with other world destinations and to attract travellers worldwide. This will not be possible without efficient human resource development policies and practices which would take into account global social and economic trends and their direct effect on the sector. The competitive advantage of European tourism in global markets in the long run cannot be based on the price of labour; it should rather focus on the quality, diversity and unique character of tourism services and travel experiences. The importance of skills and competences speaks for itself.

The main problems in tourism are very similar across countries: low pay, very high demand for staff flexibility and mobility, high staff turnover, high share of informal employment arrangements and persistent skill shortages. The sector also suffers from its highly seasonal character and is very vulnerable to external political and economic factors. Employment in such conditions is insecure. Over 95 % of companies employ fewer than 10 people (ETC, 2004). The specific nature of company size structure in tourism and the fact that the sector is practically non-unionised affect common HRD practices among tourism enterprises. The

continuous complaint from employers in the sector regarding skill gaps and shortages curiously coincides with few training offers among tourism companies.

At the same time, qualifications from tourism are much appreciated by other sectors thanks to many transversal skills in demand across occupations (e.g. customer orientation, interpersonal and intercultural communication). Many qualified employees leave tourism and young school graduates do not wish to enter the sector, preferring more stable and better paid jobs outside their original occupation. Employer recruitment practices often demonstrate a deliberate preference for un- or low qualified workers (normally cheaper) over qualified personnel. The question appears to be, therefore, whether the sector can afford such short-sightedness and waste of resources, and how this vicious circle can be interrupted.

Conversely, qualifications from other sectors are easily employable in tourism (e.g. qualifications in ICTs, finance and management). The logical question, therefore, was raised whether the provision of more general, transversal, qualifications might be a useful solution. The workshop participants looked at a number of issues in the debate and attempted to propose a suitable answer:

- (a) which societal and sectoral trends determine the shape of qualifications and which skills are demanded by the sector?
- (b) which new skills and occupations emerge in the tourism sector?

## **2. Trends determining skill needs in tourism**

Various research attempts to identify skills and qualifications in tourism have demonstrated that the development of this service sector is mainly shaped by social trends such as changes in leisure time preferences, increased individualisation, demographic shifts and raised health awareness. These trends proved to be common for European and other countries (e.g. Canada).

Demographic developments, in particular, offer new challenges since the number of older people is increasing, creating a large target group. It is estimated that the proportion of people over 65 years of age will soon comprise one third of the European population. With the increase of life expectancy another numerous and growing group is people with disabilities and restricted mobility, whose needs are not well reflected in current tourism services. This has a direct impact on the number of staff, specific skills and occupations needed to satisfy the demands of potential clients. Research results from isw, for instance, showed new fields of activity such as travel guides for people with restricted mobility. Other demographic developments, such as the increasing number of lone travellers, also impose specific demands not only on the infrastructure but also on the provision of services (entertainment programme, animation, social insertion, individualised services).

Tourism is no longer seen as a luxury good but is becoming an essential. The number of working hours per week in many European countries is diminishing, and there is more time available for leisure during the weekend, hence more frequent travel to places 'nearby' or easily accessible ('grounded' trips). More frequent travel is accompanied by shorter periods of

stay. Political turmoil and environmental disasters discourage transcontinental travel. Thus, more travel is concentrated inside Europe, inside individual countries (especially in such large countries as Germany or France) and even inside the region.

Although customers look for competitive prices for travel products, the spending per day during travel is increasing, even in countries where the recent economic situation does not encourage the population to spend more (e.g. Germany). In return, customers expect authentic and memorable local experiences. Value-added products for tighter wallets and/or for sophisticated tastes are appreciated. Thus, complex product packages and complex services on offer are expected to be available during travel <sup>(19)</sup>.

The continuous blurring of the boundary between work and leisure imposes value-added customer expectations (e.g. training programmes during vacation, a guided tour or a sports/wellness programme linked to the business trip). Business travel and shortened/more frequent trips cause a boom in the exploration of cultural heritage, urban tourism, event tourism, and in-search-for-nature tourism (ecotourism, ‘back to basics’) <sup>(20)</sup>. Health awareness has penetrated lifestyles. Thus, tourism is expected to offer sports, beauty and healthcare treatments alongside other tourism services.

Tourism is challenged by a growing demand for customer orientation, increasing international competition, volatile markets in an insecure environment, changing customer demands towards individualisation, and a significant potential in various market segments. The expansion of new technologies alters the delivery of services since the presence of the Internet changes distribution and sales practices. Mergers and acquisitions in the sector lead to a growing number of services provided by chains worldwide with a certain standardisation of quality and, hence, competences expected from the personnel.

### **3. Skill requirements and skill gaps**

The knowledge and skills required to provide services shaped by current social trends become highly interdisciplinary. Multiskilling and new hybrid occupations reflect the trend for new types of tourism products and services – more complex and sophisticated in nature – and the growing demand for functional flexibility in the labour force. The debate about the role of qualifications in the tourism sector touched on the problem of losing human resources to other sectors' appreciative of personnel from tourism and employers' failure to attract qualified personnel to the sector. Taking into account the need for qualifications from other sectors (e.g. ICTs), the workshop participants agreed that transversal and hybrid qualifications with a broader general basis might be useful and could lead to new occupational profiles.

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<sup>(19)</sup> See Abicht and Freikamp's contribution to this volume.

<sup>(20)</sup> Even among luxury travellers demand for the ‘barefoot luxury’ is on the rise, also known as ‘no news – no shoes’ (see Gottwik's contribution to this volume).

For example, according to the national survey in France, a number of managers of small establishments stated that their permanent staff took on multiple roles, doing two jobs (e.g. chambermaid and waiter, waiter and cashier, etc.). Such findings are quite common elsewhere, especially when it comes to small enterprises. The question is whether such a combination of skills would become more widespread in future. According to the opinion of the representative of the French trade unions, ‘doing everything will continue, but it could be treated differently. People required to carry out multiple tasks need to have an all-round basic competence in the hotel and catering industry, as cook, waiter, and other skills. This may mean multiskilling in fields that are quite far apart’ <sup>(21)</sup>.

However, multiskilling and growing complexity of tasks is not the only trend in the sector. The process of mergers and acquisitions often leads to creation of chains of hotels and in the catering sector. Such industries do not always require performance of complex tasks. In fact, sometimes the trend is quite the opposite: they require standardised skills with little room for creativity and manoeuvre (e.g. fast food chains). The example of the French comparative research into developments among the same sectors and occupations in another continent, namely in the US, and results of the research on skills requirements for cooks and chefs demonstrated the change of the very nature of the vocational ‘appeal’ (end of ‘gourmet cooking’) <sup>(22)</sup>.

In terms of specific skill requirements, personal and social skills are claimed most frequently across all countries. In addition, skills such as capacity to learn and to work independently are gaining in importance. Knowledge of foreign languages and specific knowledge and skills linked to technological innovation and the information technologies’ penetration to the sector are often listed as lacking.

If we look at particular country examples, the research in Canada demonstrated severe skill gaps in ICT skills, literacy and numeracy, communication/presentation skills, customer handling/service, problem solving and critical analysis, leadership skills, financial management and cost control, as well as project management <sup>(23)</sup>.

According to isw research, the tourism sector in Germany lacks well-trained intermediate-level staff. Insufficient basic knowledge and skills regarding specific tourism products, services and destinations, marketing, sales, customer orientation, electronic data processing, and computerised booking and reservation systems are often-cited weaknesses. Employees also often lack interpersonal skills, particularly when advising and dealing directly with customers <sup>(24)</sup>.

The research in Portugal detected major changes in distribution practices, where there is a growing tendency to separate the design and sales activities of travel products. Such a trend affects the demand for skills among tourism operators (market analysis, and mass and tailored

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<sup>(21)</sup> See Guegnard’s contribution to this volume.

<sup>(22)</sup> See Mériot’s contribution to this volume.

<sup>(23)</sup> See Joppe’s contribution to this volume.

<sup>(24)</sup> See Abicht and Freikamp’s contribution to this volume.

travel product design), and among travel agents (increased skills in customer relations, building customer loyalty and travel organisation). Furthermore, new skills demands were identified in designing entertainment products, particularly in using the suppliers' network and package products design, and in defining and implementing marketing strategies, and their promotion in different contexts (cultural, sports, casinos, hotel units). The Portuguese research also addressed central and local administration authorities and identified skill gaps in facilitation, promotion, territorial marketing, environmental policy, history, culture, handicrafts, gastronomy and other important aspects in the design of tourism products that help boost the regional development (25).

#### **4. New and emerging occupations in tourism**

New social trends demand new occupations. Immediate identification by enterprises is crucial for detecting skills and competences required for new qualification profiles not yet incorporated into the national qualification frameworks.

Barrier-free tourism, resulting from demographic trends and a growing number of people with restricted mobility, became an important field of activity in the sector. It required elaboration of a special training programme in Germany with a syllabus which included such subjects as special needs of disabled people, barrier-free building and planning, programme design, marketing, etc. (26).

Another interesting research example from Germany (isw) uses the so-called 'sector scouting' approach to determine trend qualifications among 'trendsetting' companies. The project identified the following new complex skill packages in the tourism sector:

- (a) travel designer, online travel agent and event designer in holiday booking and design;
- (b) tour guide for people with restricted mobility, amateur and guest relations and travel services representative;
- (c) business travel manager in business trip organisation;
- (d) agency consultant in travel agent support.

The rise of health consciousness among the broad public and better awareness of specific individual needs among clients led to a qualitatively new situation in providing wellness services in tourism. Wellness can no longer only serve as a marketing label for tourism. What we observe in this area nowadays is strong links between tourism, sports and healthcare. Sound knowledge in healthcare (both treatment and prevention) is required among those working in the sector of tourism. But traditional knowledge in hospitality and culture is required at the same time, suggesting qualitatively new, highly interdisciplinary and complex

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(25) See Belezza and Gaspar's contribution to this volume.

(26) See Berthold's contribution to this volume.

qualifications, for which training is still rather exceptional and experiential (e.g. the Sebastian Kneipp School, Health Management University in Germany) <sup>(27)</sup>.

Luxury destinations, such as spas, have a number of qualification requirements and the fundamental decision is whether to take the holistic approach, or a specific one (e.g. plastic-aesthetic surgery on the treatment menu). Alternative medicine and age management are becoming very popular and specialist services are expected. Food and beverages staff need to be trained on dietary options. Awareness and integrity in business ethics also penetrate occupations in luxury accommodation establishments <sup>(28)</sup>.

Penetration of ICTs in the sector implies importance of ICT skills across all occupational levels. But the current shape of travel and tourism value chains also includes Internet-based distribution of information as well as transactions. For successful navigation of the ‘tourism value net’, personnel require skills to identify opportunities for cross-promotion and cross-selling, skills for finding efficient combination of distribution channels, skills for managing sales across several distribution channels, etc. Additionally, traditional skills such as customer service, legal aspects, cross-cultural communication are important parts of the skill base for navigation in the tourism value net. Tourism professionals in revenue management need strong knowledge of marketing, finance management, statistics, customer service principles and distribution trends. Effective revenue management requires skills to combine these knowledge areas consistently and creatively, not only among managers but also among lower occupational categories. ICT courses can no longer be separated from other courses; ICT must be studied in the context of its application, as a part of marketing, customer service, revenue management, etc. <sup>(29)</sup>.

## **5. The transfer of research results to policy and practice**

Detection of new occupations and combinations of skills by studying social trends and by looking at actual developments in the sector and its companies is useful but not sufficient. Elaboration of new qualification profiles and inclusion of the knowledge requirements in training programmes is a separate and very demanding area.

During the workshop we heard about some successful examples of the transfer of research results into policy and practice. Here we mention only some of those.

In Portugal, the Institute for Innovation and Training (Inofor) embarked on the *Tourism sectoral study* which, among others, also incorporated *Skill trends and training needs diagnosis* with subsequent elaboration of the medium to long-term development strategy. The strategy elaboration involved directly all those stakeholders potentially in charge of its

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<sup>(27)</sup> See Ritter’s contribution to this volume.

<sup>(28)</sup> See Gottwik’s contribution to this volume.

<sup>(29)</sup> See Henriksson’s contribution to this volume.

implementation. In the framework of the institutional cooperation that steered this initiative, the key issues identified led to seven *Priority action plans* (PAPs) being drawn up. Coordinators and teams were appointed to elaborate and develop the PAPs, which consisted of operational objectives, actions to be undertaken, and the respective timetables<sup>(30)</sup>. Such concretisation, quite ‘administrative’ on first sight, may assist efficient implementation of the strategy, given that consensus of the stakeholders on the implementation process had been achieved in the development stage.

The Regional Employment and Training Observatory (OREF) of Burgundy has a similar consensus approach which attempts to negotiate research results with public and decision-making bodies, and occupational organisations within a given region, with the aim of achieving a shared diagnosis of future skill needs in the sector. In spite of years of successful experience, OREF points to a long process of persuading institutions that are sometimes in competition (e.g. national objectives versus regional) to pool certain points of view in order to carry out concerted action. Furthermore, such shared diagnosis obviously does not stand still and requires further discussion and evaluation over the years. Achievement of a regular dialogue between the economic and social actors on one side, and experts/researchers on another side, remains a challenge<sup>(31)</sup>.

Development of measurable competence-based standards – such as in the example of Canada<sup>(32)</sup> – not only helps to keep the qualification provision up-to-date but also can support the validation of prior experience and learning. While formal qualifications are not always required in tourism, their existence, and a widely available opportunity to obtain qualifications by an alternative to formal education, may contribute to raising the prestige of the occupation and the sector in general. Taking into account a very high proportion of personnel without formal qualifications but nevertheless often with adequate tacit knowledge and experience in the sector, validation of informal and non-formal learning linked to an efficient system of counselling and retraining may become the HRD solution for the sector. Such a system, however, has to be supported not only by the social partners, whose role in the sector is limited, but also, and perhaps mainly, by the government.

Little time and funds available for training, especially among small companies (i.e. about 95 % of the sector market), can be compensated by efficiently designed and offered distance learning courses. The Internet is a natural medium for many companies in the sector, and to provide access to ICTs is often easier for employers than to provide actual on-site training courses and to pay full-time attendance for the employee. The example from the Czech Republic demonstrated the result of several years’ research which led to the design of modular courses in distance learning in tourism combined with face-to-face consultations and

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<sup>(30)</sup> See Belezza and Gaspar’s contribution to this volume.

<sup>(31)</sup> See Guegnard’s contribution to this volume.

<sup>(32)</sup> See Joppe’s contribution to this volume.

seminars especially targeted at personal development and communication skills, which are highly important for tourism <sup>(33)</sup>.

A number of countries run regular or one-off surveys (e.g. Hungary, Montenegro <sup>(34)</sup>) to help identify the general direction for tourism development in the country and the linked reform process in education and training. A solution to implementing results from such studies into practice is, however, still a task for the future.

As Mériot points out, expectations of changing employment and managerial practice quality, simply by improving training programmes, are limited. Tourism, dominated by micro enterprises and virtually non-unionised, affected by seasonality and informal recruitment practices, often attracts people with no specific qualification in the sector. For them, it is often the first encounter with the sector and the profession with no long-term expectations whatsoever ('the newcomer or unconsolidated worker' in the Spanish/Czech research <sup>(35)</sup>). Bearing in mind that a high proportion of tourism school graduates go to work in other sectors, vocational education and training should provide a broad knowledge basis also in fields other than tourism. This could help prepare them for their future employment (in administration, business and sales, information technology, etc.) <sup>(36)</sup>.

From the point of view of the sector's self-interest however, it is important to establish employment and HRD practices to attract and retain qualified personnel. The promotion of social dialogue at various levels in the sector may help improve the situation.

## 6. What next?

A number of international and European research and analysis activities into identifying skill needs for tourism have already taken place. Activities of such bodies as the World Tourism Organisation, World Training and Tourism Council, International Labour Organisation, Tourism Unit of the Enterprise General Directorate of the European Commission, and European Travel Commission have been very important in shedding some light on which skills and competences will be required by the tourism sector. It is, however, important to bear in mind that for the listed institutions, skills and training issues are not the primary focus of their activities. Research in these subjects is normally linked to broader sector analyses.

The European Commission's High Level Group on Tourism and Employment initiated the creation of five thematic working groups to boost tourism and employment (1998). Working group B, *Improving training in order to upgrade skills in the tourism industry*, came up with some relevant conclusions. The main conclusion was to attract skilled labour and support

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<sup>(33)</sup> See Zelenka's contribution to this volume.

<sup>(34)</sup> See Szabó and Sisevic's contributions to this volume.

<sup>(35)</sup> See Marhuenda et al.'s contribution to this volume.

<sup>(36)</sup> See Mériot's contribution to this volume.

micro-enterprises in tourism. A second proposal consisted of the creation of a permanent observatory on learning, employment and labour environment for tourism. Although this was, and still is, seen as a very valuable idea, this proposal has never been implemented. The development of a *Handbook on learning areas for the European tourism industry* was the third proposal of working group B and has been implemented <sup>(37)</sup>.

Taking into account high and steadily growing mobility in the sector across Europe, it is possible to speak about the emergence of a European tourism sector. Comparison of occupational profiles in various Member States appears useful. Cedefop performed the first of such comparisons in 1994 (Guerra and Peroni, 1994). In 2000, Cedefop produced case studies in selected Member States on changing occupational profiles in the hotel industry (Gatti et al., 2001). Subsequently transparency of qualifications in the tourism sector from the mobility point of view were examined (Richards, 2001). With the creation of Skillsnet – an international network on early identification of skill needs coordinated by Cedefop – a number of new activities can be initiated, if Skillsnet members appear interested in supporting such activities ([www.trainingvillage.gr/etv/Projects\\_Networks/Skillsnet](http://www.trainingvillage.gr/etv/Projects_Networks/Skillsnet)).

In spite of the fact that many research activities into skills issues in tourism are taking place in Europe and worldwide, research in early identification of skill needs in the sector (i.e. with a longer-term perspective) are still exceptionally rare. This has several causes: persistent statistical gaps for this sector; domination of SMEs which are traditionally averse to research; very weak role of social partners, i.e. partners for discussion of research results and their transfer to practice. The numerous research activities are rather isolated, and hence offer limited impact and only partial transfer to policy and practice. The vulnerability of the sector makes it very difficult to cast any predictions and thus imposes additional problems for early identification of skill needs.

Skillsnet therefore proposes to establish a working group for early identification of skill needs in the tourism sector with the following aims:

- (a) exchanging knowledge and experience on methods and tools;
- (b) stocktaking available research results;
- (c) complementing other research and analysis activities on skill needs in tourism;
- (d) generating research and development projects to cover existing gaps in identifying future skill needs in the sector and transferring them into policy and practice.

Such a working group can only be created if clear interest and support is present among Skillsnet members. The working group may be coordinated by one of the partner institutions as a self-managing and self-fundraising activity, and should cooperate very closely with major European and international tourism organisations. The working group should consist of researchers and experts in identifying skill needs and social partners from the tourism sector.

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<sup>(37)</sup> See Jonckers' contribution to this volume.

During the final workshop debate, participants expressed their willingness to invest time and human resources to support Skillsnet to become a useful tool.

Piet Jonckers, European Commission (DG Enterprise), proposed a new cross-country analysis of occupations, with the perspective of a European qualification framework for tourism. Such a task may be implemented in the framework of the proposed working group on tourism and in close collaboration between Cedefop and DG Enterprise – Tourism Unit.

Stavros Stavrou, Cedefop Deputy Director, noted special attention should be paid to an elaboration of vocational profiles for new occupations (e.g. barrier-free tourism, tourism for wellness).

Further ideas in the plenary discussion included an assessment of examples of good practice in identifying skill needs and the subsequent transfer to HRD policy and practice with special attention to success factors. The proposed working group could identify areas of interest and generate projects in early identification of skill needs, as well as disseminating project results through the Skillsnet information platform and membership. The working group could monitor calls for tender and collect information on continuing and completed projects; support (cross)regional identification of skill needs (e.g. Euroregions, geographical enclaves). Finally Skillsnet could be useful in benchmarking various activities related to early identification of skill needs among different sectors.

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# List of acronyms

\* unofficial translation

BMBF	Federal Ministry of Education and Research/ <i>Bundesministerium für Bildung und Forschung</i> (Germany)
BMWA	Federal Ministry of Economics and Work/ <i>Bundesministerium für Wirtschaft und Arbeit</i> (Germany)
CARDS	Community assistance for reconstruction, development and stabilisation
CD-ROM	Compact disk read-only memory
Cedefop	European Centre for the Development of Vocational Training
Céreq	Centre for Research on Education, Training and Employment/ <i>Centre d'études et de recherches sur les qualifications</i> (France)
CSO	Czech Statistical Office/ <i>Český statistický úřad</i> (Czech Republic)
CTHRC	Canadian Tourism Human Resource Council
DEG	German Investment and Development Company/ <i>Deutsche Investitions- und Endwicklungsgesellschaft</i> (Germany)
DG	Directorate-General (of the European Commission)
DRV	German Travel Agency and Tour Operator Association*/ <i>Deutscher Reisebüro und Reiseveranstalter Verband</i> (Germany)
DVD	Digital versatile disk
EC	European Commission
ECER	European conference on educational research
ETED	<i>Emploi-type étudié dans sa dynamique/</i> (typical employment studied via its dynamic aspects)
ETF	European Training Foundation
EU	European Union
EUR	Euro
EUR-OP	Office for Official Publications of the European Communities
Fraunhofer IAO	Fraunhofer Institute for Industrial Engineering/ <i>Fraunhofer-Institut für Arbeitswirtschaft und Organisation</i> (Germany)
FreQueNz	Network for early identification of qualification needs/ <i>Früherkennung von Qualifikationserfordernissen im Netz</i> (Germany)
FUR	Research Community Vacation and Travel*/ <i>Forschungsgemeinschaft Urlaub und Reisen</i> (Germany)

GDP	Gross domestic product
HACCP	Hazard analysis and critical control point
HMU	Health Management University
HRD	Human resources development
ICT	Information and communication technology
ILO	International Labour Organization
INE	National Statistics Institute/ <i>Instituto Nacional de Estadística</i> (Spain)
Inofo	Institute for Innovation in Training/ <i>Instituto para a Inovação na Formação</i> (Portugal)
Iredu	Institute of Research in Education/ <i>Institut de Recherche sur l'Education</i> (France)
ISFOL	Institute for the Development of Workers' Vocational Training/ <i>Istituto per lo Sviluppo della Formazione professionale dei Lavoratori</i> (Italy)
isw	Institute of Structural Policies and Economic Development/ <i>Institut für Strukturpolitik und Wirtschaftsförderung</i> (Germany)
ITB	The Institute Technology and Education/ <i>Institut Technik und Bildung</i> (Germany)
NatKo	German National Coordination Office for Tourism for All/ <i>Nationale Koordinationsstelle Tourismus für Alle</i> (Germany)
OREF	Regional Employment and Training Observatory/ <i>Observatoire régional emploi formation</i> (France)
PAP	Priority action plan
SARS	Severe acute respiratory syndrome
SFRY	Socialist Federal Republic of Yugoslavia
SMEs	Small and medium-sized enterprises
UK	United Kingdom
UNDP	United Nations development programme
US	United States
USD	United States dollar(s)
VAT	Value added tax
VET	Vocational education and training
WHO	World Health Organisation
WTO	World Tourism Organisation
WTTC	World Travel and Tourism Council

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Cedefop (European Centre for the Development of Vocational Training)

**Trends and skill needs in tourism**

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Au Royaume-Uni, la gouvernance effective de l'éducation et de la formation relève de la compétence des administrations décentralisées en Écosse, au pays de Galles et en Irlande du Nord. Elle constitue une priorité de premier plan pour le gouvernement britannique. Le Royaume-Uni a engagé la réforme de nombreux aspects de la formation initiale et continue en exploitant les atouts maîtres de son système éducatif, mais aussi en s'employant à relever les défis que pose l'émergence de systèmes d'éducation et de formation tout au long de la vie. Ses priorités sont en concordance étroite avec les objectifs de la stratégie de Lisbonne.

Les systèmes de formation et d'enseignement professionnels (FEP) au Royaume-Uni sont complexes et connaissent desThis publication highlights the latest trends and skill needs in the hotel, catering and tourism sector in an international perspective. Tourism is one of the most dynamic sectors in Europe. It enjoys high growth potential and accounts for a considerable proportion of employment; a high level mobility of labour, jobs and services in tourism throughout Europe makes it possible to speak about the truly European character of the sector. Good prospects, however, may be hindered by exogenous effects and by lack of reaction to changing skills requirements; employers in the sector often complain about skill deficiencies among the workforce. Many tasks and activities in the sector are also changing in line with technological, economic and social change, with new and hybrid occupations appearing, demanding completely new sets of skills.

The publication is based on the proceedings of an international workshop held in Halle, Germany, 29-30 April 2004. Trends and developments in tourism in the old and new Member States of the European Union, and some countries hoping to join the EU, were discussed against the background of changes taking place in North America. Such discourse demonstrated many similarities and, in some cases, helped to identify possible future trends and useful solutions for Europe.

More information can be found at [www.trainingvillage.gr](http://www.trainingvillage.gr) (look for 'Skillsnet' under the 'Projects and Networks' section).ents clés en sont notamment l'importance accordée à la notion de compétence pour définir le contenu et les modalités d'évaluation des apprentissages relevant de la FEP, ainsi qu'une approche de plus en plus souple et diversifiée de l'offre de formation.

P A N O R A M A

## Trends and skill needs in tourism



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