



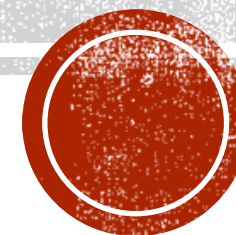
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SKILLS AND COMPETENCIES INCREASING EMPLOYABILITY THE EUROPEAN TOURISM INDUSTRY PERSPECTIVE

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EU WORKFORCE IN THE TOURISM INDUSTRY

- **13% of employees are aged under 25** (tourism is one of the main entry points to the labour market and a concrete answer to youth unemployment)
- Tourism is also the largest employer of **migrant workers, part-time** and **seasonal workers**, as well as **female workers** (58% of people employed in this industry are women) and it provides large job opportunities also to **workers re-entering the job market**



GAPS AND SHORTAGES TO BE FILLED (I)



- Tourism businesses, especially MSMEs, **struggle to find, attract and retain skilled employees**, because:
 - **negative perception** of job quality (low average salary level, seasonality, night or weekend work shifts, limited career prospects)
 - human capital working in the tourism sector generally less skilled than the EU average working population (**around 25% of the workforce has low-level qualifications**)



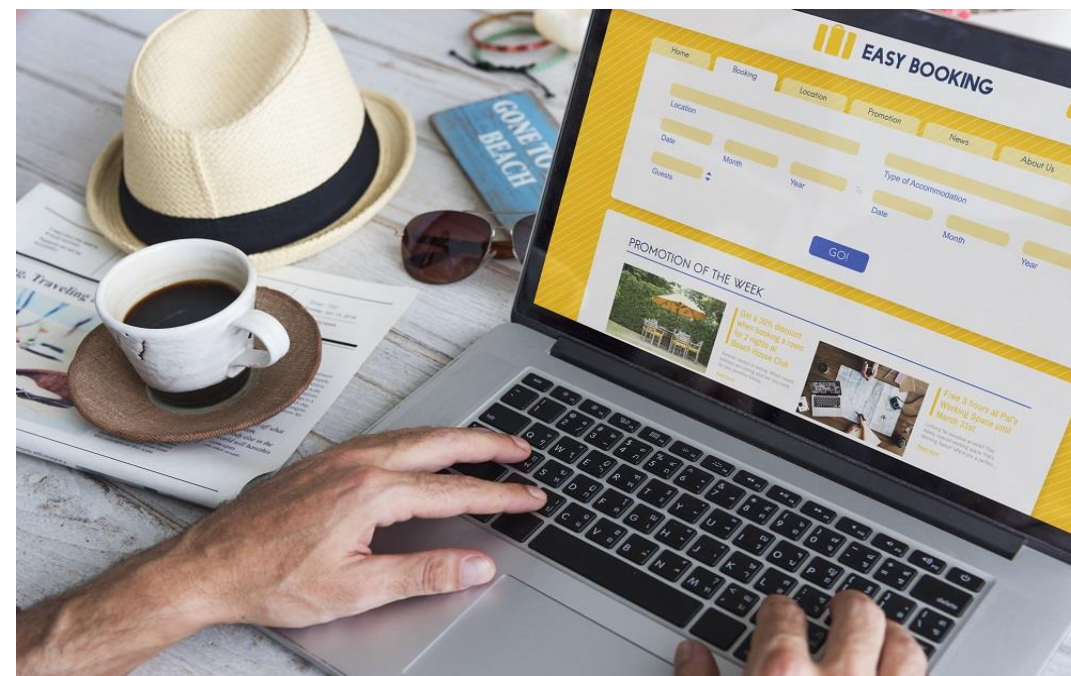
GAPS AND SHORTAGES TO BE FILLED (II)

- Other major problems:
 - **over 90% of tourism enterprises employ less than 10 people** and the training for employees is often left behind
 - **difficulty for many entrepreneurs to keep up** with the rapid changes of digitization
 - **limited understanding of employers' needs and travellers' expectations** by education and training providers



GAPS AND SHORTAGES TO BE FILLED (III)

- Thus, in such a highly seasonal sector, often involving short-term contracts, two **main goals for EU tourism companies** are currently:
 - ✓ **becoming more attractive**, especially towards the new generations;
 - ✓ continuously **identifying skills needs**, working together with public authorities and education and training providers **to bridge gaps**



FUTURE SCENARIOS (I)

- According to research «Realizing 2030: The next era of human-machine partnerships», carried out by the *Institute for the future*:
 - ❑ **85% of the jobs in 2030 have not yet been invented**
 - ❑ **the ability to acquire new skills throughout a working life will be more valuable than knowledge itself**



FUTURE SCENARIOS (II)



- These estimates indicate a clear trend towards **disruptive changes in the coming years**, when:
 - ✓ the **relationship between man and machine** will become even deeper and more immersive
 - ✓ every company, even and especially in the tourism sector, will have to become a **digital company** in order to survive



EUROPEAN COMMISSION'S RESPONSE MEASURES

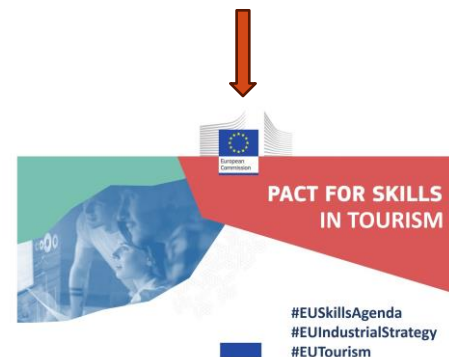
Sector Skills Alliances

(businesses, education and training providers, professional associations, chambers of commerce, and other relevant stakeholders) in the **14 leading industrial ecosystems (including tourism)** with the task of developing a **Blueprint** (a targeted strategy and action plan to close the skills gaps in each main economic sector)



Pact for Skills

promoting joint action to maximise the impact of investing in **upskilling** (improving existing skills) and **reskilling** (training in new skills): it calls on social partners, public authorities, employment agencies, education and training providers to **work together and make a clear commitment to invest in training** for all working age people across EU



SECTOR SKILLS ALLIANCES (I)



- **Basic priorities** underlying the NTG and PANTOUR projects:
 - ✓ To maintain and consolidate the primacy of the EU as the leading tourist destination worldwide, making it an ever greener, digital and tourist-friendly area
 - ✓ To ensure that, in the next decades, tourism continues to be a "capital saving and labour intensive" sector
 - ✓ To support the dual transition and the resilience of the tourism industry



SECTOR SKILLS ALLIANCES (II)

- On the basis of these strategic goals, the **two Blueprint projects**:
 1. built a **Skills Intelligence System** to continuously identify existing skills gaps and anticipate future skills needs
 2. improved the **relationship between tourism enterprises, education system and governments**
 3. provided employers, employees, trainers and students with a set of **tools and training modules**



PACT FOR SKILLS IN TOURISM (I)

- NTG and PANTOUR partnerships actively support the EC in the implementation of the **PfST**, which is a **shared engagement model for skills development in Europe** starting from the awareness that:
 - Businesses need skilled people to **innovate and grow**
 - Skills are critical to **recovery from the pandemic crisis** and for **mastering the digital and green transitions**
 - Skills gaps are increasing (while a lot of people are at **risk of unemployment**)



PACT FOR SKILLS IN TOURISM (II)

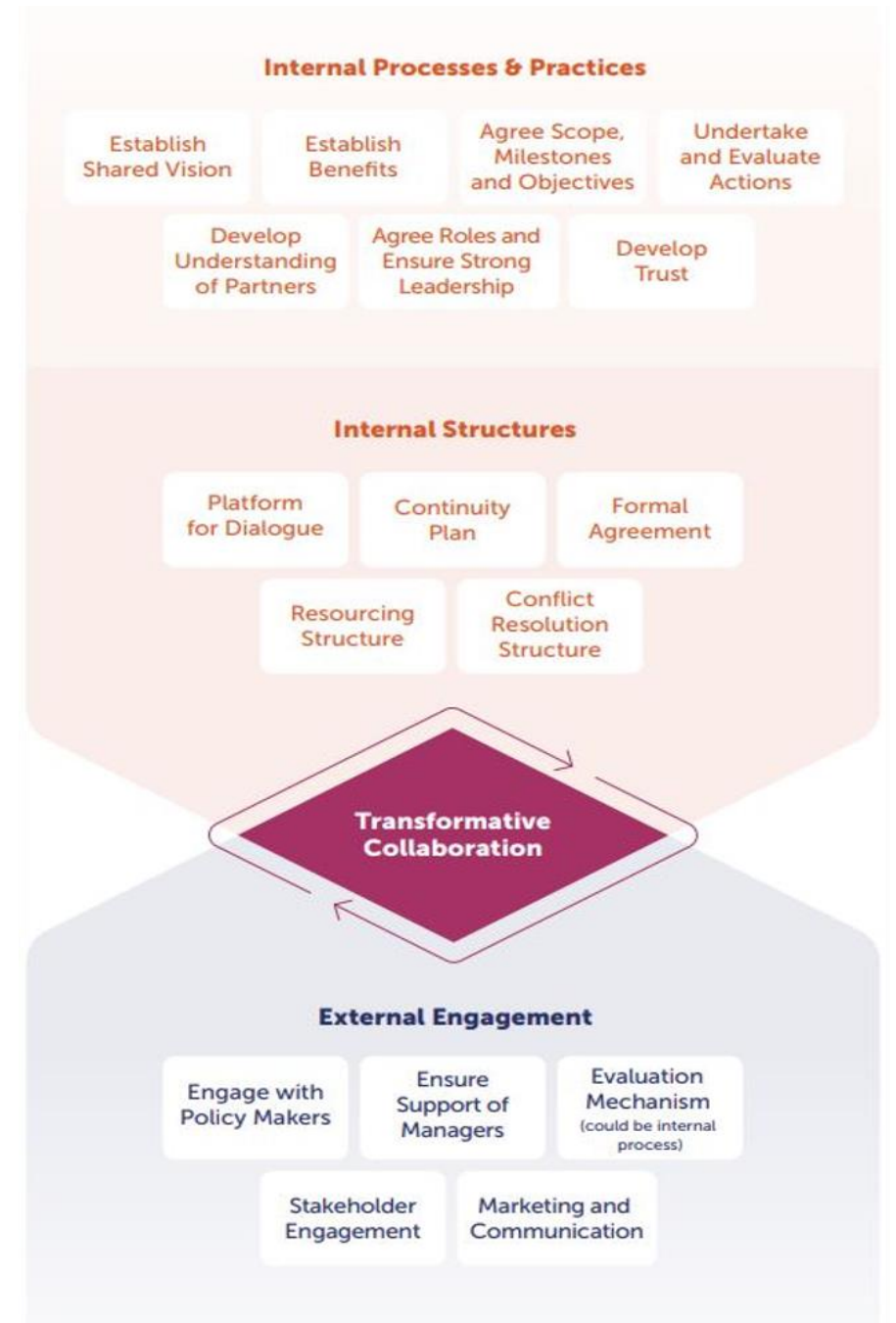


- While in other key industrial ecosystems there are large companies able to provide significant references for skills development policies, **tourism is a sector marked by the prevalence of small and micro enterprises**
- It's **hard to aggregate a significant number of industrial partners** able to inspire and support initiatives aimed at improving the human capital employed in this sector



PACT FOR SKILLS IN TOURISM (III)

- The system needs therefore to be based on a "**dual-track model**", in which the indications provided at the continental level within the PfST are then declined and implemented at the local level by a network of National and Regional Skills Partnerships
- The working methodology that enables NRSPs to operate most effectively is the **Collaborative Governance Framework**, developed during the NTG project



CURRENT SKILLS INCREASING EMPLOYABILITY



Digital
skills



Green
skills



Social
skills

- People's ability not only to find work, but also to keep it for as long as possible, or even to change it (thus improving their **professional value on the labour market**)



DIGITAL SKILLS (I)

- The demand for digital skills is growing 6 times faster than any other skills
- A recent Europe-wide survey found out which skills are considered **most lacking from a future perspective** in the tourism industry
- **The top 5 skills with the biggest gaps to be bridged are all digital:**
 1. Artificial Intelligence and Robotics skills
 2. Skills related to Metaverse, VR, AR, Brain-Computer Interface
 3. Data Analytics, Business Intelligence, Big Data skills
 4. Website Development skills
 5. Computer Programming skills



A humanoid robot at a hotel reception (Japan)



DIGITAL SKILLS (II)



- This impressive acceleration (which in part also derives from the new needs caused by COVID-19) is producing the following results:
 - decision-making processes more and more data-driven
 - possibility of delivering increasingly personalized tourism experiences
 - strong impact of ICT in all stages of the customer journey
 - since it's impossible to train human resources in the use of all systems and all upcoming changes, self-learning capacities are key



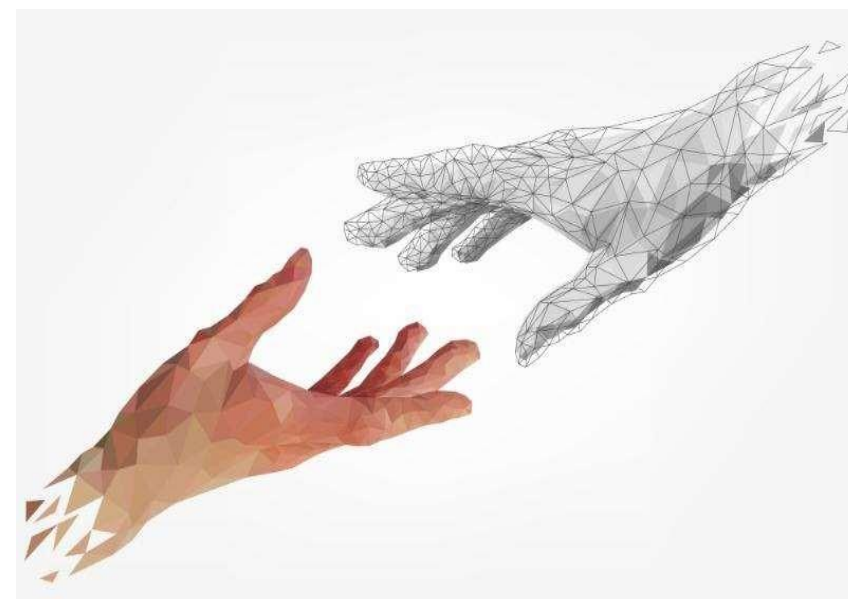
DIGITAL SKILLS (III)

- However, as tourism sector is and will remain a service sector (where the human component of performance is and will remain central), it's possible to predict that the future of work will revolve mainly around those **skills, abilities and capacities that are unique to the human brain and more difficult to automate** (social intelligence, originality, creativity)



SOCIAL SKILLS

- Soft, relational and transversal (“**skills to develop skills**”), often innate, difficult to be taught (as opposed to hard skills) but **considered essential by companies** to work successfully in this sector:
 - ✓ listen and communicate effectively
 - ✓ show understanding and empathy towards clients and their needs
 - ✓ solve problems in real time, work in a team, manage stress, dealing with emotions/conflicts, adapt to new needs



«High Tech with a Human Touch»



GREEN SKILLS

- Shift from "Nice-to-have" to "Need-to-have."
 - All tourism employees involved, not just those in an "environmentally oriented role."
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- ✓ Fostering environmental sustainability
 - ✓ Working with local supply chains
 - ✓ Apply the principles of the circular economy
 - ✓ Use in restaurants of zero-km food products
 - ✓ Reuse of the organic waste
 - ✓ Reduction of water consumption
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- ✓ Use of recycled water
 - ✓ Use of biodegradable detergents
 - ✓ Systematic use of renewable energy sources
 - ✓ Participation in climate change mitigation programs (such as carbon offsetting or low energy systems)
 - ✓ Support for the protection and management of biodiversity and local landscapes



NEW CHALLENGES FOR EMPLOYERS (I)



- In Europe, the business associations call for more collaboration between tourism industry and education system, asking for learning programs more focused on the specific needs of the sector, but they have to **change cultural approach for such structured cooperation**, also because the vast majority of European tourism businesses are small and micro (big players representing less than 10%)



NEW CHALLENGES FOR EMPLOYERS (II)

- **Sustainable employability:** as a result of an aging population → extended working careers, increased participation rate → caring for career prospects, health and well-being of the workforce
- **Lifelong learning:** fostering a "growth mindset" among staff, in which learning new skills (both hard and soft) is a permanent activity



- **Employer branding:** 'war for talent', about specialized workers not easily available on the labour market → competing in the search for talent



THANK YOU!

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