

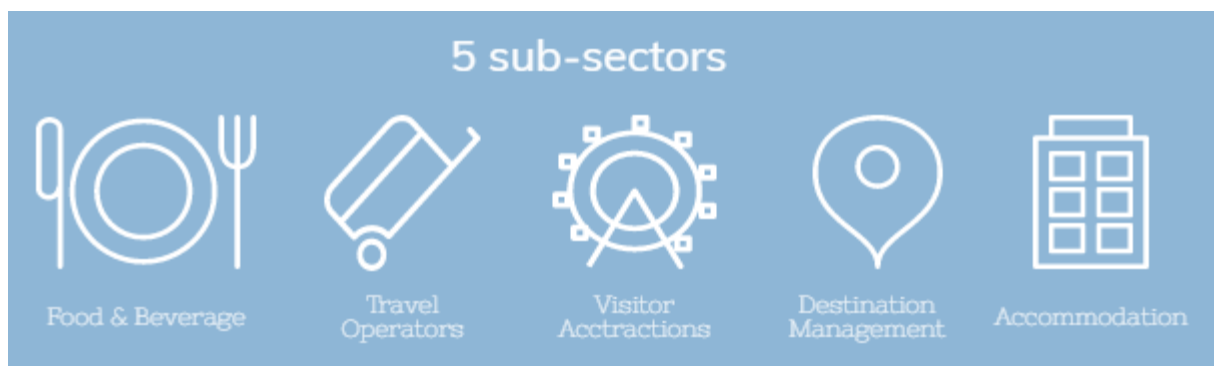


# The future of green, digital and socio-cultural skills in tourism

Next Tourism Generation research summary

# About the project

- The Next Tourism Generation Alliance aims to provide the tourism industry with a set of core modules in digital, green and social skills to meet future needs.
- The EU funded project includes a range of European partners: Italy, UK, Spain, Bulgaria, Hungary, the Netherlands, Germany and Ireland.
- It covers 5 sub-sectors: Destination Management, Food & Beverage, Visitor Attractions, Travel Agents / Tour Operators and Accommodation.



# Industry background

- In 2017, tourism accounted for 10.4% of global GDP and 313 million jobs, or 9.9% of total employment (WTTC, 2018).
- In 2015, one in ten enterprises in the European non-financial business economy belonged to the tourism industries. These 2.4 million enterprises employed an estimated 12.7 million people (Eurostat).
- The tourism employment pool is shrinking and many students who have completed tourism-related education do not enter the sector. However, a large proportion of the current workforce do not have a tourism-related education (Centre for Strategy and Evaluation Services, 2016).
- According to 2017 figures from the UN, the world population is predicted to rise by approximately 13% in 2030. The global middle-class is also increasing in numbers which offers a number of opportunities for the industry.

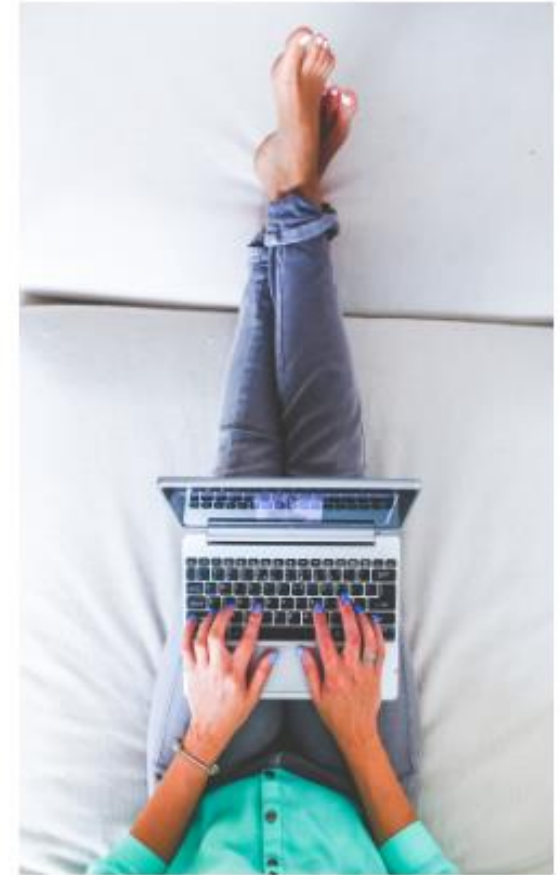
# The research – key trends

- Interviews and a survey with the tourism industry were used to identify key current and future skills, skills gaps and trends:
- The way that tourism is perceived generally will change quite significantly over the next decade in terms of the workforce as well as customer demand.
- Digital innovations such as AI, robotics, virtual and augmented reality will lead to a change in business models and place certain demands on the skills of the workforce.
- Increasingly, tourists will be looking for specialised experiences such as eco-tourism which offers industry opportunities in terms of planning target-focused travel packages considering different customer needs.



# The research – industry skills

- The research found that there is a lack of digital skills across the industry with particularly in the UK, smaller organisations struggling to effectively use digital tools and especially social media.
- The levels of social skills are fairly good, however organisations felt that cultural skills needed to improve due to an increase in Asian visitors.
- It was found that green tourism is becoming more popular however businesses are lacking awareness in terms of sustainability.
- Both across the UK and the EU, the tourism industry felt that it was important to, in the future, focus on developing interpersonal skills in the workforce, particularly as these types of face-to-face skills might not be developed in the ever-increasingly digital world.



# The research – industry skills

- Current skills gaps revolve around language skills and religious beliefs but also rather specific skills such as biodiversity and Artificial Intelligence.
- What the industry predict as key skills in 2030, mirror the future trends in terms of tailor-made experiences and understanding the community one visits. Other key future skills revolve around social skills such as promoting a positive work environment and having a willingness to learn and perform.

Top current skills	Key skills in 2030 across the EU
Customer orientation	Customer orientation
Ethical conduct and respect	Ethical conduct and respect
Willingness to learn and to perform	Promoting a positive work environment
Initiative and commitment	Willingness to learn and to perform
Promoting a positive work environment	Initiative and commitment

# The research – green skills

- Green tourism is becoming more popular and visitors are increasingly looking for businesses that have sustainability on their agenda.
- It is thought that eco-tourism will grow and tourists will visit a destination with a view to do something that will benefit that location.
- The most important environmental skills in 2030, will relate to habitat management and how to create a common environmental awareness.
- Currently, larger businesses in the industry have a greater knowledge about sustainable options so there is a need to educate and encourage smaller businesses in terms of green skills and initiatives.
- Future key green skills are predicted to centre on the promotion of environmentally friendly activities and products as well as knowledge of climate change.

FUTURE KEY GREEN SKILLS
Promotion of environmentally friendly activities and products
Knowledge of climate change
Ability to minimise the use and maximise efficiency of energy and water consumption

GREEN SKILLS GAPS
Promotion of sustainable forms of transport
Conservation of biodiversity

# The research – social skills

- Many businesses feel that their staff have up-to-date social skills however there are some skill deficiencies in terms of foreign languages, intercultural host-guest understanding as well as knowledge of different religious beliefs
- In 2030, the industry believes that people will want more personalised services and human interaction and so soft skills will be key to getting repeat business.
- Equality and diversity as well as cultural awareness will become more important in 2030 and will form a natural part of the working environment.
- Future key social skills are predicted to centre on customer orientation and positive and ethical behaviours towards staff and customers.
- By comparing current skill levels to future needs, language skills as well as disability and cultural awareness emerge as key areas staff will need training on to ensure the workforce will be able to meet future demands.

FUTURE KEY SOCIAL SKILLS
Customer orientation
Ethical conduct and respect
Promoting a positive work environment

SOCIAL SKILLS GAPS
Ability to speak foreign languages
Skills related to disabilities and appropriate infrastructure
Skills related to cultural awareness



# The research – digital skills

- There is a lack of digital skills across the industry with a large proportion, especially in more rural areas, of companies lacking basic digital skills
- Current skill levels are fairly low in terms of Artificial Intelligence (AI) and robotics as well as applying digital hardware technologies such as virtual reality.
- In 2030 it will be key for businesses to understand the concept of immersive technology in order to animate the experiences they offer.
- Future key digital skills are predicted to centre on social media, online marketing and monitoring online reviews.
- Skills related to applying hardware technologies as well as AI and robotics emerge as key areas staff will need training on to ensure the workforce will be able to meet future demands.

FUTURE KEY DIGITAL SKILLS
Social media skills
Online marketing and communication skills
Skills to monitor online reviews

DIGITAL SKILLS GAPS
Skills related to applying digital hardware
Artificial Intelligence (AI) and robotics
Data analytics, business intelligence, big data skills

# Summary

- The tourism industry will change quite significantly over the next 10 years.
- The employment pool is expected to shrink and there will be a demand for higher skilled staff.
- There will be a growth in geo-tourism and an increased focus on tailor-made provisions.
- Key future skills will centre around the promotion of environmentally friendly activities and products, customer orientation and ethical conduct and respect.
- To future proof the workforce, training needs to incorporate biodiversity, sustainability, effective use of social media, skills related to applying digital hardware, AI and robotics as well as disability and cultural awareness.

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