Training needs of the tourism sector
Executive summary
TRAINING NEEDS OF THE TOURISM SECTOR

REPORT

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Economic, Social and Work Council of Catalonia (CTESC)
Barcelona, 2012
Executive Summary

1. Introduction and methodology

1.1. Approach of the study

The current study is part of the updating works on the Strategic Tourism Plan for Catalonia 2005-2010 and it responds to the request of the Department of Enterprise and Employment to analyze the importance of training in the tourism sector, focusing on the perspective of the request for training by the sector companies.

In order to delimit the material field of study, that is to say, what we mean by “tourism sector”, we start from the application of the tourism definition made by the World Tourism Organization in the report Estimación del PIB turístico para Cataluña, marcas y comarcas 2005-2008, which conveys that only activities known as specific of tourism are included, ie, those that would be significantly diminished without tourist demand: lodging and restaurant industry, transport (land and sea), travel agencies, and leisure and entertainment.

Thus, the aim of the study is to carry out an analysis of the value that tourism companies grant to the training of the people working in this sector, which includes catering and restaurant activities, lodging, transport, and tourism intermediation as well as activities related to leisure and entertainment.

1.2. Methodology

The methodology used to develop the chapters of this study, built on the basis of social research techniques, is divided into different levels and it varies depending on the area of study.

Chapter 2, «Map of jobs in the tourism sector», was drawn from the analysis of the available statistical data (first section) and from the documentary management of the existing literature as well as from the Catalan Classification of Occupations, approved 2011 (second section, which contains the actual map of jobs).

Chapter 3, «Analysis of the training offer in the field of tourism», presents an approach to the training offer in the tourism sector for the period 2010-2011, from research on the websites of several educational institutions and the order placed to the Employment Service of Catalonia (SOC) regarding vocational training for employment.

Chapter 4, entitled «Training demand in companies belonging to the tourism sector», analyzes the results of the survey made ad hoc for this report in order to know the value that tourism companies assign to training and the demand for it. The survey was conducted by telephone with computer-assistance and it was addressed to a representative sample of training managers of firms that are economically dependent on tourism. For the statistical analysis and the interpretation of results, the sample was weighted according to the actual weight that each tourism sector has and to each firm dimension.¹

Chapter 5, «Approach to the fit between training supply and demand», reflects the fusion of the information contained in chapters 3 and 4 of this report, while the last chapter, «Considerations and recommendations» includes the final contributions of the members of the Economic, Social and Work Council of Catalonia (CTESC).

Moreover, the report in general and especially its last chapter have been complemented with reflections proceeding from the debate that took place in a workshop with experts in the field of training in the tourism sector, members of CTESC, representatives of the Department of Enterprise and Employment, the SOC

¹ See Section 4.1, «Methodology» in chapter 4, «Training demand in companies belonging to the tourism sector».
and the Institute DEP, organized with the aim of discussing the adaptation of the training offer to the business needs.

1.3. Tourism in Catalonia

Tourism is one of the main drivers of the Catalan economy, since in the year 2011 it represents the 11.1% of the Catalan GDP and 11.6% of occupied people in Catalonia. In this sense, it has become the first national tourism destination regarding foreign travellers and overnight stays in Spain.

Despite the economic crisis, the year 2011 is characterized, as 2010, by the recovery of the tourism sector, since most indicators recorded growth over the previous year. This positive evolution in the context of financial instability and high unemployment may seem paradoxical, but it shows how tourism has become an essential need in industrialized countries, especially in the case of tourists who travel for leisure.

On the other hand, focusing on the future, it is necessary to take into account some factors that have a significant influence on the evolution of the tourism model, such as demography and the impact of increased life expectancy in the population, changes in the lifestyle of society, both in the family unit, in the consumer demands and in the increased emphasis on health; the entry of information technology and communication (IT) management and self-organization of travel, the need to ensure a sustainable development of resources, the geopolitical influence in the destinations demand, the impact on industry regulations, either the specific or the transverse ones (such as the smoking ban), and the international economic situation, since tourism is sensitive to the energy prices evolution, the financial and economic policies of states and the demand from emerging economies such as Russia and China, among others.

2. Map of jobs in the tourism sector

2.1. Characteristics of employment

People occupied in the tourism sector in Catalonia are particularly relevant, since in the year 2011 they represent 16.1% of the population employed in the service sector and 11.6% of people employed in Catalonia.

In general terms the sector is characterized by the diversity, complexity and fragmentation of its labour relations, since it includes a wide range of jobs, both directly and indirectly related to tourism. Most tourism activities have a seasonal component which is concentrated on the second and third quarter of the year and this fact means that many labour relations are temporary and require flexible working forms, not only in terms of annual seasonal variation but also in shorter spaces as the week or even the day. This flexibility is linked to working conditions, characterized by work schedules which are often irregular, by discontinuous weekend shifts or shifts in night or holiday periods.

Often this situation brings with it that the sector is often perceived as unstable from the point of view of employment, and it hinders the attraction of talent by the tourism companies and discourages the investment of resources in training.

The analyzed statistics confirm these considerations. In 2011 the occupied population represents 88.5% of the working population in the tourism sector, being the most of it wage earners, the 78.9%, whereas the remaining 21.1% are self-employed people. The data registered with the Social Security reflect a similar

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2 The data are taken from the exploitation of the data referring to Catalonia in the Working people Survey (INE), carried out by the Institute of Tourism Studies, an agency under the Ministry of Industry, Commerce and Tourism, as well as data from the Directorate General of Tourism, based on data from the Ministry of Employment and Labour Relations regarding the analysis of data on tourism workers affiliated to the Social Security and the Survey on the employment situation, prepared by the Ministry of Labour and Immigration, regarding data on working hours.
distribution: the general scheme accounts for 71.2% of the membership of the sector and the special self-employed scheme, the remaining 28.8%.

The seasonality of the sector is reflected in the temporary contracts of employees: 27.2% in average (12.1% more than in 2010), while the third quarter of this year is higher (30.7%). Moreover, the temporality of the tourism sector is higher than the average rate of temporary employment in Catalonia, which was 20.1% in 2011.

Seasonality is also reflected in the sector’s unemployment rate: 11.5% on average in 2011, 9.7% less than last year (when it was 12.9% on average). However, the unemployment rate in the tourism sector is higher than the unemployment rate in the services sector (8.7%), but clearly below the total one (19.2%).

In regard to the level of education, there are not disaggregated data for Catalonia available. At the State’s level, 61.7% of the sector’s working population have secondary education, 24.1% have postsecondary education and the rest, 14.1%, have only primary education.

2.2. Map of jobs

The aim of this section is to produce a map of jobs in order to reflect a simple, yet comprehensive constellation of occupations which can be identified in the tourism sector, and, besides, be the detection tool from which the training needs of companies in the sector are identified, main objective of this study, which is discussed in chapter 4.

The starting point are the activities detailed in Chapter 1 as included in the "tourism industry" (lodging, restaurant industry, transport, tourism intermediaries and leisure and entertainment), although not all the jobs of the companies and/or organizations involved in these activities can be described as "tourist", since some of them do not have a direct relationship with customers-tourists and others because they are not specific to a tourism business and can be found also in other business sectors. The exception is the housekeeping staff. While their work is needed in virtually every business and therefore they should be excluded, in the tourism sector they are of primary importance (mainly in lodging and in the restaurant industry), since they largely determine the experience of the customer-tourists and their perception of the quality of service used.

The map has been constructed from the Catalan Classification of Occupations 2011 (CCO-2011) and it has been supplemented by information published by the Catalan Institute of Professional Qualifications (ICQP) on the sector analyzed, as well as by other documentary sources. With this information, we have created twelve occupational categories, divided into three areas, plus a residual category, to include those occupations not classified in other categories (called "others").
### TABLE-1. Map of the jobs in the tourism sector, by professional area

<table>
<thead>
<tr>
<th>AREA</th>
<th>JOBS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transverse</td>
<td>Direction and management of tourism organizations</td>
</tr>
<tr>
<td></td>
<td>Merchandising and marketing</td>
</tr>
<tr>
<td></td>
<td>Maintenance and cleaning</td>
</tr>
<tr>
<td>Lodging and restaurant industry</td>
<td>Chefs and cooks</td>
</tr>
<tr>
<td></td>
<td>Maitres and waiters</td>
</tr>
<tr>
<td></td>
<td>Kitchen and dining-room assistant</td>
</tr>
<tr>
<td></td>
<td>Reception desk</td>
</tr>
<tr>
<td>Brokerage and tourism support</td>
<td>Animation desk</td>
</tr>
<tr>
<td></td>
<td>Tourist guide</td>
</tr>
<tr>
<td></td>
<td>Brokerage agents</td>
</tr>
<tr>
<td></td>
<td>Organization of events</td>
</tr>
<tr>
<td></td>
<td>Tour assistance</td>
</tr>
</tbody>
</table>

Source: authors of the report.

### 3. Analysis of the training offer in the field of tourism

This section describes the existing training offer available in Catalonia with regard to occupations and activities of the tourism sector, some training activities which are usually labelled in the subsector "hotel trade and tourism", including activities related to the restaurant industry, tourism intermediaries and events management. Therefore, training actions with a transverse character have not been analyzed, although they can also be addressed to the professionals of this sector, such as management and administration and languages, unless they are set as specific for the sector.

The time frame of analysis was the 2010-2011 academic year, with some reference to the year 2011-2012, due to the constant evolution of the training offer.

Since the training is complex and varied, the analysis is divided into four training categories that the following table summarizes.

### TABLE-2. Training categories used in the analysis of the training offer

<table>
<thead>
<tr>
<th>Training categories used in the analysis of the training offer</th>
<th>Degrees</th>
<th>Vocational training</th>
<th>Demand training</th>
</tr>
</thead>
<tbody>
<tr>
<td>University training</td>
<td>Headmasters and doctorates</td>
<td>Professional training programs for initial qualification</td>
<td>Offer training</td>
</tr>
<tr>
<td></td>
<td>University extension courses</td>
<td>Intermediate training cycles</td>
<td>Demand training</td>
</tr>
<tr>
<td>Vocational training</td>
<td></td>
<td>Upper training cycles</td>
<td></td>
</tr>
<tr>
<td>Vocational training for employment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other training actions</td>
<td>Other training courses not included in the above-detailed categories</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(1) Please note that the CFGS integrate higher education, together with the University teaching, although here they are classified jointly with the CFGM.

Source: authors of the report.

Closing this section there is a reflection, contained in the latest edition of the MoniTUR report on the training sector offer in Catalonia, which coincides with the conclusions drawn in the following chapters: although Catalonia has a good educational system combined with recognized universities and business schools, the business sector (except for the restaurant industry) has not exploited these educational resources in all its dimensions.
3.1. University training

Degrees

Official degrees in Tourism and Related matters are structured into 240 ECTS credits (equivalent to 6,000 hours) and they are assigned to the subject area of Social Sciences and Law, given its markedly multidisciplinary content.

The year 2010-2011, Catalan universities offered eleven degrees in Tourism and six degrees related to the sector, three of them oriented to the hotel management, two devoted to the relationship between tourism and leisure and one to town and country planning. This offer is concentrated in the regions near Barcelona and it is addressed primarily at occupational categories that require a higher skill level (direction and management of tourism organizations, sales and marketing, brokering agents and events organization).

The curricula analyzed provide work experience (mostly in outer companies and/or institutions belonging to the tourism sector) with a variable length (between 12 and 30 credits ECTS) as well as learning of foreign languages, either through courses (mandatory and/or optional) or by receiving teaching entirely in a foreign language (English).

Official Master’s degrees and doctorates

The 2010-2011 academic year eleven masters and two doctorates were offered; most masters count with 60 credits ECTS (equivalent to 1,500 hours). Unlike grades, this offer is not so close to the Catalan capital in its distribution; like this, it is addressed to the occupational categories requiring a higher level of qualifications. Since they are university education of second and third cycle, they are focused on providing a high level of qualification and more specific competences. In this regard, five of the eleven analyzed masters are arranged following formative pathways to achieve this specialization.

Also like degrees, master's degree programs provide work experience (shorter than in degrees) and a final project. Unlike grades, the teaching of foreign languages is not foreseen, since it is assumed that students possess this knowledge.

University extension courses

Under this category we have analyzed those degrees offered by the Catalan universities requiring a university degree for entry, which are not considered official university education. These training actions vary significantly among them, both in the duration and the subject. The duration of these courses ranges from 30 to 60 credits (this means, between 750 and 1,500 hours); although they are treated as diploma of their own, the organization and structure of most of them follow official criteria.

Given the spatial distribution of these qualifications, it is clear that although, as in the case of degrees and master's degrees, many of them are offered in University centers located in the Catalan capital or close to it, is also significant the number of courses offered online or distance, which facilitates access to people in the rest of the Catalan territory.

Again, the occupational categories that require a higher level of education are the main beneficiaries of these actions, and some of them are also structured in pathways, with the aim to provide a more specialized training or they foresee the possibility to study independently certain subjects comprising preestablished diplomas.

Like the official University Masters, the curricula analyzed provide work experience and foresee the achievement of a final project. They do not schedule the specific learning of foreign languages either, since it is assumed that students possess this knowledge.
3.2. Formal training

Formal training (VET) is part of the educational system and, therefore, its ultimate structure and purpose are related to the development of students, both from a professional and a personal and social perspective, although it is the branch of education with a higher professionalizing vocation.

The 2010-2011 academic year, the vocational training program related to the tourism sector included four PQPI, five CFGM and six CFGS. It should be noted that this offer is extended during the 2011-2012 academic year with two more high level degrees (Kitchen management and Management in Restaurant industry), while the cycle Restaurant industry (also high grade) is declared extinct. For the academic year 2012-2013 the introduction of new courses is scheduled.

From a territorial point of view, the offer concentrates in the regions near Barcelona, although it must be noted that these concentrate a greater percentage of Catalan population.

The evaluated studies are linked to some occupational categories concurrent with those of the University training offer (brokering agents, event organizers and tour guiding) and therefore they may lead to some overlap, but also with others that have not been mentioned in the previous section: chefs and cooks; maîtres and waiters; dining-room and kitchen assistants, housekeeping, tourist entertainment, and tour assistance.

The FP duration depends on the level: the PCPI usually last one academic year (860-890 hours), while most CFGM and CFGS last two academic years and its performance involves between 1,800 and 2,000 hours.

The analyzed curricula of CFGM and CFGS foresee the completion of a period of practices in companies and also the specific learning of foreign languages.

3.3. Vocational training for employment

The purpose of vocational training for employment is to adapt itself to the needs of companies as well as to those of the employed and unemployed workers, starting from the importance of life-long learning and the concept of education as a key to the productivity and competitiveness of companies.

Regarding the training offer aimed primarily at unemployed workers, according to data provided by the SOC, in 2010 the training offer actions of the professional hotel and tourism family received the 4.37% of the overall amount foreseen by the SOC (100,45 million euros), which is lower than the 20.4% that was given to the administration and management family or the 12.1% of health.

In 2010, 567 training offer activities were organized, structured into 22 courses; three quarters of them were devoted to the lodging and restaurant area (428 training actions) and the rest, to support and tourism brokerage (139). More than half of the analyzed training actions took place in Barcelona and neighbouring areas, although the training program online e-training (UOC–SOC) should also be taken into account.

The prevailing training actions are those focused on the occupational categories requiring a lower rating (kitchen and dining-room assistants, cooks and waiters), although there is an offer associated with all occupational categories except with direction and management and marketing.

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4 Unlike the analysis of University education, qualifications classified in both the professional hotel and tourism family were analyzed as well as the others directly related and belonging to other professional fields (food industries and / or physical activities and sports).

5 We should add that it is necessary to take into account the two new cycles implemented during the 2011-2012 course (Kitchen management and Management of restaurant industry), which are addressed to the category of Direction and management of tourist organizations.
The accomplished training actions have an average length of 109.1 hours, despite some disparities on the courses length, depending on the duration of the program.

On the other side, in 2010 72 different training courses have been conducted, belonging to the training offer addressed primarily at employed workers and organized by the Consortium for Continuing Education of Catalonia. Almost half of these courses were held in the regions near Barcelona.

As the training offer aimed primarily at unemployed workers, the training actions addressed to employed workers were directed to focus on jobs requiring lower educational level (all of them in the area of lodging and restaurant industry): chefs and cooks (59.7% of the analyzed actions), maîtres and waiters (15.3%) and kitchen and dining-room assistants (12.5%).

Vocational training for employment also includes demand training that is designed to meet the specific training needs raised by companies and their employees. The available information is limited, but it allows us to see the almost absolute predominance of training in the area of lodging and the restaurant industry (96.6% of the companies and 97.4% of participants), being the weight of tourism brokerage and support residual. It also highlights the importance of the restaurant area, where we can find the 80.5% of the training companies and 73.9% of participants trained.

On the other side, the low participation of the executive (they are 3.1% of the total) and technical staff (6.9%) is remarkable.

### 3.4. Other training actions

This category includes all the training actions organized or given by any type of training centers that offer training in any area related to tourism. Cross training actions such as the learning of foreign languages were excluded, since -although it is of crucial importance in the sector-, it extended the study excessively.

The analyzed offer includes 166 courses, the majority of them also offered in the Catalan capital and the surrounding area. It is remarkable the apparent low number of identified online training (18), which can probably be explained by the importance of classroom and "experiential" training in the tourism sector, which hinders distance and/or online learning.

Regarding the occupational categories related to the different training actions, the category of chefs and cooks, which concentrates 51 courses, stands out, followed at a distance by that of maîtres and waiters (29 courses), sales and marketing (24) and direction and management of tourism organizations (21).

Unlike the previously analyzed training actions, it would be worth drawing the attention to the high number of training actions associated with the commercialization and marketing occupational category, which contributes to present it as a category with a significant outreach and demand from companies, in line with the findings of other studies and trend reports.

The skills developed in these training programs are practical and respond to specific needs of workers and businesses. Because of their shorter length (they last from 2 to 300 hours) they can be configured as specialization courses highly adapted to the demands of the labour market.

As a result of this increased permeability to the demands of companies and because of their residual character (by definition with other educational categories used in the study), "other training actions" also

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6 These data were published in the web of the Tripartite Foundation for Training in Employment.

7 Both universities, secondary education centers and a wide range of different training centers offer language courses (from the more traditionally studied as English, French or German) to others focused on the new emerging economies (and therefore potential customers of the Catalan tourism sector), as Russian and Chinese, among many others. These courses are offered throughout the territory, in a large variety of modalities (classroom, blended or online courses) and focused on many different aspects.
include training focused on other emergent jobs in the industry, such as tourism development experts or architects and hotels designers.

4. Training demand in companies belonging to the tourism sector

The aim of this section is to analyze the training needs of companies in the tourism sector and, in particular, the differences observed by subsector, company size and tourist area. As mentioned above, to achieve this goal, we conducted a survey addressed to the sector companies. The sample, representative of the tourism sector, consisted of 430 valid interviews. The respondents were managers, owners or persons in charge of human resources and training.

4.1. Training planning

In general, the tourism sector invests little in training, one in three tourism companies has not made nor will make training, and this percentage rises among tourism transport companies and restaurants.

Most companies believe that the responsibility for planning the training needs should be shared between the company and the staff, especially in medium and large companies and the tourism brokerage sector, which is the one that has done and plans to do more training. However, training has been mainly organized on the initiative of the company, especially in microenterprises and the restaurant industry. In general, the training priorities are concentrated in the field of foreign languages, cooking and affairs related to travels, culture and museums, and skills in computer science and new technologies.

4.2. Training preferences

Tourism companies prefer in-house training, especially restaurants. Training in an external center is the method selected by the accommodation sector. The preferred method is the classroom training, especially in the tourist transport and in the accommodation sector, and along the coast, although many companies of the rural interior choose a mixed model that combines classroom and distance learning.

The favourite seasons for the starting of the training are winter (January, February and March), especially in lodging and catering, and autumn (October, November and December) in tourism brokerage, with January and November in the lead. The major obstacles to organize training are the lack of time for microenterprises, the difficulty to combine schedules as for the remaining companies, and journeys for the rural hinterland.

4.3. Evaluation of training

The importance that training has on the competitiveness of the company is essential and remarkable, with an average value of 8.2 on a scale of 0 to 10. The medium and large companies, the tourism brokerage area and Barcelona city lift the score to 8.7 or more.

4.4. Evaluation of the training offer

Companies in the tourism sector are quite satisfied with the training offer, an average of 6.5 on a scale of 0 to 10, mostly with University and vocational training, which is the best known. Half of the companies consider it to be appropriate to the needs, except for medium and large companies, tourism brokerage and the companies located in the Barcelona area, that consider it scarce, especially with regard to the more specialized offer to meet concrete needs. There is also a significant percentage of the companies evaluated that consider it to be too academic, repetitive and impractical.
The areas where the training offer is missed are the training of foreign languages, destinations and related ones, and customer attention in microenterprises. Moreover, only a quarter of the companies know a reference training center and mention it.

4.5. Proposals to improve education in the field of tourism

The increase in the training offer, in practices during training, and in its quality and professional nature, especially in microenterprises of the lodging field and in the restaurant industry, are the potential improvements in tourism education expressed by the interviewees.

Finally, according to the persons that have been interviewed, the jobs with the highest growth potential are related to cooking, local and domestic tourism, rural tourism and camping, tourism through ICT, Internet and new technologies, as well as advisers in travelling and custom activities. However, it is remarkable that 53% of the sample did not answer to this question.

5. Approximation to the fit between supply and demand for training

This chapter has compared the training supply with the demand for training from businesses and the fit between them. In order to do this analysis we have taken into account, on the one hand, the differences by size, sector and territory among companies, and on the other, the differences among various job categories.

Apart from the following sections summarized, Chapter 5 includes twelve cards about tourist sector jobs made with all the information in the study. These cards group into a single category the family occupations, i.e. occupations sharing functions, skills, training offer or similar features. The job cards were distributed in three areas consistent with the map of the occupations in the tourism sector in this research: crossed ones, lodging and restaurant industry, tourism intermediation and support.

5.1. Analysis by occupational category

In general, the minimum level of education that companies require to people who hold or are going to occupy "tourism" jobs as defined by the study, is low (no studies, primary, secondary or intermediate training cycles). Tourism industry believes on practicing, experience is more important than training. However, when selecting professionals on tourism occupations, training is generally considered quite important.

On the one hand, occupations in which training requirements are higher (baccalaureate, high level training cycles or University studies), and training has value and is taken into account in the process of recruitment, are those in the support tourism intermediation area, i.e, jobs as agents in the intermediation categories (travel agencies employees and telematic sales agents), tour assistance (flight attendants, flight waiters, ship and train, and ground hostesses), and tour guides (user information in tourist offices or similar tour escorts and tourist guides).

Occupations in the support and tourism intermediation area have the lowest satisfaction rate at the educational offer – the proportion of unregulated training activities is low, since there are few training activities classified as "other training activities", which generally tend to be more targeted and flexible in terms of content and duration, and, in general, occupations in this area may show insufficient training. Training offer in the intermediation and support area on tourism is generally known, especially the offer in vocational training, since it is a very specific training, but also University degrees, which supplement their cross view with specialty provided by official masters and University extension courses. The exception of
mediation and support area in tourism is the lack of training aimed at brokering agents and event management staff (conference organizers and events).

Although the shortage of skills in occupations in intermediation and support tourism area is the lowest of all, jobs in the category of tour guides and brokerage agents are the most difficult to fill due to lack of training and workers.

Moreover, the occupations in which the required minimum level of education is low (no studies, primary, secondary, intermediate training cycle), and training is less valued are the lodging and restaurant area. In the selection process on the occupations of these categories experience is a value, and training, especially in the categories of auxiliary kitchen and living room (kitchen helpers, assistant pastry, dishes cleaner and fast food preparers), and waiters and waitresses (waiters and sommeliers, waiters as bar owners and cafes, waiter employees).

However, training is considered important in the job category of chefs and cooks, which are the most difficult to fill due to lack of professionals and training.

Training offer addressed to jobs in the lodging and restaurant area is known enough. Much of the training activities analyzed are aimed at the occupations in this area.

In general, the satisfaction level with the training aimed at employment in this area is high and training needs are identified, except in the kitchen staff and room category in which shortfalls are observed in skills, knowledge and attitudes. However, the highest skills shortage is observed in the area of lodging and restaurants, particularly in the occupational categories of dining-room and kitchen assistants, and chefs and cooks. It is necessary to keep in mind that training cannot always meet identified gaps in generic skills, as related to skills in which training has no effect.

Competence deficits are also detected in occupations belonging to the cross-direction and management area, sales and marketing, and maintenance and cleaning personnel, especially in the sales and marketing category, possibly by the lack of specific offer, the need to boost tourism online, technology, brand image and business, as well as adapting to new markets.

It is necessary to keep in mind that companies require a high level of education in leadership and management categories and commercialization and marketing. However, the lack of training in the leadership and management occupational category is remarkable.

5.2. Notes for a training offer tailored to the needs of tourism companies

Deficits in larger generic skills, ie, skills, knowledge and attitudes that people must have to develop tasks in their occupational category, are observed in leadership and management cross-area categories, in sales and marketing, and maintenance and cleaning, possibly due to lack of specific offer, but also in the kitchen and dining-room assistant categories.

It must be taken into account that in occupations related to direction and management and commercialization and marketing training needs have been identified, especially in microenterprises, related to foreign languages, in spite of the fact that all grades include undergraduate compulsory and/or elective language subjects. Moreover, specialization is required in the training offer for the direction and

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8 Professionals of advertising and marketing, and brand builders, strategic sales managers, managers and media web channels or online communities and social networks.

9 Hotel directors and managers of hotels, other lodging services companies, restaurants, bars, cafes or similar, restaurant industry companies and other food companies, companies of recreational, cultural and sporting services, workers and owners of small lodgings.
management category, and offer related to computer applications, information search and online communities designed in occupations included in the marketing category.

We can highlight deficits in language-related skills, conflict management and problem solving, initiative and creativity, and planning, organization and control.

In terms of the specific skills or abilities that people should possess to carry out the work in their occupational category in a properly way, the lodging and restaurant industry show the most important lack of effectiveness, professionalism and quality service.

So, in the kitchen and dining-room assistants and chefs and cooks categories (chefs, restaurant owners and employees cooks) shortfalls related to competitive factors are observed, such as professionalism, service quality, attention to customers, and foreign language skills. It must be taken into account that occupations related to cooking have growth potential.

Sectors like lodging, tourism intermediaries and leisure activities and events claim that training offer should be more innovative, flexible and practical.

Finally, we must consider some obstacles when organizing training for microenterprises and the lodging, the restaurant industry, the leisure activities and the events organization sector that have to do with the lack of time on training, the difficulty in combining training schedules with work, and travelling, as for the interior rural companies.

6. Considerations and recommendations

Context

With a strong and long history as a tourist destination in recent years, Catalonia has become a first order international tourism reference. According to the Watching Center for Enterprise and Employment (2011), Catalonia is a major tourist destination worldwide, also leading in Europe and the Spanish state.

At the same time, tourism is one of the main drivers of the Catalan economy, accounting for 11.1% of the Catalan GDP in 2011 and occupying 11.6% of the total employed people in Catalonia. In the current context of job losses and economic crisis, it is significant that these percentages have increased over the previous year (they were 11% in both cases), which shows the sector as a growth pole.

However, the sector is characterized by diversity, complexity and fragmentation of labor relations, combined with a demand for flexible working conditions (working hours, working time, seasonality, etc.). This situation implies that tourism sometimes is perceived as an unstable industry from the labor standpoint, which makes difficult attracting talent while discouraging investment in training.

In this sense, CTESC recommends:

1. To promote activities of revalorization between the population, in order to attract and retain talent. It is necessary that people perceive that it is a sector with future, as career and promotion career opportunities positively influence the predisposition to get an education.
2. In this regard, as already has been emphasized in other CTESC reports, it is essential to enhance academic and professional orientation services both in teaching and in employment services, to provide precise information on the potential of the sector and on the existing training facilities. A tool such as the Career Guidance Integrated Network pointed in the Catalan Strategy for Occupation can be a very good starting point.
3. One of the main groups that should be drawn to the area is youth people, given that many of them are linked to it temporarily or by necessity, without any promoting intention, which can hinder replacement when staff personnel retire.
4. We must give prestige to the sector occupations. One way to do it could be the promotion of social arrangements to improve labour relations conditions and stability in the sector. We must make an effort to retain and increase workers commitment.

5. As the Economic and Social Council from Barcelona (2010) already suggested and in order to give more value to training, a new paying system combining training with wages and productivity should be promoted; an ISO similar certificate should be created in order to point out the companies and establishments committed to quality and worker professionalism.

On the other hand, and in relationship to the difficulties in identifying the subsectors that are included in the concept "tourism" there is a very wide range of jobs that can be included, either directly or indirectly linked to tourism. In this sense, the occupations map described in the study used the concept of "occupational category" to include several occupations that can be found in tourist companies belonging to the lodging, restaurant industry, transport, tourism intermediaries and leisure and entertainment subsets.

To categorize reality often involves simplification, which can lead to exclude from the analysis any leading or emerging occupation difficult to fit into one of the twelve categories established. Anyway, throughout the text we have attempted to make reference to the emerging occupations or the ones that are difficult to classify, given its future prospects and growth potential.

In this sense, the study identifies the following areas with the greatest impact: kitchen, domestic and local tourism, rural tourism and camping and tourism online. Moreover, the areas with the highest growth potential have been identified as tourist intermediation (especially counseling services) and the organization of events, coinciding with other documentary sources (SOC, 2012).10 Finally, there are three occupations difficult to cover: chefs and cooks, specialized tourist guides and intermediary agents.11

Given this scene, the CTESC recommends that:

6. The Watching Center for Enterprise and Employment has to be proactive and it should perform a complete prospective into the sector to inform all stakeholders and especially the authorities responsible for the initial VT planning supply and VT for employment. Some data and information should be needed, using an statistical tool on the following aspects:

- Professional qualification about people working in the sector (by age group, sub-sectors and territories), and the people with specific training in this sector related to those who don’t have one.
- In the short and medium term projections of employment in the sector, workers reposition, and professional profiles and the quantification in training offers that are going to be needed.

The training offer and the training needs in the tourism industry

At the outset, we must bear in mind that features of jobs and of managerial style in tourism companies cannot be changed only by improving the training offer. As evidenced by the study, there are many people working in tourism without specific training, probably as a result of the predominance of microenterprises generally not inclined to network, with an activity subject to the seasonality of demand and tending to select staff informally and requiring little training. Many employed people did not have contact with the sector before and have few expectations to continue. Moreover, the study has identified gaps in generic skills related to attitudes and/or skills that cannot be solved only with training activities. However, there is significant room for training to improve its impact on the sector.

10 Other occupations considered emerging or with growth potential are in the category of sales and marketing, and price comparators and portals of experts in hotel assessment, in lodging and restaurant industry of food preparers, tourist entertainment, accredited monitors sports and children entertainers, and experts in planning, management and development of tourist destinations and technical quality and environmental management.

11 The SOC added to this list, as occupations difficult to cover, reception desk headmasters, managers with knowledge of hotel marketing and maintenance and cleaning personnel (SOC, 2012).
As for the training analyzed, first we can see that there is a wide offer, which contrasts with the difficulty of the companies interviewed to identify reference sector training centers (except for intermediation companies).

In this sense, CTESC recommends…

7. To improve the training offer attraction, it is important that the Watching Center for Enterprise and Employment makes research on the relationship between training and competitiveness.
8. It is essential to improve information, promotion and diffusion of the training offer to businesses, both the University offer, the vocational one and the professional certificates, as many occupations do not require University titling in exercising. In this regard, CTESC recommends to the Administration to offer companies and users an on-line instrument, and to undertake different communication strategies as advertising campaigns to strength the link between training, quality and competitiveness in the sector or meetings between training centers and companies to promote the value and recruitment on trained and qualified personnel.
9. To lay stress on improving information to companies about the possibility of organizing training on demand, as well as reporting on any eligible grants, subsidies or bonus related to this training.
10. To find attractive ways in order to drive training to tourism companies. One possibility could be providing business viability plans where training needs of the company are detected.

Secondly, training offer in the tourism field can be described as complete, since it is aimed at all occupational categories identified, but may be considered insufficient by certain categories (marketing and commercialization, and certain occupations related to tourism intermediaries) and subsectors (tourist transport, lodging, entertainment and event organization).

11. However, CTESC recommends to match the job offer in training cycles on the middle and upper sector related to the tourism sector to the existing demand.
12. CTESC recommends to have available data about these degrees, since students attending them show a positive evolution (CTESC, 2011 and 2012).

Moreover, the study reports that despite the overall positive evaluation received by training offer, a third of companies (32%) consider it little specialized to meet specific needs, too academic, repetitive and impractical.

Given these criticisms, CTESC recommends:

13. One way to enhance the practical experience that training provides, and that should be picked up by the III Professional training plan, is to implement the dual professional training in the tourism sector. CTESC welcomes the signing of the collaboration agreement with Foment de Terrassa SA to implement by the 2012-2013 academic year the dual FP training for the cuisine and gastronomy training cycles and for services in restoration cycles in the Cavall Bernat Institute from Terrassa.
14. To encourage other mixed training programs and training processes combining education with job learning.
15. In order to update and adapt the curriculum to market real needs, CTESC recommends to encourage dialog between the sector and formal education.
16. Training policies and training grants should be reinforced. In this sense, CTESC recommends to adapt processes to do training courses, so they can be done when there is sector demand (eg weekends), to improve them so students can become the "shadow" of his tutor, provide benefits to companies hiring students who have been in training classes, etc. But some effort should be done in order to make companies understand the purpose and concept about practicing policies and avoid confusion between these policies and jobs.
17. Also, flexibility of titles should be promoted (like the Netherlands), enhancing crossing qualifications. In this line, CTESC welcomes the possibility offered by some centers to obtain dual titling on the following training courses: Cuisine and gastronomy and restoration services (School Joviat, CETT and Magna) and Kitchen management or Restoration Services management (CETT).
18. We must also target on teachers' quality related to tourism training, improving selection processes and introducing training mechanisms and continuous training and evaluation, with the aim to get most competent professionals.

From the territorial point of view, training is concentrated around the city of Barcelona and nearby regions, which can be an access barrier to certain companies and people in the industry, especially those from the rural hinterland. Online training, which would solve this problem of territorial access (and also the high costs), is difficult to develop widely in the sector, given the importance of experience in this type of training.
19. Given the territorial training offer distribution, the potential of technology and web 2.0, CTESC recommends, where possible, to enhance and develop mixed formulae on training, in classroom and on-line, in order to make it accessible to the largest amount of companies and individuals throughout the country.

20. On the other hand, thematic specialization may be an option depending on the zone (rural tourism, adventure sports ...). An example may be the curricular adaptation that has been done in the intermediate training cycle Natural environment activities management, Mountain stations specialist, introduced for the first time the 2011-2012 course in the Pont de Suert IES.

21. An essential element to promote people mobility towards training centers are specialized mobility grants, which CTESC recommends to enhance.

Finally, from the analysis of the training offer we can gather some specialization according to occupational category by education. So the categories of direction and management of tourism organizations, sales and marketing, reception, intermediary agents, event organizers, guide and tourist activities are the main beneficiaries of higher education, especially the university and, to a lesser extent, higher level vocational training. Instead, categories of kitchen and dining room assistants, chefs and cooks, maîtres and waiters, maintenance and cleaning, and tour assistance are the main beneficiaries of regulated vocational training and employment.

It should be taken into account that some overlap may occur in certain cases, as in the category of direction and management of tourism organizations, as it is a professional output for all grades in tourism, many official masters and extension courses in University and two-level training cycles, which can hinder academic and professional guidance for people who interested in joining the sector and working on this occupation.

This situation contrasts with other regions, where these courses are aimed at different occupational categories. This fact affects the idea that companies have about each title, and may explain why on certain occupational categories it is considered that different minimum of studies are needed.

22. CTESC recommends a better coordination between competent administrations in various training to prevent, in some cases, overlapping and redundant training activities.

Related to the demand for training by companies, it should be noted that information comes from the ad hoc survey aimed to managers and training managers of tourism businesses interviewed by demand of the Department of Enterprise and Employment to discuss the importance of training in the tourism sector, focusing on the business perspective.

Thus, the study shows that in general a low minimum education level is asked; little is invested in staff training and it is not planned in the short term, despite the importance given to training by these companies as an element to promote competitiveness. Experience is still more valued in the selection process than the personal training level.

In this situation, CTESC recommends:

23. To encourage investment in training resources, as in new technology resources.
24. A reflection is required on which actions would be the best so that both businesses and working people assume the importance of training in the sector.
25. It is essential that companies plan in short and medium-term their training needs and to do so having the participation of working people, either directly or through legal representatives. We must ensure a true dialog with workers in the elaboration of the Training plan as well as the consensus in the utilization on training credits and in the time invested in training, among other things. However, CTESC believes that training should not be a mandatory responsibility by the company and its staff.
26. Lack of training planning by companies affects negatively the training centers planning.
27. Collective agreements by sector or company should be the framework on training affairs and must be adaptable to the needs of the territory.
28. To ensure a better detection on the training needs of the sector, CTESC recommends that people who work in it participate in this detection, through their most representative unions. The most adequate way to ensure this participation is incorporating these organizations to the Bureau of Tourism, designed as a participation platform.
among public agents and private sector with advocacy in the sector, and having as specific goals, among others, to make recommendations and to propose actions related to tourism training.

29. As for micro and small companies, it is important to increase their participation in networks to create joint training, education and recruitment activities. In this sense, CTESC recommends that public institutions implement initiatives to create these types of networks, in addition to facilitate a meeting point between supply and demand for training.

Occupational categories which call for a higher level of education are direction and management of tourism organizations, commercialization and marketing, intermediary agents, tour guide and organization of events.

30. However, CTESC recommends to establish correcting mechanisms in order to avoid overqualification and underemployment in the tourism sector.

31. On the other hand, we must bear in mind that, with regard to the category of management of tourism organizations, the management skills of higher management are different from those of small entrepreneurs (with entrepreneurial profile). CTESC recommends to take this difference into account, since it is important to plan the training addressed to this occupational category.

The main impediments targeted by the interviewed companies for not making training and on which they should work to overcome them, are the lack of staff time, the difficulty of combining training with work and personal schedules, traveling to training centers and in medium, large companies and in the housing sector, lack of motivation of workers.

32. To promote disposition of working people to do some training, CTESC recommends that companies provide the effective training to their staff.

33. As indicated by SOC, CTESC recommends to incorporate training in smaller dimension companies, many of which do not have a planned human resources management and in many cases link training to an increased risk of losing the worker for a better job.

Overall, the company is the one which usually organizes training activities, aimed to cover the main training gaps:

- Related to crossed skills: learning of foreign languages, conflict management and resolution of problems, initiative and creativity, planning, organisation, and control.
- As for the specific skills, we should highlight: cooking, travel, culture and museums, and informatic skills and new technology applied to the commercialization and marketing of products and companies.
- Although there is a wide range of training in languages, in classroom and on-line, a satisfactory level of competence is not achieved.

Given these training deficiencies, CTESC recommends:

34. To enhance generic skills in curriculums: they are particularly important in this sector.

35. The increasing demand for people with language skills in emerging markets (such as China, Russia and Japan) makes necessary to promote the learning of these languages on the one hand, and secondly, to undertake guidance, training and/or requalification actions towards the tourism sector intended on these population segments:
- Students whose first language is some of the emerging languages such as Chinese, Russian, Japanese ...
- Unemployed population in requalification processes whose mother tongue is one of these emerging languages.

36. To improve language skills, in addition to the indispensable and irreplaceable individual effort, governments have a responsibility to lay the foundations for improving outcomes in the area, affecting both resources and methodology applied to training as in the promotion of other mechanisms that have been proved effective in language learning (generalization of the original versions in the media, stays abroad, etc.).

37. Although many of the training programs incorporate ICT content, results indicate that it is necessary to further strengthen the tourism training curriculum in all policy matters related to ICT, applied both to the commercialization and marketing experiences, as well as to give support to the most rewarding policies.

38. As for managerial skills and conflict and problem resolution, initiative and creativity, planning, organization and control, CTESC recommends complementary approaches to the training resource going through the combination of different policies that every time are more and better implemented in companies:
- Direct personal supervision to detect behaviours and procedures can be improved and instruct relevant changes;
- Implementation of management systems and quality control;
- Provision of incentives linked to quality and efficient execution.
39. As the CEDEFOP (2010) points out, in an increasingly globalized world not only business customers come from different countries but also the working staff. Therefore, CTESC recommends promoting the development of intercultural competence among the staff employed in the sector.
40. Another cross ability that should be developed is sustainability applied to both the establishment management as to the configuration of tourism products and packages.
41. Moreover, CTESC recommends to encourage entrepreneurial spirit, to increase knowledge about the elaboration of a business plan, financing and consolidating strategy.

- As for occupational categories or areas: attention to customer in the case of kitchen and dining-room assistants and chefs and cooks; knowledge on new markets and tourism novelties for the organization personnel; management of cottages and campsites for the lodging area personnel as well as training in direction and management in the case of microenterprises.

Given these training deficiencies, CTESC recommends:

42. To influence in learning key habits that shape a positive tourism experience as customer attention. Challenges for the industry are reception and hospitality. If we want to clearly distinguish ourselves from other destinations, service quality is vital.
43. To meet a significant demand of training in tourism management, especially in continuous training, clearly requested by small companies.
44. To adapt training to the new “multi-skilling” required by certain occupational categories, because of the growing need for flexibility demanded by the sector, with an important weight in interdisciplinary competence.

However it is necessary to take into account that, probably due to the method used to obtain this information from the companies,\(^\text{12}\) combined with the present situation of high economic instability, the detected training deficiencies are generally poorly “innovative” and they have low projection on the future. That is to say, they are focused on the daily running of the business and and do not foresee changes. In this sense, tourism demand is sensitive to a number of factors, including domestic and international economic situation, demographics and the impact of increased life expectancy of the population, changes in the lifestyle of the society, new technologies, the need to ensure sustainable development of resources, etc.

Despite the impact of the current crisis and changes in consumption patterns of the population with respect to tourism products and tourism demand, the tourism industry is facing new opportunities. CTESC recommends:

45. To promote training contents targeted directly to specialized tourism: family, cultural, gastronomic, leisure, rural, seniors, sports club, etc., By, for example, new combinations of courses and specializations, favoring an hybrid model of contents, such as linking traditional skills to health or to sport.

Finally, related to the training format, the study shows that in general companies choose:

- To do training mainly in an external center, with the exception of the transport subsector and restoration, which prefer to organize it in their own company.
- Classroom education in hosting and transport companies, while the restoration subsector, tourism intermediation and those in the rural interior prefer a mixed model that combines classroom training and on-line training.
- To start the course in winter for the lodging companies and the restoration industry, either in the rural interior or the coast, and in autumn for the ones linked to tourism intermediation or those in the capital.

In this sense, CTESC recommends:

\(^{12}\) As explained extensively in Chapter 4 the telephone survey was done on the basis of a comprehensive questionnaire, which could cause a certain "fatigue" in the interviewee and unwillingness to do future projections.
46. To give advice to tourism companies about the planning of training policies, so that it happens to meet with low occupation periods while adjusting training to these periods.

47. In a highly heterogeneous sector as for the working schedules, it is essential to design training activities that can be adapted to the requirements of companies. In this sense an interesting resource is the on-line and semi on-line training.

48. Moreover, and especially with regard to the training for employment, CTESC recommends to define tools which make easy that students can complete their training processes although their work situations change.

49. To make an effort to innovate the training format. For example, it can be interesting to promote training visits to other companies abroad, exchanges between people working in different companies or the application of coaching and mentoring techniques.

As a final thought, one must take into account that the above considerations have been done adopting a generalist perspective, which is capable of being broken down according to the activity sector of the company, its size and location, as it has done throughout the study.