



# DIGITAL TOURISM

Co-funded by the  
Erasmus+ Programme  
of the European Union

Call for proposals EACEA 27/2017  
 Joint Qualifications in Vocational Education and Training  
 Project n.º 2018-1817 / 597875-EPP-1-2018-1-PT-EPPKA3-VET-JQ  
 "Digital Tourism (DT) intermediate professional"



European Forum  
of Technical and Vocational  
Education and Training



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# **DIGITAL TOURISM PROJECT**

## **WP2.- FINAL REPORT**

**Title:**        **Summary Report: Country situation about  
Digital Tourism.**

**WP:**         **2**

**Partner:**   **CDEA**

**Date:**        **MAY 2019 – Version 1**  
**JULY 2019 – Final Version**

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# Summary

## Project Outline

The Digital Tourism project aims to develop a new qualification for tourism, one of the fastest growing sectors in both Europe and the world. This new qualification aims to blend tourism and IT skills and meet new trends in consumer demand. The course will be delivered mainly online and students' work assessed by peer review. It targets young people between the ages of 15 and 19 and will prepare them to work with both traditional and new business models. Traditional models include Destination Management Companies (DMCs), Destination Management Organizations (DMOs), Global Distribution Services (GDSs), Hotels, Travel Agencies, Companies providing recreational activity leaders and national, regional and local tourist bureaus. New models include companies operating online or using cloud computing services and the digital travel market. This includes meta-search engines, fare aggregators, online travel agencies (OTAs) or traditional travel agencies that wish to develop or expand their online sales. The course will cover all kinds of tourist products including Sun and Sand, Business, MICE (meetings, incentives, conferencing and exhibitions), city breaks, golfing getaways, wilderness trips, cultural excursions, gastronomy holidays etc.

They will be conducting both B2B and B2C transactions according to their job profile which may be the creation, development, promotion or sale of tangible or non-tangible products online at public or private organizations of all sizes. They will use a range of skills and draw on different areas of knowledge from marketing to geography, psychology, IT, arts, history; photography, video and language skills.

The project will provide students with professional knowledge and skills focused on IT-based promotional and marketing strategies (travel technology or e-tourism). Digitalization promotes company growth.

The course will include overseas stays and be delivered in multinational companies. It will also include long term work based learning with minimum stays of three months.

The project will have the following impact: increase labour mobility for graduates, increase online promotion of tourism products, equips students to conduct both B2B and B2C transactions and reduce the seasonal nature of employment in tourism.

## Description of Digital Tourism

Digital services allow a company to become a place where technological innovation generates cultural, social and economic development. Digital tools have so far become a fundamental tile to this purpose, and they are more and more consistently present in the educational paths.

There is a widespread tourists' complaint about the difficulties in accessing tourist information in an organized, responsive and digitally interactive way. In order to develop and support the touristic sector, it is required to design and develop solutions and services that produce effective and real simplification of the processes of creation, use and exploitation of information, in an interactive way with the customers. This project will support the ***acquisition of professional knowledge and skills targeting promotional and marketing strategies based on IT (tourism)***, already widespread abroad.

## Desk Research by Country

*Tourism is a major economic activity in the European Union, contributing about 10 % to the Union's gross domestic product and employing up to 26 million people through its direct, indirect and induced impact on the economy. While it is true that the EU is the global leader in terms of international tourist arrivals and receipts, fast-growing tourism to some other destinations is challenging this status quo.*

*The EU tourism sector is also facing changes brought on by the digital revolution. (Eu Commission, [Digital Tourism in the European Union](#))*

### 1. The digital transformation has had a profound impact on tourism in the EU. What is the situation in your country or region?

#### ITALY

The EU tourism sector is facing changes brought on by the digital revolution. Many customers nowadays plan and book trips on their own through online travel agencies, search and meta-search engines, and making increasing use of mobile technology and apps. Some of them share their travel experiences through personal exchanges on social media platforms, travel blogs or commercial channels such as TripAdvisor. Most businesses serving tourists have understood the need to adapt their products to the changes in the way the market works, and consequently have launched various online and automatic services ([EPRS-European Parliamentary Research Service](#)).

Rapid growth in international tourism flows, new consumer trends, digitalisation of the economy, security issues are among the major challenges facing the tourism sector. These will require active, innovative and integrated policy responses to ensure that tourism remains a competitive sector and continues to deliver economically and sustainably in the years to come - OECD Tourism Trends and Policies 2016 ([OECD Tourism Trends and Policies 2016](#)).

According to the Italian Digital Innovation in *Tourism* Observatory, the Italian Digital Route to the digitization in tourism is work in progress. *Italy has officially presented the 2017-2022 program for tourism, where technology plays an important role to increase the quality and integration of policies aimed at supporting the digital revolution. The slogan of the new Italian tourism strategy is "Efficiency and Sustainability".*



According to the *Observatory for digital innovation in tourism at the Polytechnic University of Milan*, the growth of the Italian tourism market is generated mainly by the digital component which, with a total value of nearly 11.2 billion euros, accounts for more than a fifth of the market. Going to consider the offer of the Italian tourist system, the sector in which digital transformation has made more progress is that of accommodation structures that are currently in control of the transition from the adoption of digital instruments to an effective government of the same. The rate of adoption of digital instruments by the accommodation facilities is now high both for promotion activities and for booking.

According to the *estimates of the Observatory for digital innovation in tourism at the Polytechnic University of Milan*, the digital tourism market in Italy continues to grow and is currently worth 14.2 billion euros. In 2018 it grew by 8% compared to 2017. Digital tourism is now running and contributes to a quarter of the total value of tourism (58.3 billion). Not only online travel agencies, but also small tourism SMEs are pushing the digital trends more forward.

## PORTUGAL

For the past few years Portugal has been awarded with the most relevant “World Travel Awards” (the so called “Tourism Oscars”), some more than once. The evolution has been significant – four awards in 2016, seven in 2017 and sixteen in 2018 – and it was widely based in a change of its international promotion: the traditional ways were cut and the focus was transferred to digital communication, namely digital marketing.

The impact was tremendous: for the first time, one country won two consecutive times several awards: World Best Destination (Portugal), World Best City Break Destination (Lisbon), World Best Island Destination (Madeira), World Best National Tourism Board (Tourism of Portugal).

Tourism of Portugal (TP), the National Tourism Authority, is responsible for the promotion, valorization and sustainability of tourism activity, having in a single organization all the legal competences related to the dynamization of tourism, from supply to demand. It was its responsibility to change the paradigm of communication.

Starting from the concept that the tourist has today much more power than it had, as one organizes oneself better, searching for and requiring better information, accessing it by more and diversified channels, relying more on peers, which influences more the offer, towards a more custom than standard, TP put it into practice by assuming that putting Portugal on the map is putting it where everybody is, on the Internet and on social networks. From 2013 onwards the entire budget of “*Turismo de Portugal*” destined to international campaigns began to be used exclusively in digital marketing. Gone are the billboards, television ads and newspapers, flyers at airports and taxis.

Appointing a team of forty-five people and with a specific budget of more than 10 million euros, they assumed from the beginning the high effectiveness of Internet. In Tourism promotion through digital media, the keyword is "segmentation". For example: when the Danes, Swedes and Finns start searching for vacations in January, their Facebook is filled with videos and references to Portugal - like the image of Lagoa do Fogo in the Azores, with the caption "Not all spa have four walls ". When French searches for "surf" on Google, the results that appear first are relative to Peniche, Ericeira, Costa Vicentina – “Turismo de Portugal” has created a specific landing page with tips, videos and routes for surfers.

The aim is to have Portugal present at all times of the holidays: since the tourist is dreaming, planning, booking, staying and sharing one's experience.

It was based on that new reflection on what destiny is Portugal - and what it wants to be: tourists today are no longer looking for products, they are looking for experiences. Consequently, instead of showing paradisiacal photographs that compete with thousands of paradisiacal photographs of other places, TP began to show the experience: the tourist does not look for only the picture postcard. Today's tourist is experienced, demanding, knowledgeable and wants to live and share experiences.

Digital helps selling experiences instead of picture postcards, as by analyzing data on Google's search TP can know exactly who's on the other side and what one is looking for in a destination. Typical images continue to have their effectiveness, however. See the success that has on Facebook the photograph of a beach of Sintra accompanied by a legend "In Portugal, the summer never ends". Or a simple image of the Douro valley. Or a video with the ten best Algarve beaches.

In addition, Portugal's position as a "destination of experiences" also served to convince the international press to look at the country with different eyes. TP needed people to experience the country and experience it freely. This allowed the tourist to contact with an authentic experience and not with a billboard.

To achieve that, "Can't Skip Portugal" was a campaign, launched at the beginning of 2017, with the objective of promoting the image of Portugal and increasing the notoriety in the international markets. Composed of four films, the campaign focuses on the message that there is no way to pass by a destination like this: authentic and unique, with so much to see, to taste, to feel and to experience. An all-inclusive destination, which can be visited all year long, for all ages and with a greater offer than the more traditional destinations. It was launched exclusively in digital media from 20 strategic markets, and is Portugal's most viewed campaign ever. Although it was implemented in 20 countries, it reached, in an organic way, more than 200. Only in those strategic markets it impacted in more than 160 million people.

The intensive use of new communication technologies has changed the face of the tourism industry as much or more than any other sector (Buhalis and Law, 2008). The way the public choose where they travel, how they pay for it and enjoy it has changed radically with the appearance of Internet.

The tourism industry makes a highly important contribution to the national economy and even occupies prime position in some regions. It continues to create employment and is thus vital to the Spanish economy.

These are the eight key factors to the digital revolution in the Spanish tourist industry.

1. **New business models:** New business models have appeared and the emergence of numerous new players has reshaped the value chain.
2. **The mobile phone:** The mobile phone has consolidated its position as the preferred channel for requesting tourism services. Consumers demand new products and services with their mobile phones and this has provided an opportunity for the creation of new business models. M-Commerce and last minute travel have become commonplace.
3. **IoT-Technology (The Internet of Things):** This technology is being used mainly by big hotel chains, theme parks and governments to develop applications for the tourism industry. One example is the Las Palmas de Gran Canaria Town Council: it is promoting shopping tourism through a communication system based on beacons. Barcelona Town Council is another example: they have introduced a system to advise coaches on the availability of parking space around the Basilica of the Sagrada Familia.
4. **Social Media:** These are two way channels of communication between retailer and customer. Tourist companies and institutions can receive alerts and react quickly. They have become essential media for communication and commerce. The two most important are Facebook and Instagram.
5. **OTA's and other business platforms:** These are new business models that include systems that search for and compare customers' comments.
6. **Co-operative business models:** This is a new area of activity that displaces value from larger companies and professional operators to private individuals and smaller companies. These models have still not been fully regulated and are creating a great deal of controversy in some Autonomous Regions where many towns are curtailing their activities.
7. **Innovation:** Other technologies that have begun to play an important role in the tourism industry are geolocation, virtual reality and augmented reality.

- 8. Big data:** These are technologies that generate and collect data on tourists' behaviour, preferences and movements.

## THE NETHERLANDS

Now, with as many as 42 million people forecast to visit the country annually by 2030, up from 18 million in 2018, the Netherlands tourist board has had enough. Europeans remain the most likely to visit the Netherlands, with Germans and Belgians making up 42% of all tourists. Incoming tourism to the Netherlands has experienced clear growth over the past decade, apart from a dip during the 2008 and 2009 crisis years. The number of foreign guests staying in the Netherlands for a vacation or business is expected to have grown by 7% compared to the previous year. The number of passengers at the airport of Schiphol raised up until 86 million per year, and the number of guests staying for more than one day has risen to around 19.1 million per year.

Start-up's, new marketing tricks, mobile apps, market fragmentation and the changing consumer. The Dutch travel industry has to adapt to face the future. It seems obvious that tour operators, hotels, landlords, OTAs and Agro-tourism no longer ignore technology. Software and systems are necessary to develop new business models, to receive reservations, to do marketing or to increase the customer experience. Companies in the travel industry are gradually undergoing a digital transformation. In addition to the changing consumer and his power on social media, the playing field of the travel industry is also changing. In addition to the increasing number of new entrants, the big boys such as Booking.com and TripAdvisor are becoming increasingly dominant. Dutch Digital transformation is especially necessary for marketing. This means on more focus on branding through an app (i.e. Corendon). The use of WhatsApp is also more used in a user-friendly way of communication towards the customer (i.e. hotelspecials.nl).

### Tourism statistics The Netherlands

<https://www.statista.com/topics/3940/travel-and-tourism-industry-in-the-netherlands/>

In recent years inbound tourism numbers have grown consistently. This is confirmed by the number of tourists traveling to the Netherlands between 2010 and 2016, categorized by accommodation type booked. Hotel accommodation showed the highest growth rate. If in 2010 the number of inbound tourists staying in hotels amounted to approximately 8.7 million, in 2016 it rose to roughly 12.4 million. When looking at the total number of inbound tourists, it increased from approximately 15.8 million in 2016 to 16.3 million in 2017. Furthermore, forecasts predict that the number of inbound tourists will amount to roughly 16.7 million in 2018, indicating a trend of continuous growth in visits from abroad.

As regards to digital tourism there is a major shift going on. Recently (Huffington Post, 6th May 2019), the Netherlands tourist board has had enough. A country of 17 million people can have too much of a good thing, it is suggested. “We say that ‘more’ is not always better, certainly not everywhere,” a tourist board policy document states. “To be able to control visitor flows, we must take action now. Instead of destination promotion it’s time for destination management.” The board is moving its focus from promoting the country as a tourist destination to trying to manage the huge numbers coming in by plane, train and automobile.

Lesson to learn: Digital marketing is no longer just for fixed desktops. Nowadays, people need to be connected at all times. Give them access to your online content on their own devices when and where they crave it the most. Your thoughtfulness will be appreciated, and people will be much more inclined to purchase additional services when they are using a familiar and safe device.

## 2. EU institutions recognised the importance of digitization in tourism in a number of policy documents; what is the situation in your region or country?

### ITALY

According to the Strategic Plan for Tourism (PST – Piano Strategico del Turismo), similarly to other sectors, tourism is undergoing an increase in demand that no longer focuses only on the destination, but seeks out unique and sensational trips to transform a holiday into an experience to be shared and remembered.

More than ever before, the viral distribution of information, decision making by travellers, and the expansion of informational tools are the new key features. In fact, the digital revolution has brought about a change in consumer behaviour, from the decision stage through to pursuing authentic experiences.

Of all web browsers: 91% have booked online at least one product or service in 2015 and use search engines as their primary source when planning a holiday; 42% use a smartphone or tablet to book and get information.

A crucial factor for the competitiveness and attractiveness of destinations is the capability to innovate. “For this, the role of governments (at all levels: EU, national and regional) should be that of providing the right infrastructures. The revision of digital strategies, moreover, needs an active participation of all stakeholders (after all this is the real spirit of the network).” eTourism megatrends Rodolfo Baggio - Bocconi University.

Digital technologies have brought significant transformation to the tourism industry, revolutionizing tourism enterprises, products and experiences, business ecosystems, and destinations. In order to support the digitalization in tourism and support tourism SMEs and to maximize the benefits associated with the digital economy, the Italian Ministry of Culture and Tourism consists of three key interventions:

- 1) the launch of think tank with the aim of developing a digital strategy for the tourism sector together with key stakeholders;
- 2) the establishment of a tax credit measure to support investments in digital tourism;
- 3) the development by ENIT of national digital communication and marketing plans to promote Italian tourism.

The Ministry of Culture and Tourism has provided guidance and recommendations through the following Documents:

- the **Strategic Plan for Tourism 2017-2022** (PST – Piano Strategico del Turismo)

The guiding principles of Italy's tourism system for the next 6 years: innovation, sustainability and competitiveness. The Italian government is reshaping its plan for the tourism economy, putting it at the heart of national policies, and implementing a strategy to create a standardized vision for tourism and culture. The document has a time horizon of six years (2017-2022) and is based on key drivers such as technological and organizational innovation, skill building, and quality services. These aspects are integrated with the need to have a lasting and sustainable approach to our environmental and cultural heritage.

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The PST's vision is based on boosting the competitiveness and employment of the national tourism system through innovation, digitization and creativity.

- **TDLab** (Italian laboratory for digital tourism)

Created in 2014, the TDLAB had the task to identify key issues and necessary steps to bridge the digital gap of the Italian tourism industry and integrate multiple layers of digital public administration. The TDLAB was composed of representatives of the Touring Club of Italy, the Italian Digital Agency, the Italian Tourism Board (ENIT), the Automobile Club of Italy (ACI), Expo 2015, TrentoRise and other experts in the field of tourism and digital innovation from academia and industry. In 2014, the TDLAB delivered a national strategy for digital tourism that addressed three key areas of interventions (interoperability and big data; digital development and promotion) and identified twenty-seven priority actions. The proposed priority actions included, for example, the set-up of a national register of tourism facilities, the mapping of Italian cultural and tourism sites, the access to big data and support for vocational training, the creation of a common corporate identity for all tourism public administrations, and the development a digital brand reputation ([OECD Tourism Trends and Policies 2016](#)).

During the Industrial Revolution, the major element that has caused a change in working society across different industries is the introduction of new technologies. That role is now assured by digitalization. Tourism organizations are constantly looking into how it can help them to reduce costs and improve efficiency. But introducing this new technology into an existing workplace has not been an easy task. If older workers are facing adaptation problems, the ones newly graduated from Hospitality Schools and Universities see the introduction of this new framework as less of a worry and more of an opportunity to gain new skills that could benefit them when it comes to future employment / future career.

There are many topics that are being tested in companies, about how technology will tackle topics like customer proximity, innovation, international development and understanding clients' expectations. All these topics that are emerging are potentially creating new jobs and upskilling existing ones.

Even smaller restaurants and hotels, for instance, have understood the importance of having a virtual image, so they have been outsourcing the service of webdesign or social media management, or asking the second generation of owners/managers/workers to handle these matters.

Even if a large part are still taking their first steps on digitalization, there is already a significant part of tourism organizations, small to large, that are keeping up with the new trends: mobile, for instance, has been increasing its role, with smartphone applications leading the way – it's not only big brands that have their own app, but a significant number to adapt its sites to Android users, or even to invest time and resources to interact with customers in P2P apps and sites.

In fact, with the needs of travelers changing, the "one-size-fits-all" approach stopped working, so these organizations have begun to incorporate other tools in their contact points, such as chat or messenger, to improve the consumer experience and discover the best way to "talk" with their customers.

Most of these, however, were "individual" efforts; in order to have a strategic plan for digitalization in the entire sector, Portuguese government created, in 2018, "Turismo 4.0", a specific joint initiative of the Ministry of Economy, the Portuguese Secretary of State for Tourism and Tourism of Portugal, our country's national Tourism Board, to promote Tourism transition to the digital economy. It aims to promote entrepreneurship, support tourism startups, as well as foster innovation in tourism in Portugal. This programme will work as framework for public funding and policies.



Its goals are:

- to foster entrepreneurship, as a vehicle for innovation and creation of new businesses;
- to transfer knowledge to businesses;
- to lead the innovation process, anticipating future changes in tourism;
- to train and train companies and human resources in the area of innovation.

It is built around two dimensions, each with three axes:

#### A) Technological and Business Cooperation Ecosystem

##### a. Streamlining the ecosystem

- Promoting the cooperation for the development and
- Subsequent implementation of digital innovations in the Tourism sector.

##### b. Internationalization

- Increasing the awareness of the program abroad.
- Promoting the destination Portugal.
- Promoting the internationalization of Tourism Startups and companies.

##### c. Startups

- Promoting an ecosystem favourable to entrepreneurship in the Tourism.
- Ensuring the alignment of the initiatives with Startup's national strategy Portugal.

#### B) Support and incentive tools

##### a. Legal and normative adaptation

- Ensuring legal adaptability and regulatory framework to address challenges of the new digital revolution.

##### b. Training and qualification of Human Resources

- Providing the national education system with the curricular updates necessary for the digitalization.
- Promoting Tourism professionals' and students' digital skills.

##### c. Funding and supporting the investment.

- Developing mechanisms for financing for projects of digital scope, in order to accelerate investments and adoption by Tourism players.

All these axes led to practical results, namely:

1) Digital Tourism Platform

- 1.1) Creating an i4.0 maturity assessment template;
- 1.2) Digital Tourism Forum: events for dissemination of digitalization in the Tourism sector;
- 1.3) International promotion of the best practices and initiatives in the Tourism sector.

2) Technological and Business Cooperation Ecosystem

2.1) Streamlining the ecosystem

- 2.1.1) Digital Single Desk of interaction between companies in the tourism sector and the public bodies;
- 2.1.2) Relevant data platform for tourism companies;

2.2) Internationalization

- 2.2.1) Uniformization of how “Portugal as destination” is promoted on public digital platforms.

2.3) Startups

- 2.3.1) Tourism Innovation Centre
- 2.3.2) Digital Tourism Hackathon

3) Support and incentive tools

3.1) Legal and normative adaptation

- 3.1.1) Standardization for Industry 4.0

3.2) Training and qualification of Human Resources

- 3.2.1) Tourism Digital Academy
- 3.2.2) Creation of training offer in i4.0 at Universities, Polytechnic Institutes and Hospitality and Tourism Schools.

3.3) Funding and supporting the investment.

- 3.3.1) Promoting Research & Technological Development
- 3.3.2) Accelerator for calls of incentives to tourism digitization

### 3.3.3) Funding voucher i4.0 for Tourism (SMEs).

Since its creation, all Portuguese territory was covered, with 11 funding acceleration programs were launched; more than 250 Startups are in the program; three European wide events were created and financially supported – Cascais Tourism Forum; Tourism Challenges; Smart Funchal.

Spain received a record number of tourists 2018 and official sources at the Ministry for Industry, Business and Tourism believe now is the time to reshape the model for development of the tourism industry. The current one has been highly successful to date but must now adapt itself to a new environment characterized by constant growth, technological innovation and rapid changes in market behaviour and motivation.

After forty years of uninterrupted growth, the time has come to assess whether or not the current model can continue to grow whilst meeting the needs not just of the sector but also of the country and its population. It is essential to ensure that the sector is equipped with the necessary tools and resources for the new environment shaped by constant growth, technological innovation and rapid changes in market behaviour and motivation.

For the above reasons the Government presented its the first draft of its **Strategic Plan for Sustainable Tourism in Spain 2030**<sup>1</sup> which is currently being completed by the Secretary of State for Tourism. The plan will lay the foundations for the adaptation of the model for the growth of tourism in this country.

As far as new technologies are concerned, the Spanish tourism sector must confront some technological weaknesses which may affect its future growth. We should add two more factors to the ones mentioned in the previous point:

- *The digital breach* which locks out a lot of SMEs (small and medium size businesses) of the tourist industry as they do not enjoy high visibility in cyberspace perhaps because they are unable to meet the demands of the new online customer.
- *The new platforms* which have diverted a lot of business away from traditional tourism models in our towns and destinations.

This new strategy is integrated into the national agenda for tourism; its aim is to meet the challenges confronted by the sector in the medium and long term. It promotes three principles of sustainability: socio-economic, environmental and territorial. The government has launched a group initiative to get the tourism industry and the Autonomous Regions involved.

There are five general guidelines in the strategy but it is the third one is of interest for this project:

- Competitive transformation includes the group of mechanisms and courses of action designed to increase revenue from tourism and develop policies that

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<sup>1</sup> GENERAL GUIDELINES FOR THE 2030 SUSTAINABLE TOURISM STRATEGY IN SPAIN. Ministry of Industry, Trade and Tourism January 2019

encourage competitive transformation in the sector. The idea is to adapt to an increasingly digitalized society, economy and market environment.

Some of the programmed courses of action <sup>2</sup>:

- a. Improve relations between the technological and the tourist industries and assist the former to meet the growing needs of the latter.
- b. Promote wider use of technology to achieve a more sustainable management of the tourist destinations and thus accelerate the digital transformation in the industry. The digital strategy must therefore include courses of action designed to narrow the digital breach at lower levels of the tourist industry, especially amongst SMEs and tourist destinations. The strategy must help operators adapt to the needs of on-line tourists as well as improve efficiency of local government management. The strategy must also address issues outside the tourist industry itself but necessary for its development. These include new communication and information technology infrastructures as well as cyber security. The transition to a data economy will require a new basket of indicators to measure the competitive nature of the sector.
- c. Promote the adaptation of the current legislation to the new conditions of the tourism industry. At the present moment new business models created by operators inside and outside the industry are causing serious disruptions to the sector; they must be regulated.

Other schemes and initiatives have already been developed to promote this transformation. This is a list of them <sup>3</sup>:

**National Comprehensive Scheme for Tourism (PNIT) 2012-2015.** This scheme had six axes (building the Spain brand, customer service, supply and destinations, firming ties between public and private sectors and knowhow, talent and entrepreneurship). Measures related to technological issues were amongst those proposed: smart destinations (innovation in the management of destinations), support for the international expansion of Spanish tourism companies, loans for young entrepreneurs in tourism etc..

**TURESPAÑA** is the national tourism body and is responsible for marketing Spain throughout the world and adding value to the tourist industry by promoting economic, social and environmental sustainability at national destinations. TURESPAÑA manages the Spanish tourism brand by cultivating the image of Spain as a tourist destination in conjunction with the Ministry for Foreign Affairs and Foreign Aid and the Government High Commissioner for the Spain brand.

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<sup>2</sup> GENERAL GUIDELINES FOR THE 2030 SUSTAINABLE TOURISM STRATEGY IN SPAIN. Ministry of Industry, Trade and Tourism January 2019

<sup>3</sup> The Digital Revolution in the Tourism Industry-the Orange Foundation. 2016

**EMPRENETUR Finance** supports innovators in the Spanish tourism industry and enables them to take advantage of business opportunities.

**Connected Accommodation Providers Programme**, to facilitate the introduction of technological solutions in small and medium size hotels and properties devoted to rural tourism.

**The National Scheme for Smart Cities**, to promote the creation of smart cities through the introduction of technology and assist local entities in the transition towards smart cities and destinations.

**The Basque Region. Scheme to Support the Modernization of Tourism Businesses.** The scheme seeks to support the upgrading of tourism businesses and thus assist in the development of good quality tourist product that is competitive and aimed at the clientele and the market.; it also seeks to promote the acceptance and introduction of CITs that improve companies' relationships with their customers, as well as their efficiency and promote the creation and growth of new companies.

**The Spanish Tourism Board (CONESTUR).** The Spanish Tourism Board (CONESTUR) was established in 2005. It comprised government tourism departments, representatives from the business community, employees and other workers involved in the industry. Its aim was to promote the necessary changes in tourism and encourage co-operation and participation between public and private initiatives.

**Tourist Host Project** is one the many branches of the Spanish Tourism Horizons Scheme 2020. It belongs to the Customer Value area and forms part of the Perceived Quality Programme. This started with the idea of improving the quality of companies and destinations with the aim of living up to the expectations of even the most demanding tourists.

Here are the two basic courses of action:

- Promote attention to detail through awareness programmes and customer service training for tourist service providers (Attention to Detail Programme).
- Encourage the beautifying of tourist destinations as a key factor in influencing customers' overall assessment of their visit (Destination Detail Programme).

## THE NETHERLANDS

The common Dutch policy on Tourism is 'to spread tourists more'. The government wants to tempt tourists to travel outside the high season and visit other regions. That must prevent inconvenience. By spreading tourism, other parts of the Netherlands can also benefit from the increasing number of visitors. NBTC Holland Marketing implements this tourism policy on behalf of the central government with the so-called HollandCity concept. The digital strategy is focused a lot on Holland.com concept.

Concrete actions from the HollandCity concept are:

Promote the Netherlands on the basis of cultural and regional themes: The province of Overijssel for example has been declared as the 'Garden of the Netherlands'; In 2018 extra attention was paid to Leeuwarden at home and abroad. This city has been elected European Capital of Culture in 2018. The year 2019 is dominated by "Rembrandt and the Dutch Golden Age".

With fictional storylines tempt visitors to visit multiple places in our country. A storyline on the theme of flowers was started in 2018. The Keukenhof flower park, the various flower bulb fields and the international flower trade in the Netherlands are central to this. The Floriade with the theme 'Growing Green Cities' will be held In 2022 in Almere.

Foreign tourists are pointed out at short distances between the sights in our country. As a result, tourists not only visit Amsterdam, but also other places in our country.

Each municipality has its own Tourism policy documents (in which digitalization does not play a major role).

The government is therefore committed to a two-pronged approach (source: Dutch Digitalisation Strategy Getting the Netherlands ready for the digital future – June 2018):

1. Leveraging social and economic opportunities (acceleration).

An important part of digitalisation is taking place in social sectors in which the government plays a relatively large role. This includes healthcare, mobility, energy and the agri-food sector. The digitalisation of public administration itself is also an important task. The challenge for the government is to speed up and support the digital transition in these sectors.

2. Strengthening the foundation (basic conditions)

The foundation for digitalisation – including privacy protection, cybersecurity, digital skills and fair competition – must be strengthened further. The government will focus on five key focus areas such that citizens and businesses can take advantage of the opportunities offered by digitalisation.



Whilst working on this questionnaire, we have spoken with many Dutch tourism organizations and we also discussed the part of the various EU policy's on digitalization in tourism. Quite surprising was that nobody was aware of any information regarding policy's on digitalization in tourism or the importance of it. They all believe that when the EU makes decisions which may have impact on their tourism organization, they will be informed personally. The policy of the EU is obviously too far from their daily life. We also spoke with teachers and students, and also they are not aware of any EU policy on internationalization in the tourism industry.

### 3. Digital transformation reshapes every aspect of business. Which of the following aspects are most affected by it: management, marketing, communication or others?

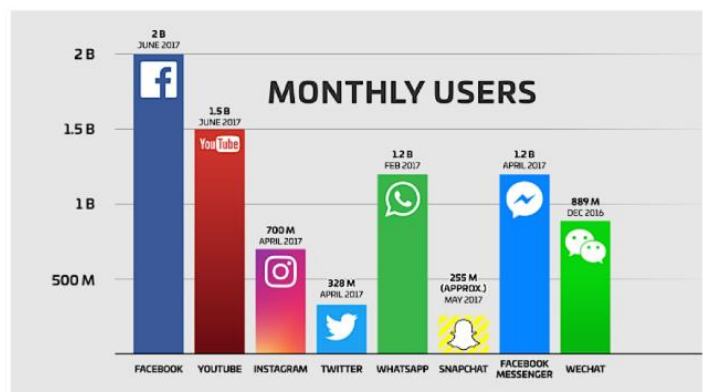
#### ITALY

Digital marketing is transforming the tourism industry; transportation and accommodation companies have been the first ones to embarking on digital transformation trends in Hospitality and Tourism.

The main reason hospitality and tourism companies are so successful at adapting digital marketing strategies is because they carefully analyse how people interact with surrounding environments while travelling.

The Digital Marketing Agency Single Grain claims that 2019 will be about better customer experience with personalization, automation and AI-powered technology. The main digital marketing trends used to attract the users/tourists are the following<sup>4</sup>:

- Booking: emerging trend of mobile-only travel agencies (MTAs) offering travellers the possibility to book tickets through downloadable mobile/tablet- apps.
- Travelers need to be connected at all times.
- Chatbots: virtual assistants offer outstanding customer service, meeting customers' expectations and automating repetitive tasks.
- Personalization: With the availability of data like purchase history, consumer behaviour and links clicked, custom content has never been easier.
- Social Messaging Apps.



Considering the growing popularity of social messaging apps for business purposes, social messaging apps can be very useful in sending messages to customers directly, as they allow personalization (another trend) and add value to the users' experience (Single Grain).

<sup>4</sup> Facebook now has 2 billion monthly users... and responsibility.  
<https://techcrunch.com/2017/06/27/facebook-2-billion-users>

## PORTUGAL

We believe all aspects were affected!

As Atilio Forte (2018) said, since Tourism was the first of the great areas of the Economy to give material meaning to what today's globalization - the appearance of the internet has change abruptly the habits of tourist consumption: how the offer became available; how the relationship between who sells and who buys changed; how it made possible to collect information from a mere click, simply by pressing a key, so that the experience - or the emotion, as we prefer to say - of the act of traveling began to take shape, allowing anyone to begin, in the first place, to anticipate the excitement of the discoveries that were about to take place during the actual journey.

And since then, tourism has never been the same again, at least under the terms in which until then it was perceived so much by who owned and made available the products, as by who acquired them and enjoyed them. The foundations on which the tourist activity stood suddenly shifted to made Tourism turn from an almost insipid activity to the leader of the world economy. The ruling of the "Offer" on the "Demand" was is replaced by the determinism of the "Demand" on the "Offer". In short, the power of "decision" has changed radically, from the moment that the one who decides to spend his money came to have (almost) all the existing information about what exactly one wanted to achieve, being completely free to buy what one specifically wanted to, but still to do it where, with whom and at the price that best suited oneself.

Entrepreneurship changed as well: facing the possibility of non-existence, to be able to create its own product and put it on sale at a planetary level, attracting all those who sought it. Many of today's great business and business conglomerates were born from this first step, which was nothing more than the seeks for the satisfaction of a personal need that later came to gather, or to find prosperity, in all who "craved" for something similar.

The "market" thus ceased to be local or regional, to become global. Companies, products and destinations, regardless of the type of size, no longer competed with each other and were no longer limited to certain (large) geographic to begin to compete "all against all" ... in the whole World!

At present the "customer" (read, consumer) is the "center of the universe", around who everything in the organization (all departments) revolves, whose needs can, should and must be fulfilled, under penalty of compromising the success of the business itself.

Given this large-scale effect, this staunch competition, where success often depends on a details, the emphasis on difference, on authenticity, genuineness, where each customer is "unique" (and wishes to feel treated as such), in an activity where the creation of "stocks" is an impossibility and where innovation has to be a constant, the technology - and the digital tools that it makes available to us - are the only possibility that Tourism organizations have to manage the amount of information at the same time that ensure that you are always

close to the client's hand (literally), waiting for the "orders and commands" given by him/her.

Therefore, technological upgrade was – and still is! -necessary for many national companies suffering from potential obsolescence (travel agencies) or from having to share their income with international players (hotels, restaurants ...).

Concerning the hotel industry, it is required to find alternatives to the almost cartel of online booking platforms, with personalized digital marketing, offering a more integrated "pre-stay", "stay" and "post-stay" experience, namely with loyalty tools.

For transport or tourism animation companies, it will be needed a more engaging and personalized e-commerce experience. Nowadays, personalization is the "Holy Grail" of digitalization. A remarketing methodology that integrates all the data: website, CRM, ... increases the effectiveness of online advertising, eliminates unnecessary expenses with more bookings and purchases and less costs.

There are already some good national references to follow: Indie campers, Tripaya, a somewhat different hospitality activity like Uniplaces, or the recent e-shop of Benfica (football has also become a tourist experience, combining a club branded hotel + museum + match in a unique experience).

Therefore, all areas of a Tourism Organization were affected, as all of them had to re-structure themselves in a way that their focus is on gathering and analyzing information that will lead to customer targeted improvements.

## SPAIN

The digital revolution has rapidly changed the external environment in just about every industry. It has also changed the internal operation of organizations. This transformation continues at a great rate and the tourism and travel industries are amongst the fastest changing. The Spanish economy relies heavily on these two sectors and this reliance could lead to an even greater modification of the internal operation of the entities involved.

The profound transformation affects every aspect of companies' operations. These are the main areas subject to this profound change:

- **Administration:** We should highlight here the use of new information and communications technologies based on the cloud, above all for the management of bookings and their prices (revenue) often using big data. This lends flexibility to operations and increases the ability of entities to co-operate with each other and improves the internal management of organizations and companies. All this helps to increase companies' productivity.

- **Distribution:** The principal channels for the distribution of tourism products have changed: the traditional model of the travel agency has given way to a model based on e-business in Internet, search engines and consumers of tourist services. In addition to this, tourism businesses themselves market their services through their websites.
- **Communication:** The digital revolution has transformed relationships and communications with customers. Digital channels of communication bring customer and company closer together much quicker. It is also two way communication. This helps companies adapt to tourists' needs and assists in building customer loyalty.

## THE NETHERLANDS

The Netherlands is in an excellent position to capitalize the economic and social opportunities created by digitalization. The Netherlands has a world-class digital infrastructure. Wi-Fi and Bluetooth were invented in the Netherlands. The AMS-IX, one of the most important internet exchange points in the world, is located in the Netherlands. The Netherlands has a highly educated workforce at an international level and Dutch consumers often lead the way in embracing new digital applications. The Netherlands also has leading digital companies such as Booking.com, TomTom, Adyen, NXP, Coolblue and WeTransfer. Moreover, the Netherlands has a long tradition of cooperation between companies, scientists and governments. This has contributed to the emergence of innovative clusters all over the Netherlands.

Some of the major challenges still faced by SMEs are the lack of technological knowledge, funds and e-skills. Addressing these challenges is definitely critical to the growth and development of SMEs. Thus, policymakers and private companies should provide training; they should support the creation of qualified jobs and create an SME-friendly environment in order to boost digitalization of tourism businesses.

### INTERNET PLATFORMS

Major internet platforms such as Google, Facebook, Alibaba, Uber and Airbnb are now playing an indispensable role in the economy and in our lives. We spend a lot of time on such platforms, buying and selling things, communicating, navigating the web or the road and enjoying music or series. A flourishing platform economy has been created in the Netherlands in recent years, with leading companies such as Adyen, Booking.com, WeTransfer and Thuisbezorgd.

Internet platforms offer major benefits, such as improved access to knowledge, easier and faster communication and new opportunities for businesses and consumers to buy and sell goods and services. As a result, platforms have quickly become crucial hubs for social and

economic traffic. The government sees the advantages and importance of platforms and wants to make as much room as possible for innovation. At the same time, this means that platforms have an important responsibility, for example in the fight against disinformation and illegal content. They also have an important responsibility towards affiliated workers and consumers, with regard to transparency and explainability of algorithms and in the way they handle data. In this strategy, the government will set out the principles and actions that are appropriate to these changing responsibilities of platform companies.

Digitalisation offers many opportunities for companies to increase their productivity. For example, it lets them respond more quickly to customer requirements by analysing data on payment behaviour, automate payroll administration with the aid of smart apps or set up an online marketing campaign.

These opportunities are currently not being sufficiently exploited for various reasons. The Annual Report on the State of the SME sector (Jaarbericht Staat van het MKB) shows that, in all sectors, only a few SMEs are highly productive. Companies indicate, among other things, that they do not know which digital innovation is most profitable for them and how to implement it in their company. In addition, companies experience uncertainty due to concerns about cybersecurity.

A good practical case study to see how political good intentions are being applied on the ground is the Carmacal calculator: This is a web-based tool that can calculate the entire carbon footprint of a travel package. This includes transportation, accommodation, excursions and activities. It contains more than 25 transport modes, and calculations of more than 750,000 accommodations and multiple excursions and activities. It is a unique and innovative tool that could, and indeed should, be used all over the world. It was developed by ANVR, an association of Dutch tour operators, in collaboration with NHTV, a private university.

Carmacal allows travel planners and tour operators to make travel decisions and to create tours based on criteria of sustainability (added to the usual price, quality and convenience variables). This is just the sort of innovation that normally should be led by the public sector, and yet it is a private sector initiative championed by ANVR and its membership of mainly SMEs.

Gerben Hardeman, manager of Responsible Travel & Tourism, ANVR, explains how he sees Carmacal being used by European legislators and policymakers. Gerben: “ANVR is an association of tour operators in Holland. Our membership includes some large companies, but mostly we are SMEs. ANVR requires its members to follow a strict sustainability policy in their respective businesses, but there was no way of measuring how sustainable they were being. We therefore created a tool – initially for our own members, but we would be delighted for the whole industry to make use of it.

Carmacal won the UNWTO Award for Innovation in Research and Technology and the WTTC Innovation Award, but we have not sought any support from European institutions in the development of the system. We all (public and private sectors) need to take responsibility to work on carbon management. Carbon management and reduction should be normalized within the travel and tourism industry, and this calculator could be used for strategic and operational purposes. This event is a wonderful opportunity to look for collaboration, innovation, interest and support from the EU. This is an open invitation to European policymakers and the European private sector to start an innovative carbon management project and further develop the tool for various target groups in Europe. I would also like to highlight that more than 80 percent of European holidaymakers value the importance of decreasing the size of their own carbon footprint<sup>5</sup>

An explicit successfully digital tourism approach is that of the City of The Hague. The municipality of the Hague has set up their own 'Marketing Bureau The Hague and Partners'. This Marketing Bureau has several channels that are aimed directly at the customer in this case the (inter) national visitor. Central to all marketing campaigns the website [denhaag.com](http://denhaag.com).

This website was set up in 2014 and in recent years became a quality platform with more than 2 million unique visitors per year. To keep it up to date and to remain relevant is constant development necessary. In the context of the theme 'Year Festival On'. At [denhaag.com](http://denhaag.com) there are some sea (small) ones developed new functionalities.

In addition to the website, The Hague has with the Marketing Bureau various social media channels at its disposal. These are often used for marketing campaigns, but certainly also to inform visitors. For 2018 the focus is on 'Tell the Story': carefully chosen ambassadors in their own words and language leave the message of The Hague to tell (via text and video blogs).

This then involves an informative approach.

However, we will also take the proactive and reactive approach

They further strengthen: the web care function where respond proactively and responsively to questions on various social media is also one for 2018 important pillar in customer contact.

The Hague also has digital tours, a tourist can upload an individual journey into certain attractions, sightsee events in the city.

The moment the visitor arrives once in The Hague, there are various channels for contact. The largest is the VVV branch is on 'the Spui'. In 2018 will give this establishment a completely new look & feel and are being further developed to a "The Hague store".

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<sup>5</sup> <https://www.mmgy.com/industry-insights/europes-tourism-smes-are-getting-smarter/>

The purpose of this is to connect even better with the needs of the target group and the clarity with the strengthen branding. In addition, they also look for new product combinations. In addition, the possibility of more specific The Hague merchandise to add to the range.

In addition, the program 'Search for visitor on' that started in 2017, will be further detailed expanded. The approach of this program is around the front office staff from hotels, museums and attractions further inform about the tourist offer in The Hague, in order they can better speak to the customer stand. This contributes to a more hospitable experience during the stay and ensures visitors more than they originally intended.

In addition to the physical information provision, The Hague Marketing Bureau also a number of papers forms of information provision...<sup>6</sup>

According to our surveys, all departments are affected by the digital transformation in the organization. The employees need to process for example the reservations or questions via online tools. The sales use digital aspects to communicate and make analysis. The director as well as the manager is responsible for efficiency and productivity. Only the HR department is maybe less in connection with direct transformation regarding digitalization.

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<sup>6</sup> [https://www.thehague.com/fileadmin/user\\_upload/Reports/Jaarplan\\_2018\\_TH\\_P.pdf](https://www.thehague.com/fileadmin/user_upload/Reports/Jaarplan_2018_TH_P.pdf)



#### 4. What kind of EQF4 vocational training courses are available in digital tourism in your region or country? What kinds of methodologies are used? Is there any national or regional strategy to ensure a good supply of adequately trained graduates?

##### ITALY

VET Tourism schools which provide EQF4 qualifications are *Istituto Tecnico Economico* (tour operators, travel agencies, tourist guides, receptionists, creation and selling of tourist products in general) and *Istituto Professionale Alberghiero* (waiters, chefs, receptionists, barmen)<sup>7</sup>.

Unfortunately, the digital approach in VET tourist courses is very weak.

Italian school system is based on a very formal approach but since 2015 and thanks to the 107/2015 law, Italian school system is experimenting a dual system and 400 hours of internship in three years are now compulsory for VET students. Thank to this reform the students can now learn from non-formal and informal education, but the practical approach is not supported by the methodologies used at a formal level. Although VET schools have up-to-date equipment and cutting-edge computer labs, the digital competences are not sufficiently developed. In tourism curricula there are no IT hours and teachers from other subjects are not trained to teach digital contents. The major obstacle to a digital approach to tourism in Italian school system is represented by teacher who is not properly trained and who does not take up the challenge of a digital changing world.

In Italy, tourists can enjoy 80% of the world historic artistic heritage, astonishing landscapes and good food but unfortunately the country is not able to exploit its tourist potential. The technological gap in relation to other countries and bureaucracy constitute a brake to the sector development.

A pillar of Law 107/2015 is the The National Digital School Plan that represents the guideline document of the *Ministry of Education, University and Research* for the launch of an overall innovation strategy of the Italian school and for a new positioning of its educational system in the digital age. It provides an operational view with respect to the most important innovation challenges of the public system: At the center of this vision, there are the innovation of the school system and the opportunities of digital education<sup>8</sup>.

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<sup>7</sup> <https://www.orientamentoistruzione.it/index.php?s=110>

<sup>8</sup> [http://www.istruzione.it/scuola\\_digitale/allegati/2016/pnsd\\_en.pdf](http://www.istruzione.it/scuola_digitale/allegati/2016/pnsd_en.pdf)

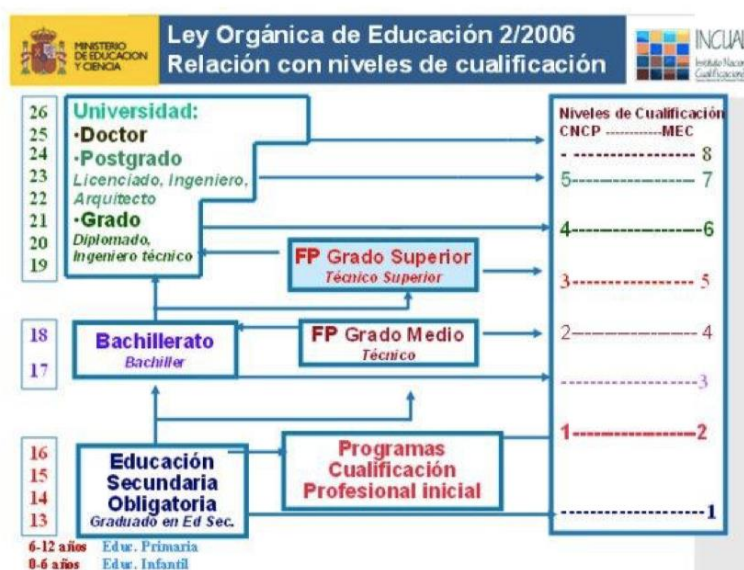
## PORTUGAL

The offer is non-existent, concerning VET Secondary courses.

There are, however, short term courses, namely with 25 or 50 hours, of Digital subjects (Digital Marketing, Digital Communication Means, Social Media, Digital Content Management, Mobile Management, E-Marketing, ...) that, depending on the training group, can include topics, examples and practical works focusing on Tourism.

## SPAIN

As far as digital competences are concerned, none of the three tourism courses (EFQ5) available here offers a specific module in this area. Nevertheless, some of the modules require students to be familiar with and know how to use IT tools and new technologies. The university degree in tourism includes a subject called *applied computing in tourism management*; this subject looks at technological as well as sociological aspects (the use of social media for tourism).



Nevertheless, in the ETHAZI programme that runs as part of the Basque Regional Government's training course reform; students have to meet a series of "challenges". This methodology requires them to participate much more actively and also use group information and communications tools. Whilst these are not included in the academic syllabus they are assessed as across the board competences.

Neither are there any specific post graduate options in this field. Private institutions are the only ones that offer training in this area. This means that vocational training students can access these courses as the qualifications are not official ones<sup>9</sup>.

<sup>9</sup> <https://www.imf-formacion.com/evento/turismo-competencias-digitales>

<https://programas.iebschool.com/programas/master-turismo-marketing-digital/>

<https://programas.iebschool.com/programas/postgrado-gestion-turistica-marketing-digital/>

## THE NETHERLANDS

It seems that there is not a dedicated digital tourism full time and apprenticeship VET Training yet. There are some Dutch VET courses which partly address digital tourism, such as:

- TRAVEL, LEISURE & HOSPITALITY (REIZEN, RECREATIE & FRONT OFFICE) BOL 3 EN 4 (ROC De Leijgraaf)
- VACANSOLEIL ACADEMY - LEIDINGGEVENDE LEISURE & HOSPITALITY INTERNATIONAAL (Cingel College)

There is an International Tourism Management, at the TIO, which is the best ranked programme for 8 years in a row. Tio's International Tourism Management bachelor programme combines knowledge of the world of tourism with aspects of e-commerce<sup>10</sup>.

This means you will feel right at home in the online world as well.

YouTube: <https://youtu.be/enf8NyXkByw>

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<sup>10</sup>: [https://www.tio.nl/en/international\\_tourism\\_management/](https://www.tio.nl/en/international_tourism_management/)

## 5. Please briefly describes the training offer/methodology/strategy/approach in your educational system, providing details about: Training Provider(s), Training Contents, Exit Profile

### ITALY

#### EQF 4

The Italian School System depends on The Minister of Education and The EQF4 level corresponds to qualifications obtained after 3 year of upper secondary school (16 -18 years old students). At the end students get a Diploma in different fields and they can have access to any type of University courses or other post diploma courses <https://www.orientamentoistruzione.it/index.php?s=110>

The EQF 4 qualification course in the tourist sector applies to VET SCHOOLS:

1. *Istituto Tecnico Economico* – tourist course - where the students learn how to produce and sell tourism products and services. It is a technical economic course where the focus point is the management of all kind of tourism enterprise and the assistance to tourists. (Tour operators, tourist guides, hotelkeepers and receptionist, travel agencies)

#### EXIT PROFILE:

The students acquire specific skills in the sector of tourism companies and general skills in the field of national and international macro-economic phenomena, civil and fiscal legislation, and business systems. At the end of the upper secondary school they will be able to have significant competences in the. They will be also able to manage tourist services and/or products, enhancing cultural, artistic, handicraft, enogastronomic, landscape and environmental heritage, to collaborate in defining the tourist identity of a specific area, and to intervene in business management, administration and marketing.

*Istituto Professionale Alberghiero* whose curricula are focused essentially on Enogastronomy and hotel accommodation. The students will work as cooks, waiters or barmen, they can also work at Front Office, Food & Beverage, the Room Division

#### EXIT PROFILE:

The students acquire specific technical skills in the field of national and international macro-economic phenomena, civil and fiscal legislation, and business systems.

The students at the end of this upper secondary school will be able to oversee both the organization and the management of specific services related to seasonal touristic demand and to the customers' needs. They will be also able to promote reception activities or design tourist products that enhance the local heritage.

The students attending both kind of VET SCHOOLS study to integrate the professional competences with the linguistic and informatics ones and they are able to operate in the company information system and to contribute both to the innovation and to the organizational and technological improvement of the tourist enterprise in an international context.

In these contest the digital approach is very weak.

## EQF 5

*ITS Istituti Tecnici Superiori*. Training Provider. Regions

The courses are 2 years long and are divided into 4 semesters, Total 1800/2000 hours.

The ITS train highly specialized technicians, required by companies in the strategic sectors of regional economies.

They are divided in 6 areas. The area 5 is about *innovative technologies for cultural heritage and activities – tourism*

<http://www.sistemait.it/corsi-tecnici-superiori-formazione-post-diploma.php?area=5>

Only 2 courses over 37 are focused on digital approach to tourism

Region: Puglia

- 1) promotion and enhancement of cultural, digital and experiential tourism - communication management 4.0
- 2) digital marketing e management for the sale of tourist products

The percentage of the digitalization of the sector is quite low

## EQF 6/7

*Private and State Universities*. (Ministry of Education and Private)

There are many courses focused on tourism but the digital approach in 3 or 5 year courses is not very widespread. Normally students or workers who want to deepen approach to tourist sector have to attend to Master which have very high fees.

According to recent investigation, at a University level, the exit profiles do not respond to the demand of the labour market. The needs of the new digital users in the digital sectors urgently push towards change in the training content of the University courses to adapt the formative offer to new digital professional figures

**Training Agencies** – (private &/or regional) – design and manage training interventions aimed at job placement; higher technical education and training paths; adult education initiatives carried out through lifelong learning interventions, of a formal and vocational type, with particular reference to the development of transversal skills. They issue a certification that can be compare to EQF 5.

They are more active than other state institutions in the digital modernization of the different professions on tourism.

## PORTUGAL

Tourism VET Training in Portugal can be divided in two training types:

A) Initial Qualification:

A.1) Public and private VET Schools, Hospitality and Tourism specialized or not, whose courses take three years and give a secondary equivalence and a level 4 certificate;

A.2) Public regular secondary schools, which also have VET courses – same as the previous ones;

A.3) Public VET Centers (not schools – VET training for unemployed adults) – courses are similar to the first ones (they just have longer internships), three years long and also with a level 4 certificate.

B) Continuous Training

B.1) VET providers – mostly done by private for profit companies, although A.1) and A.3) can also offer it. The courses are 25 or 50 hours long and the great majority is supported by ESF/Portuguese State.

<http://www.catalogo.anqep.gov.pt/UFCD>

## SPAIN

There are three courses on specific areas of tourism available at present; they are all tertiary courses (EQF5):

- Bachelor's Degree in Travel Agencies and Event Management
- Bachelor's Degree in Accommodation Management
- Bachelor's Degree in Guiding and Tourist Information and Assistance

The three courses have a number of things in common: language learning, usually English and French, modules related to protocol and specific modules on marketing in tourism. They also offer across the board vocational training modules such as career guidance and entrepreneurship.

This division is due to the need for specialization in a country with a profile like Spain where tourism represents about 12% of the GDP and increasing – both internally and externally. As well as the increase in quality, new niche markets appear. These might mean older holiday makers or those with special educational interests as well as groups that seek family holidays or leisure activities for young adults without children. Customers for these niche markets may be locals or foreigners.

The diversity of these types of tourism requires the educational system to produce highly qualified and specialized graduates possessing across the board competences but at the same time capable of dealing with the diversity and complexity of the tourism market. We should add the university degree in tourism (EQF6), to the list of qualifications available.

Basque Regional Government data confirms that fact that almost ten per cent of the formal workforce is employed in the tourism industry; this percentage has been on the rise in recent years. Notwithstanding this, the greatest challenge facing the tourism industry is the seasonal nature of these jobs and their quality. As for the former, one of the principle aims of government tourist departments is to encourage the public to travel at other times of the year besides summer and thus create employment beyond the traditional tourist season.

As far as the second challenge is concerned, the aim of offering tertiary or university degree courses reinforces the image of the competent professional, specialized in his field and able to project an image that will subsequently lead to higher quality employment.

## THE NETHERLANDS

As regards to Dutch Vocational education and training (VET): The Dutch term for secondary Vocational Education and Training (VET) is middelbaar beroepsonderwijs. The Dutch usually referred to it by its abbreviation mbo. Pre-vocational education and training is known as voorbereidend middelbaar beroepsonderwijs (vmbo).

In the Netherlands VET training is offered at upper secondary as well as postsecondary levels. There are different access routes to VET: students in upper secondary VET usually have a lower secondary diploma at prevocational level, while postsecondary VET is accessible to every student with a vocational or academic high school leaving certificate. The Dutch mbo sector consists of 70 colleges. These so called Regionale Opleidingencentra (ROCs) – Regional Training Centres are multidisciplinary colleges offering VET in i.e. technology, economics, personal/social services, hospitality, health care, tourism, construction, graphic design, information technology, and so on.

The land based VET colleges offer vmbo and VET. The senior secondary vocational education (VET) prepares students (both full-time and apprentices) in all land based curricula area at four different educational levels, for professions in the green and tourism related industry at the EQF levels 1-4. The students can choose from a number of disciplines, i.e.

- Equine sports
- Wildlife
- Sport fishing / water management
- Green Area and Recreation
- Garden, Park and Landscape
- Urban Design and Trade
- Forest management and recreation
- Nature Conservation
- Floristry and design
- Garden centre manager
- Plant breeding
- Floriculture
- Arboriculture
- Arable farming
- Agriculture
- Social Farming
- Business and Management
- Dairy farming
- Poultry and pig farming
- Agricultural service supply agency
- Livestock
- Horse management
- Animal welfare
- Veterinary nursing
- Food technology
- Aquaculture / fish farming



Specialised VET colleges offer programmes for a specific branch of industry, such as graphic design, butchery, house painting, furniture painting and transport.

Duration and levels:

The duration of VET programmes varies from six months to four years, depending on the level and the requirements. There are four VET levels:

Level 1: entry level

Level 2: basic vocational training, preparing for professions at EQF 2

Level 3: full professional training, preparing for professions at EQF 3

Level 4: middle-management and specialised training, preparing for professions at EQF 4

There are two VET learning pathways (both tracks combine learning and working):

1. The school-based pathway: Beroepsopleidende Leerweg (BOL): The school-based pathway is full time education in vocational education. Pupils who choose BOL spend between 60 and 80 percent of their time in the classroom. The other 20 till 40 percent takes place in an authentic learning environment, either practical lessons or practical placement.
2. The work-based pathway: Beroepsbegeleidende Leerweg (BBL): The work-based pathway, is a professional pathway (the apprenticeship education in vocational education. students who choose BBL spend at least 60 percent of their time as apprentices working for an employer; they have a labour contract in which their work based learning has been described. Furthermore these students are following practical and theoretical lessons at a VET College for 20 percent.

Important note: In the Netherlands Work Based Learning (WBL) is compulsory in both pathways and can only be offered by a recognised training company. There are training companies for all professional educations. The training companies are all registered for one or more educational levels.

The work based learning approach gets a lot of high praise from other countries.

In contrast to lower and upper secondary general education, Dutch VET does not operate on a 'year group' basis; VET students might complete their study within the nominal number of years, or finish earlier, or later; there is no obligation for schools to offer courses in standard periods only.

Roughly 6 billion spent on VET each year: A large portion of Dutch students pursue vocational programmes at some point in their education career: over three-quarters of the 1.2 million students enrolled in the Netherlands.

Based on the number of participants, the number of issued diplomas and certificates, and the number of students with special needs or deemed “at risk”, in 2014 around EUR 3.5 billion in public funding for upper secondary VET was allocated to institutions in.

In addition, over EUR 2.5 billion was spent on postsecondary VET institutions.

Summarizing the main characteristics of Dutch apprenticeships and differences between the school based and dual pathway:

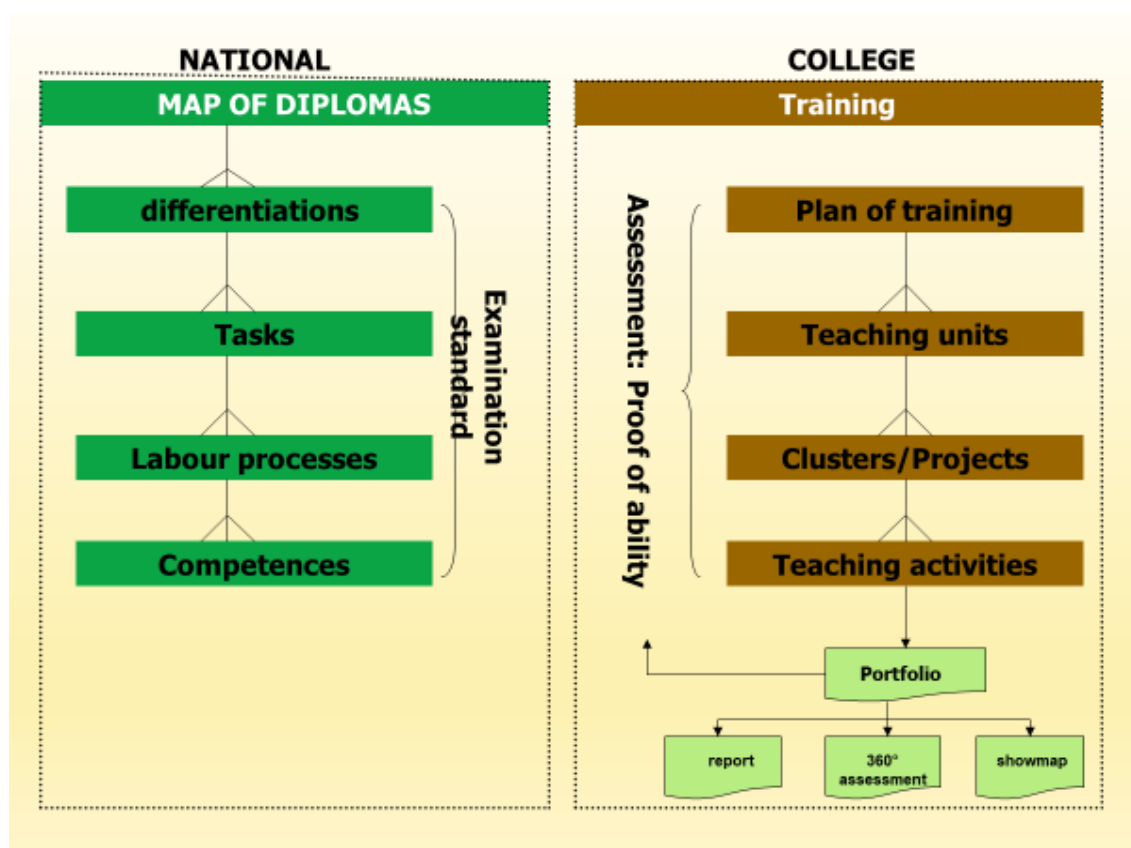
- all VET qualifications at EQF-levels 1-4 can be obtained in a school-based or a in a dual pathway
- diploma’s for both pathways are identical; there is no reference to the pathway in the diploma
- the rights to proceed at higher VET-levels or HE are related to the diploma, not the pathway
- in both pathways a substantial part of the time is dedicated to work-based learning; In a school-based pathway at least 20% – on average 40%; in the dual track at least 60% – on average 76%
- to enrol in the dual pathway a contract with a firm is obligatory, in 99 percent this is a labour contract, this is no obligation for the school-based pathway
- the two-pathway system is designed as a system of communicating vessels; in times of business crises students can be transferred from the dual to the school-based track for instance
- students in the pathway stay with one learning company for the duration of their student in the school- based pathway change the learning company at least three times one or several time during their VET-training

Role of industry and education in the development of professional profiles, job descriptions, qualification files, curriculum, lesson plan and assessment:

- Professional profiles and job descriptions are compiled by the business community.
- The description of the qualification files are a responsibility of both business and education.
- The defined qualification files are determined by the Minister of Education, Culture and Science.

- VET colleges are entitled to offer training for the determined qualification files, so called CREBO codes.
- Based on the qualification files each college develops their own curriculum, lesson plan and assessment.
- Execution of the training and the assessment is a co responsibility of education and business. The assessment is executed in skills demonstrations and in a proof of ability in an authentic situation.
- The assessment is conducted by both representatives of the business community and representatives from education.
- The ministerial school inspectorate checks, among other things, the quality and procedures used for the study programs and assessment.

In the graphic underneath the responsibility of the development of the qualification files (map of diplomas) and the development of curriculum, lesson plan and assessment (training) is shown. At national level the qualification files are developed by representatives of both business and education. At college level curriculum, lesson plan and assessment (training) is developed by education<sup>11</sup>.



<sup>11</sup> <file:///M:/directie/DFW2W/Projects%202019/A-Skills-Beyond-School-Review-of-the-Netherlands.pdf>

## Qualification files

The qualification file describes the requirements that a student must meet in order to obtain his diploma. Each file contains one or more qualifications and each qualification leads to a diploma. The better the diploma requirements match the wishes of the business world, the greater the chance of a job for a starting professional and the better companies can fill their vacancies. All qualification files together, supplemented with the optional components, form the qualification structure.

Basic part, profile parts and optional parts:

A qualification file consists of a basic part and one or more profile parts. The basic part contains the generic parts Dutch language, arithmetic, career and citizenship and English (only for level 4). It also contains common elements that apply to all qualifications in the file: core tasks, work processes, professional knowledge, skills and attitude aspects. The profile part describes the specific parts. Optional courses are a plus on the qualification and complete the course.

Quality criteria:

Criteria apply to the qualification structure, which are laid down in the assessment framework of the Ministry of Education, Culture and Science. The assessment framework describes both the quality requirements for the qualification files and structure and the process. The Review Chamber assesses the quality of the proposed qualification files, optional components and certificates on their effectiveness, feasibility, recognisability, transparency, flexibility and sustainability.

## VET in Tourism

The VET education in tourism is to be divided in two major faculties: Leisure & hospitality and Travel and hospitality. Both faculties have national qualification files for EQF 2, 3 and 4

To give an example the qualification files and a short description of the training for Leisure & hospitality and Travel and hospitality EQF 4 are given.

Qualification file Supervisor Leisure & hospitality EQF 4:

The EQF 4 worker Leisure & hospitality has an executive role and is responsible for the execution of own work. S/he also has a managerial role. S/he is responsible for own work, but also for the results of the team of employees that s/he manages.

The Leisure & hospitality EQF 4 has a steering and coaching role vis-à-vis employees and is responsible for the proper functioning of themselves and the other team members. S/he hereby guarantees the quality and progress of the activities and the implementation of the activities. S/he is responsible for the safety of him/herself, colleagues and guests.

The Leisure & hospitality EQF 4 provides for the management of employees, but also carries out executive leisure activities itself.

The Leisure & hospitality EQF 4 takes care of the agreed turnover, is commercially oriented and carries the budget responsibility within set guidelines. These guidelines are set by the supervisor / manager. The Leisure & hospitality EQF 4 receives guidance and is accountable to its immediate supervisor, who bears ultimate responsibility.

As a supervisor leisure & hospitality (level EQF 4) you can lead in the recreational or tourism sector. You know how to run a business, for example a campsite, recreation company, conference centre or a front office of a bungalow park or amusement park. You can also organize activities. You are able to explore new markets and develop other products. You can also work abroad. For example at a hotel in Spain or a bungalow park in Germany.

## Core tasks and work processes

- Organizes and carries out activities
  - Makes a schedule for the organization of activities
  - Prepares the implementation of activities
  - Supervises activities
  - Completes the activity
  
- Provides guidance and performs management tasks
  - Makes an operational plan
  - Plans and distributes the work
  - Budgeted finance
  - Guarded finances
  - Guides and directs employees
  - Conduct formal discussions internally
  
- Acts as the point of contact for customers / guests
  - Receives the customer / guest Informs and advises the customer / guest
  - Sells and / or rents products and / or services
  - Identifies and handles complaints
  - Maintains internal and / or external contacts
  
- Performs administrative and financial processes
  - Keep track of the stock
  - Collects and processes information
  - Keep financial administration and handle transactions
  - Keep the administration
  - Makes proposals for after sales or adjustments to services

### Professional requirements:

- you have a service attitude
- you have a positive attitude
- you have good communication and social skills
- you are creative
- you can work independently
- you are solution-oriented
- you are flexible
- you are a team player
- you are commercial and customer oriented

### VET training:

The training lasts 3 years and is offered via the vocational training pathway (BOL: school and internship). During the training there is a study load of 4800 hrs, divided over 5 school days a week and an internship. Approximately 25% of the training is spent on internships and is divided over the school years, for example one day a week or 16 weeks at the end of the first year and 16 weeks at the end of the third year. It is possible to do an internship at home or abroad. There is a close cooperation with the regional business community in the tourism sector. Part of the lessons takes place at regional tourism companies.

### Contents of the training:

The training consists of three parts, the basic part, the profile part and optional parts. With all those parts it is about gaining the knowledge, insight, skills and behaviour needed to properly practice for the future profession. The three parts must be completed to get a diploma.

The school year often is divided into 4 teaching periods of 10 weeks each. The student works on professional assignments and projects, that can take place both inside and outside the school. During the course, study trips at home and abroad are organised / take place in which forms of Leisure & Hospitality are discussed. To ensure that the future employee has sufficient knowledge to be able to perform the professional assignments properly, projects, training-courses, instructions and lessons are organized to support the practical assignments. In addition to the professional components, there are general subjects like English, German, Spanish, Dutch, Arithmetic, and also Sports and Citizenship. Personal development is a very important part of the school career, for example: working together, presenting yourself and reflecting. Components often end with a test, assignment, report or assessment interview. In addition, the student is busy building his own portfolio. During the training, the student works among others on the following professional components:

- Hospitality Skills
- Information & Advice
- Guiding & Organizing
- Managerial skills

Qualification file Supervisor Travel & hospitality EQF 4:

The EQF 4 worker Travel & hospitality manager is responsible for organizing customer / guest-oriented services and for achieving commercial results. s/he can carry out own work at the front office of an (international) hotel or leisure company and at companies in the travel industry or focused on tourist information. As the first point of contact for his colleagues, s/he performs coordinating tasks. In that capacity, s/he is alert to developments, trends and commercial opportunities in the area. s/he can make a commercial offer, sharpen and sell products, and optimally assist the (international) customer / guest in making the right choice.

As a travel & hospitality manager you receive customers and give them appropriate sales-oriented advice. You know how to sell convincing travel packages and travel arrangements. You can work at a contact centre / (online) travel agency or hotel desk where you arrange bookings and reservations for holiday travellers, business travellers and tour operators. But you can also start your own travel organization or, for example, get started as a department manager in organizational functions in the travel world. You can lead colleagues and are good at languages.



## Core tasks and work processes:

- Realizes commercial offer
  - Attracts customers / guests and assignments
  - Promote products and services
  - Draws up a suitable offer
  - Makes a price calculation with the offer
  
- Provides guidance and performs management tasks
  - Makes an operational plan
  - Plans and distributes the work
  - Budgeted finance
  - Guarded finances Guides and directs employees
  - Conduct formal discussions internally
  
- Acts as a point of contact for customers / guests
  - Receives the customer / guest
  - Informs and advises the customer / guest
  - Sells and / or rents products and / or services
  - Identifies and handles complaints
  - Maintains internal and / or external contacts
  
- Performs administrative and financial processes
  - Keep track of the stock Collects and processes information
  - Keep financial administration and handle transactions
  - Keep the administration
  - Makes proposals for after sales or adjustments to services

Professional requirements:

- you are service-providing, flexible and customer-oriented
- you have good communication and social skills
- you are creative, commercial, proactive and solution-oriented
- you are a team player, but can also work independently
- you enjoy preparing for study trips and events
- you enjoy working in an international and dynamic working environment

VET training:

More or less structured in the same way as supervisor Leisure & hospitality EQF 4. The content is different, of course. During the training, the student works among others on the following professional components:

- Hospitality Skills
- Information & Advice
- Guiding & Organizing
- Managerial skills

### **Agro-tourism and rural tourism**

Agro-tourism is about recreational stay on or around a farm. The stay on the farm can vary from a few hours (also: day recreation) to one or more days including overnight stay (stay recreation). Examples of companies with day recreation are companies with activities such as farmer's golf or polder sport. Examples of accommodation recreation are companies with a farm campsite, group accommodation or bed & breakfast.

The possibilities in the field of accommodation and day recreation are numerous. New agro-tourism concepts are constantly being invented. They all have in common that they offer a form of "rural experience", in which they focus more or less on, or offer activities within, the agricultural branch of the company. This diversity has to do with the fact that the "recreational farmer" is entering a highly competitive market. The recreational farmer must be able to distinguish himself, which requires a professional approach, as well as creativity.

The number of farms offering recreation has fallen sharply in recent years. After an increase from more than 2,500 in 2003 to just under 2,900 in 2011, the number of farms with agro-tourism decreased in 2016 to 1,835. This decrease can be attributed to a decreasing number of mini-camps and to the general decrease in the number of farms.

Many farm campsites disappear because there is no successor to the farm. These campsites can also not be sold because owners want to live on the site. Potential buyers then cancel the purchase.

Therefore, next to a recreational stay on or around a farm there is also started rural tourism with recreational stay like recreation in and nature reserves, horse boarding and nature forests.

The stay in nature can vary from a few hours (also: day recreation) to one or more days including overnight stay (stay recreation). Examples of companies with day recreation are companies with activities as fish guides, fish sports, nature guides, food forestry, horse boarding.

Examples of recreation at the farmer:

There are various examples and forms of recreation with the farmer, from day recreation to a longer stay. A number of forms of recreation are specified below.

Spend the night with the farmer:

Some holidaymakers look for a place to stay in a rural setting for their vacation. The tranquillity of the countryside and the contact with farm life and with the animals on the farm is preferred by many people to staying at large, commercial campsites. You can spend the night in various ways on a farm.

There are (mini) campsites, B&B, stay on a haystack, farmhouse hotel rooms, apartments, cottages, hikers' cabins and group accommodations.

In 2016, 518 agricultural companies had a (mini) campsite, 367 ran a B&B, 501 companies rented houses or apartments and 284 companies had group accommodation. Turnover in the subsidence recreation sector was 79 million euros.

There are two associations representing farmers agro-tourism for spending the night with the farmer: the Free Recreation Foundation (SVR) and the Dutch association of camping farmers (VeKaBo). The SVR is the umbrella organization of nearly 2,000 camping farmers and the VeKaBo has more than 1,600 addresses available.

For more information, please have a look at

- Vekabo, Vereniging van Kampeerboeren in Nederland
- SVR, de Stichting Vrije Recreatie

At various farms, the consumer (individual, family or company) is offered the opportunity to recreate through completely arranged packages. For example, an afternoon cheese making, a fully arranged tour on the farm with a snack and drink or a game of farmer's golf. There are also more and more farmers who offer the possibility to let children celebrate their children's party on the farm. In addition, various entrepreneurs have started renting bicycles, horses, go-karts or canoes. This allows people to make 'discovery trips' through the nature of farmers. In the field of day recreation, more and more entrepreneurs are focusing on food trends, creating combinations with food and health. For example, organic or local produce meals combined with a day of being a "farmer".

In 2016, 360 agricultural companies offered sports and game activities, 468 companies rented recreational goods, 324 had catering facilities, 360 companies operated a meeting or reception area and 268 organized courses or workshops. The turnover amounted to 77 million euros.

Welcome on the farm including a tour:

The Campaign Entrepreneurs of Nature was launched in 1998 as an initiative to promote dialogue between farmers and citizens. The campaign was aimed at involving citizens and consumers more in life and work on farms and horticultural businesses. The people could, among other things, take a look at the farms. The Entrepreneurs of Nature campaign was continued in the work of Friends of the Countryside. Many farmers open the farm to visitors, after which a drink and (local) snack is presented. This form of recreation is especially popular for groups of people and during national theme days.

Farmer's Golf:

A lot of farmer's golf courses have been built in recent years. The farmer's golf variant is easier than the real golf. Instead of clubs, the player plays with a clog (wooden shoe) on a stick. A ball is hit with a clog through a meadow, with or without cows, after which the ball must end up in a buried bucket. The length of the holes is around 200 to 300 meters and there are a total of 10 holes. The game lasts approximately 2 hours.

The number of farmer's golf courses is growing steadily. From a few farmer's golf courses in early 2004 to now more than 200 farmer's golf addresses in 2016. For a farmer, an activity like farmer's golf is easy to achieve. The investment is not very large and there is much interest in this new branch of golf.

A variant of the regular farmer's golf is farmer's Frisbee golf. Frisbee golf is a well-known sport in America, New Zealand and the Scandinavian countries. Instead of a ball and a wooden shoe on a stick, the participants receive a Frisbee that must be thrown into a basket in as few throws as possible.

On April 14, 2007, the first professional farmer's golf course was opened in the Netherlands.

For more information, please have a look at [www.boerengolf.nl](http://www.boerengolf.nl)

#### Horse breeding:

The horse makes a substantial contribution to extra income and broadened agriculture. According to a latest estimate, the total horse stock (including horses in stables and stables) in the Netherlands is between 350,000 and 550,000 horses and ponies.

With the growth in the number of horses, the number of horse boarding houses is also growing. Running a horse pension is a possible broadening for a farmer. Many farmers have already started a pension. Especially in the provinces of Gelderland, Noord-Brabant, Noord-Holland and Zuid-Holland there are many riding schools and horse boarding house.

#### Hiking trails:

Walking is becoming increasingly popular. More and more runners want to walk on farmland outside the paved roads. the Ministry of Agriculture, Nature Management and Food Safety has set up a subsidy of 45 euro cents per meter per year for creating walking paths on agricultural land. One-off amounts are also available for the construction of the path, the placement of an information board or the placement of a folding gate.

Various groups of farmers throughout the Netherlands have started setting out hiking trails. One of the organizations set up for this is called Walking through the Farmer land. The purpose of the walking routes is to allow the walker to become acquainted with farming life in a different way. The organization may use farm yards, parcel paths, but the routes also go through meadows, corn and cornfields. The walker does not have to worry about 'the inner person'. At set times, a farmstead pops up, in which hikers are warmly welcomed with coffee, tea, lunch or a hot meal. In this way complete walking arrangements of one or more days have been created.

For more information, please have a look at:

- Stichting Wandelplatform-LAW, de koepelorganisatie van wandelend Nederland
- [www.boerenlandpad.nl](http://www.boerenlandpad.nl)

### Rental of fish ponds:

From 2006, the Back2Nature foundation 'rented' fishing waters for farmers. The approach is based on the fact that anglers are willing to pay well to be able to fish in exclusive fish water where other people are not allowed. Farmers who own their own water can earn extra money in this way. According to Back2Nature, the start-up costs that the farmer has to incur to create attractive fishing water come to a few thousand euros. This involves the purchase of a boat (with paddles), life jackets, a fire extinguisher near the water, a first aid kit and a waste bin. The farmer possibly can construct a few scaffolding and provide toilet and shower facilities. The farmer must also ensure that the area is accessible and kept clean. It does not necessarily have to be necessary to undertake fish farming and / or stake out fish in the water, it is sufficient if anglers can fish for the local stock of fish.

In the approach of Back2Nature, anglers pay Back2Nature 32.50 euros per 24 hours to 239 euros per week. The owner of the water receives 65% of the cash proceeds; the rest goes to the foundation.

Zone College is offering training to become i.e. an EQF 4 worker in managing fish travels or to become a fish guide, a nature guide, a wildlife ranger

**6. Up to what point have training options, methodologies and strategies been implemented in your country or region?**

	ITALY	PORTUGAL	SPAIN	THE NETHERLANDS
Local	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Regional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
National	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
European	<input checked="" type="checkbox"/>			

## 7. What is the digital content of the training on offer, the methodology employed and the strategy in place?

### ITALY

The digital training should help the new generations to better understand complex and articulated content within the digital communicative universe, in which fragmentation sometimes prevails. Digital learning is reshaping education in unprecedented ways and it is necessary to rethink how teachers present information and how students work with that information. For this reason, it is essential to work on information and digital literacy that focuses on the role of information and data in the development of an interconnected society based on knowledge and information. Digital literacy and information literacy should be part of the curriculum and it should be necessary to create standards for these new competences just as we have already done for reading or math literacy.

In particular the skills, the methodology, the strategy and the approach that are expected to be implemented and / or strengthened are:

For students:

- Introduction of ICT training lessons in all the upper secondary courses
- Improvement of transversal skills strengthen through non formal and informal learning in all the studied subjects
- Involvement in laboratory activities as a constant and permanent work practice. The traditional model of teachers lecturing in the classroom and students completing practice and homework on their own is changing. Instead, students are learning on their own and using the classroom as a place to dig more deeply into what they have learned.
- Facilitation of the assimilation of the CLIL methodology in one or more foreign languages
- Enhancement of teamwork. Thanks to increased technology in the classroom, students are able to collaborate online and work on projects together. With a flipped classroom model, teachers can spend less time lecturing and devote more time to collaborative activities and projects.
- More active participation in the learning process. Thanks to technology, students have instant access to all the information they could ever want or need. There is no longer a need for students to memorize facts or dates. Today, there is much more emphasis placed on higher-order thinking that occurs when students are asked not just to know a piece of information but also to do something with that information.



Today's students are learning how to be critical thinkers, a skill that is in-demand in today's job market.

- Better awareness about the use of the internet and of the resources available on the net.

For teachers:

- Compulsory updating of digital skills.
- Introduction of new working models in the classroom, with a progressive reduction of the classic frontal lesson.
- increase in the number of CLIL teachers
- Development of media education activities as an integral part of daily teaching practice.
- Use of laboratory activity as an integral part of daily teaching practice.
- Creation of individualized learning paths.

## PORTUGAL

Like we wrote previously, there is no specific offer on this topic. We have only related ones, like Digital Marketing, Digital Communication Means, Social Media, Digital Content Management, Mobile Management, E-Marketing.

## SPAIN

Education has a life of its own and is subject to constant change and development; we students, teachers and parents have no option but to adapt ourselves as best we can. It is clear that communication in today's world has changed and this has subsequently affected the way we teach. We have been able to adapt to this change but this process has not been the same for everyone in the educational community. Internet is the common tool that also provides us with more specialized tools that each one of us uses: social media, applications, search engines and so on. Students now rarely have to move to obtain the information they require to learn: everything is within their reach and they have been born into a world of quick and easy access to "everything".

We, the parents, and the education system, are the ones who have provided students with these tools but at the same time we have had to adjust to and live with them and also become completely conversant with them: we are the ones who have to help our children and students as they learn.

Digital technology has revolutionized teaching and learning. Students no longer have to memorize data; now they have to research it, understand it and apply it. They must be capable of analyzing it and assessing it realistically.

Digital literacy should be compulsory content in all syllabi and create standard qualifications.

The skills, the methodology, the strategy and the focus should be the following:

For students:

- They should be taught information and communications technologies from the beginning of secondary education. The biggest companies in Silicon Valley recommend that teachers should not use virtual learning with children until they reach secondary level. They believe it is important that children should be familiar with the real world before entering the virtual one.
- The system of teaching must enable students to learn by themselves. Teachers must set guidelines that establish academic goals; their role should be to assist students to achieve them. High performance training is where a mastery of digitalization is vital: for the reasons mentioned above and to reinforce group work on joint assignments.
- Students are longer asked to memorize data; they are asked to think more and debate about and criticize established thought.

For teachers:

- Teachers have to ensure that their digital competences are up to date so they can subsequently guide students to achieving their goals.

Teachers must adopt a new approach to classroom teaching. They must abandon the old chalk and talk model and concentrate on guiding students towards the academic goals created by the teaching body.

## THE NETHERLANDS

Within the tourism organizations many different types of features is used.

The following features in software have been used by the respondents of the held survey; Office software, process management software, search engines, social media and cloud services.

Intranet, communication and co-operation tools and security software is been used by the manager, director and HRM only.

It can be concluded that general software is used by nearly all the departments and they use this in their daily tasks.

Further: Hospitality and tourism is one of the industries that is most affected by digital development. Transportation and accommodation companies are among the first ones to utilize digital marketing techniques in their practices to engage communities and make sure their customers have the best possible away-from-home experience. In order to perform well and gain competitive advantages, players in the travel industry are always looking for the newest and greatest ways to reach their buyer persona and tailor their offering to their target audience.

## 8. What improvements can be made to vocational training in the field of digital tourism in your country or region?

### ITALY

As we have already pointed out in the answer to the question 4, in Italy it is necessary to elaborate a real National Organic Plan for the training and development of digital skills in the tourism sector, which may even perfect and unify existing ones. Digital tourism is totally absent in EQF 4 courses and it is provided just in a few High education or University courses.

According to us the Italian VET education referred to the tourist training could be improved as follows:

- Constantly train the trainers and so give them the possibility to better understand a very changing reality and the new generation needs, not only as students but also as consumers of digital products
- Include in the study plans new disciplines that allow us to study in depth the digital applied to tourism.
- Modify the exit profiles of the VET Upper Secondary and create new ones more in line with current professional profiles linked to a digital society
- Unify the EQF 4 tourism courses and create a single one where ICT and technical subject prevails
- Set up the dual training education system

### PORTUGAL

We fully agree with Marianne Thyssen, EU Commissioner for Employment, Social Affairs, Skills and Labour Mobility: "I think one of the main challenges is the skills of the people. Almost 70 million people in Europe are lacking basic digital skills. And this is not okay. We see a lot of vacancies that are not filled in [*a major problem for the Portuguese Tourism sector, especially in bottom / middle jobs*] and what we really have to take care of is that we can skill our people better, more, and making skills, education and the training often also more relevant for the labour market. I always say, when it is about skilling of people, 'employability' – is not a dirty word. We have to take into account that people, after they finish school, they have to come on the labour market and this transition should be as smooth as possible."

"We have to ask citizens to look at their skills, to make an effort, of course. We also have to ask them to be ready for life-long learning. I think we cannot say in the years ahead of us, we go to universities, or we go to other schools, and we have our certificate and then it's

done. No! We have to skill, to reskill, to upskill. And we will be busy with skilling all our life. But from the side of, let me say the government, the public authorities, we also have to do our bit and we must make sure that there are good offers available," she said.

To do that, we need both a bottom-up approach, but also a top-down one. Companies must be persuaded to invest more in training and do not consider it a cost; the State should provide a legal framework that encourages and rewards training, namely the one on Micro and Small companies, where the resources are scarce; guidance centers for adults should be properly funded, so they could do their work in a more effective way; companies should be persuaded to actively value the training the employee has attended, namely the one that fits both company needs and one's career profile.

Other important issue would be to allow VET providers to be able to adapt the training offer more freely to companies' needs, as it is quite often too standardized.

## SPAIN

The national government no longer has jurisdiction over education and tourism policy in our country; they transferred responsibility for these matters to the Basque Regional Government, an autonomous community within the Spanish nation.

Vocation training (VT) in the Basque Region is an example for other autonomous communities in our country and we are able to say that it enjoys good health because of the following reasons:

- a) The tertiary level courses offer qualify students to fill positions in the tourism industry.
- b) The high performance teaching methods used in vocational training enable students to study for themselves using computing tools, work on group assignments and achieve academic targets. The teacher acts as an advisor.

Great emphasis is placed on group work, self-criticism and responsible contribution to group work so that targets are met within the established deadlines.

## THE NETHERLANDS

The major reason hospitality and tourism companies are so successful at adapting digital marketing strategies is because they carefully analyse how people interact with surrounding environments while travelling. These insights help them recognize existing customer needs and give travellers what they want to create the “wow” effect and ensure repeat sales.

Digital consumption today is very different from what it used to be, even a few years ago. The use of mobile devices is on the rise and the situation is no different for the tourism industry. Additionally, it might be even more deal-breaking since people use various devices to book their airplane tickets and hotel rooms. Due to that fact, there is an emerging trend of mobile-only travel agencies (MTAs). These companies offer travellers the ability to book tickets through downloadable mobile/tablet-exclusive apps. Although currently most of those services are focusing on tonight-only bookings made by travellers on the go, in the future, we can expect to see an emergence of full-service mobile travelling agencies

Lesson to learn: use emerging technologies and digital marketing to explore how else your products and services can benefit your current and potential customers. By adding value it is easier to convert returning visitors into customers.

**9. Digital tourism is “the digital support to the tourist experience” Do you agree with this definition given by David Benyon, Aaron Quigley, Brian O’Keefe and Giuseppe Riva. If not, how would you define it?**

**ITALY**

Digital transformation is revolutionizing every industry, hospitality and tourism included. According to Daniel Newman -CEO of [Broadsuite Media Group](#), principal analyst at [Futurum](#) and author of [Futureproof](#)- the industry of tourism and hospitality has been completely turned on its head in recent years, due to extreme digital transformation.

Many tourism companies are unprepared or are unwilling to make the investment needed to adapt to the new digital model. The companies that do not embark on digital transformation trends in Hospitality and Tourism (e.g. Mobile Integration, Virtual reality, reputation etc.) and do not face undergo a digital transformation process will lose competitiveness.

On the ground of the above, digital tourism understands the potential of technology, integrating the digital technology into the industry of tourism and hospitality, in order to add value to every customer interaction. As with digital tourism the destination becomes less and less important, tourism shifts its focus from the destination to the experience. So, the digital tourism can be considered as the challenge is to redefine the concept of tourism, rethinking the role of customer and the customer experience.

**PORTUGAL**

We believe it can be considered as the virtual, coherent and structured interaction of a person willing to do a leisure experience with the Tourism sector organizations who will provide it, from the moment one dreams with it till the moment one shares it.

## SPAIN

“Spain has not devoted adequate resources to the development and introduction of a new model for tourism: the industry is highly important in this country and the old model has always worked reasonably well” <sup>12</sup>

In addition to the above state of affairs, there are a number of other obstacles that have to be overcome in this country to ensure that digital tourism really takes off. They must be taken into account when creating an overview of the situation <sup>13</sup>:

- Senior management has shown a lack of strategic vision. One section of this group regards technology as an expense rather than an investment as they do not see a direct return on their investment. In addition to this, the rapid development of information and communications technologies makes it difficult to see exactly where the best place to invest is. All this is without mentioning the reluctance of some management to take into account and act based on customer comment on social media.
- There is a lack of digital competences within the organizations themselves.
- The industry is extremely fragmented. The average size of businesses is very small and this makes competition with multinational giants very difficult.
- There is also a great deal of uncertainty about the legislation regulating new business models, especially ones based on a co-operative economies; this gives rise to clashes between the different models.
- Ignorance of the benefits and advantages of digitalization.
- Continual changes in value chain. Technology has changed the way tourists look for, plan and organize their holidays and also the way they relate to their destinations.

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<sup>12</sup> The Digital Revolution in the Tourism Industry The Orange Foundation. 2016

<sup>13</sup> Idem



## THE NETHERLANDS

Digital tourism can be defined as the tourism of the future. Guest experience service via digital systems. The whole process of tourism is done via software, programs, computers and maybe even robots.

At this moment the contact of the guest towards the tourism organization is mainly via direct contact.

Already here there are changes implemented such as the usage of digitalization. People can book reservations via the internet without having personal contact. Also when there personalized changes need to be implemented this is also already done via digitalization.

At this moment students from tourism studies receive outdated information about the industry.

Another definition of Digital tourism is the digital support of the tourist experience (David Benyon, Aaron Quigley, Brian O'Keefe, Giuseppe Riva Received: 18 April 2013)

Digital Tourism can be defined as the digital support of the tourist experience before, during and after the tourist activity. This might be a recommendation system to help someone find suitable accommodation during holiday planning (Ardissono et al. 2003), a mobile tour-guide application on their smartphone while there (Abowd et al.1997) or the ability to easily explore holiday photos around a table once at home (Apted et al. 2006). The concept of digital tourism is not new and permeates many of the online activities people engage in today with trip planning, using Expedia and TripAdvisor, travel management with airline frequent flyer websites and Tripit, mobile tour-guide applications on smartphones and photo management including Facebook, Flickr, iPhoto or Picasa. However, what is new is the concept of digitally enhanced tourism. Through the use of technology, the aim is to further improve the quality or extent of a tourist experience (Uriely 2005). Instead of making travel bookings easier, or replacing a printed guide with a multimedia one or supporting better photo management, new technologies can appreciably intensify the tourist experience.

## 10. What are the most important features to consider when defining digital tourism?

### ITALY

- Business 4.0
- Europe's single digital market
- Digital Trends
- Big data
- Consumer experience

### PORTUGAL

- Digitalization;
- Online;
- Tourist;
- Tourism organizations;
- Experience.

### SPAIN

We should bear in mind a number of key factors when attempting to define digital tourism:

- **The Cloud.** This is a fundamental factor in the technological infrastructure of digital businesses. More and more company management is done through the cloud; this improves productivity, management capacity, internal and external company communication and customer relations and communication.
- **Mobile phones.** Mobile phones are playing an essential role in the digital marketing of products and services in all sectors, especially in tourism. Consumers of tourist products use mobile devices such as smart phones to make bookings and communicate with tourism companies through the social media. They provide customers with rapid responses and a better quality service; they also facilitate building customer loyalty.
- **The Internet of Things.** There are more and more "smart" devices such as electrical appliances that run off the Internet. This improves the service provided by tourism companies as well as providing a deeper knowledge of their customers.
- **Social media and co-operative economies.** The social media constitute a basic communication tool: they help to put companies in touch with their customers, get to know them better as well as being able to create communities and build customer loyalty. We should perhaps mention the so-called "co-operative

economies”: this term refers to the sale of properties, products and services offered by individuals through technological platforms that act as intermediaries. More and more individual operators in the tourism industry are adopting this model with increasing success.

- **Big data.** More and more companies are accumulating massive amounts of data and information through electronic channels. This data and information is vital for the day to day running of the company. The constant flow of huge amounts of data gives rise to problems with its management using traditional methods because of its quantity, variable nature and rapid creation. The trend is to turn to specialized techniques and technology to store, process and use this information.

## THE NETHERLANDS

The most important features considering digital tourism are

- Knowledge of the digitalization
- Education
- Software
- Money to invest

There are a few challenges when defining important Digital Tourism features:

- **Skills:** The digital competencies of the tourism labour force will play a key role in the successful uptake of digitalisation in Dutch tourism. SMEs however often lack the necessary technical resources in their workforce to fully realise digital potentials. This can be due to a number of factors ranging from a lack of knowledge in identifying required digital skills to limited staffing issues, restricting the time and effort which can be applied to learning new digital processes
- **Finance:** Lack of finance is identified as the number one obstacle preventing the implementation of digital technologies in tourism SMEs. There is a significant concern amongst tourism enterprises that the cost of implementing new digital technologies will not be offset from the gains
- **Infrastructure:** The geographic location of tourism enterprises greatly affects their access to adequate digital infrastructures. SMEs in urban settings benefit from modern wireless and fibre broadband connections whereas the infrastructure in rural areas is often deficient and needs to be improved (although it's clear that in The Netherlands we are very well connected as regards to Wi-Fi)
- **Mentoring support:** Mentoring initiatives can boost innovation, enhance creativity and ideation, assist with capacity building, and improve connectivity

between tourism enterprises, tech companies, the arts and cultural sector, and other start-ups. Mentoring reduces the distance, and improves the timeliness, of advice between those that have the expertise and those that need to learn. Hubs and Business networks are being created in The Netherlands (but not with a specific focus on digital tourism)

- **Policy support:** Policy initiatives and actions are needed to support SME awareness of new technologies and make clear the benefits of their implementation. Furthermore, SMEs require support in their business planning and decision-making with regards to new technologies to ensure efficient utilisation.
- **Recommendations:** Technical assistance in the form of digital training should be targeted to different groups of SMEs including those just starts to digitalise and are moving into e-business; those that are in transition to e-commerce; and those that are highly digitalised and experimenting with new technologies. This form of technical assistance also ties in with aspects of lifelong learning and the digital empowerment of the workforce.

## Desk Research Synthesis

### 1. The digital transformation has had a profound impact on tourism in the EU. What is the situation in your country or region?

The digital tourism market is expanding rapidly in all four partner countries. All four are feeling the full effects of the digital revolution and its impact on the tourism industry. Consumer habits have changed but at the same time the bodies promoting tourism have been able to adapt their marketing strategies to these new channels and take full advantage of the opportunities they provide.

The **Italian** accommodation sector is leading the way in digital tourism in Italy and using new tools for both booking and promotion. The Italian Government released its 2017-2022 tourism support programme under the slogan of “Efficiency and Sustainability”.

**Portugal** is perhaps the country where greatest change is taking place and the steady stream of international awards won by the local industry attests to the vibrant state of the market. Government conducted an analysis of the market and acted in consequence focusing initiatives on placing and promoting product in digital channels and taking full advantage of the new media. They have been able to capture the imagination of a considerable number of consumers using striking visual presentations.

The digital revolution has radically transformed the tourism industry in **Spain**; this partner cites a number of factors as being representative of this transformation. New business models have appeared and reshaped the value chain. Consumers now prefer the mobile phone as a vehicle for viewing and purchasing tourist products. IoT technology broadens possibilities for reaching consumers and provides a useful channel for communication. Social media have begun to play an important role in consumer assessment of tourist services and have also changed marketing techniques. New innovative technologies such as geolocalization and virtual and augmented reality offer a broad band of new possibilities. A number of new technologies gather and analyse consumer behaviour and provide valuable data for marketers and retailers. In a country that has relied on traditional models technology is playing a vital role in maintaining its place in the market.

Tourism in **the Netherlands** has experienced clear growth over the last decade and the digital revolution is also leaving its mark on the industry. As in the other three partner

countries, operators are adopting new technologies to cope with the changes in the market. Consumer habits are changing and marketing techniques are therefore obliged to change with them. In the Netherlands the use of social media, especially WhatsApp, is seen as vital. This latter medium provides operators with more personalized access to customers.

Visitor numbers have been rising so dramatically that the country's tourist board has switched its focus from destination marketing to destination management coinciding to some extent with the Italian Government's idea of sustainability in the management of visitor numbers. As for marketing, operators are now looking beyond desktop formats to the more convenient and more popular small screen mobile phone format.

## 2. EU institutions recognised the importance of digitization in tourism in a number of policy documents; what is the situation in your region or country?

A number of bodies in **Italy** have recognized the importance of digitalization in tourism and are taking a series of measures to ensure changes are made in the industry and that it remains competitive and able to meet consumers' needs.

In fact, the Italian Ministry for Tourism and Culture has provided the blueprint for the digitalization of the industry in its document entitled "Tourism 2016-2022: A Six Year Strategic Plan". It is based on incorporating technological and organizational innovations, building skills and providing quality services. It aspires to ensure the industry's future and sustainability by increasing its competitiveness and creating employment through innovation, digitization and creativity.

The other significant contributor to innovation in the Italian tourism industry is TDLab. Its mission was to identify key areas for action and ways of streamlining government management. The group brought together experts from a broad range of national tourism bodies in both the public and private sectors and delivered its strategy in 2016. Its most important proposals included the foundation of a national register of tourist facilities, the mapping of heritage sites, increased access to big data, support for vocational training, the unification of Italian tourism under a common logo and more emphasis on brand development.

**The Portuguese** authorities also detected the need for leadership in the implementation of the sweeping changes needed in the tourism industry to maintain its competitiveness and ensure its future. The Government launched "Tourism 4.0" in 2018, an initiative to facilitate the digitalization of the tourism industry. This initiative brings together the Ministry for Business, Energy and Industrial Strategy, the Secretary of State for Tourism and Portugal Tourism, the country's national Tourism Board. Its aim is to encourage entrepreneurship, support new tourism businesses as well as stimulate innovation in tourism. The programme will provide a framework for public funding and policy making.

**The Spanish** Tourism industry has enjoyed forty years of uninterrupted growth but current trends have caused authorities to question whether the current business model is capable of maintaining this growth whilst ensuring sustainability. Legislation is desperately needed to avoid further disruptions created by new models in a rapidly changing sector. The government has presented an initial draft of its plan to ensure a healthy future for the tourism industry in Spain: "The 2030 Strategy for Sustainable Tourism in Spain". The two most relevant issues the document addresses as far as digitization is concerned are digital breach and new business platforms. The plan aims to fully equip the small and medium size

businesses entering the sector by ensuring they possess the necessary technical skills to compete in an increasing digitalized market and, on the other, regulate the newest business models created by these rapid and sweeping changes and thus create equal conditions for long and sustained growth.

Whilst authorities in **the Netherlands** are committed to growing the nation's tourism industry their approach to its digitalization is perhaps more indirect than in other countries. Authorities feel the digitalization of the tourism industry forms part of the digitization of society at large; in the document "Dutch Digitalisation Strategy: Getting the Netherlands Ready for the Digital Future" in June 2018, they enlarge on the changes that must take place in public administration. These changes will naturally have an impact on the tourism industry.

Respondents to the questionnaire were unaware of EU directives stressing the importance of digital innovation in tourism.



### 3. Digital transformation reshapes every aspect of business. Which of the following aspects are most affected by it: management, marketing, communication or others?

**The Italian** respondents to the questionnaire feel that digital innovations have affected consumers' choice of medium when planning their travel. The mobile phone has been the most popular choice and media such as WhatsApp have enabled providers to get closer to their potential customers by anticipating customers' needs more accurately using the greater array of data available on consumer behaviour and tailoring their sales messages to individual consumers.

**The Portuguese** believe that it would be impossible to single out a specific area that has been affected more than any other: they believe the very nature of tourism has been transformed. They believe the digital revolution has empowered the consumer and enabled him to have an unimaginable range of choices at his fingertips and also the ability to acquire a more accurate idea of the experience he is about to purchase.

Suppliers are now able to offer their product to a far broader market the entire planet. The sphere of competition has thus ceased to be regional or national; it is now global. The Portuguese feel that the industry has become consumer centred and that suppliers have a great deal more information at their disposal. At the same time they have been obliged to strive harder to acquire, maintain or increase market share.

The booking of accommodation has changed radically with the emergence of new tools and services. The digital transformation has also led to the creation of new products and new experiences. Generally speaking, tourism operators have had to change their focus to gathering and analysing information to survive and grow in a rapidly changing environment.

**The Spanish** partners also feel that the digital revolution has brought about change in just about every area of the industry. Both the external environment and the internal operations of companies have undergone drastic modifications. Respondents to the questionnaire identified three main areas of change: administration, distribution and communications. New technologies have made booking management much easier and more flexible and have improved their productivity. As for distribution, more and more consumers view and purchase product on-line and the traditional travel agency model has suffered severely as a result. Communication between vendor and purchaser is now much more fluid and also bidirectional. This has brought the two parties much closer together and enables vendors to customize products with greater accuracy and facilities building brand loyalty.

**The Netherlands** has a highly developed digital culture and one of the major changes wrought by the digital revolution in the country has been in business models. Digital platforms for the sale and purchase of all kinds of products dominate economic activity and of course travel products are no exception. The digital revolution has greatly improved communication, created new business opportunities and facilitated all kinds of transactions.

New digital tools can make an important contribution to sustainable travel as the Carmacal calculator has demonstrated. This tool enables consumers, and retailers, to calculate the carbon footprint created by travel. The Hague Town Council has been a pioneer in travel marketing and communication as well as providing visitors to the city with ample information on how to best employ their time. Respondents feel that change has been sweeping and affected the industry right across the board.

#### 4. What kind of EQF4 vocational training courses are available in digital tourism in your region or country? What kinds of methodologies are used? Is there any national or regional strategy to ensure a good supply of adequately trained graduates?

European Qualification Framework Level 4 courses are available in a wide range of areas related to the tourism industry in **Italy**. Unfortunately, methodologies are mainly traditional and there is a genuine lack of digital content and adequately trained teaching staff. The 2015 National Scheme for Digital Education aims to remedy the situation and reposition national education in the digital age.

Vocational training in **Portugal** has also very little to offer the interested student. There are some short courses available and they include digital content, but the choice is severely limited.

The situation in **Spain** and the Basque Region is similar. The vocational training courses available do not include any digital content although they do require students to be conversant with digital technology. The university course does however include some digital content and students receive training in how to use social media in the marketing of travel products.

There is a programme in place in the Basque Region which attempts to remedy the situation and requires students to use digital tools to meet a number of “challenges”.

There are a number of post graduate options, but they are offered by private institutions and are unable to offer officially recognized qualifications.

Things are not much different in **the Netherlands**. There are no full-time digital tourism courses available in vocational training although some do partially address the issue.

The university level course does however combine elements of the traditional travel business with aspects of the new digital model.

## 5. Please briefly describes the training offer/methodology/strategy/approach in your educational system, providing details about: Training Provider(s), Training Contents, Exit Profile

There are two EFQ4 options for students wishing to train for tourism industry in **Italy**. The Istituto Tecnico Economico trains students to produce and market travel products. The course focuses on management and customer service and prepares students for a broad range of job profiles in the industry. They thus acquire across the board skills which include accounting, management, marketing and specialist product knowledge.

The Istituto Professionale Alberghiero focuses exclusively on hospitality industry skills. Graduates will be equipped to work in accommodation and food and beverage as well as staff management and product creation and promotion.

Graduates from both vocational training colleges acquire computer and linguistic skills and are full equipped to introduce innovations within their companies.

There is further training available in Italy. This is at EFQ level 5. The provider is the Istituti Tecnici Superiori or ITS and two of the thirty seven courses on offer focus on digital tourism.

Private and State universities offer tourism courses at EFQ level 5 and 6 but digital content is minimal. Students seeking to broaden their technical knowledge are obliged to do Master's Degrees \which are highly expensive.

Graduate profiles do not therefore meet industry needs and there is a strong demand for the realignment of the academic world with its commercial counterpart.

Private and regional colleges are perhaps the most effective and active in providing digital training and really preparing their graduates to enter the work force. They offer short courses to a diverse range of students and issue a certificate that roughly corresponds to EFQ level 5.

Training centres in **Portugal** can be divided into two broad groups: institutions offering initial training in hospitality and those offering further training to workers already forming part of the workforce.

The institutions offering initial training may be public or private vocational educational institutions providing three year courses and an EQF level 4 qualification. There are public schools which also offer vocational training or public vocational training institutions for adults that provide similar qualifications.

There are also private institutions offering further training for adults wishing to improve their skills. These institutions are subsidised by the national government.

There are three university degrees in tourism available in **Spain** at the moment. Whilst each focuses on a specific area of the industry all have certain features in common: language learning, etiquette and protocol and marketing. They also receive career guidance and business training. Courses have become highly specialized as the country relies heavily on tourism and needs workers to take up positions in specific areas of the industry. In addition new niche markets are constantly appearing. Graduates obtain a qualification equivalent to EFQ level 6.

Ten percent of the working population in the Basque Region are employed in the tourism industry. Unfortunately much of the work is seasonal and one of the government's challenges is to stimulate business at times during year when activity is normally low. University graduates are able to provide visitors with a highly professional service and also enjoy good career mobility.

**Dutch students** can access vocational training on completing their lower secondary school studies or on completing their higher secondary school studies. Rural vocational training colleges offer students EQF qualifications in tourism from levels 1 to 4. Courses may vary from six months to four years, the shortest being equivalent to EQF level 1 and the longest to EQF level 4. Vocational training in tourism is divided into two faculties: leisure and hospitality and travel and hospitality. All courses include a practical on the job component and tourism students can choose from a wide array of options. All the degree courses provide them with very complete training in all facets of the industry although the respondent makes absolutely no mention of digital content. There is also a great deal of training available for those interested in studying different areas of rural tourism and options once again are extremely broad: once again no mention is made of digital content. It is unclear to what extent the digital revolution has had an impact on vocational training in tourism in the Netherlands.

## 6. Up to what point have training options, methodologies and strategies been implemented in your country or region?

**Italy** enjoys with most complete level of implementation: their training options, methodologies and strategies have been implemented at local, regional, national and European levels. **Spain** and **Portugal** have yet to implement these three areas at European level whilst **the Netherlands** still has to implement them at both European and national levels.

## 7. What is the digital content of the training on offer, the methodology employed and the strategy in place?

**Italy** has an ambitious programme to strengthen digital skills amongst its students and teachers; the date for its implementation is uncertain. All secondary students at higher levels will receive training in ICT, participate in laboratory activities, study some subjects using the CLIL methodology, do more group work, take a more active role in class and be made more aware of the possibilities offered by the Internet.

As for teaching staff, they will be required to update their digital skills and introduce new techniques in the classroom; more CLIL teachers will be incorporated into the teaching staff, media education activities will receive more attention and so will laboratory work. Teachers will create more personalized curricula for students.

In **Portugal** the situation is worse. There is no digital content in tourism training courses and no plans to incorporate it into current syllabi. There are however courses with high digital content that could be subsequently applied to tourism but at the present time there is no training which combines digital skills and tourism.

**Spanish educators**, it would seem, are only too well aware of the importance of digital skills in tourism and education at large but at the present time little has been done to modernize syllabi and incorporate these skills. Educators believe children should learn these skills from the beginning of secondary education although not before. They also believe educators should encourage students to learn independently instead spoon-feeding them as at present. There should be less rote learning and more analysis and discussion. The system should incorporate more innovative teaching models as well and abandon the chalk and talk technique of the past.

**The Dutch respondents** do not supply any information regarding the state of digital training for the tourism industry in the Netherlands. They do however stress the dependence of the tourism on digital skills and tools but no comment is made on just how present operators obtained the necessary skills to function in this environment or how future operators may adequately skill themselves to take their place in the industry.

## 8. What improvements can be made to vocational training in the field of digital tourism in your country or region?

**The Italian respondents** to this question believe that a national strategy should be put in place to remedy the situation: the total lack of programmes at EQF level 4 to enable future workers in the tourism industry to move freely and take full advantage of the digital environment.

They suggest a number of aspects that could be included in this national strategy: frequent retraining for teaching staff to ensure their awareness of the latest developments in the digital world as well as their students' needs; the incorporation of new subjects that enable students to acquire a complete understanding of the digital world and its application to the tourist industry; graduate profiles adapted to the current working environment; unification of EQF level 4 courses with a higher ICT and technical content; incorporation of the dual train and work system.

**The Portuguese respondents** express their complete agreement with Marianne Thyssen, EU Commissioner for Employment, Social Affairs, Skills and Labour Mobility, when she says that digital skills in the European Union are deficient and when acquired must be constantly updated. They believe that companies should play a more decisive role in training and invest in skilling their workers whilst government should create an environment that encourages and awards investment in training. It would also be useful, the respondents go on to say, that vocational training providers be able to shape courses more closely to specific companies' requirements.

In the case of **the Basque Region**, the respondent is confident that vocational training has already made the necessary changes in the system to provide workers with the digital skills necessary to work in the tourism industry in the local area.

**The Dutch respondents** stress the increasing dependence of the tourism business on digital skills and tools, especially the mobile phone and tablet, but make no comment on just how vocational training could make a better contribution to the training of future workers in the sector.



**9. Digital tourism is “the digital support to the tourist experience” Do you agree with this definition given by David Benyon, Aaron Quigley, Brian O’Keefe and Giuseppe Riva. If not, how would you define it?**

There is no doubt in the minds of the **Italian respondents** that the industry is changing radically. They lament the fact that there are companies that are not making the necessary changes to keep abreast of the times and forecast a limited future for them.

They perceive digital tourism as a way of enriching supplier-customer relations. They also suggest that digital technology shifts the focus from the destination to a broader travel experience. They hold that digital tourism redefines the concept of tourism and the providers’ perception of the customer.

**The Portuguese** have a similar conception of digital tourism: they believe it enriches every aspect of the travel experience and provider-customer relations too.

**The Spanish respondents** seem unclear on the definition of digital tourism. Whilst they do not question the one offered at the beginning of the question they fail to come up with any alternative. They suggest division within the industry and lack of direction makes it challenging to offer a clear definition.

**The respondents from the Netherlands** have little doubt: digital tourism is the future. Customers will no longer deal with human operators: they will make all their arrangements through digital channels. The respondents finish their response with a greatly extended version of the quote that appears at the head of this question. There can be little doubt of their opinion.

## 10. What are the most important features to consider when defining digital tourism?

**The Italians cite business 4.0**, the extension of the market beyond national borders, digital innovations, big data and customer experience.

**The Portuguese response** is similar although they do make mention of the importance of tourism organizations.

**The Spanish respondents** list a series of items that are essential when attempting a definition of digital tourism: the cloud for company management, the increased use of the mobile phone to purchase travel products, the Internet of things or the use of devices that rely on it to function, social media as a means of getting closer to the customer, co-operative economies as alternative business models and finally big data and the accumulation of massive amounts of information, its processing and practical application.

**The Dutch** begin their response by listing education, the use of software and having the necessary financial resources to invest in new technology. They go on to talk about the importance of acquiring the necessary skills especially where small and medium size businesses are concerned. They cite the lack of resources and uncertainty about returns as other important factors to be borne in mind when attempting to define digital tourism. An effective connection to the Internet is also mentioned as a vital factor. Mentoring could greatly facilitate the process as could appropriate support from government.

## Conclusion

Digital tourism arouses passionate responses from all four partners. There are clear differences between the four: different needs, different aspirations and different resources. What is clear however is that all are determined to move forward and convinced that the future of tourism is digital. Some are closer to that future than others, but all are aware of their shortcomings and the importance of remedying them in order to create a competitive and productive industry for future generations.

Training is basic and judging from the responses. Training is basic because a solid command of the new information and communication technologies is essential in an industry that operates more through digital channels than on a person to person basis. Young people in the four partner countries seeking futures in tourism really have very few options to skill themselves. This is precisely the generation that lack the necessary skills to take their place in the industry and desperately need training. Small and medium size businesses are also vulnerable, and steps must be taken to support this valuable sector of the industry. It would seem that consumers are embracing the digital revolution with great enthusiasm but that suppliers are lagging behind and not taking full advantage of the opportunities available.

Government must provide leadership and make funds available for training both for those seeking a future in tourism and those already employed and attempting to grapple with the challenges of the digital revolution. The Basque respondents seem confident these steps have already been taken whilst the Italians deplored government tardiness. The Portuguese were also dissatisfied with the state of affairs in their country and respondents from the Netherlands expressed similar sentiments.

All these responses seem to indicate that now is the time to take initiatives and skill workers thus pushing the industry fully into the digital age. The course the project proposes to develop is ideal for equipping young people interested in entering the industry with the necessary skills to ensure its and their own future and acquit themselves well. As the survey reveals, the younger members of the industry are precisely the ones who lack the necessary training in new information and communication technologies. This course will assist to close the skills gap between junior employees and their senior counterparts and situate the industry squarely in the digital age.

# DIGITAL TOURISM PROJECT

## SURVEY RESULTS

**Title:** Results of the survey on current digital competences and future needs in the tourism industry in Italy, Portugal, Spain and the Netherlands.

**WP:** 2 - A2.2

**Partner:** CDEA

**Date:** MAY 2019 – Version 1  
JULY 2019 – Final Version

The following report contains the results of the survey conducted in the four countries that form the partnership for the digital tourism project: Portugal, The Netherlands, Italy and Spain. The project's aim is to assess the situation with regards to command, use and impact of digital competences in tourism businesses. The study is based on the results and conclusions obtained from the 105 responses received from partners in Portugal, 73 from the Netherlands, 40 from Italy and 86 from Spain.

The questionnaire was divided into five sections: the aim of the first two sections was to gather statistical data on the participants and the companies that responded to this questionnaire; the following sections focused on gathering data on company training policy and its medium and long term needs and directions. Respondents' answers will be treated as strictly confidential and used exclusively for internal purposes.

### **Section 1 Personal Information**

- 1.1. Your position
- 1.2. Your digital competences

### **Section 2 Nature of your organization**

- 2.1. Name of your organization
- 2.2. Property rating and type
- 2.3. Employees' age
- 2.4. Employee numbers
- 2.5. Number of inhabitants in the area where the property is located

### **Section 3 Digital technology and media in the workplace**

- 3.1. What digital technology you use in the workplace?
- 3.2. How would you rate the digital competences of your staff?
- 3.3. Assessment of need for digital competence change
- 3.4. Digital media in the workplace

### **Section 4 Digital competence awareness and policy**

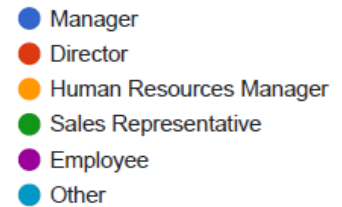
### **Section 5 Identification of needs and trends**

- Digital Competences
- Information and Data Literacy
- Communication and Co-operation
- Digital content creation
- Security and safety

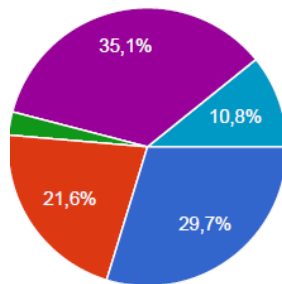
# DIGITAL TOURISM PROJECT: QUESTIONNAIRE RESULTS

## 1. PERSONAL INFORMATION

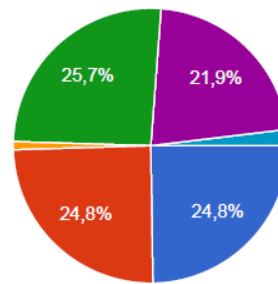
### 1.1. YOUR POSITION



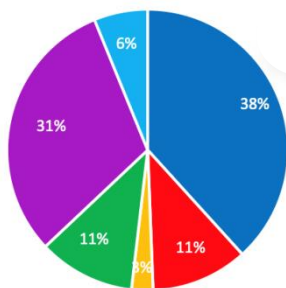
#### ITALY



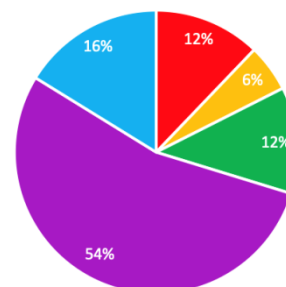
#### PORTUGAL



#### SPAIN

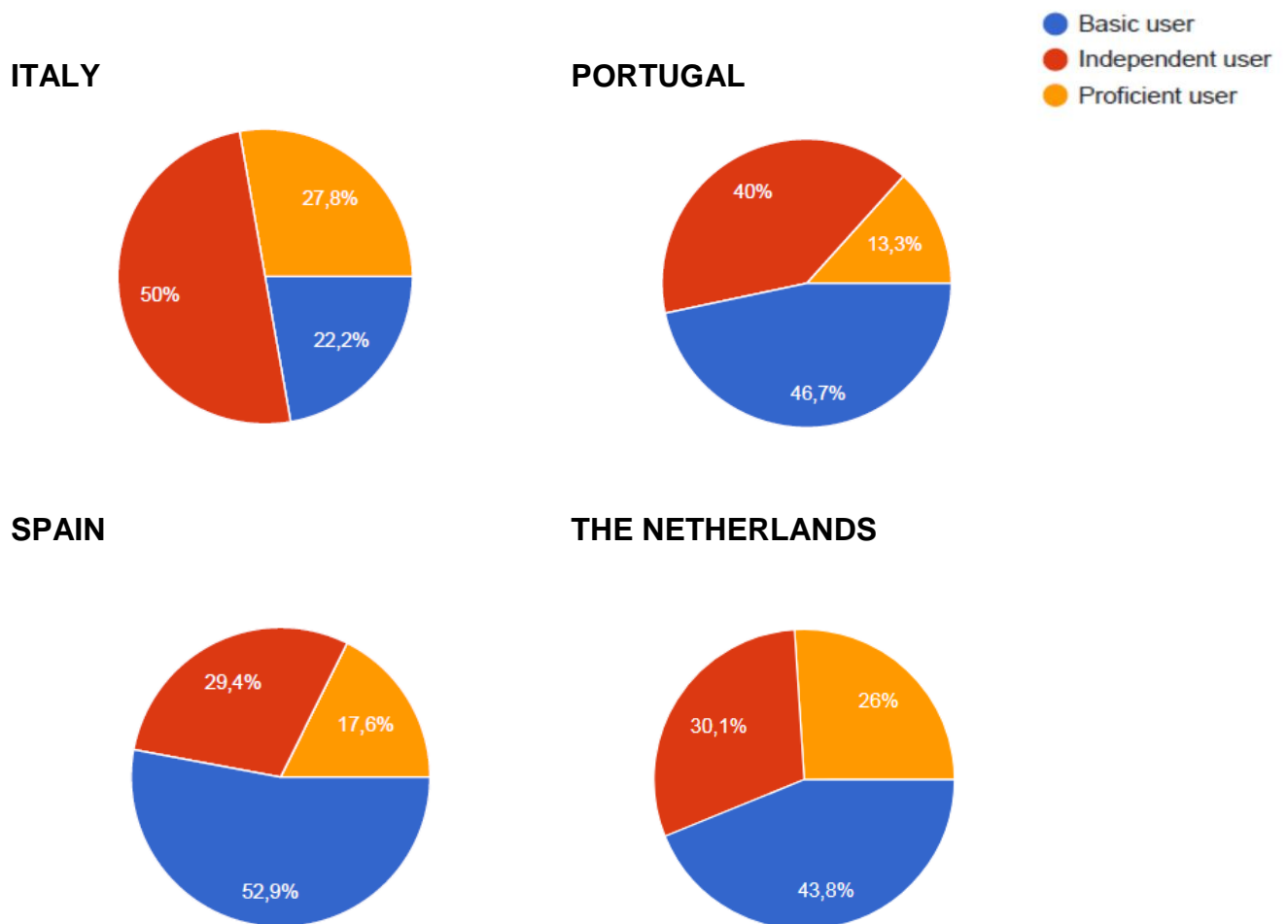


#### THE NETHERLANDS



The results of the questionnaire show that the highest number of responses from company managers came from Portugal, Italy and Spain. The result from the Netherlands was quite different: the highest number of responses came from employees. Responses from employees in managerial positions provided more credible information than those from employees in more junior positions.

## 1.2. YOUR DIGITAL COMPETENCES



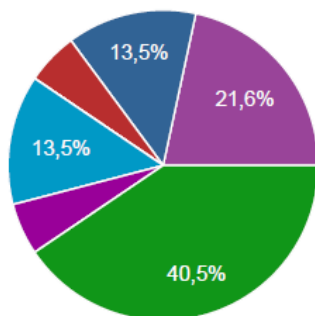
It was the results of Spain and the Netherlands that most coincided in this case: the pie charts show that the majority of employees have basic digital competences. Italy had the highest percentage of independent users whilst Portugal had an almost equal number of basic and independent users. It should be noted that Spain had the highest percentage of basic users whilst, at the other end of the spectrum, Italy the lowest<sup>14</sup>.

<sup>14</sup> The lack of a precise definition for each of the profiles (basic, independent and proficient) may have given rise to different interpretations in some countries.

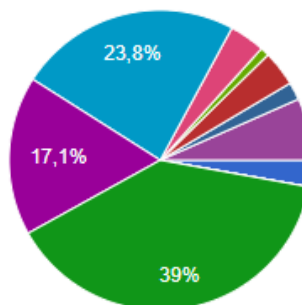
## 2.- NATURE OF YOUR ORGANIZATION

### 2.1 WHAT KIND OF ORGANIZATION DO YOU REPRESENT

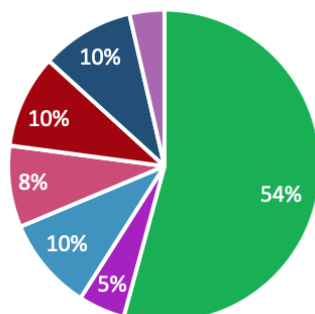
#### ITALY



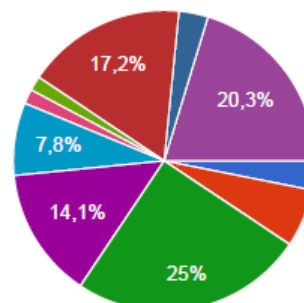
#### PORTUGAL



#### SPAIN



#### THE NETHERLANDS



- Destination Management Organizati...
- PCO - Profesional Congress Organi...
- Global Distribution Service Provider...
- Accommodation Provider (\*)
- Tour Operator
- Travel Agency
- Recreational Activity Tourism Company
- National, regional or local tourist bureau
- Other

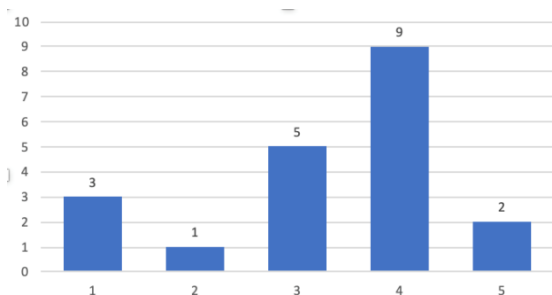
The pie chart shows that the majority of responses from Portugal, Italy and Spain came from accommodation providers, followed by tour operators and travel agencies; these three groups were the most important companies in this survey.

We believe the data from “*Other tourism businesses*” is important. Whilst they do not constitute a majority, they do provide a lot of important information on the tourism industry. Their responses were invaluable in assessing digital competences in tourism especially in the Netherlands and in Italy.

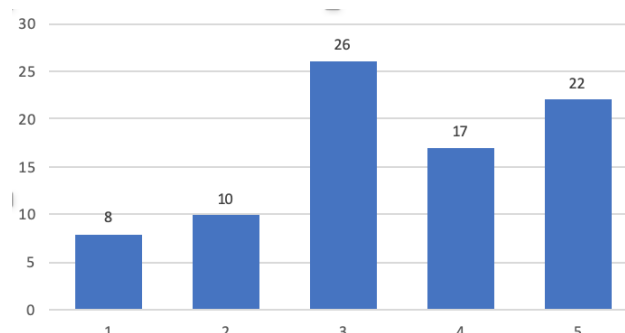


## PROPERTY RATING AND TYPE. Accommodation provider

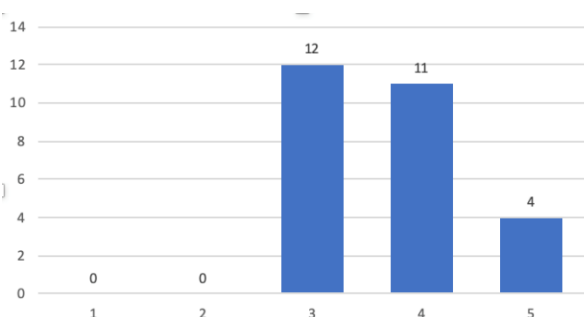
### ITALY



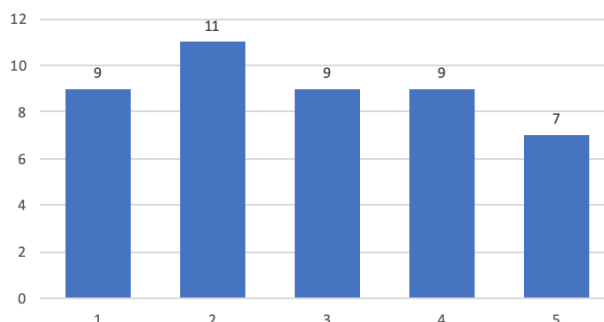
### PORTUGAL



### SPAIN



### THE NETHERLANDS



The responses from accommodation providers broadly coincide across the four countries. Level three and four properties provided the most responses. In the Netherlands level two<sup>15</sup>.

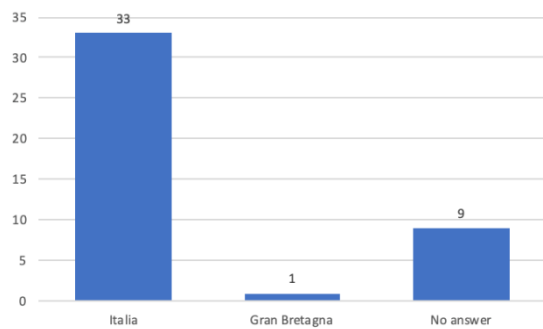
<sup>15</sup> **Level 1:** All rooms must have at least a wash basin with hot and cold running water. Guests must be able to access private or shared bathtub or shower facilities. Guests' rooms must include standard beds, one towel per bed, a desk and a cupboard and a chair.

**Level 2:** All the facilities provided by a level 1 property plus the following: rooms with private baths or showers. Refreshments must be available on the property for purchase by guests.

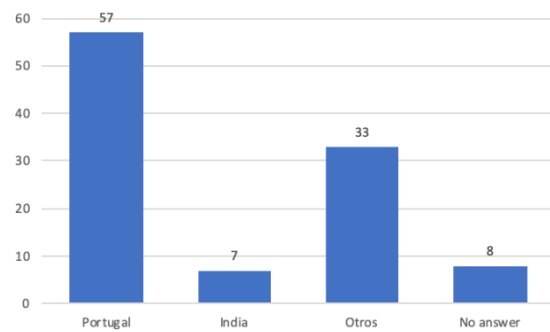
**Level 3:** All the facilities provided by a level 2 property plus the following: All rooms must have bath or shower and toilet facilities as well as television and a desk. Larger properties must have rooms for non-smokers. Reception desk staffed during the day. A lift if the property has more than three floors with guestrooms. There must be a safe in most of the rooms.

## 2.2 THE COUNTRY ORIGIN OF THE ORGANIZATION

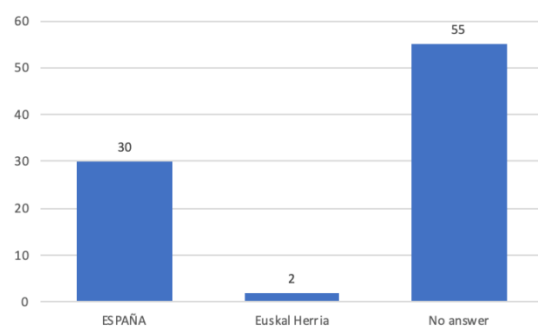
### ITALY



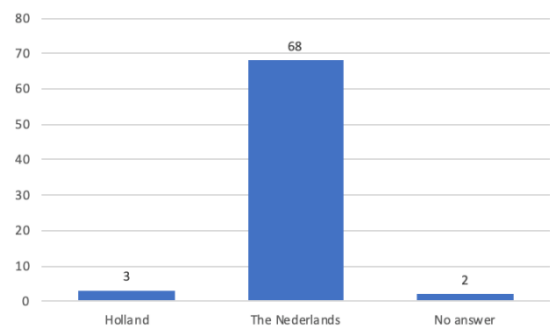
### PORTUGAL



### SPAIN



### THE NETHERLANDS

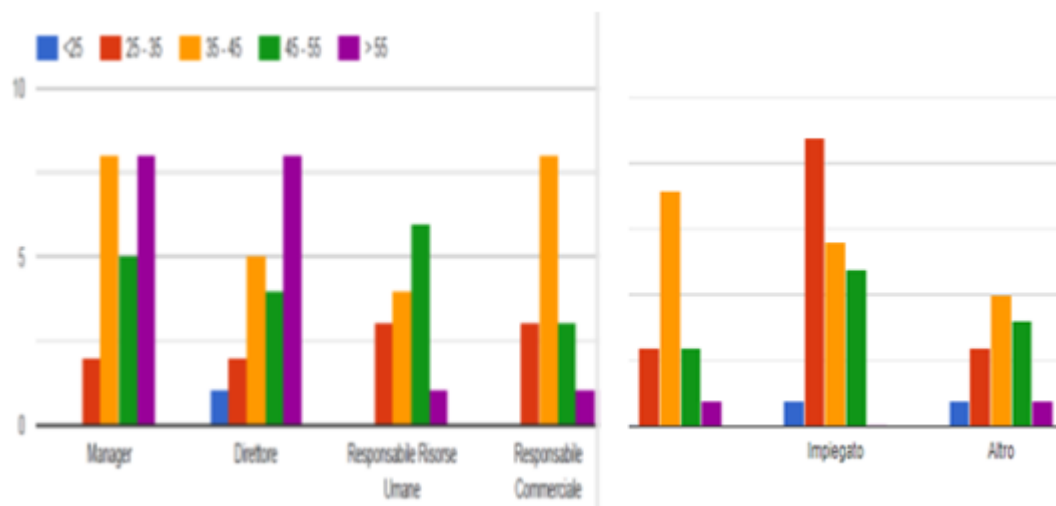


The information in responses related exclusively to the countries surveyed except in the case of Portugal which provided a wider sample. The vast majority of companies surveyed were locally owned.

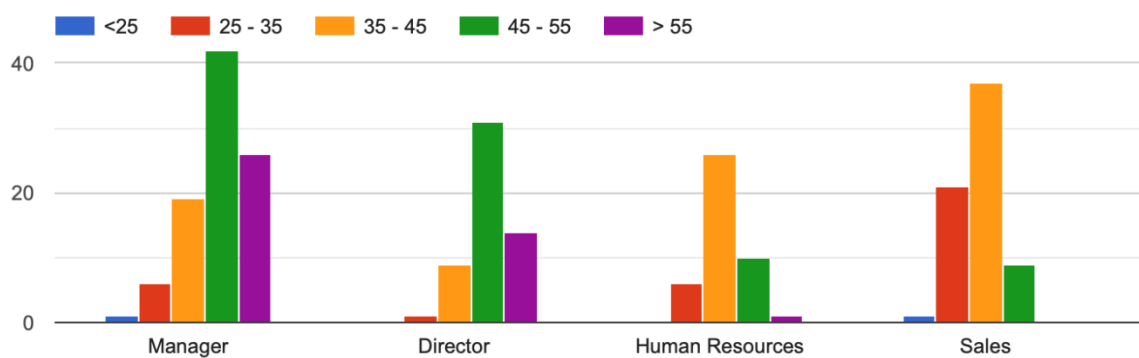
**Level 4:** All the facilities provided by a level 3 property plus the following: Television with international channels. Reception desk staffed 24 hours a day. Restaurant (open for dinner at least six days a week) and a bar. Mini Bar in all rooms or room service refreshments 24 hours a day. Lift. Room service. Adequate work space in all rooms.

## 2.4 EMPLOYEES' AGE

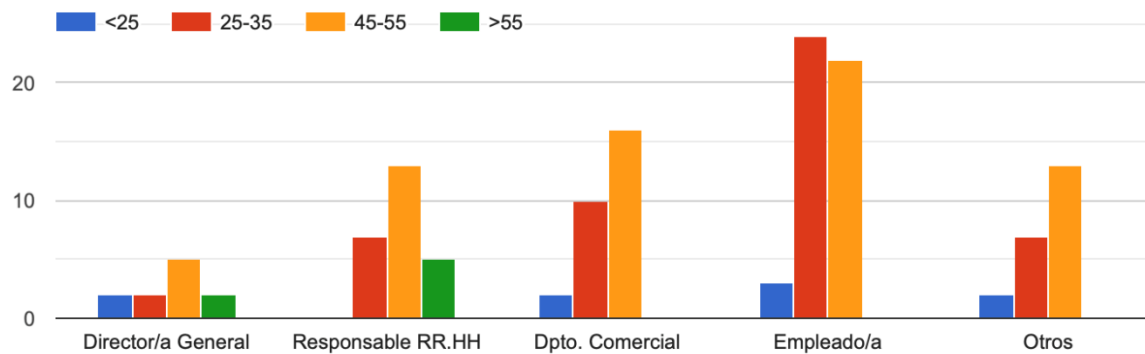
### ITALY



### PORTUGAL



## SPAIN



## THE NETHERLANDS

### Employees' age

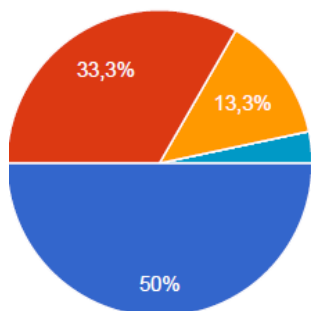


We should highlight the fact that older employees, who should in theory have fewer digital competences, occupy the highest positions in each company; their younger counterparts, who should in theory have greater digital competences, occupy positions with fewer responsibilities.

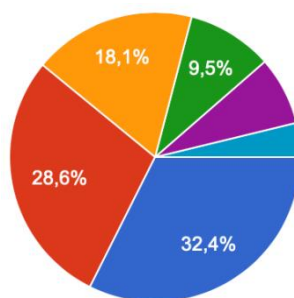
## 2.5 EMPLOYEE NUMBERS

- < 5
- 5 - 10
- 10 -25
- 25 - 50
- 50 - 75
- > 75

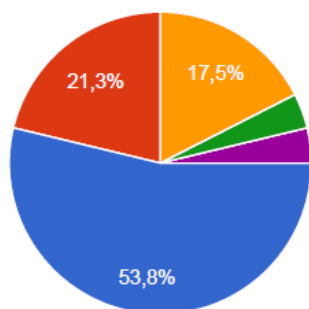
### ITALY



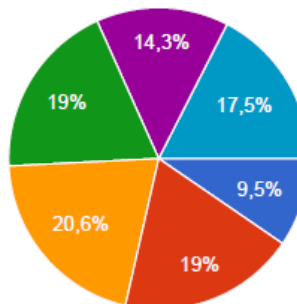
### PORTUGAL



### SPAIN



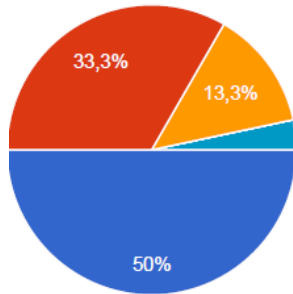
### THE NETHERLANDS



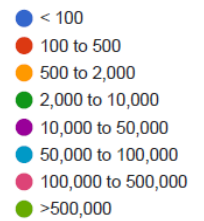
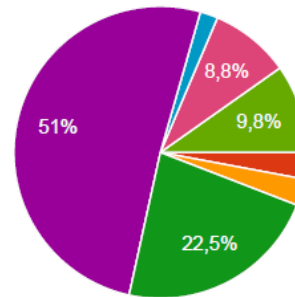
We received a higher percentage of responses from companies with five or fewer employees in Portugal, Italy and Spain. The responses were more evenly distributed amongst companies of different sizes in the Netherlands.

## 2.6 NUMBER OF INHABITANTS IN THE AREA WHERE THE PROPERTY IS LOCATED

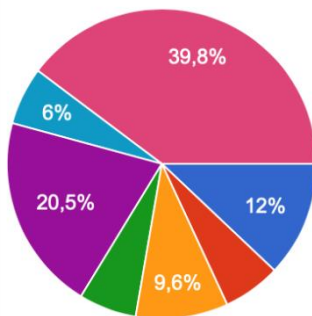
### ITALY



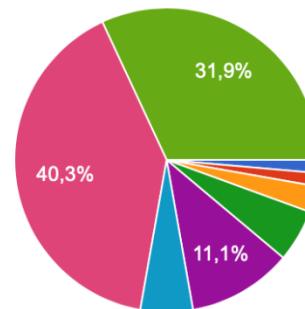
### PORTUGAL



### SPAIN



### THE NETHERLANDS



The majority of companies surveyed in the Netherlands and Spain were located in larger towns whereas respondents in Portugal and Italy were from smaller ones.

## COMMENTS TO SECTION 2

### ITALY

- The typology of our accommodation facility is a holiday home with 5 self-catering apartments, the above description does not reflect all our equipment (kitchen, with dishes, etc).

### PORTUGAL

- REDITUR is a non-profit project and has no staff in charge, only has its Director "ad honorem" that represents the member agencies to develop business partnerships and new tourist circuits in different countries.
- The response to personnel information is approximate as an average of all the agencies that make up the Network.
- Not sure of the relevance of the question

### SPAIN

- Subcontracted employees working in the shop, in reception, on guided tours and in education appear under "Others".
- We do not appear in any of the above mentioned categories

## THE NETHERLANDS

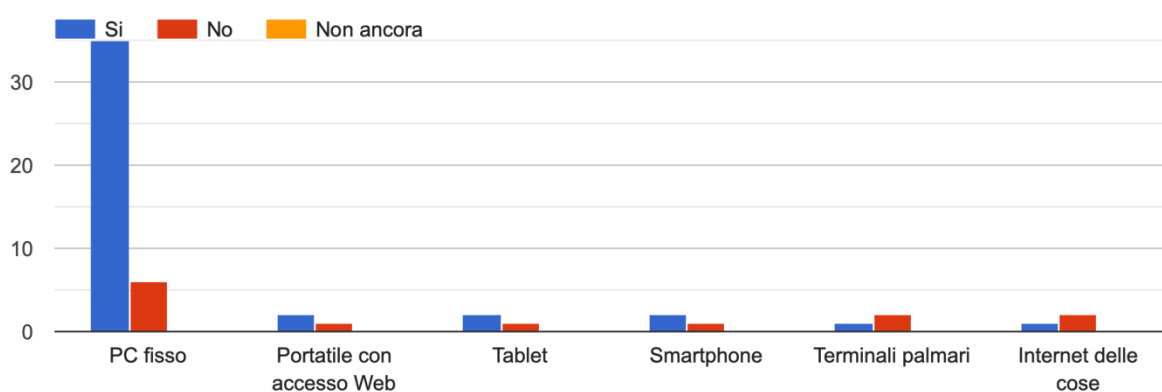
- I work for a national organization but I am based in Rotterdam. It is difficult for me to know how the numbers and needs are nationwide
- The working area is much wider than the area where we are located
- The Hostel has all kind of room types, also dormitories mostly used by backpackers from all over the whole world
- I don't know exactly the numbers of employees, we work with a lot of volunteers of which I am one.
- We have visitors from all over the world
- Although we are located in the Green Heart we provide travel and accommodation for professionals through EU
- I don't know exactly how many employees we have, it's a guess
- The ages of our staff are diverse and it is incorrect that all employees fall into 1 age category. I have now entered something
- I don't know the age of the employees
- The kind of organization I represent is the catering industry
- The number of employees is more but I have counted the full-time employees
- The kind of my organization is in the area of the Horeca
- The youngest employee is 15 years old and the oldest employee is 80 years old
- Remark for our tour operator organization, we have electric train and do a hop on hop off touristic tour in Dordrecht
- We have a lot off employees I don't know all the personal information about them, I'm the bus driver strange class system you guys use... I would class our business as 3 stars, by law we are not allowed to sell refreshments and we do have TV and desks in the rooms. I wonder what this survey will show...
- The ages of the employees is an estimate
- I am 35 years old. I could choose a range 25-35 and 35-45. I choose the latter the work area is much wider than the location of the company, I'm working as a project manager of the department
- Destination management België, Nederland en Luxemburg
- The company organize touristic trips but is also an public transport company
- Remark at the Property rating and type, the company is a Hostel so we have bed dorms
- In every function we have employees of all ages but I can't fill that in
- The number of inhabitants is including the big cities around nuenen
- Short stay apartments - designed all prices range fully equipped
- Smoking rooms are officially not allowed in The Netherlands, so the answer for question 'Property rating and type' is almost correct, except that we do not have smoking rooms.



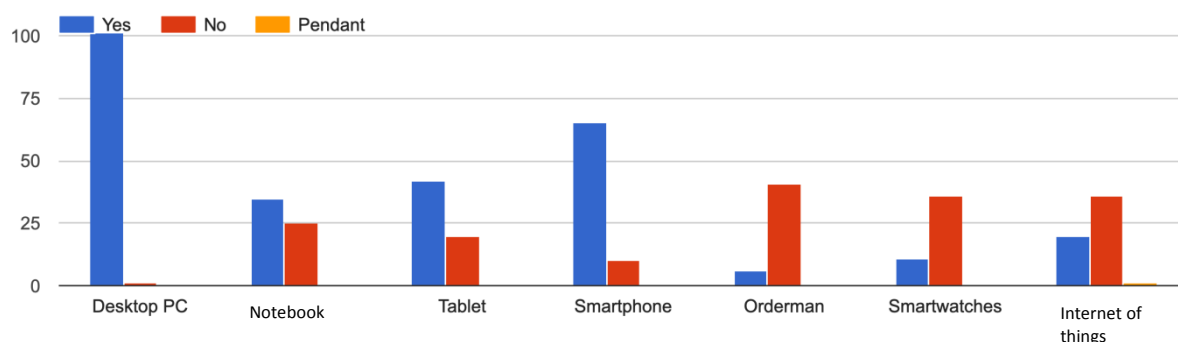
### 3.-DIGITAL METHODOLOGY AND MEDIA IN THE WORKPLACE

#### 3.1 WHAT DIGITAL TECHNOLOGY YOU USE IN THE WORKPLACE

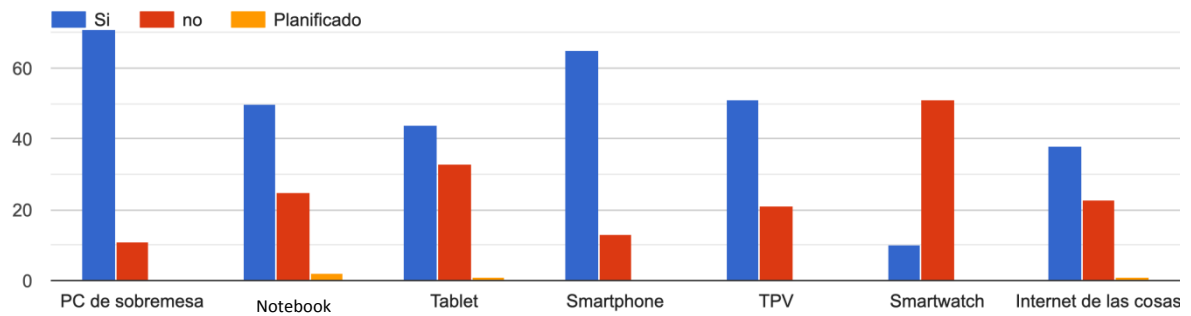
##### ITALY



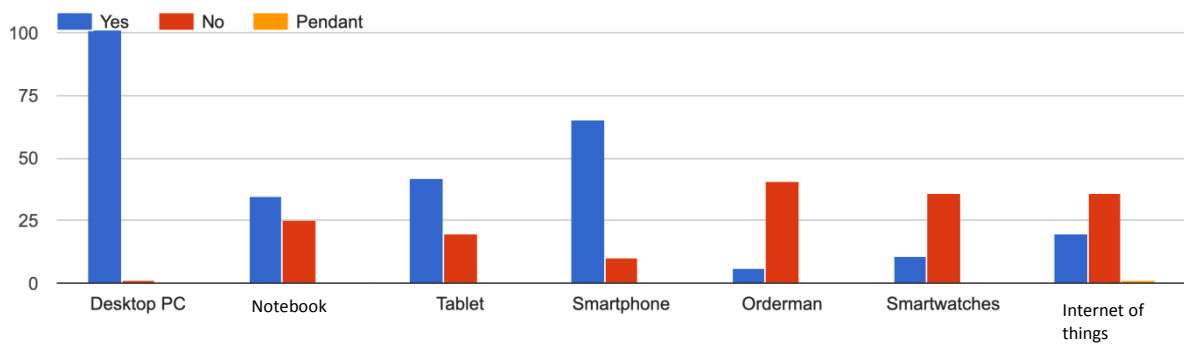
##### PORTUGAL



## SPAIN



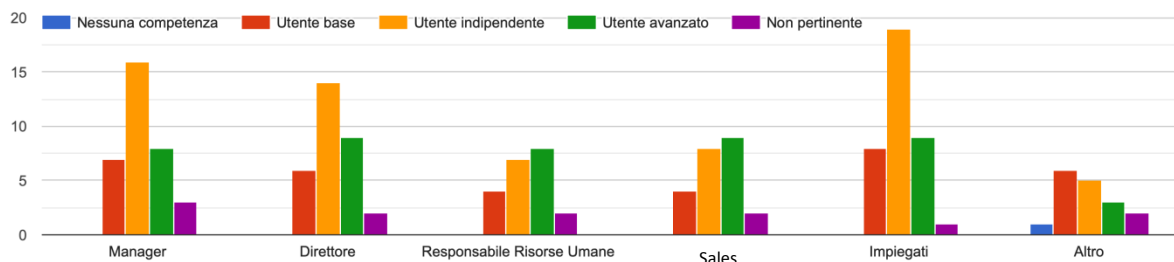
## THE NETHERLANDS



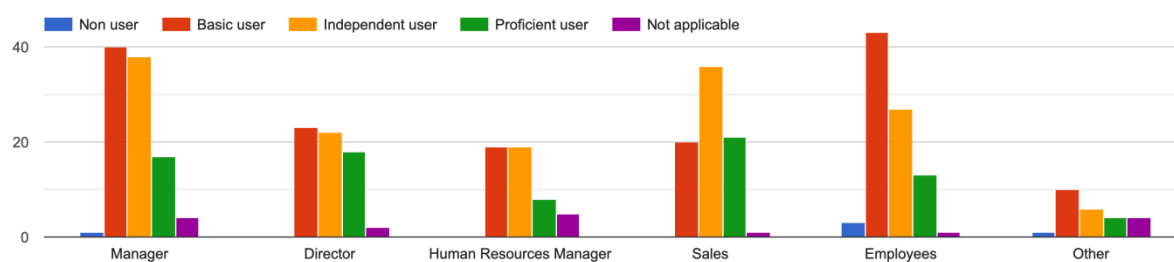
Desktop computers and smartphones were amongst the most commonly used digital devices in tourism businesses; they were followed by tablets and notebooks.

## 3.2 HOW WOULD YOU RATE THE THE DIGITAL COMPETENCES OF YOUR STAFF

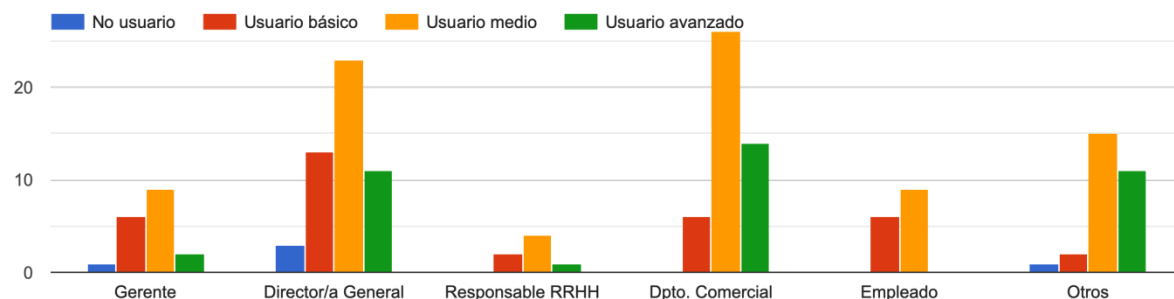
### ITALY



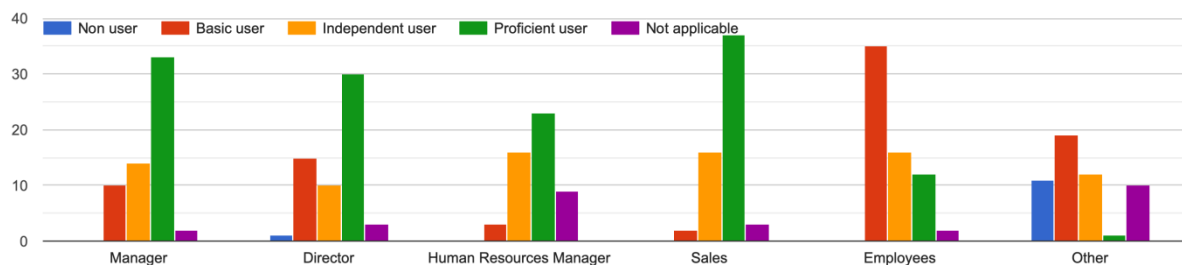
### PORTUGAL



### SPAIN



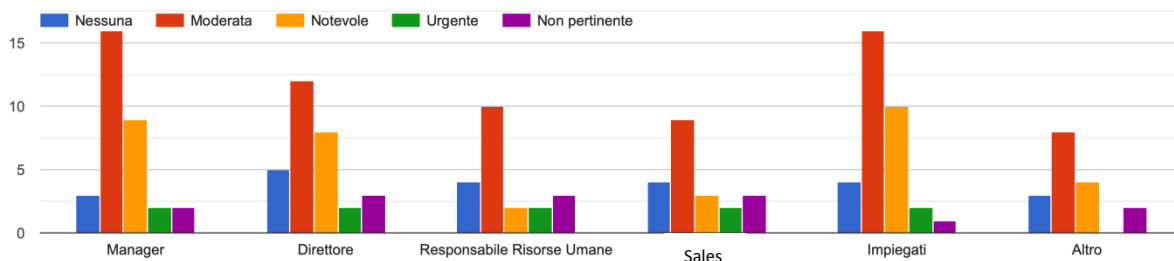
### THE NETHERLANDS



Generally speaking, employees occupying management positions had superior digital competences in all countries, above all in the Netherlands. We should also highlight the fact that basic users comprised a minority except in Portugal.

### 3.3 ASSESSMENT OF NEED FOR DIGITAL COMPETENCE CHANGE

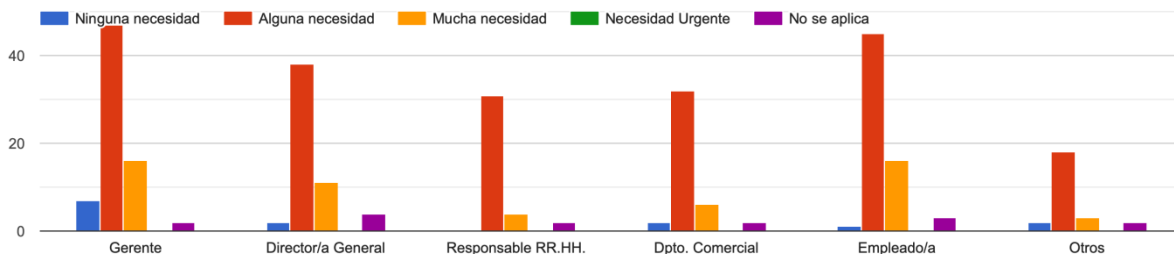
#### ITALY



#### PORTUGAL



#### SPAIN



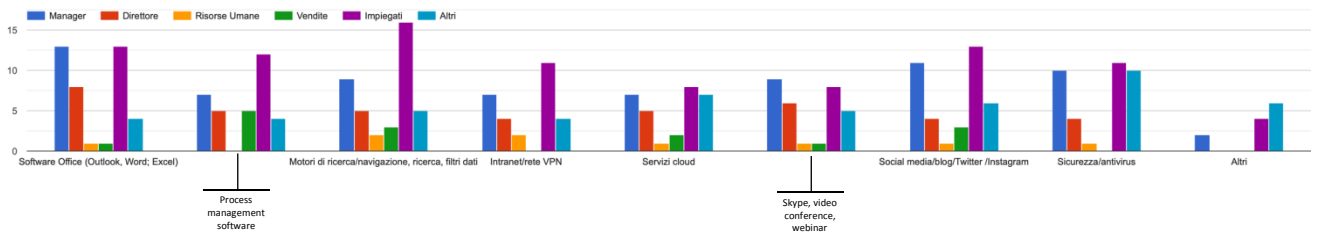
#### THE NETHERLANDS



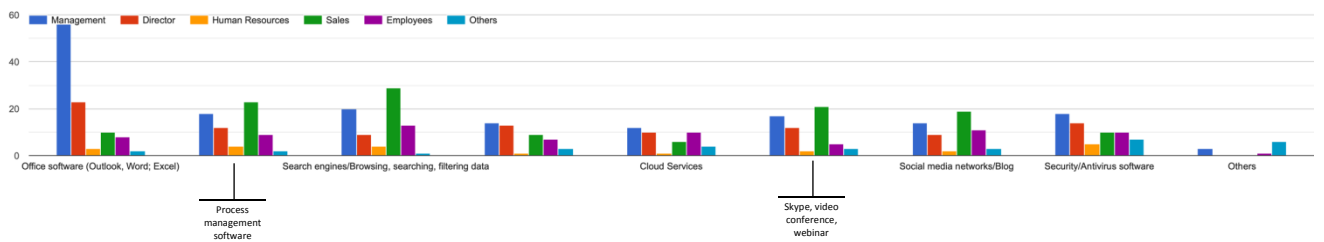
The need for upgrading digital competences varied from country to country. Respondents in Portugal and the Netherlands perceived an urgent need for improvement whereas those in Spain and Italy confined this need to certain positions in companies.

## 3.4 DIGITAL MEDIA IN THE WORKPLACE

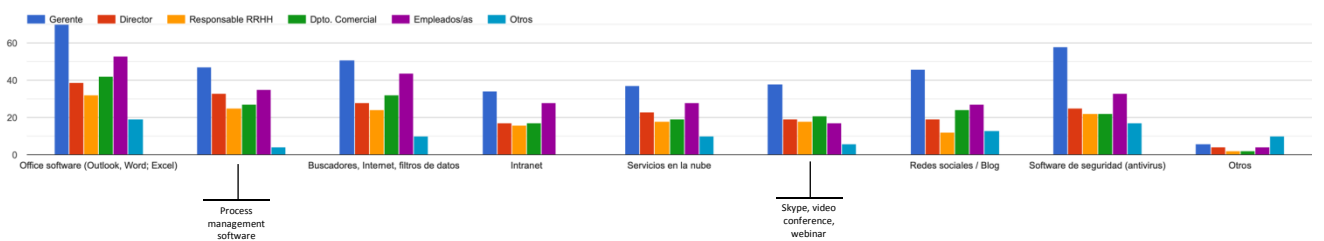
### ITALY



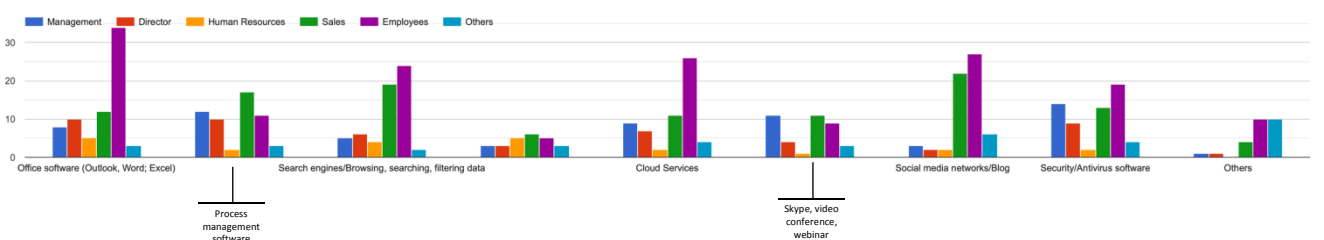
### PORTUGAL



### SPAIN



### THE NETHERLANDS



We should stress the fact that office suites were the most commonly used digital media in the workplace, above all in the Netherlands and Spain, followed by Internet search engines and management software.

## COMMENTS TO SECTION 3

### ITALY

- All profiles use the selected elements
- Everyone uses these tools. The question is wrong. I am not mutually exclusive
- All procedures are performed with Intranet management software/

### PORTUGAL

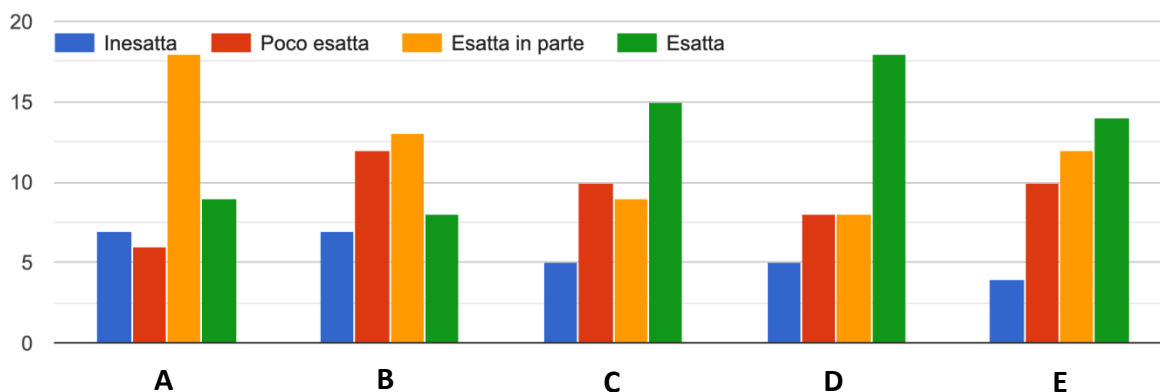
- The above question is, probably, erroneous: what should I tick if more than one departments use e.g. Internet Browsers (as it is the case). Instead of radio buttons it should use checkboxes.
- Not clear question different people use the digital technology mentioned
- The answers above limit the choice. So, e if not the majority of the items listed above are used by all in the company

### THE NETHERLANDS

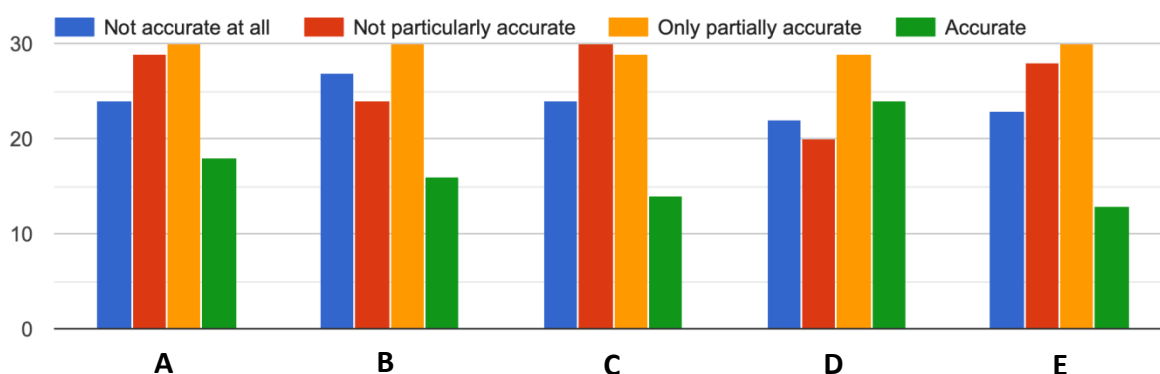
- we should use better search engine techniques
- The Intranet/Virtual Private Network does not apply but I can't change it in the form.
- e.g.: Our director, manager and also our sales manager are writing blogs and/or using social media accounts... I cannot tick multiple boxes
- These are the items I work with
- More boxes apply to functions
- I can only make 1 choice per line and I could make multiple choices per line
- The appropriate response is diverse and it is incorrect that all employees fall into 1 category. I have now entered something
- I filled in the answers only for myself, I'm not sure about the others in the in the company
- what if I don't use some of these choices at all? I answered 'others' but that is not the correct answer to the question.
- Pendant? what does that mean?
- The development in the digital technology goes fast and there's always something to learn
- The answer are a guess because I only exactly know my own uses, we have a big team
- Some programme types are using by more persons but it's not possible to choose more than one!
- Here I have the same comment, we have more employees in one function so it's not possible to answer the questions accurate
- The previous question was not properly formulated; so answers are not valid

## 4.-DIGITAL COMPETENCE AWARENESS AND POLICY

### ITALY

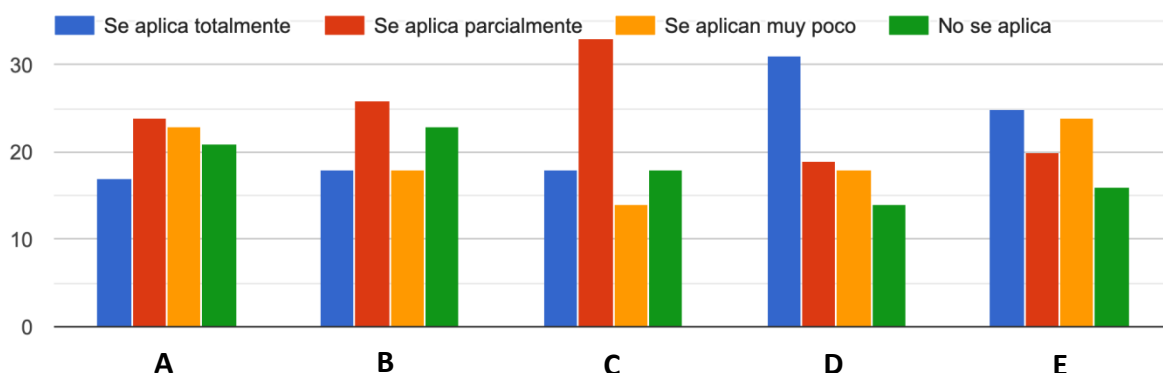


### PORTUGAL

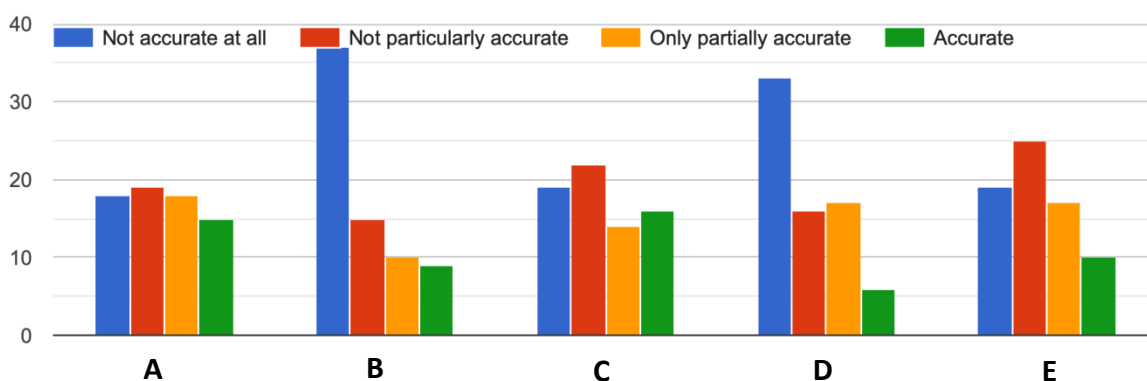


- A. We have a clear strategy focused on promotion and assessment of digital competences in our company
- B. Our company promotes a set of initiatives to improve digital competences (observation and assessment, identification of training needs etc.).
- C. We have skilled workers with the necessary digital competences to take full advantage of ICT in the workplace.
- D. Digital competences are an important part of workers' personal learning programme.
- E. We have accurate information regarding the digital competences of our employees.

## SPAIN



## THE NETHERLANDS



The application of digital competence strategies in the tourism industry varied from company to company in all the countries surveyed. The exception was the Netherlands where digital competences are higher.

- 
- A. We have a clear strategy focused on promotion and assessment of digital competences in our company
  - B. Our company promotes a set of initiatives to improve digital competences (observation and assessment, identification of training needs etc.).
  - C. We have skilled workers with the necessary digital competences to take full advantage of ICT in the workplace.
  - D. Digital competences are an important part of workers' personal learning programme.
  - E. We have accurate information regarding the digital competences of our employees.



## COMMENTS TO SECTION 4

### SPAIN

- Employees in small companies do not receive adequate training in new technologies.
- I think this is one of the company's weak points.

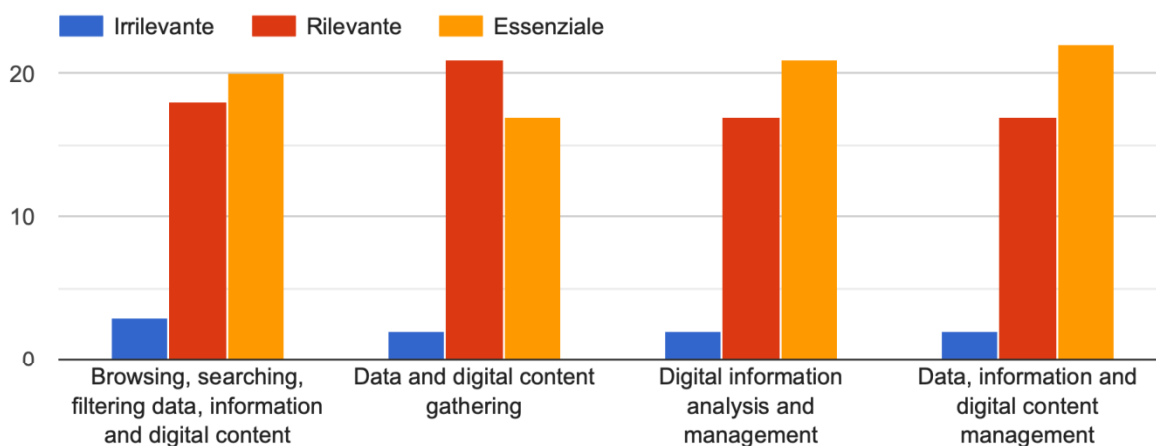
### THE NETHERLANDS

- We have a Facebook and Twitter account
- I work as a receptionist and have made an estimate for the above question. I find it very difficult to answer this fact correctly
- As regards to social media employees are just giving tips and tricks
- Difficult to answer. I feel that we could do a lot more as regards to the digital competence of my workers/employees
- I don't understand this question
- We have an extern ICT worker
- It's hard for me to answer this accurately, as I am an apprentice
- why would a small business like mine need a 'policy' Your assumptions are making it harder and harder to take this survey seriously.
- information regarding digital competence differs between, for instance the bus driver of the excursion, the tour guide and the sales representatives

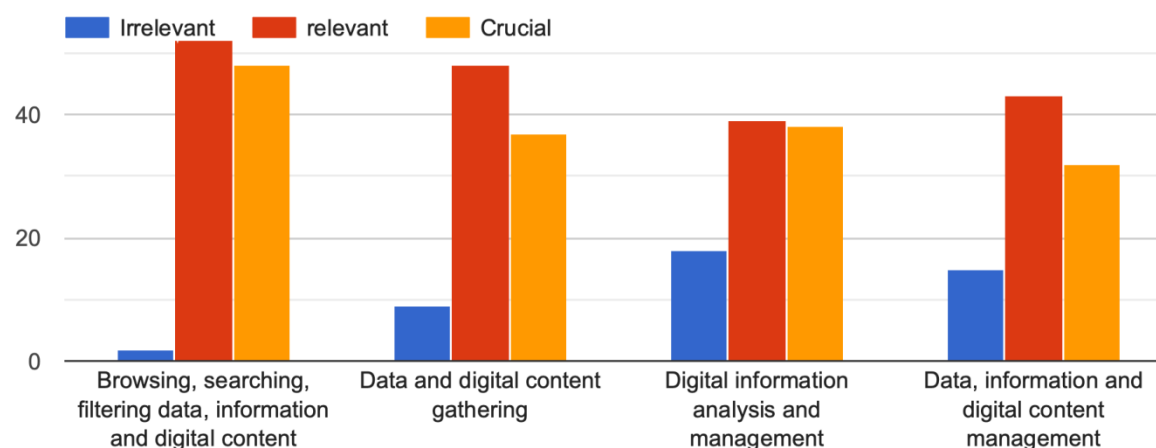
## 5. IDENTIFICATION OF NEEDS AND TRENDS

### 5.1 INFORMATION AND DATA LITERACY

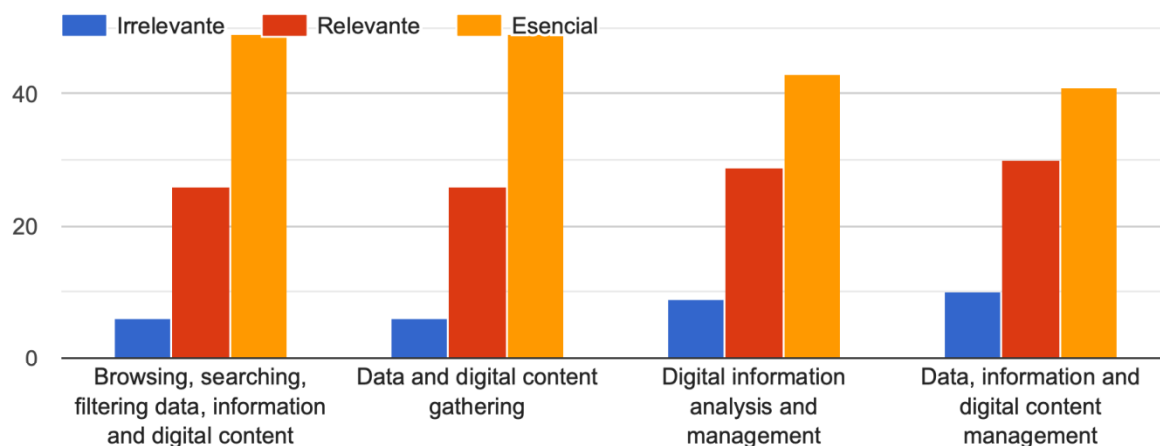
#### ITALY



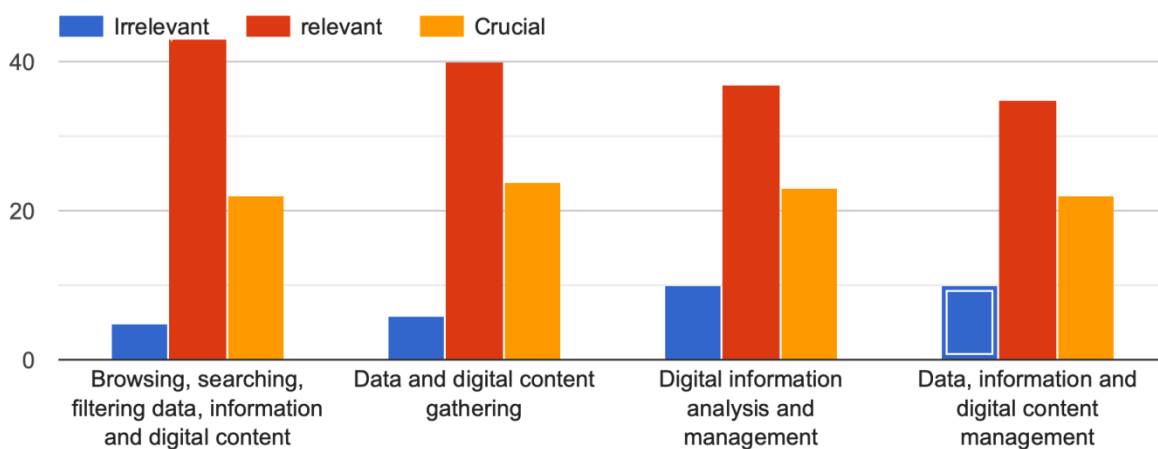
#### PORTUGAL



## SPAIN



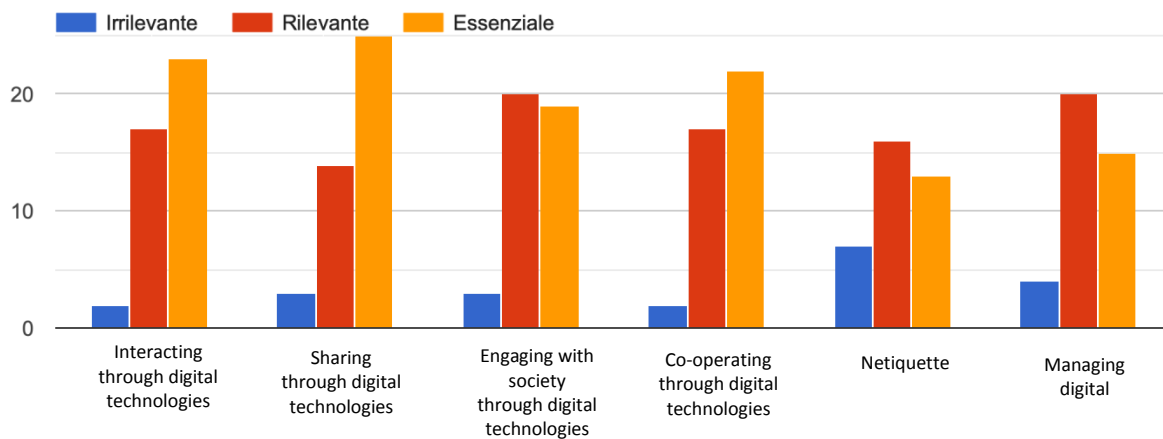
## THE NETHERLANDS



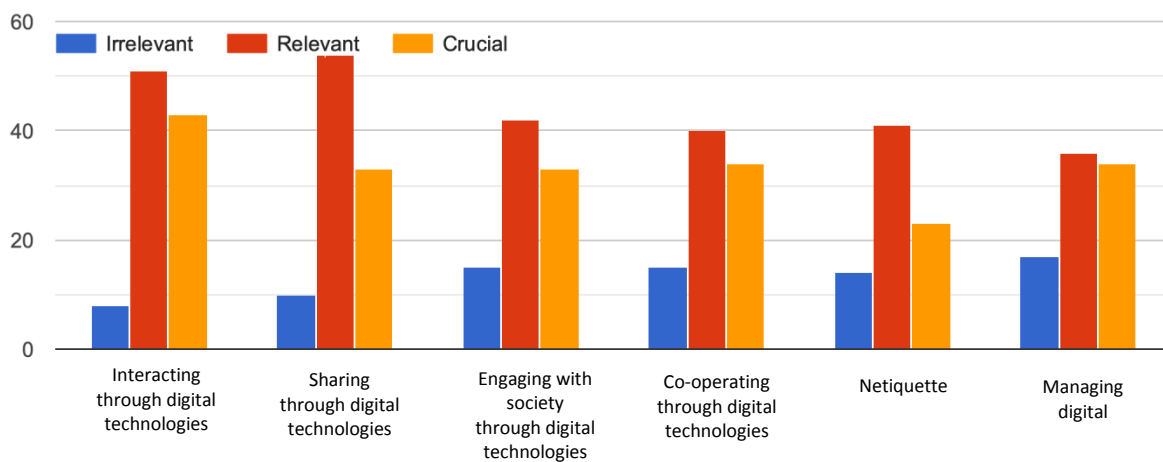
We should highlight the fact that all respondents regarded the management of digital information as highly important in the tourism industry. Very few believed it had no importance.

## 5.2 COMMUNICATION AND COOPERATION

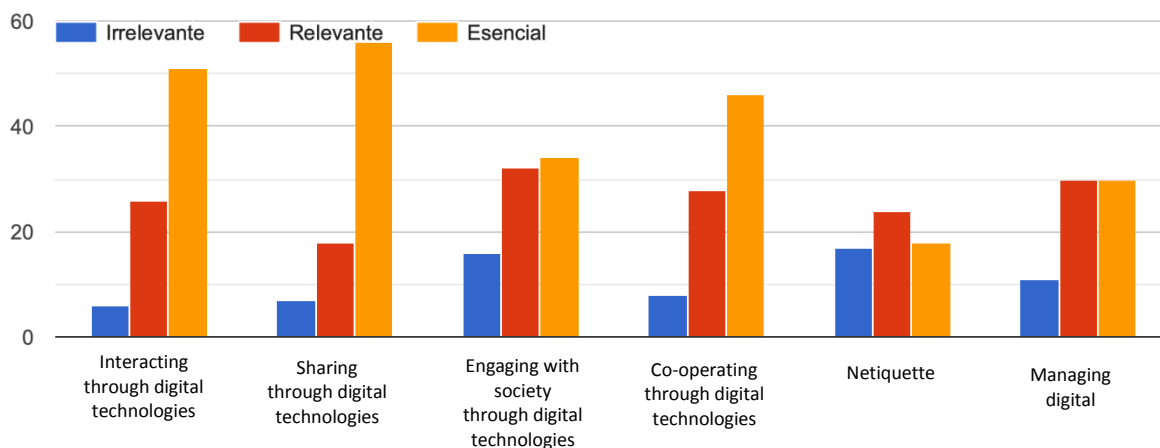
### ITALY



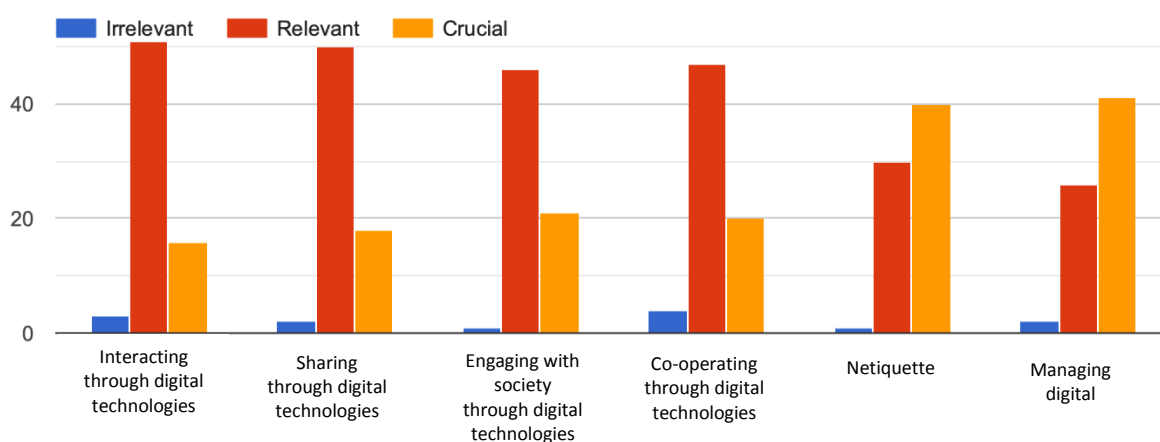
### PORTUGAL



## SPAIN



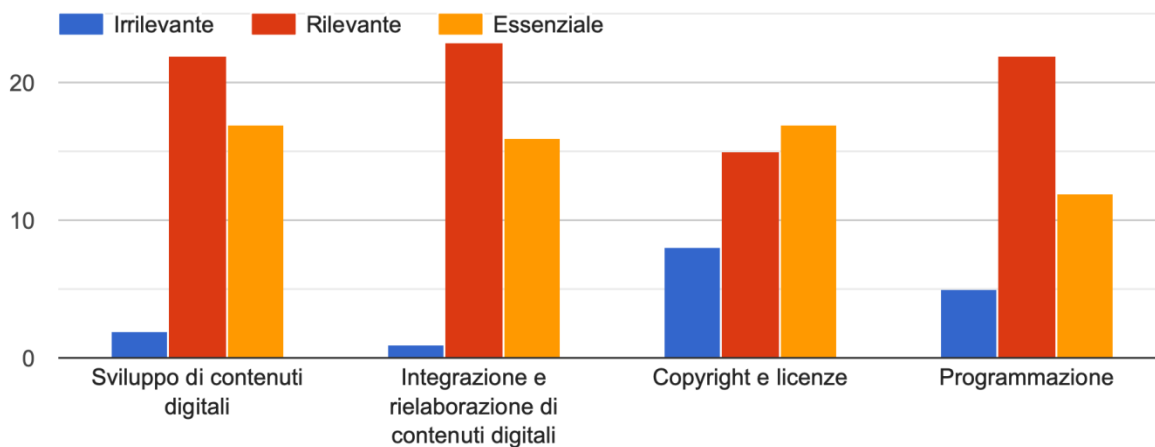
## NETHERLANDS



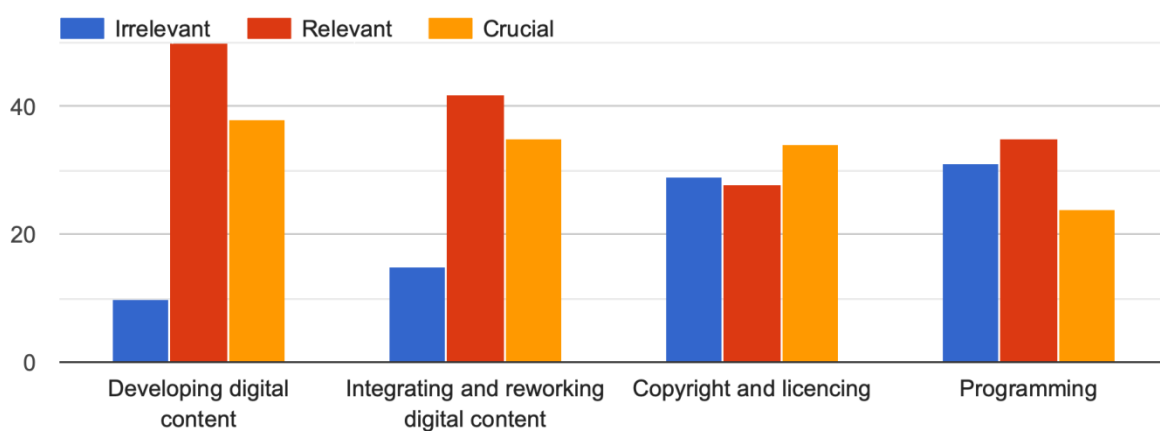
Communication and co-operation with customers and other related companies was seen as essential by the vast majority of tourism businesses in all the countries surveyed.

## 5.3 DIGITAL CONTENT CREATION

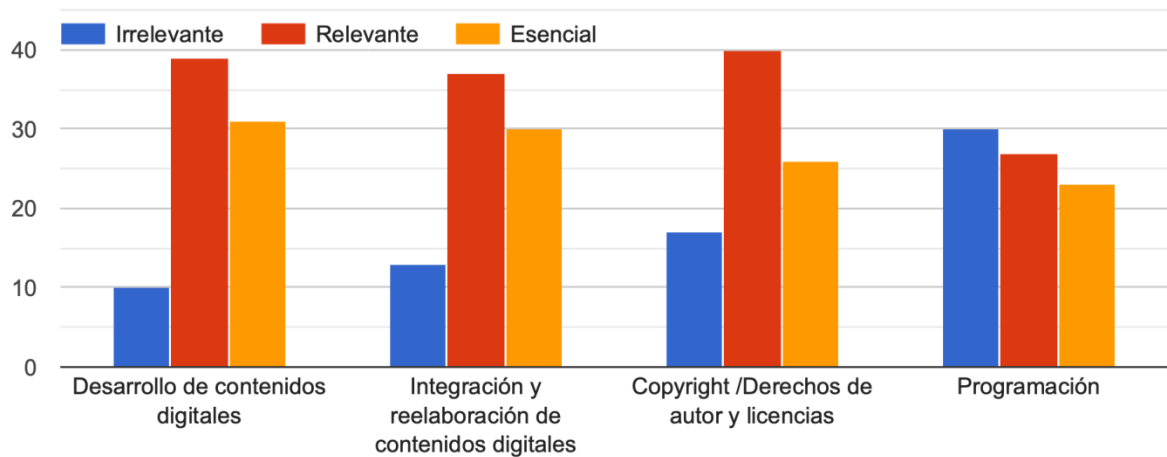
### ITALY



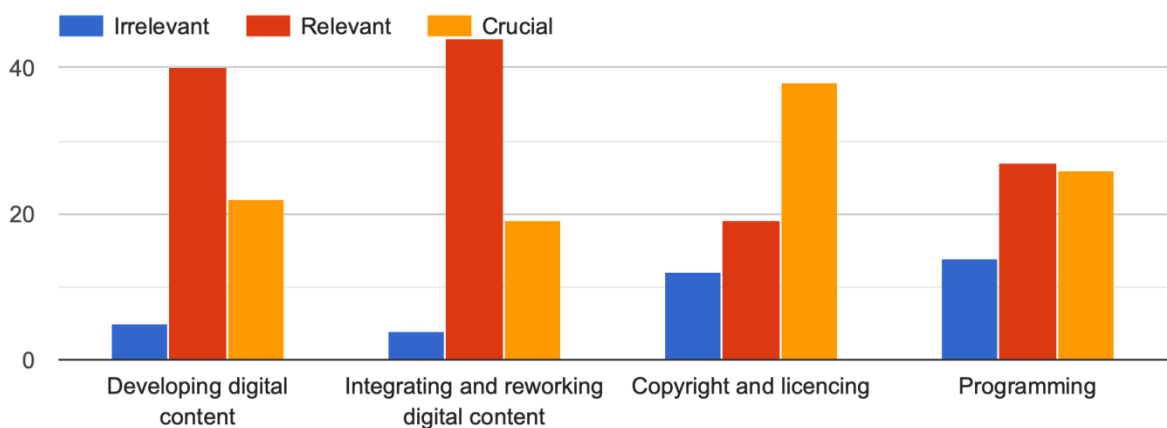
### PORTUGAL



## SPAIN



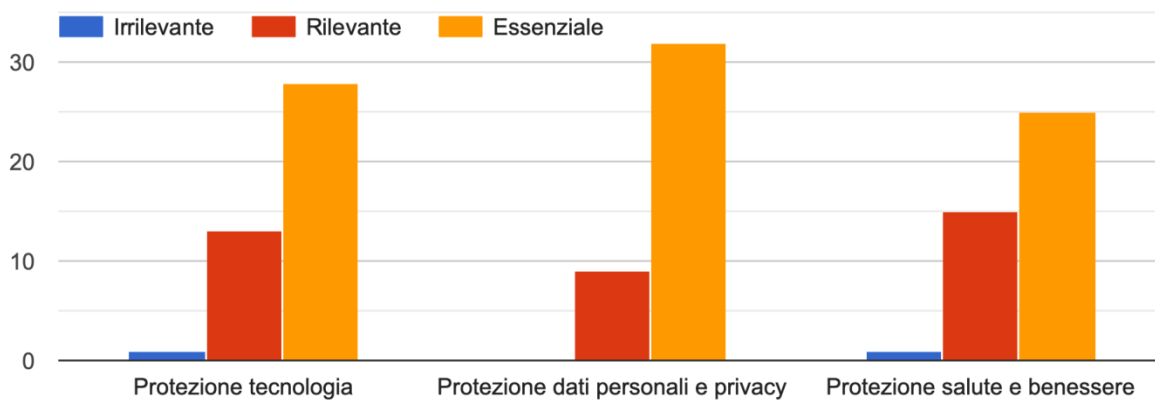
## THE NETHERLANDS



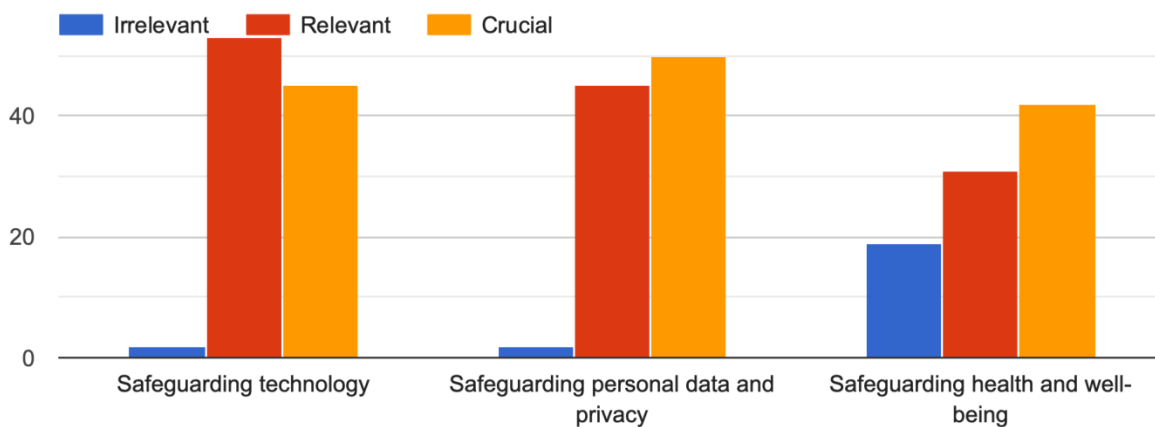
The vast majority of businesses in all the countries surveyed regarded the development and management of the digital content they had created as highly important or essential. The sole exception was in programming where the percentage of opinions regarding it as unimportant increased in all the countries surveyed.

## 5.4 SECURITY AND SAFETY

### ITALY

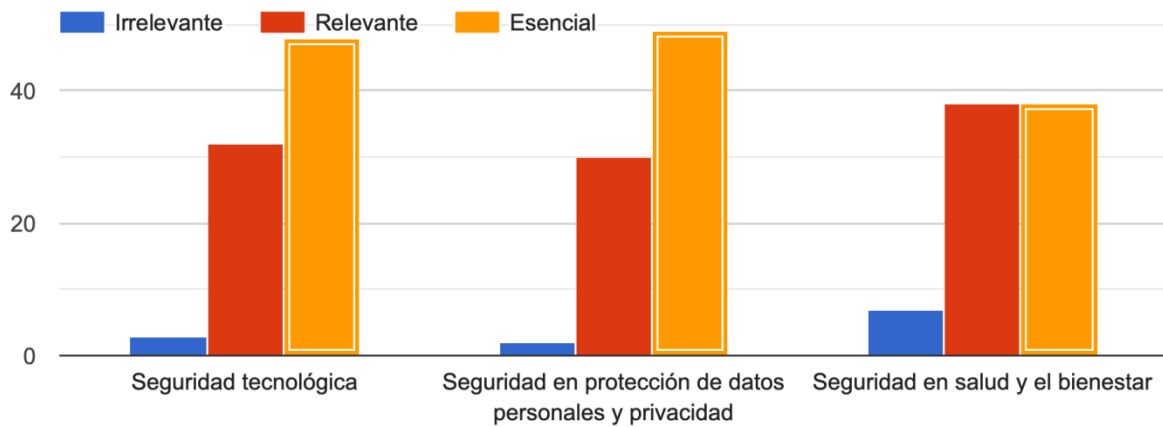


### PORTUGAL

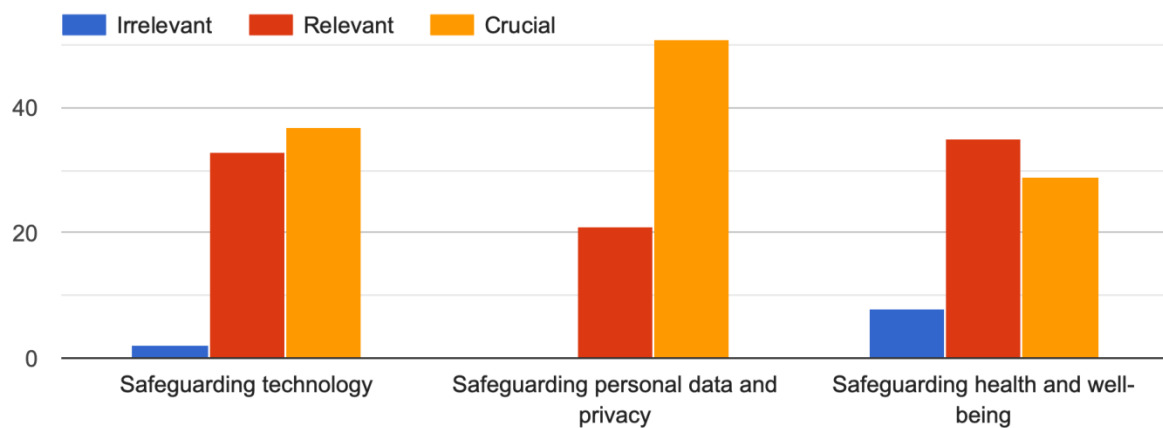




## SPAIN



## THE NETHERLANDS



Tourism businesses in all the countries surveyed were sensitive to the issues of security and privacy of information and digital content. The vast majority of respondents described the issue as important or essential. We should also mention that whilst the Dutch did not regard the issue as crucial, they did see it as important.

## COMMENTS TO SECTION 5

### THE NETHERLANDS

- Social media is not crucial for us, but it's very important nowadays
- Some questions are not very clear
- I don't understand all questions.
- All the answers are based on my needs related to my work
- What does health and wellbeing have to do with digital competences? Yes, I go to the gym. Is that it?
- Social media is very important for us
- Not all questions are very clear
- It's always good to be up to date and developing
- We have external workers in this section but it would be better to have more knowledge in these and apply it internally
- This is not relevant for each worker in the company only a few
- Not an easy survey
- Bovenstaande antwoorden zullen erg verschillen per type medewerker/The above answers will differ greatly per employee type.

## CONCLUSION - SURVEY RESULTS

The aim of this project is to develop a course to equip young people between the ages of 15 and 19 with the necessary digital skills to take their place in the tourism industry - subject to significant change over recent years. A solid command of the new information and communication technologies is essential in a sector which operates more and more on line than in person.

The survey detected a lack of digital skills amongst junior personal in all four participating countries. In addition, proficient users of digital technologies were by and large a minority in all the partner countries. The survey covered a broad spectrum of operators and age groups. It also detected industry concern for the development and protection of digital content.

The course the project proposes to develop is ideal for equipping young people interested in entering the industry with the necessary skills to ensure its future and acquit themselves well. As the survey reveals, the younger members of the industry are precisely the ones who lack the necessary training in new information and communication technologies. This course will assist to close the skills gap between junior employees and their senior counterparts.