

BRIDGES

Bring & Develop Good Education Systems

Skills catalogue in tourism sector



Co-funded by
the European Union

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor EACEA can be held responsible for them.

D2.3 – Skills catalogue in tourism sector

PROJECT INFO	
Grant Agreement No:	101129387
Call:	ERASMUS-EDU-2023-CB-VET
Acronym:	BRIDGES
Full project Title:	Bring & Develop Good Education Systems
Start Date – End Date	01/12/2023 – 30.11.2026
Project URL:	https://bridges.projectlibrary.eu/
WORK PACKAGE (WP)	
WP No, Title	2, Analysis of dual programmes, business needs and sharing Platform
WP leader	ARTES SRL
DELIVERABLE (D)	
Deliverable No, Title	2.3, Skills catalogue in tourism sector
Dissemination Level¹	Public
Nature	REPORT
Date of Delivery	28.08.2024

¹ PU = Public | PP = Restricted to other programme participants (including the Commission Services) | RE = Restricted to a group specified by the consortium (including the Commission Services) | CO = Confidential, only for members of the consortium (including the Commission Services)

Contents

1. Acknowledgements and Disclaimer	4
2. Trends in Tourism	5
2.1. World overview	5
2.2. Tourism in Latin America	12
2.3. Tourism in Argentina	17
2.4. Tourism in Bolivia	20
2.5. Tourism in Mexico	23
3. Skills needs in tourism sector.....	27
3.1. Staff shortage in tourism sector	27
3.2. Some reflection by opinion leaders and research about tourism staff shortage	30
4. The survey aimed at the entrepreneurial system	33
4.1. Results of interviews in Argentina	33
4.2. Results of interviews in Bolivia	45
4.3. Results of interviews in Mexico	57
4.1. Results of questionnaires in Argentina.....	84
4.2. Results of questionnaires in Bolivia.....	103
4.3. Results of questionnaires in Mexico	123

1. Acknowledgements and Disclaimer

This document has been produced by the BRIDGES Erasmus+ Consortium, under the editorial direction of ARTES SRL

The BRIDGES consortium comprises the following organizations:

TIBER UMBRIA COMETT EDUCATION PROGRAMME,

Italy (IT)

www.tucep.org

DIMITRA Education and Consulting

Greece (GR)

www.dimitra.gr | www.iekdimitra.gr

Artes S.r.l.

Italy (IT)

www.artesinlinea.it

Associació Empresarial L'alqueria Projectes Educatius

Spain (ES)

www.alqueriaeducatius.org

Instituto de Capacitación para el Trabajo de la Ciudad de México

México (MX)

www.oaxaca.gob.mx

CAINCOTAR (BO)

Bolivia (BO)

www.caincotar.org

AGENCIA COORDINACION TERRITORIAL ITALIA ARGENTINA

Argentina (AG)

www.corredorproductivo.net

CAMARA DE COMERCIO ITALIANA DE ROSARIO

Argentina (AG)

www.italrosario.com

UNIVERSIDAD NACIONAL DE ROSARIO – UNR

Argentina (AG)

www.unr.edu.ar



**Co-funded by
the European Union**

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor EACEA can be held responsible for them.

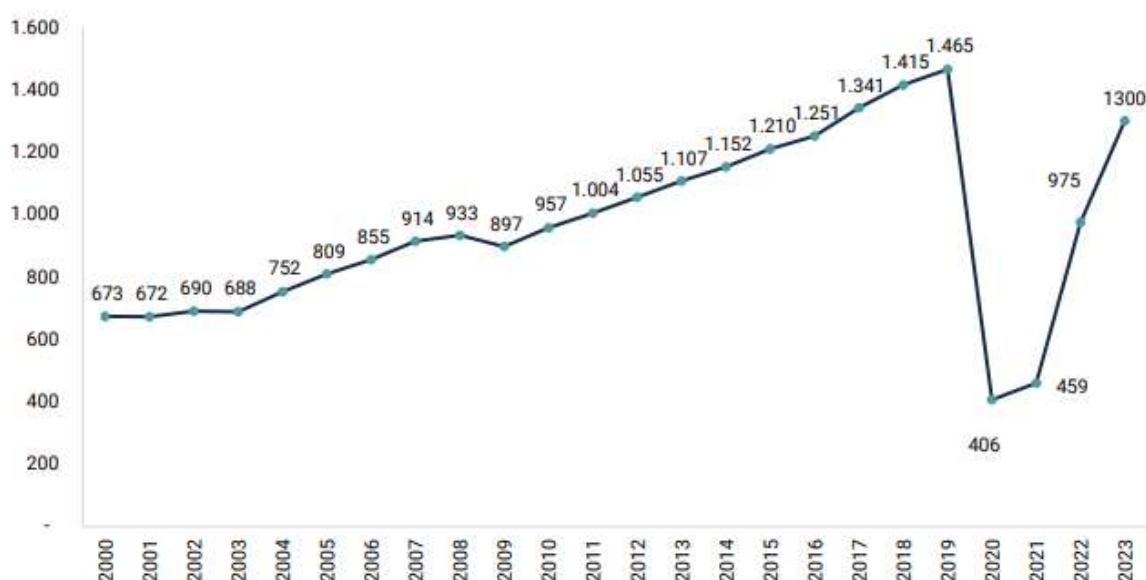
2. Trends in Tourism

2.1. World overview

In 2023, international tourism recorded a 33.4% growth in demand to 1,300 million arrivals, of which almost 55% were concentrated in Europe, 18.2% in Asia Pacific, 15.4% in the **Americas**, 6.7% in the Middle East and 5.1% in Africa. This trend has allowed progress to be made in the recovery process to pre-pandemic levels, reaching almost 89% of international tourist arrivals in 2019. At a territorial level, the recovery is complete for the Middle East, which has surpassed them by 22%, while Asia-Pacific is still far behind (-34.6%). Between these two extremes are other areas such as Africa, which recovered 96.1% in 2023, while Europe reached 95.6% and the Americas 91.3%.

The direct GDP of tourism reached pre-pandemic levels in 2023, totaling some \$3.3 trillion, equivalent to 3% of global GDP. Considering the entire Travel & Tourism sector, the direct, indirect and induced economic impact in 2023 was \$9.9 trillion, 9.1% of global GDP (Travel Tourism Economic Impact, WTTC), up 23.2% from 2022 but still lower than the 2019 figure (-4.1%). In terms of employment, 330 million jobs are attributed to the sector, 10% of all jobs, -1.4% of 2019.

International Tourist Arrivals Worldwide (mln)



Elaboration of SRM on UNWTO data

With reference to 2024, UNWTO first-quarter data are available showing that international arrivals have reached 97% of the first-quarter 2019 levels. Specifically, with 285 million arrivals, there has been an almost complete recovery of pre-pandemic numbers and a 20% growth over the same period in 2023. Several factors underpin the positive trend and range from the continued desire to travel, the opening of Asian markets, improved air connectivity and visa facilitation. The Middle East continues to be characterized by significant demand growth, leading it to exceed the Q1 2019 level by 36% in Q1 2024. Europe, for the first time, surpassed Q1 2019 levels (+1% compared to Q1 2019), Africa recorded 5% more arrivals, while the Americas almost reached pre-pandemic numbers (99%). Finally, the recovery also continues in Asia and the Pacific where demand reaches 82% of pre-pandemic levels in Q1 2024. Looking ahead, the latest UN Tourism Confidence Index shows a positive outlook for May-August 2024.

However, adverse economic and geopolitical factors continue to undermine the full recovery of international tourism and confidence levels. According to the global survey (May 2024) to a group of United Nations tourism experts on the impact of Covid-19 on tourism and the expected recovery time, among the main factors weighing on the recovery of international tourism are rising transport and accommodation costs and the economic environment, which remain the most worrying elements, albeit to a lesser extent than in the previous year's survey (May 2023). To these must be added new factors such as extreme weather events and geopolitical crises and conflicts (such as Hamas/Israel). Concerns about staff shortages are also on the rise.

International Tourism Arrivals

Area	2023 mln	%	variations by 2023		variations on 1st trimester 2024	
			compared to 2022	compared to 2019	compared to 1st trimester 2023	compared to 1st trimester 2019
Europe	709,4	54,6	16,40%	-4,40%	10,40%	1,50%
Asia and the Pacific	237,2	18,2	154,20%	-34,60%	60,80%	-18,10%
Americas	200,2	15,4	27,40%	-8,70%	10,60%	-1%
Middle East	87	6,7	28,30%	22%	3,60%	36,10%
Africa	66,3	5,1	41,20%	-3,90%	12,60%	5,40%
World	1300	100	33,40%	-11,20%	19,80%	-2,90%

Elaboration of SRM on UNWTO data

Looking ahead to 2024 as a whole, a full recovery in international demand is estimated, with tourist arrivals growing by 2% compared to 2019. A consolidation of the economic impact of the Travel & Tourism sector is also expected, with an estimated overall impact of 10%, reaching \$11.1 trillion in 2024 and employment at 348 million, 10.4% of total employment.

International arrivals in top ten Countries

2023			2019		2019/2023
Rank	Country	millions	Rank	millions	Growth
1°	France	100	1°	90,9	10%
2°	Spain	85,2	2°	83,5	2%
3°	Italy	67,9	3°	65	4,40%
4°	USA	66,5	4°	79,4	-16,30%
5°	Turkey	55,2	5°	51,2	7,80%
6°	Mexico	42,2	6°	45	-6,30%
7°	United Kingdom	37,2	7°	39,4	-5,60%
8°	Germany	34,8	8°	39,6	-12%
9°	Greece	32,7	9°	31,4	4,50%
10°	Austria	30,9	10°	31,9	-3,10%

Elaboration of SRM on UNWTO data

Having analysed the data, let us look at **some trends that would seem to characterise the tourism phenomenon at least in the short term.**

It seems that 2024 is witnessing a fascinating evolution in global tourist preferences and behaviors.

The allure of urban landscapes is rising, with **city breaks** becoming increasingly sought-after for their vibrant culture and bustling energy. Meanwhile, the pressing narrative of **climate change** is reshaping future itineraries, as cooler climates begin to draw more visitors, offering a respite from the heat intensified by global warming.

Family vacations are experiencing a revival, signaling a renewed appreciation for cherished moments spent with loved ones. When it comes to **luxury** vs. budget travel, travelers are willing to spend more where they see value. Otherwise, they are combating inflation by choosing cheaper accommodations or purchasing packages.

Television and cinema continue to captivate travel enthusiasts. A staggering number of travelers are now planning their next adventures inspired by the locales of their favorite movies and series, underscoring the profound impact of storytelling on travel choices.

Popular destinations are becoming more diverse. Nations like the Dominican Republic, **Mexico**, Greece, and Colombia are climbing the ranks of traveler hotspots, thanks to a blend of safety, affordability, and improved connectivity.

Lastly, **off-the-beaten-path destinations** like the secluded corners of Peru, the historic mystique of Tangiers, the untouched wilderness of Argentine Patagonia, and the tranquil waterways of New Zealand are emerging as sanctuaries for those seeking solace in togetherness and the beauty of nature's embrace.

The essence of domestic travel, where journeys begin and end within the same country, is undergoing a remarkable transformation. According to a recent "Cultivating Luxury" market trends report by PoB Hotels, the UK's domestic travel scene in 2024 will be dominated by gastronomy-inspired getaways. An overwhelming 82% of domestic travelers are drawn to culinary experiences, making it the highlight of their journeys.

The report also reveals an increase in travel plans among affluent individuals, with over half aiming for "three or more" leisurely escapes within the UK—a significant rise from the previous year. Additionally, 27% of this demographic is looking forward to extended stays of "three or more nights" on their UK adventures, indicating a deeper exploration of local charms.

In light of recent global events, including geopolitical tensions and economic pressures like rising travel costs and inflation, a shift towards more proximate destinations is helping balance domestic and international travel. This trend is expected to bolster tourism in regions such as the US, Europe, and Africa. Countries like Kenya, Gambia, Seychelles, and soon Rwanda are enhancing this appeal by easing visa protocols for fellow African continent explorers, promising a richer tapestry of cultural exchanges and experiences.

Moreover, the resurgence of major festivals and events on a global scale promises a plethora of unforgettable experiences, all accessible across international borders without the need for lengthy flights.

Other reflections on trends come from a series of research on possible developments in the tourism phenomenon. First of all, more and more tourists are forgoing beach relaxation in favour of unique, authentic and personalised experiences, be it nature hikes, good food or wellness moments, which have increased by more than 10 per cent over 2019. In addition, the climate crisis and tourists' desire to interact with the local community could mean fewer but potentially longer long-haul trips and more local short-haul trips. 66% of tourists today prefer to travel to places they feel are familiar and safe, so tour operators must strive to generate in travelers the desire to discover new destinations.

According to estimates by the WTM Global Travel Report², in association with Oxford Economics, leisure travel in 2023 was 10% lower than its previous peak in 2019, yet the value has grown. By 2033, leisure travel spending is expected to more than double pre-pandemic levels. A driving factor, says the report, will be the significant increase in the number of households in China, India and Indonesia able to afford international travel. Indeed, the World Travel Market London 2023³ found that the 'travelling class' in China will almost double over the next 10 years.

The future of tourism and the tourist market is poised to evolve significantly, shaped by emerging trends and shifting traveller preferences. Here are some potential developments we might see:

² <https://hub.wtm.com/wtm-travel-reports/>

³ <https://www.wtm.com/london/en-gb.html>

- **Increased travel costs:** Travelling will become increasingly expensive, there will be a tendency to take fewer but potentially longer long-haul trips and more local short-haul trips. This is what emerges from authoritative research by the World Tourism Organisation and major trade fairs such as the World Travel Market⁴ in London and ILTM5 in Cannes.
- **Sustainability at the forefront:** With growing environmental awareness, sustainable travel will become even more central. Tourists are expected to increasingly opt for eco-friendly accommodations, low-carbon transport options, and experiences that contribute positively to the local ecosystem and community. In 2024, regenerative tourism, nature-based ecotourism, support for local communities, eco-friendly lodging, and low-impact transportation—especially trains—will take center stage. This aligns with the findings of the Sustainable Tourism Forum and the Global Sustainable Tourism Council⁶, which sets international sustainability standards. From environmental respect to self-care, sustainable travel will encompass a holistic approach.
- **Advanced technologies enhancing travel:** The integration of advanced technologies like AI, VR, and IoT will enhance the travel experience, offering personalized itineraries, virtual tours, and seamless connectivity. Blockchain could also play a role in secure, transparent bookings and loyalty programs. According to Richard Brekelmans, Area Vice President South Europe of Marriott International, “Artificial intelligence (AI) will become a key tool in vacation planning, considering that one-fifth of people (22%) are already using it for this purpose.”
- **The demand for unique, immersive experiences:** The desire for unique, immersive experiences will continue to rise. Travelers will seek activities that offer a deep dive into local cultures, cuisines, and traditions, moving away from generic tourist attractions towards more authentic, off-the-beaten-path experiences. Passion-driven tourism is on the rise, with a significant expansion in outdoor and slow tourism. Shopping tourism is making a comeback, with Italy and France being favored destinations. Winetourism is experiencing exponential growth, and culinary tourism is evolving, focusing more on genuine sustainability. Additionally, astrotourism, or star bathing—traveling to observe astronomical phenomena in areas free from pollution, crowds, and traffic—is gaining popularity, allowing people to spend hours watching stars, planets, and constellations.
- **The focus on health and wellness:** The focus on health and wellness will intensify, with tourists seeking destinations that offer wellness retreats, spa experiences, outdoor activities, and culinary tours centered on healthful eating. In the realm of

⁴ <https://www.wtm.com/london/en-gb.html>

⁵ <https://www.iltm.com/cannes/en-gb.html>

⁶ <https://www.gstcouncil.org/sustainable-tourism-forum-gstc-st-course-italy/>

wellness, key trends for 2024 include the need to disconnect and sleep tourism. According to data, 50% of travelers prioritize "good rest," and 44% are planning to organize sleep retreats in 2024.

- **The growth of 'bleisure' travel:** The blend of business and leisure travel, known as 'bleisure,' is expected to grow, driven by remote work trends. Professionals will extend business trips for leisure purposes, seeking destinations that cater to both productivity and relaxation.
- **Rise of microcations and staycations:** Shorter, more frequent trips, or 'microcations,' along with staycations, will become popular choices for travelers seeking quick breaks without the hassle of long-distance travel. Another emerging trend is 'dupe destinations,' which are alternative spots that offer similar experiences to classic vacation destinations.
- **Attraction of digital nomad visas:** With the rise of remote working, destinations offering 'digital nomad visas' and facilities catering to long-term stays for remote workers will attract a new wave of travelers.
- **Accessible travel for all:** Greater emphasis will be placed on making travel accessible to everyone, including people with disabilities. Efforts will ensure that accommodations, attractions, and transportation are inclusive and barrier-free.
- **Support for cultural and historical preservation:** Tourism that supports the preservation of cultural and historical sites will gain traction, with more tourists participating in conservation efforts and educational tours.
- **Roots tourism:** Roots tourism is emerging, generating 8 billion dollars annually. This trend involves first-, second-, and third-generation tourists returning to their countries of origin.
- **Prioritizing safety and stability:** In the wake of global challenges, including health crises and geopolitical tensions, tourists will prioritize destinations known for their safety, stability, and robust health infrastructure.

New ways of categorizing tourist clusters are emerging:

- **The Enduring Explorer:** These travelers have an insatiable desire to visit new places, regardless of the pressures they face. According to SiteMinder's Changing Traveller Report, 57% of travelers intend to travel more than they did the previous year, while 91% will travel at least the same amount. Additionally, the number of people planning to travel "internationally only" has doubled.
- **The Digital Dependent:** These travelers are characterized by the time they spend online, which now exceeds six-and-a-half hours a day globally. Travel planning is closely linked to this trend. Worldwide, 70% of travelers admit that social media

influences how they discover accommodations, while 50% are open to using AI to generate accommodation recommendations.

- **The Memory Maker:** These travelers are becoming more intentional about cultivating enriching and memorable experiences on their trips.
- **The Conscious Collaborator:** These travelers no longer see their accommodation as just a bed and a roof over their heads. They want to collaborate with their chosen property to enjoy a stay that feels tailor
- ed to them. In fact, 88% said they would be happy to hear more from their accommodation, with 35% keen on receiving personalized offers.

Finally, according to the New York Times' annual list, there are 52 must-visit destinations around the world, ranging from picturesque and remote locations to cities and memorable experiences. Notably, at the top of the recommended travel list is the Path of Totality, a route spanning 16,000 km from **Mexico** to Canada.

2.2. Tourism in Latin America

The unstable economic and political situation in many Latin American countries has impeded the growth of the travel and tourism sector in the region. However, the region's appeal as a travel destination has actually increased over the past decade. Between 2010 and 2019, international tourist arrivals in the region grew by roughly 60 percent, although the COVID-19 pandemic caused a significant reversal in this trend. Despite this setback, the United States remains the primary source of tourism for the region. In 2021, nearly 40 million U.S. citizens traveled to Latin America and the Caribbean⁷.

The World Economic Forum's Travel & Tourism Development Index 2024 highlights the mixed progress of Latin American economies in developing their travel and tourism sectors since the pandemic. The index methodology combines quantitative statistical data from reputable international sources and an executive opinion survey of business leaders across different countries. A total of 119 economies were evaluated using 102 key indicators grouped into five categories: enabling environment, travel and tourism policy, infrastructure and service, tourism resources, and sustainability. These categories measure how attractive and prepared a country is to tap into its tourism potential and positively impact society.

Globally, the United States topped the ranking, followed by Spain, Japan, France, and Australia as the five most competitive economies in travel and tourism. On average, the Americas region underperformed compared to the global average.

In **Latin America**, Brazil (26) and Chile (31) achieved the highest scores, followed by Mexico (38), Argentina (49), Colombia (50), and Costa Rica (51). Peru (62), Panama (63), and the Dominican Republic (64) occupied lower positions.

While some nations have made progress in areas such as the environmental sustainability of tourism, the region as a whole continues to face significant obstacles that limit competitiveness in this lucrative sector. Among the main challenges identified are:

- Poor business and security conditions, including high levels of organized crime and violence in several countries.
- Need for greater conservation efforts to protect key biodiversity areas and endangered species.
- Lag behind in broad tourism growth enablers, such as infrastructure, **human capital**, and technological adoption.

Latin America's performance in the Travel & Tourism Development Index 2024

⁷ <https://www.statista.com/statistics/909289/number-visitors-united-states-latin-america-sub-region/>

Posición	País	Puntaje	Cambio en posición respecto al 2019
26	Brasil	4.41	8
31	Chile	4.33	4
38	México	4.26	-6
49	Argentina	4.1	-2
50	Colombia	4.08	6
51	Costa Rica	4.08	4
62	Perú	3.9	7
63	Panamá	3.9	-6
64	Rep. Dominicana	3.88	1
71	Uruguay	3.79	-3
80	Ecuador	3.66	-6
92	Paraguay	3.47	0
94	Bolivia	3.45	3
97	El Salvador	3.43	4
100	Guatemala	3.42	-5
103	Venezuela	3.34	-5
108	Nicaragua	3.24	-2
111	Honduras	3.19	-3

Source: World Economic Forum data.

Mexico stands out as the main driving force for the Latin American tourism sector. Even during the COVID-19 pandemic, Mexico led the region in international tourism by a significant margin, attracting more tourists than all other countries in the region combined. Consequently, Mexico was the leading contributor to Latin American inbound travel spending that year. Foreign visitors in Mexico spent a total of around 11.5 billion U.S. dollars, nearly four times the amount spent in Brazil, the leading travel market in South America.

While Mexico draws the highest number of international visitors in the entire Latin American region, South America has increasingly attracted budget travelers. According to the latest Travel and Tourism Development Report, countries in this subregion scored highly on the tourism price competitiveness index. In 2022, seven of the ten most affordable cities for backpacking in Latin America were located in South America, with Quito, Ecuador, topping the list.

In 2023, Mexico was the most visited destination by international tourists in Latin America, exceeding 42 million arrivals⁸.

The region's Travel & Tourism sector is heavily dependent on domestic travelers. In 2023, domestic spending totaled USD 417.4 billion, accounting for 82.8% of internal Travel & Tourism expenditures. In contrast, spending by international travelers, including intra-regional travelers, stood at USD 86.5 billion, making up the remaining 17.2%. The sector can also be categorized based on the purpose of travel: leisure versus business. Spending by

⁸ <https://www.statista.com/statistics/305482/latin-american-countries-with-the-most-international-tourist-arrivals/>

leisure travelers comprised 89% of total Travel & Tourism expenditures, while business travelers accounted for 11%. These metrics are crucial indicators for assessing the sector's overall health⁹.

About the share of total tourism contribution to GDP in Latin American countries, in 2022, Mexico was the most tourism-dependent economy in Latin America, with the sector directly and indirectly accounting for approximately 14,4% percent of its gross domestic product (GDP). Argentina is the third country, with tourism incidence in GDP of 8.8% and Bolivia 5,5%.

Travel & Tourism's Total Contribution to GDP (2023)

Rank	Country	US\$ BN	% Share of Whole Economy
1	Mexico	261.61	14.4%
2	Brazil	165.45	7.7%
3	Argentina	58.33	8.8%
4	Chile	32.53	9.7%
5	Peru	18.27	6.8%
6	Colombia	17.78	4.7%
7	Venezuela	15.20	6.6%
8	Panama	12.89	15.2%
9	Uruguay	11.59	14.4%
10	Costa Rica	8.23	9.3%
11	Ecuador	5.47	4.6%
12	Guatemala	5.42	5.4%
13	El Salvador	4.95	14.5%
14	Honduras	3.59	10.5%
15	Bolivia	2.55	5.2%
16	Paraguay	2.02	4.7%
17	Nicaragua	1.68	9.9%
18	Belize	0.95	30.8%
19	Guyana	0.40	2.3%
20	Suriname	0.08	2.3%

Source: *Unlocking Opportunities for Travel & Tourism Growth in Latin America*, WTTC, June 2024

⁹ *Unlocking Opportunities for Travel & Tourism Growth In Latin America*, WTTC, June 2024

In 2024, the Travel & Tourism sector's contribution to the regional economy is projected to increase by 3.4% year-on-year, supporting an additional 1 million jobs. International visitor spending is expected to rise by 10.2% to reach USD 95.3 billion, surpassing its 2019 value.

By 2024, Travel & Tourism in Argentina, Costa Rica, and Uruguay is anticipated to fully recover to 2019 levels of economic contribution. Ecuador, Paraguay, Peru, Suriname, and Venezuela are projected to recover fully after 2024. Projections suggest that these economies will have all recovered or surpassed 2019 levels by 2025, except for Suriname and Venezuela, which are expected to take longer.

Over the next decade (2024 to 2034), Travel & Tourism's total contribution to GDP in Latin America is forecasted to grow at an annual rate of 2.7%, slightly faster than the 2.2% CAGR projected for the region's wider economy. Consequently, Travel & Tourism's total economic contribution is expected to reach USD 852 billion by 2034, equating to 10.3% of the region's overall economy. During the same period, the number of jobs supported by the sector is expected to increase by 5.94 million, reaching 31.7 million. This would mean that the sector's share of all jobs will be approximately 10.6%, or 1 in 10 jobs.

Travel & Tourism's Total Contribution to GDP - Forecast growth for next ten years

Country	2024 - 2034 CAGR
Guyana	7.0%
Paraguay	6.0%
Costa Rica	5.3%
Suriname	5.0%
Honduras	4.9%
Peru	4.6%
Bolivia	3.7%
Guatemala	3.5%
Panama	3.5%
Nicaragua	3.4%
Argentina	3.3%
Colombia	3.0%
Chile	3.0%
Uruguay	3.0%
Ecuador	3.0%
Mexico	3.0%
Belize	2.8%
El Salvador	1.9%
Venezuela	1.8%
Brazil	1.4%

Source: Unlocking Opportunities for Travel & Tourism Growth in Latin America, WTTC, June 2024

The projected annual growth rates for the next ten years for all the Latin American countries evidences that Guyana, Paraguay, and Costa Rica are forecasted to have the strongest growth potential in the next decade. Mexico is expected to grow at an annual rate of 3.0%, while Brazil is forecasted to grow at an annual rate of 1.4%, the lowest CAGR among the countries in the region.

2.3. Tourism in Argentina

Bordered by five countries, the Atlantic Ocean, and the Drake Passage, Argentina covers approximately 2.8 million square kilometers in the southern part of South America. It is the second-largest country in Latin America and one of its most populous. The country's capital, Buenos Aires, with its two major airports—Ezeiza and Aeroparque—is the primary entry point for international air travelers. By the end of the 2010s, Argentina welcomed around seven million international visitors annually. However, the COVID-19 pandemic severely disrupted the tourism sector.

Argentina's diverse geography and globally renowned wine industry have contributed to the growth of its international tourism sector. The influx of foreign visitors can partly be attributed to the country's air travel infrastructure. Aerolíneas Argentinas, the national carrier, was one of the leading airlines in Latin America in 2019, and passenger traffic to Argentine airports grew by four percent that year¹⁰. Nonetheless, in April 2020, the onset of the COVID-19 pandemic led to a complete halt in international air travel to Argentina, mirroring the challenges faced by the global tourism industry.

In 2021, Argentina scored four out of seven possible points on the Travel and Tourism Competitiveness Index, matching the scores of Panama and Colombia. In contrast, Mexico and Chile achieved the highest regional scores with 4.3 points. That year, Argentina's strongest sub-index was the conditions supporting travel and tourism, which encompass factors such as security, the business environment, communication technologies, and health and hygiene. However, the country still needed to improve its tourism infrastructure.

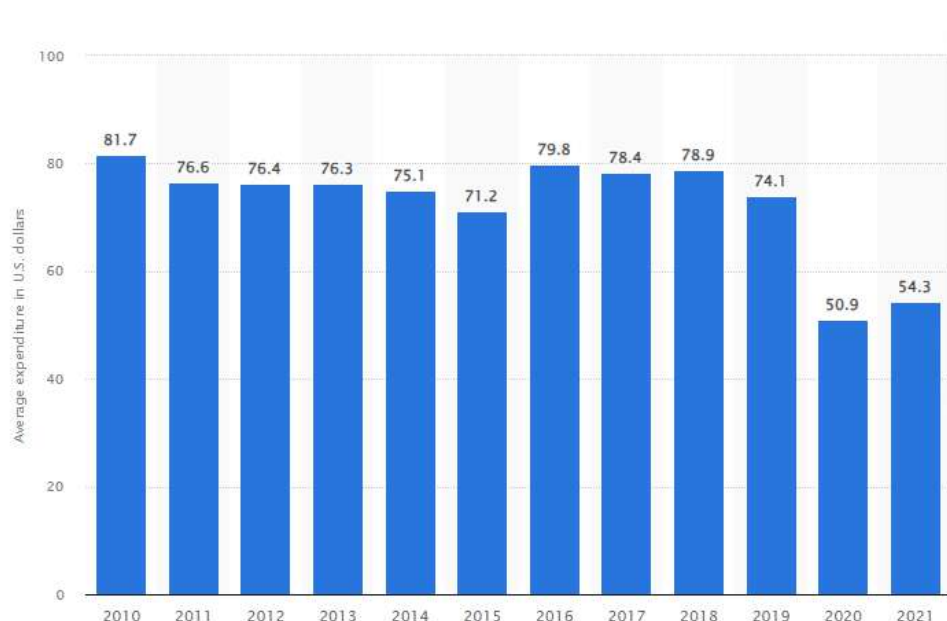
Despite its vast territory and numerous tourist attractions, Argentina's tourism sector was severely impacted by the COVID-19 pandemic. In 2021, the country welcomed fewer than 300,000 international tourists, including about 45,000 from Brazil, and a similar number from the U.S. and Canada.

The travel and tourism sector contributed nearly 34 billion U.S. dollars to Argentina's gross domestic product (GDP) in 2021, representing an increase of roughly 39 percent compared to the previous year. This growth came after a significant decline in 2020, when Argentina's main international airports recorded only 630,000 international inbound passengers due to travel restrictions.

In 2021, Argentine travelers spent an average of approximately 54 U.S. dollars per day on their trips abroad, showing a modest increase from the previous year when the average daily expenditure was around 51 U.S. dollars. At the start of the past decade, Argentine outbound tourists spent more per day compared to the end of that period.

¹⁰ <https://www.statista.com/statistics/882120/argentina-passenger-traffic-airports-growth/>

Average daily expenditure of international tourists in Argentina



Source: <https://www.statista.com/>

Ranking among the top wine producers worldwide, Argentina's wine vineyards are a top destination for travelers from all over the world.

Internal tourism (residents) is very important not only because the proportion of inhabitants who carry out tourism activities, but also because most people that carry out these activities in the territory national are residents. During 2019, tourism internal amounted to about 50 million visits, 27 million tourists and 23 million hikers.

Internal tourism



Source: ILO elaboration on data of Tourism Ministry

The guiding axes of the “**Plan Federal Estratégico de Turismo Sustentable 2025**” are economic development with social inclusion and the conservation of the national tourism heritage, its objectives being:

- Implement an environmentally friendly tourism development model that meets present needs, without compromising the capacity of future generations.
- To achieve a better quality of life for all inhabitants, guaranteeing respect for the culture, identity and values of the host communities.
- Develop continuous quality improvement, based on the commitment of all actors and the renewal of management and production methods.
- To promote the generation and balanced distribution of domestic tourism income and international economic surpluses generated by inbound tourism.

The Plan is based on the following strategic guidelines:

- Regionalisation of tourism development. Each tourism region carries out participatory planning, based on its social, environmental, political-institutional and economic particularities, in order to give uniqueness to tourism products and destinations.
- Tourism as a driver for the growth, development and conservation of Protected Areas. Recreational and leisure activities are complemented by the conservation of biodiversity and habitat, which translates into the generation of public use plans and the development of programmes such as ‘Senderos de Argentina’ (Trails of Argentina).
- Consolidation of public investment and incentives for private investment, in agreement with provinces and municipalities.
- Establishment and control of sustainable growth thresholds for destinations.
- From data to knowledge. It is necessary to build bodies that generate understanding of tourism phenomena.

2.4. Tourism in Bolivia

In Bolivia, the Travel & Tourism market is expected to reach USD 525.60 million by 2024, with an anticipated annual growth rate (CAGR 2024-2029) of 5.44%. This growth is projected to result in a market volume of USD 685.10 million by 2029.

Turnover from tourism sector



Notes: Data was converted from local currencies using average exchange rates of the respective year.

Source: <https://www.statista.com/>

The largest segment of Bolivia's Travel & Tourism market is the Package Holidays sector, which is forecasted to reach USD 327.10 million by 2024. By 2029, the number of users in the Package Holidays sector is expected to total 1.96 million. User penetration in this segment is projected to increase from 19.6% in 2024 to 25.5% by 2029. The average revenue per user (ARPU) is anticipated to be USD 213.10.

In Bolivia's Travel & Tourism market, 64% of total revenue is expected to be generated through online sales by 2029. Globally, the United States is projected to generate the highest revenue in the Travel & Tourism market, with USD 214 billion in 2024.

In terms of the trade balance, the tourism sector has consolidated itself as the third most important source of foreign exchange earnings from exports of goods and services (IBCE, 2022), representing, on average, between 10 and 15% of total exports in the last two decades. It is also worth noting that, as a consequence of the border closures due to the pandemic, domestic tourism began to gain importance in the last five years, with more than 3 million visits registered in 2023, generating revenues of close to USD 300 million.

In addition, the Bolivian tourism sector is an important employer and income generator for women, in stark contrast to the heavily male-biased extractive sectors¹¹. Similarly, tourism is a low greenhouse gas generating sector compared to primary extractive activities, as well as organically promoting the protection of biodiversity, which makes it a potential driver of sustainable development in Bolivia.

Tourism in Bolivia has found its main strength in a variety of natural and cultural attractions, which have been gradually gaining international relevance. Peru's tourism boom (following the dismantling of the Shining Path terrorist group and the successful promotion of its gastronomy) has had a positive influence on this regional development.



Source: <https://www.statista.com/>

The tourism sector in Bolivia has exhibited significant dynamism over the last two decades, interrupted only by the Covid-19 pandemic, although by 2023 there are already signs of a solid recovery. Despite the growing relevance of this sector, the empirical evidence developed through panel data on the sector's contribution to the country's economic growth is still modest. Similarly, the main actors in the sector recognise - based on surveys of key actors in the sector - the sector's potential but identify a large number of challenges that constrain its development.

There are several reasons for this, but the absence of a coherent and consistent public policy to promote and strengthen the sector over time is one of the main weaknesses at present. As a result, the scarce tourism infrastructure (e.g. accommodation, recreation, security and

¹¹ Andersen, L., A. Medinaceli y E. Pacheco (2022). Turismo como Motor del Desarrollo Sostenible e Inclusivo en Género en Bolivia. Boletín de Inteligencia Turística - BIT 01-22, UPB.

signage) and the provision of quality services (transport, basic services, communications) is insufficient, especially in natural destinations.

Considering that competition in the region's tourism offer is becoming increasingly intense, it is necessary and urgent to prioritise the strengthening of the Bolivian tourism sector under a public-private approach that encourages investment and strengthens linkages with the country's productive sectors in order to generate higher levels of income and wealth.

In this context, the following aspects should guide sectoral public policy:

- Design and implementation of sectoral regulations to raise tourist safety standards and the overall quality of services. This requires efficient and technical co-ordination between national and sub-national competencies.
- Development of tourism infrastructure and conducive to tourism under public-private.
- Development of tourism and tourism-related infrastructure under public-private schemes, evaluating the possibility of offering fiscal incentives to encourage investment and the relationship with the rest of the national productive fabric.
- Development and implementation of a 'green' country brand to guide the national tourism strategy for the next decade, being this dimension where Bolivia enjoys its main strengths. Indeed, Bolivia is among the 18 most biodiverse countries in the world according to the Global Biodiversity Index 2022.
- Promotion of preferential financing schemes for tourism ventures under a sustainable finance.
- Promotion of preferential financing schemes for tourism ventures under a sustainable finance approach, given that tourism has the potential to effectively address issues such as inclusion, poverty alleviation, biodiversity and forest preservation, and gender equity.
- Training and awareness-raising of the population on the general attitude and attention to foreign tourists, reinforcing the warm and hospitable character of Bolivian citizens.

2.5. Tourism in Mexico

Ancient civilization ruins, tropical weather, stunning nature, and authentic cuisine are just a few of the many attractions that draw travelers to Mexico. According to the latest Travel & Tourism Development Index (TTDI), which evaluates infrastructure, policies, resources, and enabling conditions for tourism worldwide, Mexico is the most competitive travel destination in Latin America. In 2021, the best-performing sub-index for tourism development in Mexico was the natural, cultural, and non-leisure features. Consequently, tourism remains a major economic activity in this North American country.

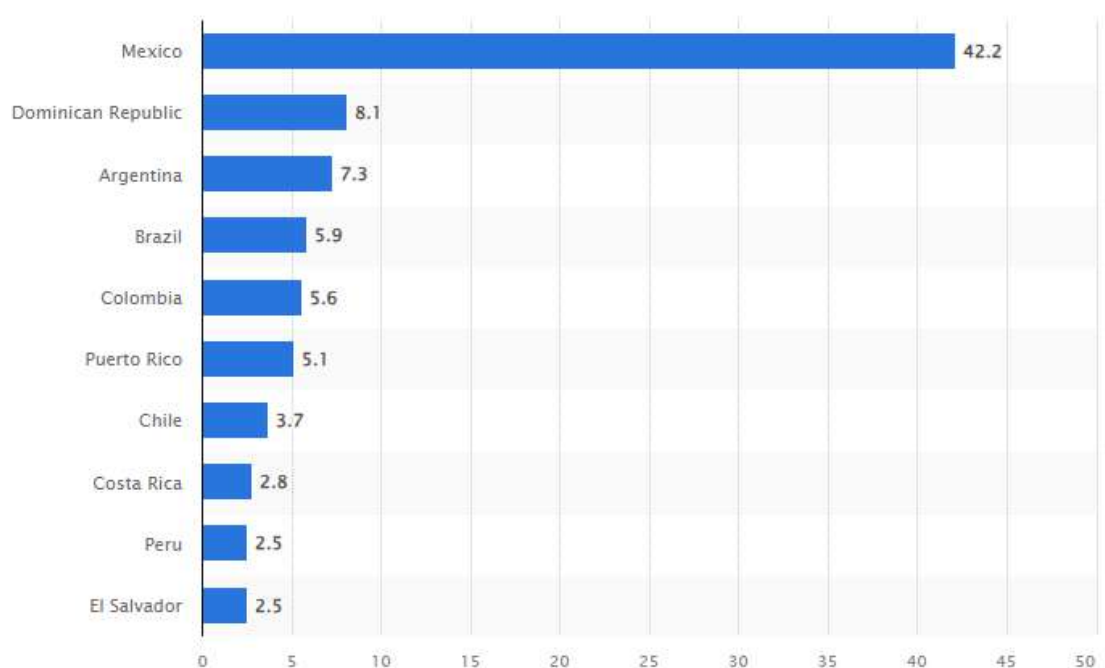
By developing airport infrastructure and establishing new direct flights, Mexico has prioritized international tourism. Leading this effort is FONATUR, Mexico's National Fund for Tourism Development, which has overseen the expansion of Cancun's airport and four other key tourist airports in the country. Additionally, Mexico City's airport added several new international direct flights in the 2010s, earning it the title of the best internationally connected airport in Latin America in 2019. These and other developments have helped Mexico rank among the top 20 destinations in the Travel and Tourism Competitiveness Index that year.

In 2020 and 2021, Mexico alone accounted for over half of all **international tourist arrivals** in Latin America and the Caribbean. By a wide margin, the United States is the primary source market for Mexico's inbound tourism. In the first half of 2022, the number of air travelers from the U.S. was more than three times higher than the combined number of air passenger arrivals from the other nine leading countries of origin for international tourism in Mexico.

However, **domestic tourism** is the main driver of the sector's economy. In 2020, the tourism expenditure by domestic travelers in Mexico was five times that of inbound and outbound tourists combined.

In 2022, Mexico welcomed over 38 million international tourists, marking a 20 percent increase compared to the previous year, although the country has not fully recovered from the COVID-19 pandemic. Unlike many other countries, Mexico did not implement strict restrictions on the entry of foreign visitors during the health crisis. However, the global halt in air travel and the fear of contagion severely impacted the country's inbound tourism in both 2020 and 2021, which had seen steady growth up until 2019.

Number of tourist arrivals in millions



Source: <https://www.statista.com/>

While the total number of international travelers to Mexico was increasing in the years leading up to the 2020 COVID-19 outbreak, the number of same-day international visitors was decreasing, from over 77 million in 2016 to roughly 63 million in 2019. In the inbound **business travel segment**, tourism expenditures—excluding transportation expenses—have also declined in recent years, in contrast to the annual total spending by travelers motivated by personal reasons. In 2019, business travel in Mexico City cost international guests nearly 220 U.S. dollars per day, with hotels accounting for over two-thirds of that expense.

Mexico is establishing itself among the world's tourism powers. While in the rest of Latin America tourism represents around 7.7% of jobs, in Mexico this figure rises to 12.2%.

According to SECTUR data for 2024¹², foreign exchange earnings from international visitors to Mexico are estimated to amount to \$31,141 million, which represents an increase of \$242 million compared to the previous year. Foreign exchange earnings from international visitors continue to exceed the volumes seen in 2019, with a 25.7% increase in 2023 and a 26.7% increase in 2024.

The federal agency specified that the arrival of 42 million 469 thousand international tourists is expected by 2024, with an increase of 5.4% compared to the previous year, or 2 million 181

¹² SECTUR. (2023, December 30). Mexico will attract 31,141 million dollars from international visitors in 2024 according to expectations. SECTUR. <https://www.gob.mx/sector/prensa/mexico-captara-31-mil-141-millones-de-dolares-por-visitantes-internacionales-en-2024-de-atrabajo-con-expectativas>

thousand more tourists. It is estimated that 22,448,000 interned travelers will arrive by air, i.e. 216,000 more tourists than in 2023.

Meanwhile, consumption per accommodation for 2024 is expected to reach \$11,587 million, which is 2.1% higher than in 2023 and 24.5% higher than recorded in 2019.

Results from Marriott International's Travel Trends Forecast study in the Caribbean and Latin America (CALA)¹³ show that Mexico is positioned as the preferred international destination for leisure and business travel in 2024, even surpassing such powerful Caribbean destinations as Jamaica, Aruba and Dominican Republic. The cultural, gastronomic and geographical diversity, its beaches, mountains, deserts and large cities are some of the attractions that make Mexico an ideal destination for local and foreign tourists. According to this study, 60% of tourists showed interest in local drinks and regional flavours, 59% in local music or dance performances and 58% seek an immersive experience in the local language.

This is the result of many factors, one of the main ones being the numerous geographical attractions of Mexico, which has the largest number of distinguished UNESCO World Heritage Sites in the entire American continent and ranks sixth in the world. Having 35 sites (27 historical, 6 natural and 2 mixed) inscribed on the World Heritage list is a testament to Mexico's priceless historical legacy and natural wealth¹⁴.

Another of Mexico's great tourist assets is its gastronomic richness¹⁵. In 2024, Mexican cuisine continues to surprise with new fusions and creative proposals, in addition to traditional regional dishes. Mexican food is a magnet that attracts tourists from all over the world. The cuisine, declared an Intangible Cultural Heritage of Humanity by UNESCO on 16 November 2010, fascinates with its great variety of flavours, colors and textures.

It should be mentioned that Mexico's connectivity and accessibility has improved significantly in 2024 thanks to significant investments in infrastructure. New international airports such as Felipe Ángeles (AIFA) in the metropolitan area of CDMX and Felipe Carrillo Puerto in the Riviera Maya expand the options to receive tourists from all over the world. Regarding land transportation, the expansion and improvement of roads and services at the national level (such is the case of the upcoming inauguration of the Oaxaca-Puerto Escondido highway), as well as megaprojects such as the Mayan Train, facilitate tourist mobility to the corners most attractive in the national territory. Without a doubt, Mexico is more connected than ever to provide an unbeatable experience to visitors.

¹³ Contreras, J. (2024, January 1). What does tourism hold in 2024? Business Leader. <https://www.liderempresarial.com/que-depara-el-turismo-en-2024/>

¹⁴ Travesias (2023, September 21). These are the 35 World Heritage Sites in Mexico, <https://www.travesiasdigital.com/destinos/mexico/mexico-el-pais-con-mas-patrimonios-de-la-humanidad-en-america/#:~:text=Nuestro%20pa%C3%ADs%20cuenta%20con%2035,hay%205%20Patrimonios%20Culturales%20Inmateriales>

¹⁵ Escamilla, E. & De Gortari, Y. (s.f). LA GASTRONOMÍA COMO DESTINO TURÍSTICO. Secretaría de Cultura. <https://www.cultura.gob.mx/turismocultural/cuadernos/pdf14/articulo10.pdf>

A key aspect is Mexico's growing commitment to sustainability. Recently at the 4th Meeting of Sustainable Beaches led by the Mexican Institute of Standardization and Certification A.C. (IMNC) 50 certificates were awarded to beaches from eight different states of the Mexican Republic, which are granted for compliance under the NMX-AA-120-SCFI-2016 regulation on Beach Quality and distinction of Platinum Beaches. Likewise, the conservation of protected areas is reinforced, now with more than 44 Biosphere Reserves (more than 62 million hectares are covered under this category). (ANFAD Digital, 2023)¹⁶.

¹⁶ ANFAD Digital. (s.f). 4th Meeting of Sustainable Beaches led by the Mexican Institute of Standardization and Certification A.C. (IMNC). ANFAD Digital. <https://anfaddigital.com.mx/4o-encuentro-de-playas-sustentables-liderado-por-el-instituto-mexicano-de-normalizacion-y-certificacion-a-c-imnc/>

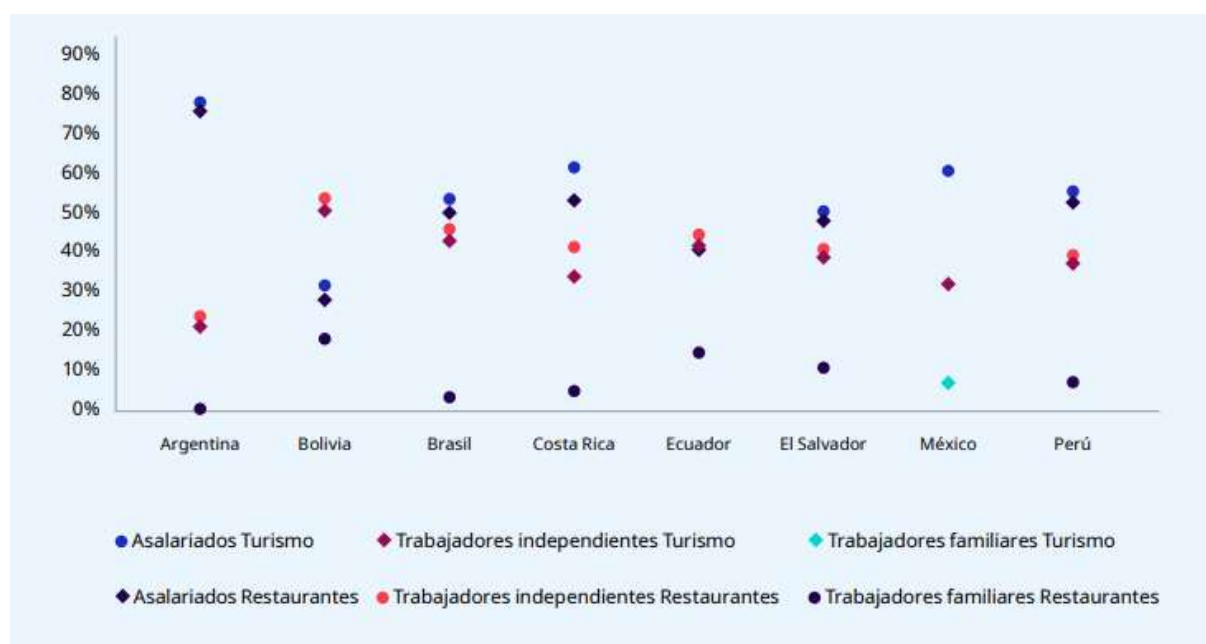
3. Skills needs in tourism sector

3.1. Staff shortage in tourism sector

With the only exception of Bolivia, the occupational category in which the majority of tourism workers were concentrated in the fourth quarter of 2019 is salaried. Argentina stands out for having the highest wage employment rate among the selected countries, reaching 78 percent. As mentioned, Bolivia is at the other extreme with 31.8 percent of salaried workers.

In the other countries this proportion is between 44 and 61 percent. The importance of unpaid family workers stands out in Bolivia (17.5 percent), Ecuador (14 percent) and El Salvador (10.5 percent). In all countries, a greater weight of independent workers is observed in the restaurant subsector, with Costa Rica being the country in which the difference in the occupational structure between the restaurant subsector and tourism activity is greatest.

Distribution of employment in tourism, by subsector and employment category (2019)



Source: *Panorama de la recuperación laboral postpandemia en el sector turismo de América Latina Oficina Regional de la OIT para América Latina y el Caribe Nota técnica, Oficina Regional de la OIT para América Latina y el Caribe, 27 June 2023*

Following COVID-19 and the significant loss of jobs in Travel & Tourism, there are now staff shortages in many global markets, including Latin America.

The issue of unemployment in the region is multifaceted. Firstly, there is a significant gap in access to the skills required to enter the job market. This often results from deficiencies in educational systems that fail to adequately equip individuals with the practical skills demanded by employers. Secondly, even among those with the necessary skills, there is a notable scarcity of job opportunities that match their qualifications. Factors contributing to this include sluggish economic growth, limited investment in certain sectors, and regulatory hurdles that inhibit business expansion and job creation. Thirdly, the rapid pace of technological advancement and changes in consumer demand post-COVID-19 have led to a growing mismatch between the skills possessed by the current workforce and those demanded by emerging roles. This underscores the need for continuous upskilling and reskilling initiatives to ensure competitiveness in the job market. Addressing these complex issues requires a concerted effort from governments, educational institutions, and the private sector to foster an environment conducive to skill development, skill recognition, entrepreneurship, and sustainable economic growth.

Youth unemployment is also a pressing concern. The International Labour Organization (ILO) reports that the youth unemployment rate for individuals aged 15-24 in Latin American countries reached a worrying 21.6% in 2021, significantly higher than the global average of 13.5% for the same year. Young people, eager to enter the workforce and contribute to society, often face barriers to employment due to various factors such as limited job opportunities, lack of experience, and mismatched skillsets. This issue not only affects their economic well-being but also has broader societal implications, including decreased productivity and potential social unrest. For example, Mexico's economy has undergone significant transformation in recent years, with a shift towards automation and service industries. Without the provision of alternative roles or cost-free options to reskill for emerging roles, young people with degrees or training from traditional sectors can struggle to find suitable employment.

Furthermore, a significant portion of the population in Latin America may face exclusion from the workforce due to barriers related to formal education or credentials. Individuals who acquire skills through non-traditional routes, such as self-study or informal training, often encounter difficulties in having their capabilities recognized in the formal sector. This lack of recognition further constrains their access to employment opportunities and impedes their potential for economic advancement.

In societies where access to formal training that aligns with the evolving needs of industries is limited, unemployment or underemployment can persist. This disparity perpetuates cycles of economic inequality and hinders societal progress.

More certification is needed for non-traditional skills often acquired through unconventional avenues such as self-study or informal training. Formal recognition of these skills is crucial. A prime example is Chile's "ChileValora" program, which allows participants to validate skills obtained in areas like hospitality, cultural awareness, and customer service. By verifying that skills gained through self-study or informal training are legitimate, workers can formally

certify these skills. This forward-thinking initiative empowers individuals and supports greater workforce participation by recognizing competencies acquired outside of traditional, formal avenues.

In addition to validating existing skills, providing comprehensive and specialized training to those who seek or require it is essential. Colombia's Servicio Nacional de Aprendizaje (SENA)¹⁷ offers a blend of classroom instruction, practical training, and apprenticeship programs, equipping individuals with hands-on experience directly applicable to their chosen fields. This holistic approach not only enhances participants' skills but also ensures they are well-prepared for job market demands. Moreover, SENA's strategic collaboration with private sector partners ensures that training programs stay aligned with the evolving needs of industries, thereby optimizing participants' employability upon completing the program.

Travel & Tourism employs a higher share of young workers than the wider regional economy (16.8% compared to 15.2% in 2022). However, to further reduce youth unemployment, targeted initiatives must be developed and implemented. These should incorporate traditional teaching methods alongside experiential learning to enhance students' confidence and technical abilities.

The Programa Jóvenes Construyendo el Futuro (Youth Building the Future Programme)¹⁸ is a strategic initiative by the Mexican government aimed at addressing youth unemployment. Launched in 2018, this program targets individuals aged 18 to 29, offering them opportunities for on-the-job training and apprenticeships. A key aspect of the program is its partnerships with a wide range of businesses across various industries, including hotels, travel agencies, and tourism attractions. Through these collaborations, the program not only aims to reduce youth unemployment but also to equip participants with practical skills and foster professional networks within their chosen fields. According to the most recent data, the program has benefitted more than two million young people across Mexico.

By promoting experiential learning, formal skills recognition, and comprehensive training across diverse sectors, these strategies boost individual employability while fostering social equity and economic development.

¹⁷ <https://www.sena.edu.co/en-us/Pages/sena.aspx>

¹⁸ <https://jovenesconstruyendoelfuturo.stps.gob.mx/>

3.2. Some reflection by opinion leaders and research about tourism staff shortage

The recovery of the tourism sector post-pandemic has brought the challenge of addressing the staffing crisis. According to data from the WTTC (World Travel & Tourism Council), the upward trend necessitates managing employee training and improving customer satisfaction to maintain the sector's success levels.

Alberto Pérez, Corporate Operations Director at Morpho Travel Retail, a company present in 10 Latin American countries, notes that many countries in the region are showing a high recovery of international passengers. However, tour operators must ensure their businesses and employees are better prepared to be more competitive and achieve a stronger position than before the pandemic.

A direct consequence of the pandemic and the global tourism halt was the migration of talent to other countries or economic sectors. Despite tourism's recovery, there remains a significant gap between the demand for talent and the availability of trained personnel.

The Costa Rican Coalition for Development Initiatives (CINDE), a private, apolitical, and non-profit organization, has highlighted the shortage of qualified personnel as one of the major challenges facing such a dynamic and valuable sector in Costa Rica. Vanessa Gibson, Director of Investment Climate at CINDE, stresses the historical growth and impact of the sector, and the need for human capital to reinforce it. This underscores the importance of supporting and strengthening strategies to bridge the gap between the sector's demands and the country's training capabilities.

This observation emphasizes the need to proactively address the human resource shortage, recognizing that effective personnel management is crucial for the continued success and growth of tourism businesses.

Regarding the crisis, Michael Wehmeyer, President of the Honduran Tourism Chamber (CANATURH), argues that the shortage of qualified human resources in the tourism sector has become a significant obstacle, limiting the ability to innovate, offer high-quality experiences, and adapt to global market demands. This skills gap underscores the urgent need to invest in education and training for tourism professionals. Developing effective strategies to retain and attract talent is essential to ensure sustainable and competitive growth in the sector. Implementing a well-structured legal framework for hourly employment could maximize the use of local talent during peak demand periods, benefiting both employers and workers by providing flexible job opportunities.

The World Economic Forum (WEF) has emphasized the critical importance of talent development for prosperity in the tourism sector. Quality education, staff training, efficient hiring practices, and programs for sourcing skilled labor are essential to equip tourism

organizations with a workforce that enhances operational efficiency, provides quality services, and adapts to changing business needs.

According to the Economic Commission for Latin America (ECLAC), finding qualified workers, especially in digital skills, is a challenge that implies enhancing technological capabilities to significantly increase productivity. This is evident in Mexico, where less than 20% of tourism service providers have digital tools, despite high visitor demand.

A 2021 study by joblist.com found that 74% of respondents believe that tourism employers need to reconsider employment benefits. The study suggested improvements in healthcare access, greater flexibility, and disability or parental leave payments. Specific suggestions included:

- Flexible working hours (sabbaticals, four-day workweeks, or employee-paced work)
- Work-life balance (safe spaces for feedback, co-creation of new ideas and projects, wellness management, and shared work)
- Long-term learning (opportunities for personalized and individualized training programs, creating new learning modalities with mentors).

APS (Automatic Payroll Systems, Inc.), a company offering payroll and HR management services, notes that high turnover and difficulty in recruiting qualified staff are significant challenges for the global tourism sector. Attracting staff impacts customer experience and business operations. Issues include unclear job expectations, inefficient communication, minimal growth opportunities, and disconnection with management. The tourism industry also struggles to retain qualified workers due to low wages and long working hours.

The critical importance of human resources in the tourism sector was underscored at the World Tourism Organization (UNWTO) Congress in the Dominican Republic in 2022, where the need to place people at the center of tourism strategies was emphasized. The call to "put people at the center" resonated strongly, urging a rethinking of the global tourism sector to address new post-pandemic challenges.

Similarly, the research "Diagnosis of Training Needs in Tourism for the Central American Region and the Dominican Republic," developed by Texas Tech University-Costa Rica, provides recent data shedding light on the issue of regional tourism and its development needs for policies, strategies, and training actions that energize the sector according to current needs. The study, published in September 2023, resulted from a regional survey conducted on 479 participants from Costa Rica, Nicaragua, El Salvador, Guatemala, Honduras, Panama, and the Dominican Republic, with a 95% confidence level, conducted from December 2022 to April 2023. The document compiles training needs obtained through consultations with various individuals from the tourism industry, from mid to senior management, determining development requirements in leadership, as well as digital, technical, and transversal skills.

According to the Texas Tech-CR study, 97.07% of respondents consider skill development crucial, but only 50% are aware of the training plans of their organizations. 63% of respondents suggest that the implementation of these plans should continue to be annual or semi-annual. Additionally, the research reveals that 55% of respondents prefer a hybrid training model, followed by 32.6% in-person and 11.8% virtual.

The most significant obstacles regarding training plans are time (81%), budget (11.5%), and lack of internal trainers (9.6%); the most effective techniques include in-person training (88.7%), coaching (79.5%), and project participation (52%).

The frequency of the plan can be annual or semi-annual, but actions must be deployed in the short, medium, and long term, using techniques such as microlearning, virtual reality, and gamification. The design should balance internal and external trainers with relevant content.

Organizations are willing to invest up to \$1,500 per employee, as stated by budget managers. On the other hand, when all respondents were asked about their investments, 64% indicated they could invest up to \$1,500, and 22% up to \$2,000.

The study also highlights the importance of languages in the sector. English is considered crucial, with 60% of respondents indicating the relevance of training plans in this language. Additionally, French is positioned as the most relevant language after English, followed by Portuguese and German.

These findings, combined with data from the regional tourism environment, provide a solid foundation for redesigning human talent management tools.

4. The survey aimed at the entrepreneurial system

4.1. Results of interviews in Argentina

In **Argentina**, an attempt was made to include all the sub-sectors that are part of the department's Tourism System: Hospitality facilities, tour operators and travel agencies, touristic centers, local and national entities and federation operating in tourism sector. In total, 20 interviews were carried out.

1. "Tourism system" changes and how is it changing. Main factors (drivers) behind this change

According to hospitality facilities interviewed, the tourism system has changed and continues to do so constantly. Tourists have become more critical when choosing destinations and accommodations and are more demanding regarding safety, hygiene, and quality of service standards. They quickly share their experiences on social media, and the impact is instant.

The factors impacting on tourism are several:

- demand adjustments, new critical spirit of tourists, product/process innovations, technological, regulatory factors, globalization, labor costs, delocalization, etc.
- virtual social network and the different modalities of reservation and payment
- types of places that became quite fashionable as rural area with accommodation and typical food or, for example, "cabañas" that are becoming more demanded than hotels
- from a local perspective, economic disruptions and negative impacts on the security image of the city of Rosario have been highly damaging.

Someone complains lack of government policies that modify and support the tourism system.

According to travel agencies and tour operator tourism is always changing:

- Tourists today have a more critical spirit; they demand more genuine products. They are not just looking for what you offer, but how you present your services to provide a memorable tourism experience. In this context, the role of organizations needs to be increasingly active, more present on social networks, and more competitive in the field.
- People are faced with a greater number of offers and services and are looking for a better quality-price ratio, because of social network.
- At national level, given the current economic situation in Argentina, there is less and less inbound tourism available due to the low quality of the services offered and the high costs.

According to **local and national entities and federation operating in tourism sector**, the more important changes are:

- technology, not only because of the dynamism of the Internet to work, but also because of social networks that opened up to the world for new experiences, not only touristic but also for dissemination, promotion and sales.
- the introduction of artificial intelligence to all spheres of life, which leads to finding a more educated and demanding demand, which implies that the offer must be at the level of its market.
- different types of tourism, different tastes and different ways of promoting, whether with information technologies or social networks

Someone complains no changes in the tourism system. "I do not see government policies that modify the tourism system".

According to touristic centers, there is no change in the tourism system. Only changes are related to:

- Information Technology or the social technology
- greater choices regarding the more natural tourism to tourist stays to rural or cultural tourism or for example on the wine route in Mendoza

2. Sectors of the Tourism System (hospitality, catering, etc.) more affected by drivers of change

Hospitality facilities interviewed, indicate the hospitality sector as the most impacted by drivers of change:

- "it is more challenging to recover from fluctuations or economical/social crises in structures like Hotels, with such high operating costs. Additionally, investing in staff development to meet the demands of the tourists, which are constantly changing, to train the employees in social media management and various GDS to increase the number of bookings, among other needs takes a lot of effort from companies in the hospitality sector".
- due to the constant need for readjustment, especially from a technological perspective, also talking about the management of diverse booking systems and ways of communicating with the different target audiences
- must constantly adapt to meet the new and changing expectations of guests.

Tour operator and Travel Agencies declare that changes in tourism:

- affected the most the Hospitality sector

- the impact is not the same depending on the different tourist areas. In most cases, the greatest impact is suffered by inbound tourism companies.

3. Work processes in which the impacts of drivers of change are most evident

According to **hospitality facilities** interviewed, the most influenced hotel operations are:

- Customer service, related to bookings and information.
- In terms of technological and communicative innovation, the impacts on procedures involve managing reservation and payment systems.
- Regarding communication, managing institutional and public relationships is much that requires daily operational dedication that wasn't previously required.
- The way leadership is exercised, and teamwork is conducted in the daily operation of the hotel highlights the impacts of a changing context. Considering empathy and the human factor in collaborative work is an essential value that was not prioritized before.
- Training especially because this had another purpose and now it is necessary to train in tourism in general
- Cost management, by taking advantage of new technologies that allow for more efficient management.
- Environmental aspects require different considerations in room operation procedures.

According to interviewed, driver of change in tourism influenced following areas of operations:

- Sale of products and services
- Areas related to booking management and communication. Communications are more direct, faster, and instantaneous, and users are increasingly autonomous in this regard.
- "The work processes in relation to the tourism industry are to act with framework agreements that involve the entire industry. Because it is the only way to be a receptive country despite the difficulties."

According to **local and national entities and federation operating in tourism sector** interviewed, driver of change in tourism influenced following areas of operations:

- The sale of products, as the demanders are increasingly more educated, the competition also seeks its market, which impacts the proportion of the segment that can be captured and, in the best of cases, retained.
- Training especially because this had another purpose and now it is necessary to train in tourism in general

According to touristic center, the most impact is in the social media and information technologies, that is where there is the most impact in the way of dissemination of what one does.

4. New skills that will be necessary to cope with the evolutions and developments of tourism. Or skills, already required and/or present in the companies, to be strengthened to meet production needs

Respondents asked to evidence the **new skills** necessities to cope with the evolutions and developments of tourism or the **skills already required and/or present to be strengthened** to meet production needs.

Hospitality facilities evidence that:

- Proficiency in technology and social networks.
- Handling conflict situations, creativity, and flexibility to make decisions and solve problems.
- Teamwork, emotional management, empathy, and the appropriate handling of oral and written discourse.
- General notions of tourism, such as what is nearby that they can explore, in addition to the activities we have here.
- More knowledge about the field, the social economic segment of passengers
- Good manners
- Languages.
- Information Technology. "It seems paradoxical because people come to this type of place precisely to forget about technology, to enjoy the landscape, but that technology is essential at this time".
- Knowledge on the region, regional crops and meals, sports, animals, viewpoints for pictures.

According to **travel agencies and tour operators** interviewed, to face changes in tourism system, it is necessary to stay updated, to be on communication networks.

Also, it's very important the creativity to generate original content to share, to seek originality so that the same thing can be seen and shown in many other ways.

According to **local and national entities and federation operating in tourism sector** interviewed, it needs:

- Language management.

- AI management
- General notions of tourism, such as what is nearby that they can explore, in addition to the activities we have here.
- There is a primary and essential factor that remains, which is the treatment, the cordiality, the wait, the attention to the client, the way they are welcomed, which constitutes a differentiating factor when it comes to attracting potential clients.

According to **touristic center**, the skills necessities to cope with the evolutions and developments of tourism or the skills already required and/or present to be strengthened to meet production needs are:

- Foreign language, especially Portuguese and English
- Information technology and the use of social media and electronic payment.
- Knowledge about the new forms of tourism to be able to promote them.

5. New professional figures to cope with evolution and changes in tourism

The interviewed was asked to indicate **new professional figure resulting from the evolution and changes in tourism**.

First indications come from hospitality facilities, that have no doubt about arising of new professional figures. In general, employees should be more and better prepared, with university training and continuing education where languages, in special English but more important Portuguese.

A big request is about people enthusiastic and willing to learn and work.

Some indications come from **travel agencies and tour operators** interviewed. They think that new figures are linked to creative and innovative roles, not only in terms of technology, which changes all the time. It's the ability to create and innovate constantly in the development of content and communication of the attractions that a destination can offer. Also, people trained in the management of AI and technology for sales on networks.

According to local and national entities and federation operating in tourism sector, the new figure that should emerge is that of a City Bureau, where the public and private sectors work together and merge.

Tourist centers are sure that new professional figures are going to emerge, they will emerge, and they will be useful to be able to carry these new tastes, these new tourism preferences.

6. Jobs contents and tasks have changed most noticeably (more manual or cognitive?)

According to hospitality facilities interviewed about jobs contents and tasks that changed most, both cognitive and manual activities have changed.

Most indicated the following skills:

- Problem solving; Creative and Critical thinking and analytical skills.
- Decision making, Problem solving
- Speaking and writing communication
- Ability to work in a team
- Interpersonal relationship skills; Empathy; Management of emotions; resilience and flexibility
- Knowledge of IT and social media

According to travel agencies and tour operators, cognitive and related to all the soft skills have changed: Decision making, Problem solving; Creative thinking, originality and initiative; Critical thinking and analytical skill; Effective communication; Interpersonal relationship skills; Empathy; Management of emotions; Stress management, resilience and flexibility; Leadership and social; Time management; Ability to plan and organize; etc.

According to local and national entities and federation operating in tourism sector, the changes, in their organization, have been based on teamwork, interacting together with different areas, generating brainstorming, agreements, etc., so that all employees feel part of the entity. Very important is the ability to planning a tourism package which involves both cognitive and manual skills.

In general, according to **touristic center interviewed** both manual and cognitive skills are changed, especially those that have to do with the technologies, which require training.

Cognitive skills such as creative thoughts, ability to work as a team, empathy is very important, but also manual skills, such as knowing how to fish and knowing how to teach how to fish, knowing how to cook river fish so that visitors can learn not only to do it but also to taste it.

Last but not least, desire to work and enthusiasm.

7. Professional figures and skills that companies need and which they have difficulty finding

According to hospitality facilities interviewed, professional figures hard to find are those related to social media, a community manager formed in the tourism field, for instance. Also:

- New professionals with the ability to manage problematic situations without consulting.

- People with the ability to identify and encourage motivation, empathy. Professionals with a human approach, people who can understand that employees have talents, and we can get the most out of them, buy generation and environment where each of us learn from each other. Figures who can identify talent and make the most out of it, not to retain but to appreciate and benefit from it.
- More trained people. People with a lot more practice, especially with imaginative ideas and proposal and willing to work.
- Mostly, leadership managers, professional with a revenue management training.

Someone affirm that there is not the problem in finding people working in tourism, "there are many that want to come here to have an experience, to improve their formation. It is a beautiful place to live, and it is full of tourist".

Also, for travel agencies and tour operators it seems not difficult to find people with professional training in the field; education is free in Argentina even if tourism professionals are fundamental in the sector, they are very necessary for companies.

Maybe some difficult is in finding professionals trained in the tourism field to carry out planning and sales tasks as well as customer service at the receptive tourist point.

For local and national entities and federation operating in tourism sector there are not particular difficulties in finding people working in tourism sector.

Maybe there is still a need to deepen teamwork, which implies empathy, emotional and stress management, resilience, in short, all the soft skills.

According to touristic centers, it lacks a real and tangible training and the desire to do things well. Many times, it seems like people work in tourism sector because "it is the only and easiest thing they found as a job but not as something that interests them".

8. Main reasons why companies are unable to find these professional figures

According to hospitality facilities interviewed, the difficulties in finding professional figures lie in the following causes:

- Students are not adequately prepared in the classroom with practical experience.
- A lack of updating in specialized training, which is not easy in a changing context and also a wrong idea of what it takes working in this sector
- Little connection between the two sectors: the academic and the tourism system itself. For greater specialization to exist, there should be more connection between the different actors.

- Little interest in the profession since there is not much public policies which give importance to the sector.

According to travel agencies and tour operators interviewed, professionals with the diploma are easy to find. The challenge lies in finding people with the necessary skills to deal with the dynamics involved in working in tourism: motivated individuals, empathetic, creative with good communication skills.

Particularly, it is very difficult for companies to hire new graduates, they require experience in the area and job, and new graduates almost never have it. The figures are that companies prefer, for economic reasons, to train or take on those who are in other jobs rather than those who have just left universities. This shows a very important gap between academic and professional training.

According to local and national entities and federation operating in tourism sector, finding right professional in tourism sector is difficult because the "little interest in the profession, lack of specialized training, lack of attractiveness of the sector".

According to **touristic centers**, the sector is less attractive, so it has to pay more its employees. Difficulties are most in the receptive tourism, many enter with enthusiasm in tourism that goes outwards, not in incoming tourism, there is no real concrete idea of what it is about incoming tourism. Also, receptive tourism is not much support by government policies, and it generates a lack of interest.

A suggestion is that there should be more training but at the same time do "more training in Company".

9. Ability of young people, leaving training and education programs, to work independently in tourism businesses

Hospitality facilities interviewed generally think that after ending their studies young people don't have the skills or the experience needed to work independently, mostly because of the lack of practical experience in different areas of the sector. Students are not adequately prepared to work in the sector, not due to a deficiency in the education system, but because practice consolidates them in the profession, and it is normal for this to be lacking immediately after finishing studying. Companies are part of the problem, they don't provide enough opportunities for new professional or students to have hours of practice.

According to travel agencies and tour operators interviewed, students are not ready face that kind of challenge once they finish their studies. Students are not adequately prepared in the classroom with practical experience. This is because there is a lack of joint work between training institutions and the world of work.

According to local and national entities and federations it's depends on situations, someone is very well trained. In most cases not, because they are not prepared in logistics, accounting/tax

and economic issues. Some others not, because they study tourism perhaps because it is related to travel to beautiful or exotic places “but not because they know what is really involved”.

According to touristic center interviewed, those who finish their degree, especially university students, are prepared above all to work independently. They may not have had much practice, but nothing that cannot be corrected.

The problem is that in Argentina in general there are not short courses unless they are within the system and have some special training. In general, there are careers that, although they have internships, are rather theoretical and quite long compared to a common technical degree or a more specific course. The most offer to study are formal and takes many years, students, if they are not well stimulated, they leave. Moreover, most program are related to sell trips to other countries o even domestic tourism, but not to organize receptive tourism or to be waiters.

10.Participation in dual training programs and main critical issues of these programs

There is not dual system in Argentina.

About dual training program the situations of all interviewees are very similar.

Hotel facilities affirm to have partnerships with professional training institutions and students come here and have a period of practice, internship, but not in a dual education system. They are not favorable to these, because the cost is too high, and the risks are many. The insurances and legal trouble as well as the worker protection make it not very attractive to have people working in the company, what more ones take all the risks and other use these people.

This is the same opinion of travel agencies and tour operators interviewed and of local and national entities and federations. The lasts think that students in this system can't be used as personnel because there is a high level of monitoring.

Same considerations by touristic centers who added that it would be like financing training for others because student trained can then go to work somewhere else.

11.Interventions to address the difficulty in finding specific professional profiles and improve collaboration with schools and training centers

Hotel facilities interviewed first indicate the solution to difficult in finding specific professional profiles in tighten relationship between training and educational institutions and the organizations that already work in the field of tourism. There is not an integrated initiative between institutions and companies to work for the goal mentioned. Just individual initiatives,

also talking about the local government administration. So, it has to find an effective way of communication and cooperation among these actors it's the right solution.

And "the Argentine legislation should be changed because maybe a person does this type of training in my company and after two months, I have to compensate them because they take it as if it were just another job but that is how it is". Dual Training is not considered too much.

It could be useful motivating people through more formation and giving credit to that. Meritocracy, more training and better payment.

Same considerations by travel agencies, tour operators and local and national entities and federations, who believe the opportunity to create stronger links between the sector and the educational system to constantly update training content. The aim must be the creation of a program that includes academic training centers and companies.

A proposal from touristic centers it to offer more informal training and courses which give, for example some credit in their work; it might be an incentive.

12. Suggestions for training and education system: necessary changes in training programs and curricula to address the issue of inadequacy among new hires

The suggestions of all kinds of companies and entities interviewed about the training and education system are the following:

- Students should be exposed to simulated real situations and working training to understand the dynamic of the sector. Dedicate more hours to practical matters rather than theoretical contents, including real tasks in programs
- Include real work tasks, internships, and professional practices in university curricula and to generate in students the responsibility of conscious study, so that they commit to being good students so that they can later become good professionals.
- Try to work more in the soft abilities, because these needs are very much tangible.
- Get all the students excited about all the possibilities that tourism offers and see it as a factor of Development as well as a possibility beyond the trips that each of them can take.
- Argentina education system is very good, it has a lot of theory, the students come out with a lot of knowledge, but it lacks practice, the daily practice of every day, we do not have a legalized dual system of learning that can become formal, that can become to be more widespread.
- Offer more practice through pre-professional practices or the so called "pasantias".

13.Ability of companies in training new hires on the job

Most of interviewed they are very confident in their ability to train new hires on the job but economical resources, spaces that are needed to invest in this matter is a problem and the time and employees that should be properly dedicated to the interns is an issue. Another critical point is about “why companies should invest if students trained will not stay in the position”.

14.How motivate a young person to choose tourism as a career field and attend a dual training program, also using apprenticeship programs

Exposition to real simulated situations make students aware of the dynamic of the tourism sector and also is a way to motivate students and help them to learn about the procedures and also to manage better their emotions, matter that it is very sensible among young generations. Hospitality facilities interviewed thinks that to better involve and motivate a young person to choose tourism as a career field and attend a dual training program, it occurs:

- Working harder with schools or environments where kids from their younger age could understand better or have a brother perspective about tourism. As they do about other professions.
- Showing all the possibilities of tourism and better economic situation
- Improving their salary, recognising their efforts, so that they have better training and have better attention to the public and that they improve, that they have better dedication. That would be the way to stimulate them to see that growing in the company is something positive for them.
- Courses and training in general
- Informing people about tourism career, what it really means and how important could be for the development of a community. And sharing this information in schools, or other institution dedicated to vocational orientation. Stimulating them with courses and formation in general and recognising their efforts. Better salaries may also help.

Travel agencies and tour operators interviewed believe that to motivate someone to study this career, it is important to be clear about what working in tourism entails, the complex dynamics involved. So, it should be provided informative and descriptive talks, highlighting the role of each member of the tourism chain. Maybe, with a campaign of real information about the industry and the professional future that you can explore and make profitable.

It's also important offering better working conditions and salaries.

Local and national entities and federations offer tourist awareness courses to the community. They did this in schools and high schools, especially in the last year of high school, so that they know the career and know that La Plata is a tourist city, that it generates foreign currency, that there is supply and demand and, above all, free quality education.

Another action of information has to be centered on what happens in other Countries where tourism has a better place in the economy, where it is given more importance and at the same time.

Tourist centers affirm that tourist career and training are quite new in comparison to what happens in other sectors. It can be stimulating if there are new ideas of tourism for Argentina, like orange, cultural tourism or religious tourism.

So, it's important offering training, also continuing training, both accessible and free of cost, with some kind of credits as stimulus.

4.2. Results of interviews in Bolivia

In Bolivia, an attempt was made to include all the sub-sectors that are part of the department's Tourism System, for which they were subject to the application of business instruments from both urban and rural lodging establishments, travel agencies, tour operators, and guide organizations, tourism, rural tourism associations, museums and cultural centers, wineries that provide wine tourism services and finally public sector authorities directly related to tourism, who are the ones who set the rules for the operation of the sector. In total, 22 interviews were carried out.

1. "Tourism system" changes and how is it changing. Main factors (drivers) behind this change.

From the interviews conducted, the same awareness does not emerge regarding the factors of change and the fact that changes have taken place in the tourism sector.

Regarding the **hospitality facilities** interviewed tourism has not changed, except for some private initiatives such as the wine route which has been consolidated. After covid 19, tourists look for destinations that offer experiences, new and native places, the tourist system has become a little more experienced in services.

According to **travel agencies and tour operators** interviewed in tourism sectors there were innovations due to market demand: the customer looks for affordable prices and quality of services. New actors entered the tourism market from social networks, the number of tourism companies increased, there is greater competition. Furthermore, today we have more offers and destinations to show to the general public.

According to **touristic and cultural centers interviewed** after pandemic work is returned because tourism contributes to the relief of stress. the market gives more importance to nature. "The entrepreneurship opens to the population", that is the main change, from being family, to open to the collective. The tourist sector in Tarija has experienced a change in its traditional approach, implementing social networks to promote activity packages especially in our countryside. Currently it has been transformed into a living museum that transmits a story to the tourist; there currently exist touch screens, it was modernized.

Restaurants, winery and food and wine and craft shops interviewed affirm that the tourist system has changed, because it is improved the tourist flow, the tourist offers, and the academic area. However, there are also deficiencies due to the lack of union of the sector, it is very divided and there is no public-private coordination. It is vital that an articulating entity be returned that horizontally manages joint and coordinated actions, with a holistic vision of tourism in Tarija. At local level there were both positive and negative changes. Positives: from

the private initiative: wine route, it has generated greater demand and end of the year parties. Negatives: very expensive tickets and very expensive fuel for the tourist.

According to **public entities and chamber of commerce** interviewed, the tourism has changed due to the pandemic, the operators gave more emphasis on adventure and nature tourism and the municipality provided training in adventure tourism. Guide associations were created that have strengthened the sector. On the other hand, the winery made greater investments. Innovations such as weddings are given, along with other uncommon offers for Tarija. The economic factor and the pandemic have boosted the use of digital media, on the other hand, tour operators have increased. There is a disordered growth in tourism, there is the emergence of houses and apartments provided for the services of tourism at lower prices and with a negative impact on the hotel area.

According to **guide associations, tourist and tourism service operators, rural tourism operators** interviewed, there were changes because there is more and much more diverse offering. There are new tourist routes, more use of new technologies (social networks). As for the tourist, they are more critical and observant, they demand a more diverse tourism.

According to **touristic college** interviewed, there is a new tourist profile, tourist searches for new destinations, more natural environments, with short-duration but diversified and complementary products. New forms of access to information through technological tools, use of social networks, etc.

2. Sectors of the Tourism System (hospitality, catering, etc.) more affected by drivers of change

For most of interviewed people, hotel sector is the most affected by changes in tourism but, more in general, all sectors were affected in one way or another, mainly due to the current dynamics of tourism, the new customer or tourist, new travel motivations and the requirement for diversified tourism products.

According to the **hospitality facilities** interviewed for hotel "it is very difficult to get through off again the confinement". Furthermore, the hotel business suffers the great competitions and the globalization of services with air b&b.

Travel agencies and tour operators interviewed have different ideas about which is the tourism sector more impacted by drivers of change. Someone thinks that "due to unfair competition and lack of training, all service providers are affected". Others report that hotels, educational institutions and those in charge of the organization of events are more impacted. Others indicate tour operators and tour guides

According to **touristic and cultural centers** interviewed everything is linked, there is an interdependence of all sectors. The hotel sector would be more affected, house rentals appear and hurt the hotels that pay taxes, then unfortunately there is the boa airline monopoly, which

causes damages, conflicts, lack of tickets, delays on flights. With the growth of the tourism sector in the region, also travel agencies, for example, must promote packages that adapt to more authentic experiences, which cannot be found in other parts of the world.

According to **public entities and chamber of commerce** interviewed it has been identified that all private entrepreneurs who offer or are linked to tourism have been affected by the illegal opening of companies after covid 19 (transportation, hotels, operators, agencies, restaurants, etc). However, the most affected sector was the hotel sector because several companies closed, followed by the gastronomic sector which had a considerable decline since the pandemic and confinement. Also, the operators and tour guides suffered. But the 4- and 5-star hotels have remained without problems, the 1- and 2-star hotels have been suffocated and even more about the b&b accommodations. For this reason, in light of these changes, there are being established requirements for obtaining a departmental guide credential, a departmental tourist license for establishments of tourist gastronomic services, for accommodation establishments and tourist spaces, camping, for tourism operators, travel agencies, community guide. With these actions public entities aim contribute to regulate tourism.

According to **guide associations, tourist and tourism service operators, rural tourism operators** interviewed, every sector is affected. The lack of public investment in improvements in infrastructure or services, which leads to no tourist attraction and visitor interest, directly affects the entire tourism sector. Furthermore, there is not the concept of joint work between the same actors, there is no information about the other services. The entire tourist sector is affected by illegality and a bad ecosystem.

3. Work processes in which the impacts of drivers of change are most evident

About the areas and the work processes more impacted by tourism changes, there are different opinions by the various categories of respondents.

Hospitality facilities interviewed believe that “there are negative impacts at all levels and in all work processes”.

Travel agencies and tour operators interviewed affirm that in all processes, due to the demands of the market, are required commitments and work with legally established companies and working with professionals who have the vocation to exercise the profession are required. Another particularly impacted process is the supply of tourist packages, because it's necessary to guarantee an appropriate price-quality relationship to tackle competition

Touristic and cultural centers interviewed, they report communication and marketing as very important, that's why the staff involved must not only have academic training for this, but they must have the ability to easily interact with visitors

Restaurants, winery and food and wine and craft shops interviewed believe that ALL companies in the sector are impacted in their processes, because they have to innovate, present new and more attractive products tourists, generate characteristics particular to attract tourists. Human resources have to be trained, the permanent rotation of staff is necessary, informality must be reversed, more organization in companies is required to converge towards professionalism and excellence.

Public entities and chamber of commerce interviewed, they are aware that in all areas will be required more training to cope with a higher degree of quality by demand. It's also required more research activity, to develop new offers.

On the public organization side relevant public policies are required to facilitate the development of tourism, to work on topics of practical usefulness for the industry, to incentive, monitor and control policies.

Guide associations, tourist and tourism service operators, rural tourism operators interviewed believe that the entire system due to the lack of knowledge of the sector and the presence of untrained people. In particular, in customer service there is not much practice, there is more theoretically based training. "Coordinated and joint work between the public and private sectors will allow collaboration and optimization in the use of resources"

Tourism impacts are addressed also to training. According to **touristic college interviewed**, training processes were impacted, not only those addressed to students but also those for professionals who require update knowledge, learn new dynamics of tourism training as well as the use of ICT's. Training processes should also be contemplated for public officials to better understand the dynamics and trends of the sector.

4. New skills that will be necessary to cope with the evolutions and developments of tourism. Or skills, already required and/or present in the companies, to be strengthened to meet production needs

The tourism sector needs to enhance different skills and knowledge, according to interviewees. Languages, soft skills, creativity in particular. Here the most important indications, depending on different kind of interviewees.

In **hospitality**, soft skills are necessary to address tourists with a "better treatment".

For **travel agencies and tour operators**, people who work in tourism must have charisma, ease of communication, positive and quality communication, almost like an innate skill. "Higher human quality" is required in companies in the sector and in public entities committed officials. Also, important management of new technologies and communication through social networks, ability to participate in fairs. People working in sector have to be able to constantly innovate.

More indications come from **touristic and cultural centers** interviewed:

- In general, the English language is a competence that is required and necessary.
- People capable of innovating tourist products, capable of reinventing entrepreneurship so that they are competitive against large corporations.
- The tourism industry, in recent years, has been driven by technology, for this the sector requires professionals with this training or practical skills and techniques.
- The ability to build interpersonal relationships and communication with ease.
- In our location, skills such as empathy with animals and the willingness to care for animals are necessary.
- Finally, considering the cultural sector in which this category of interviewed operates, palaeontologists and archaeologists are required to generate more and better information for tourist scripts.

Restaurants, winery and food and wine and craft shops interviewed ask for:

- People trained in wine tourism, sommeliers, tasting experts, are needed to explain the tasting process. Professionals who know about the industry (type of soil, grape varieties, etc.), the history of wine
- English language is necessary, also French.
- Styles of setting the table, placing orders.
- Guiding the tourist.
- Skills in teamwork, association
- In both universities and institutes should implement dramatic subjects, body expression and good manners (humility).
- Ability to seeing all sectors as complementary, because they are not rivals.

Given that the need is felt the necessity, for operators and guides, to be professional in tourism, **public entities and chamber of commerce** interviewed report that skills and knowledge necessities are:

- English language
- Customer service
- Marketing and graphic design
- The history of Tarija, the tarijean culture and knowing the natural and cultural wealth as well as the services of the other municipalities with touristic potential.
- Digital marketing to reach the markets

- Ability to face planning processes, support the development of tourist routes and the development of tourism with cultural and territorial identity
- Interpretation in inclusive languages by tourism guides
- Specialisation for guiding as extreme tourism / trekking / watching / other.

Guide associations, tourist and tourism service operators, rural tourism operators interviewed ask for:

- Responsible, committed, bilingual, honest professionals, very want to work, with knowledge and culture in all areas. Proactive professionals, that contribute to the sector development.
- Skills in customer service, proactivity, empathy.
- Ability to make the “product more experiential”.
- Specialisation in new tourist trends such as adventure tourism

Touristic college interviewed asks for:

- Management of concepts and variables of customer service and quality of service, as well as the provision of tourist services, good practices, etc.
- Ability to resolute conflicts
- Management of technological tools
- Design of new products
- Ability to identify the new tourist profiles, to understand new customers
- Skills to address a more inclusive and sustainable tourism and to improve cultural identity

5. New professional figures to cope with evolution and changes in tourism

There are few indications about new professional figures arising in tourism sector:

- **COMMERCIAL AGENTS WITH ATTITUDE AND SELLING SKILLS**, for hospitality
- **TOURISM PLANNERS, VERY USEFUL TO OPTIMIZE THE GREAT TOURISM POTENTIAL THAT TARIJA HAS**, for **touristic and cultural centers**
- **TOURISM PLANNERS AND MANAGERS** for **restaurants, winery and food and wine and craft shops**.

6. Jobs contents and tasks have changed most noticeably (more manual or cognitive?)

Some indications about job contents and tasks changed most noticeable are strictly related to the drivers of changes and the local criticalities evidenced in the previous questions. It emerges that they have changed both the manual and the cognitive tasks and job contents, but with emphasis on the cognitive:

- Teamwork, interpersonal relationships, problem solving, good communication (also using technology) and, in general, soft skills according to all types of interviewees
- Attitude to sell, with more commercial training according to hospitality
- The data analysis, the ability to collect and analyze the data to direct the tourist system with the new trends from the market, according to **touristic and cultural centers and for restaurants, winery and food and wine and craft shops**
- The museum techniques are raised to the level of museum curators as a more specialized profession, according to **touristic and cultural centers**
- Accounting task for **restaurants, winery and food and wine and craft shops**
- The ability to achieve new objectives based on knowledge and specific study of the sector, above all by working together but generating innovativeness according to **guide associations, tourist and tourism service operators, rural tourism operators**

Very interesting the reflection of **touristic college**: “understand that tourism is intangible, that customer satisfaction and the quality of the service are intangible, that the tourism business is not the same as the rest of the industries and products in the market for a region. Understand that it is cross-cutting and that it requires the contest and support from other areas, training therefore should consider, among others, conflict resolution, teamwork, human relations skills, effective communication, pro activity.”

7. Professional figures and skills that companies need and which they have difficulty finding

According to interviewed, professional figures hard to find are those who have a good mastery of English language. furthermore, the difficulties in finding concern the following professions:

- administrator, able to resolve specific problems within the company, create sustainability policies, to increase the influx of tourists in low seasons, in hospitality
- professionals in paleontology and archeology, in **touristic and cultural centers**
- sommeliers and wine tourism specialists, in **restaurants, winery and food and wine and craft shops**

- professionals in tax matters, in **restaurants, winery and food and wine and craft shops**
- innovators and developers applied to the wine sector in **restaurants, winery and food and wine and craft shops** and in **guide associations, tourist and tourism service operators, rural tourism operators**
- professional who has knowledge of adventure tourism, in **touristic and cultural centers**
- planners and managers in tourism, in **public entities and chamber of commerce**
- technicians in tourist guidance, in **public entities and chamber of commerce**
- technicians in gastronomy, in **public entities and chamber of commerce**
- technicians in quality processes, in **public entities and chamber of commerce**
- certified technicians in adventure tourism, in **guide associations, tourist and tourism service operators, rural tourism operators.**

8. Main reasons why companies are unable to find these professional figures

The difficulties in finding professional figures lie in the following causes:

- the lack of specialized training; “unfortunately in the hotel sector there are very few professionals who have training or theoretically know ways to manage a hotel establishment, they do not know about management, they do not know about average occupancy, human resources management, among others”.
- lack of economic resources, professionals in the cultural areas are paid very little, according to **touristic and cultural centers, restaurants, winery and food and wine and craft shops** affirm that companies are afraid and avoid entering people into the labor market due to wage increases. the greater profile, the higher is the wage.
- the absence if some careers in institutes and the labor demand is growing and there are no people trained in those areas. according to **public entities and chamber of commerce** the human resources that are prepared, who speak English and provide quality services, migrate towards other tourist centers because in Tarija they are not well paid.
- the lack of coordination and international friendship. it is necessary to take our young people abroad, to see the world, to acquire new experiences of professional growth. international exchange of experience should be generated
- lack of practical training and lack of positive and proactive attitude of professionals. lack of specialized training and teaching interest, teachers who are not from the area of tourism, little training time according to **guide associations, tourist and tourism service operators, rural tourism operators**

- low value of the profession in tourism by companies and institutions linked to it, job instability and low salaries, according to **touristic college**.

9. Ability of young people, leaving training and education programs, to work independently in tourism businesses

According to all types of interviewees generally young people, after ending their studies, don't have the skills or the experience needed to work independently, mostly because of the lack of practical experience in different areas of the sector. they need to do work in the area, to handle tourism. if they are, they should only improve in aspects related to professional ethics and positive attitude and if they are professionals, they do not have the capacity to work alone:

- They need to know even more about entrepreneurship, about administrative and legal responsibility, according to **travel agencies and tour operator**
- "The curricular mesh is not framed in the departmental needs and does not adapt to the tourist reality", according to **public entities and chamber of commerce**
- They are not guided in entrepreneurship either and this should be a priority in training, according to **guide associations, tourist and tourism service operators, rural tourism operators**
- They are not well trained, they lack a lot of understanding the value of tourist attractions, they have little vision.
- Guides they have no training at all, according to **touristic and cultural centers**.

10. Participation in dual training programs and main critical issues of these programs

About dual training program the situations of all interviewees are in the same situation because they are not involved in dual training system. Someone had the opportunity to host internship but the most of interviewees have not experienced dual training system. Who have experienced training in companies believe that "for a correct articulation between the theoretical knowledge acquired and practice, there must be constant supervision and secondly, it must be verified that the associated companies are in the process of updating and according to the demands of recent times."

Someone can't participate due to lack of time "because we are a family business and we do not have the possibility to facilitate the training of external human resources" (**tour operators and travel agencies**) or because they have not time (someone from **winery and food and wine shops** and **public entities**). Someone indicates that the more practical training should be associated from the initial moment of the training (someone from **guide associations, tourist and tourism service operators, rural tourism operators**).

A critical issue reported is about the minimum compensation to be paid to the student (from **craft shop** and **tourist college**).

11. Interventions to address the difficulty in finding specific professional profiles and improve collaboration with schools and training centers

Interviewees first indicate the solution to difficult in finding specific professional profiles in tighten relationship between training and educational institutions and the organizations that already work in the field of tourism.

According to **hotel facilities** it is important:

- Sign agreements with training centers and schools
- Modify the contents of the subjects and ask for each subject to have a final work applied to resolve specific problems in companies or others, with real cases

According to **touristic and cultural centers**:

- Identify and provide professional exchange spaces
- Organize study trips that contribute to having new and varied perspectives
- Implement career guidance programs in schools providing updated information on the needs of the tourist labor market and the great advantages of addressing these topics in training.

According to **travel agencies and tour operator**:

- Have exchanges with other countries
- Establish incentives.

According to **restaurants, winery and food and wine and craft shops**:

- Alliances with institutes also to update courses
- Facilitate international agreements, international exchanges, etc.
- We must apply dual training and direct hiring during the process

According to **public entities and chamber of commerce**:

- Work with the operators to know the reality more in depth, then generate training and continuous education spaces.
- Extracurricular activities as participating in workshops, conferences, internship, others

- More practical training in the curricular mesh of institutes, with english language and strong content in customer service, problem resolution, and others related to soft skills.

According to **guide associations, tourist and tourism service operators, rural tourism operators:**

- Creation of institutes or subjects in institutes to be able to specifically prepare the route or services to be carried out.

According to **tourist college:**

- Through the signing of institutional agreements that allow the sustainability and commitment of beneficiary actors, on the other hand, the professional profiles must be adapted to the reality of the destination required and to the new dynamics.

12. Suggestions for training and education system: necessary changes in training programs and curricula to address the issue of inadequacy among new hires

The suggestions of all kinds of companies and entities interviewed about the training and education system are the following:

- Work on training soft skills in the students. They should be more confident, communicative, determined, they should be trained in speaking, they should strengthen their personality, etc. Incorporate theater, body expression.
- Hire professionals who not only have experiences in traditional training, but teachers who have work experience in the sector and in tourist companies.
- Generate specialization courses.
- Agreements, scholarships for students.
- International agreement
- Specialized training in natural heritage, paleontology and archeology.
- Specialized training in wine tourism
- Handling of new technologies
- Carry out the internship for 6 months and at the end be evaluated and rated by a court.
- Create a tourism career with mentions or specialties like most careers do.
- Institutes should incorporate subjects of entrepreneurship and innovation.
- Programs to adapt to the current context.

- Specialized certification and approved by the corresponding ministry.

13.Ability of companies in training new hires on the job

Most of interviewed they are very confident in their ability to train new hires on the job but economical resources, spaces that are needed to invest in this matter is a problem and the time and employees that should be properly dedicated to the interns is an issue.

Tourist college points out that the companies themselves require to be trained according to the reality and the new dynamics of the sector.

Some doubts come from guide associations, tourist and tourism service operators, rural tourism operators, because they think that companies can train in the rules, roles and activities of the company, but not knowledge that the professional should already have. Students must have prior good training according to some touristic and cultural centers.

14.How motivate a young person to choose tourism as a career field and attend a dual training program, also using apprenticeship programs

First it emerges that it is important to position the tourist issue as the main axis of development of Tarija. Young people should know that. Young people should feel that their decision to study tourism is an invaluable help for all sectors linked to tourism.

Students get bored in the classrooms, the content must be modified and updated, they must know how tourism moves and the importance of each job position in each tourist service. Tourism professionals must know their field with practice, the outings, the stories, the real things.

Many of them do not know the areas of work that exist when studying tourism, they have wrong ideas about the career...

Through correct communication to possible professionals, it's important to show the potential in tourism and alternative therapies such as equinotherapy as an alternative to improve the economy and the health of people. At the same time, it could be useful to show the strong potential of destination and that they can become pioneers in the implementation of new trends, which involves job stability and important economic income.

Other suggestions are:

- Certify knowledge.
- Motivate them through trips, which help them to know and love our culture and our cultural groups in order to respect them despite the differences, in addition to generating respect and commitment to the care of nature
- Provide economic recognition or incentives and the possibility of job insertion.

Finally, an important consideration is about the lack of structural planning. "As long as they stay in the speech and there is no investment and articulated work, everyone will look at their navel. There will be a less productive and poorly organized sector. Training is a pillar, but without other pillars by the side, tourism falls!".

4.3. Results of interviews in Mexico

In Mexico, an attempt was made to include all the sub-sectors that are part of the department's Tourism System: Hospitality facilities, Tour operator, Travel Agencies, Destination Management companies and transport companies, Entrepreneurial associations. In total, 21 interviews were carried out.

1. "Tourism system" changes and how is it changing. Main factors (drivers) behind this change

The first section of interviews was centered on tourism system scenario. About what are the principal factors behind the change in tourism different considerations emerge.

First for Hospitality facilities, "tourism system" changes and adapts to multiple factors. Changes originate from global reasons such as wars, natural disasters, etc. to local factors such as fashions, prices, etc. The Hotel and Hostel interviewed evidence some area of change in tourism sector and business:

- The way to travel: the pandemic was something that changed a lot the expectation of tourism and also the way of traveling, now people are a little more organized, it became a little extreme, either many travel or few travel or travel alone. People are in fashion to travel, travel has been democratized, before it was very expensive, now it is not, now everybody travels, you can pay with interest-free plans, cards, so you do not have to have a large outlay of money at that time to travel; and it is fashionable, especially among young people. Before, people used to travel, you took the trip of a lifetime when you got married and maybe another one, but not now, now people try to save up to at least take a big trip once a year. After the pandemic, the type of tourism that arrived changed, because normally we had American and Canadian tourism, which came for the winter season, and now after the pandemic we have had Europeans, we have had a little bit more Europeans, so it has become known a little bit more.
- Since the meetings were virtual, since it was possible to work online, remotely, we have noticed that they come more time, many come to work from here, so they can be traveling and working from here. We had some travelers who took their sabbatical year at work, but they continued working online with other businesses they had, they stayed for about a month

- The period of travel: less seasonability after pandemic. It's as if many people have stayed with that dynamic of coming when there are few people (as in pandemic period), maybe planning their trips a little bit when high seasons are near, but before, right, vacation
- Labor costs: these have been increasing, because the standard of living in the countries has also been increasing. Mexico had very low labor costs historically and now they have started to equalize with other countries, that is good, but it must go hand in hand with productivity.
- Reservations: changed radically, here we clearly feel the increasingly frequent use of platforms, applications in the first instance, then web pages to book their rooms, increasingly occupy less and less the intermediary that is the retail travel agency.
- Intergenerational travel is becoming more marked (for example, grandmothers are traveling with mothers and granddaughters); also more and more women traveling without men.
- Technological development is the most important, for example, the use of control systems, administrative systems, statistics, makes work much easier, improves sales, increases prices. Now travelers have all the information at hand, that is, they no longer depend so much on third parties, but worldwide they are seeing or comparing both price, places, they are a click away from booking them on the phone, on the tablet, on the computer. Technology helps both the clients and our side of the company, and what is also done when there is this, well, is to look for an improvement, you could say, for the company or also to look for a segment that you want to target specifically, because there will be companies that have the same beds, but maybe the service in which I am going to specialize already differentiates me and maybe I can bring more travelers. Technology has had an influence; it has had an impact on hospitality processes. Before they gave you a key, today they hardly give you a key, the access to the room is through a fingerprint or through a credit card. Security, there are always cameras for everything. Technology has done a lot to streamline processes. Now you can not only make a reservation through the computer, you can check in, check out, or do anything. Nowadays technology plays a very important role even in the education area, now we have the hybrid part and all this, when before it was all face-to-face and imagine being with some screens and seeing each other from different places and that also opens a much wider panorama.
- Tourism is more inclusive: Today we have a **more diverse tourism** in the broadest sense. Previously society has always changed from before we saw LGBTQ+ relationships that have always existed throughout the history of mankind, but they had never been as visible as they are now. Before, people used to travel as a family or in conventional couples, now there are weddings and travels of women with women,

men with men, now people travel more frequently for business or business reasons, and all this has changed, the public is more demanding

- It is increasingly difficult to hire staff.
- Energy savings through renewable energies, through being more environmentally friendly and socially responsible.
- Very successful is the pet friendly program.

Tour operator, Travel Agencies, Destination Management companies and transport companies declares that:

- Pandemic forced “the old school to adapt”. So, in the tourism sector there was a growth, well, for those who knew how to handle the situation, there was a very strong growth, because the validation and importance was given to social network advertising. Many people began to update and improve the entire customer experience within the website, that is called UX design. There are many digital tools, software, programs such as CRM, that you should already know. It's all technology now, you can't use anything but technology for the customer shopping experience anymore. So, you have to be extremely up-to-date. If you don't upgrade, you die. That's true. So that's what travel agencies had to do and they are still struggling to grow and innovate in that part.
- Tourism importance has been highlighted a little more even to the career as well, because it is a strong income for the country. "Well, tourism gives us this, tourism is the third most important economic spill in the country, well, let's go for that axis". Tourism has become a little more fashionable, it is more visible than before
- The way in which people travel has changed a lot from 10 years ago, but even after the pandemic it has changed a lot. For people before it was very easy to call and book directly with us, there was like an exchange of information and now there is not, now just by opening their phone they can enter and book with us and with whoever they want at the same time, compare, do everything that used to take a long time, many days, now you can do it on the phone, depending on how skillful you are
- Role of platforms: technological factors of bringing people closer to the purchase of these services that we develop, has also made that on this side, we have the need to create new positions that did not exist before, “like the famous community managers, like the people who are completely dedicated to e-commerce, or to be working through platforms, uploading our services, rates, etc., to bring them closer to our potential customers or to our existing customers”
- Growth of social networks: all the information that is on the networks, on the Internet, is overwhelming. They helped traveling become a more democratic thing in the sense that it is less expensive to travel than before

- Dynamic tourism: air fares are dynamic, hotel fares are dynamic, everything is dynamic. Everything we need is changing, so we have to adapt to the market.

Entrepreneurial associations evidence that many of the young people have decided to dedicate more time to their personal interests and issues, and now it is difficult to find sufficient personnel. The needs of the personnel, of the young people have been changing, now the young people are more concerned about their emotional wellbeing, their personal wellbeing, more focused on how to feel good with the minimum effort. Also, now they no longer accept a wake-up call, for anything they get angry and leave. This also leads to high turnover, then also to the lack of tolerance of the staff, and also to the fact that we have an endless number of social programs at home, where there is no longer so much need to work - "if I have already solved the food" for example, - "why do I make an effort if I have already solved this" -, which is the main part. The entire tourism sector has a great need for collaborators, everybody has vacancies, and second, apart from the great need for collaborators we have, we also have a high turnover, I think this is due first to the factors of the schedules that we have, for example, in lodging, since we never close, we have difficulty to hire the afternoon and night shifts. There is lack of city transportation that can take people to their homes, that is, on the one hand, we do not have an economic Uber, we do not have Uber, we do not have a conscious car driver who is charging our people low rates so they can move; then in the afternoon it is a boy or girl who has transportation or who lives very close, that there is also the issue of insecurity.

2. Sectors of the Tourism System (hospitality, catering, etc.) more affected by drivers of change

Hospitality facilities interviewed indicate which are sectors, in tourism system, more impacted by drivers of change:

- Drivers of change impacted all tourism sectors, they have impacted all equally because it is an issue that also comes hand in hand with labor legislation, so this impacts all, but it has a beneficial impact on the tourism sector. In general, each one within their own aspects has had to change way of working in order to keep up with the new needs of the tourist. Hotels have focused more on marketing promotion, on maintaining a very good image, the restaurants have had to adapt, many of them have had to access to collaborations as they are now known in order to have a good promotion. Travel agencies have also had to start working with many people involved in tourism. Those who did not adapt to these changes, well, they did lag behind a little.
- Hoteliers are impacted by platform as Airbnb because they pay certain taxes that Platform do not pay, and besides that they can get off even more if they want to, and if they steal some tourism from us
- Sell food inside homes, affects restaurants, so it has been like unfair competition.

Tour operator, Travel Agencies, Destination Management companies and transport companies declare that changes in tourism:

- Affected everyone equally, all sectors. For example, one of the things that affected travel agencies is that hotels have been updated and can now book through their web page; before they could book the hotel through an intermediary, which would be the travel agency. Also, the OTAS came to affect this situation before the travel agencies that are not OTAS. People already like to book through OTAS. Obviously the OTAS have a much higher marketing budget, because they are very large companies with foreign investment, so they monopolize the market. The OTAS do not have operating expenses. But they already monopolize more and obviously have a different financing budget, higher than what a final supplier has. So, travel agency first has to ally with them, to be their suppliers. That is very important. And also, not to depend only on that too, "hey, as a travel agency, should we update ourselves". In these years, if you do not become e-commerce, you are already down, you have no value, that is how exaggerated the market is, that is how exaggerated your client is and that is how exaggerated we must be as a company because the client is more demanding every day, and we must meet that kind of demands.
- The most vulnerable, the most affected are apart from the suppliers, they are the tourist guides. It is really a mess they get into, because there is no appreciation on the part of either the tourist, the tourist, or the businessman who has to be educated. Tourist guides, who are, that is, together with the suppliers, are the face of the country, the face of the experience, and they are the ones who are most affected.
- The travel agency is physically obsolete and now everything is virtual, a virtual travel agency, so the travel agency is one of the most affected sectors.
- The direct affected or more focused has been the hotel industry. The applications that give you the opportunity to stay in a bedroom, a loft, an apartment, a house, a mansion ... there are many more options for rest, for the place where you are going.

3. Work processes in which the impacts of drivers of change are most evident

According to Hotel and Hostel interviewed the most influenced hotel operations are:

- Operations: receptionists, telephone operators, waiters, porters. Likewise, the activity of designers, in most cases, has been reduced due to the offer of user-friendly design programs, such as Canvas, which allows for a quick and functional design. Designers are now only required for professional work, such as designing a company's identity, logo, Web page, advertisements, videos or some other more specialized product. Online registration reduces the need for receptionists. The landline phone is less and less used, as it has been displaced by cell phones and chat applications. The trend toward self-service or extended restaurant hours, wheeled luggage and the tendency

to travel light has also diminished the role of waiters, and that of doormen with automatic doors.

- Areas who have a degree of responsibility, for example, decision making, cash handling, cashiering, reception and at some point, more focused on dealing with the direct customer.
- Reception: the person at the reception desk is a very important position, because he has to combine the economic, the invoices, the receipts, a bit of administration, but also a bit of psychology, because the client arrives tired, maybe he had to wait 20 hours at the airport, maybe he had a very bad flight or whatever, or not, but you have to welcome him in a way that he calms down, "relax, you are here, rest...". So, it is a bit delicate, human relations are like that; but these positions are very important, because that is where the whole process starts, it is useless to have a super clean room, a super good mattress, super disinfected, to have everything in order, if the person I have at the reception does not receive people well, and that is where it all starts.
- All the process related to public services: the shortage of water, which we have to carry in pipes or the lack of bank in some countries, internet quality low, etc.
- The area of promotion, marketing, sales functions, it needs to be working constantly on updates so as not to fall one step behind, so as not to remain stagnant, because it is quite noticeable in terms of the flow of tourists. Hotels work on sales percentages, then when hotels are getting stagnant, it needs more promotion, more sales, new videos, some collaboration etc.

According to travel agencies, tour operators, destination management systems and transport operators interviewed, driver of change in tourism influenced following areas of operations:

- All the areas related to technology: WhatsApp Business to make quotations by mail. Tools like CANVA or CRM. CRM gives the opportunity that customer experience is fulfilled, and that in each funnel goes step by step. People want to feel special, that's right, so what's the best way to make someone feel special is to give them personalized attention, and that's very expensive and very difficult, because it's not one, it's 50, it's 100 people who want the same thing. So, what does the CMR do with message automation, with days and times when we can give that customer experience to everyone. We already have all this stipulated, we already have it in funnels and all this helps you with the CMR. Now we are creating an experience that distinguishes us as a company, as Ocean Travel, "ok, but we have to help us with a CRM". In terms of marketing, you have to adapt to Tiktok, whether you want to or not you have to have Tiktok, Instagram and Facebook, and be aware that you can't upload the same content on all three, because all three have different content. TikTok is more of a laugh, it's more informal, it's more disclosure, that's what people are looking for on TikTok. Instagram is more status, it's more travel, etc. Facebook is informative, Facebook is still used by companies, it is still used by adults, young people no longer use Facebook,

so you also have to identify, because there are agencies that say "I upload this publication in all three", and they expect the same result in all three, no, you can't and yes you can, but it's not right, so that's what we also saw in our social networks.

- All services addressed to customers: The issue of airline tickets, for example, before you had to print your boarding pass, now you do not. Now it is already the process that you go through with your card and they print your pass, just with your phone and that's it; to pay for the same thing, you no longer need to take the code from your card because you just swipe your phone and it is already paid, and that's it, so there are many processes that have been, well, simplified, to say it in a manner of speaking.

According to **entrepreneurial associations** the most important factor influencing tourism is the lack of personnel. First, these has an impact on the performance of the companies, because of the contributions that we have or because personnel take a long time to hire. About personnel training, because the hoteliers say that they do not send their personnel to be trained during working hours and all paid if later they are going to leave, they are going to invest in a training that will not be of any use to them.

4. New skills that will be necessary to cope with the evolutions and developments of tourism. Or skills, already required and/or present in the companies, to be strengthened to meet production needs

Respondents asked to evidence the **new skills** necessities to cope with the evolutions and developments of tourism or the **skills already required and/or present to be strengthened** to meet production needs.

Hospitality facilities evidence that:

- Ability of innovate, train and be aware of new trends, of what people are looking for. Creativity and innovation in the services offered, initiative to look for new alternatives and satisfy the needs that the market demands and that now are infinite
- Responsible management, very well prepared and with a lot of empathy. Knowledge in psychology. The traveler arrives more and more alone both because he travels unaccompanied and in solitude. People who can understand the needs of the customers and who can be empathetic with the situation, with the place where they come from, with all the context they bring and that makes them arrive at the destination
- Ability to interface and explain with many types of travelers in world tourism, from the backpacker, the businessman (who travels less and less), families, women (who also travel now), the LGBTQ+ group, all that.
- Fluency in more languages. Yes, the most we have found is that when we have vacancies, for example, in the reception area, there are those who apply, there are

those who arrive, there are those who studied tourism, but when it comes to the English test, they just say, "it's just basic" or "I don't like it", so, that is where we find that, although there are people who want to work or who want to occupy this position, the issue of English has been complicated.

- A good command of technology, use of social network and of Whatsapp
- Knowledge related to tourist information, general culture and history above all.
- Humility to learn, humility to say "I don't know, but I learn"; good attitude because it is something that is contagious.
- Being congruent, responsible, adaptable to change. Tolerance to pressure, sometimes there is a lot of work to do, sometimes there is not
- Ability to teamwork, everything also varies depending on the position, but if you have to work as a team, suddenly we are going to work a lot
- Data Science is in great demand due to the need to design a process that collects, organizes and analyzes large volumes of data from different companies or organizations, allowing predictive analysis of user behavior and information privacy strategies.
- Cultural knowledge of hotel city, state and country.
- Inclusive approach, work with a non-discrimination approach

According to **travel agencies, tour operators, destination management systems and transport operators** interviewed, the new skills necessities to cope with the evolutions and developments of tourism or the skills already required and/or present to be strengthened to meet production needs are:

- Ease of adaptation, that is the best competence that a profile has to have.
- Conflict resolution, it has to do, that is the basis of conflict resolution, but you can only get that with experience, there is nothing else.
- Working as a team. Respect is essential to work as a team.
- Customer service. The importance of this area lies in the fact that good customer service makes a difference, since the average local and foreign tourists who receive quality service will be the best reference for recommending the destination and the activities offered in the locality.
- English and, in general, language skills are very important, since the imminent visit of international tourists makes it necessary to learn other languages, which will significantly contribute to the interaction with tourists.

- Experts in social networks, to have, let's say "free of charge" all the advertising. "Free of charge" because it is only symbolic what Facebook are charging them. So, there has been a change, and they have had to be looking for this type of people, who are experts in social networks to be able to follow up on everything that is being advertised, everything that is trying to sell, and that is how agencies are now having much more clients. They are having more clients based on that, on social networks, on Instagram and WhatsApp. So, there has been a change in that area. Before, social networks were not used as much. "Only one agency here in San Luis, I have seen that it still advertises on the radio"
- "you cannot be a nervous person, a person who projects insecurity, because if you work in a restaurant, in a hotel or in a travel agency" ... "if you run or walk fast in front of a diner, in front of a guest, in front of a client, it is synonymous that you forgot something and that something is wrong and that you forgot about their service, that you didn't remember that they had asked you and then you reacted and went back". So, in the tourism sector it is necessary to "manage emotions" and "work under pressure and even more". Tourism is when people are on vacation, and they are expecting to have fun, they are expecting not to be stressed, people are expecting to have a good time, because it's a time of rest and you're going to meet all kinds of people, as well as people who are relaxed, people who are jerks, and so on.
- Ability to create experiences that people want, to make the circuit, etc. Techniques to create memorable experiences for visitors
- Techniques to impart knowledge regarding the culture and history of the community (enriching activity for tourists).

Finally, the training and formation of local personnel in the **rural tourism sector** is fundamental for the sustainable development and success of tourism. After the pandemic cycle tourism activity has expanded so much, so it is necessary to ensure the benefits of and for tourism and that the benefits are distributed in a conscious, capable and equitable manner. Hence the need to carry out a continuous training program for workers in the rural tourism sector, prior diagnosis and focused on the areas considered key and important to improve both the visitor's experience and the quality of life of the inhabitants of the communities where rural community tourism potentiates the workforce.

According to **entrepreneurial associations** to be a hotel professional you need several requirements, characteristics that are very important to know and always keep in mind. To begin with, you need a:

- spirit of service, where a hotelier is characterized by seeing how to make a guest's stay more pleasant, how he can help to make that stay really pleasant, whether for business or recreational reasons, so that we can collaborate to achieve those objectives
- knowledge of touristic route, cultural resources/attraction in location etc.

- Language

Finally, it is an issue that we are seeing the trend of personalized attention and that can help a lot to involve and develop those young talents. The issue is that we have to tie the academic part with the current needs, where we must also have a great communication with the schools, the universities, the technical schools, which intend to develop a relevant system, we have to go hand in hand looking for those common objectives to develop these programs.

The problem comes from high school and ends up increasing in universities. We need a critical sense, a sense of proposition, logic, to be proactive, to take the initiative. We need to work with tools that have to do with values, that have to do with where I am going.

It's necessary to carry out a strict revision of the work plans of the universities, and a strict revision of the work plan includes strict supervision, because students finish their degree in Tourism Administration, and they don't even know the tourist routes. My first suggestion is to review the curricula of the universities that have the careers for the tourism sector, from there comes the big problem, and if it exists.

5. New professional figures to cope with evolution and changes in tourism

The interviewed was asked to indicate new professional figure resulting from the evolution and changes in tourism.

First indications come from Hotel and Hostels:

- Figure of the programming engineer is already indispensable in any company; "we need to become more technological, and I do not mean to do things with less staff is the key, but in the absence of being able to recruit".
- Manager of social networks, of communication. "Today, Reels are in fashion to promote products and services and young creatives with original designs are needed".
- Specialized service people, in the sense of more personalized, and now it is more focused on experience tourism: "people are no longer looking to eat quesillo, they are looking for how to make quesillo and if possible burn their hands in hot water to make quesillo"; "they are no longer looking to eat a tlayuda, they are looking to be taught how to prepare a tlayuda, that is to say, more towards this sector, more towards service, more personalized, more focused". Person who is aware of many types of details, which are difficult to box, and I believe that to the extent that a person is capable of adapting to all these different facets of this job, of the hotel business, that will be his or her worth. "Even if he is a super plus CEO manager, even if he is the CEO of a holding company, he has to know how to make a bed.
- People specialized in sustainability, recycling and care for the environment.

- A financier, an economist, “someone who can help us to know the role that is viable before executing it”. Someone who knows how to make financial plans, who knows how to project them.
- Legal framework, a figure operating at least one by association. Its role is to verify legal framework for companies’ ideas, how to register trademarks, how to do the paperwork, etc.
- People specialized in health, in wellness, in sustainable issues, in food issues. “Nowadays, many people travel and say, I’m vegan, don’t they? So, they look for a hotel or a restaurant that has something vegan on its menu, right?”
- Experts are required in IoT (Internet of Things), in Blockchain to ensure security and data transparency; in UX/UI, (user experience and interface) to ensure an optimal experience. Since the emergence of digital assets such as cryptocurrencies or NFT, experts in internet of value investments are required.
- A generator of experiences. In Mexico we create a lot, but it is hard for us to land the ideas. “Then we need someone to tell us how to land the ideas. So, the trend is that people want experiences and something personalized, so you have to say... and in beach hotels there are more because they are there for eight days, you have to create something even more special for them, you have to ask for their hand and decorate the room, that is, it requires more creativity, to see what you can do, how the client will like it, to be aware.”
- Expert in the promotion of the care of the natural and social environment by establishing a relationship with professionals of environmental institutions and social benefit in indigenous communities, as well as civil associations that are becoming very fashionable, as people are turning more and more to rural, agricultural, environmental tourism, for example: bird watching and local species, gastronomic experiences and above all mental, spiritual and physical health
- In Oaxaca there are already managers who manage several hotels. So, perhaps a small hotel is no longer managed by a family or a person, but by a chain, but a small chain that focuses on small hotels; “perhaps this is a type of figure that is emerging now, concessioning as a form of business”.
- Some figures of great utility such as: "Cloud Architect", "Data Scientist", "Content Creator", "Ethical Hacker", "Head-Hunting", "Influencer", "Networker" as well as the management and analysis of Big Data.

Finally, someone suggests that more than adding new figures, it would be just that, to keep workers in a process of constant updating, because we have” to be subject to change, we have to maintain innovation within the companies. (...) The ideal would be that within what you already have you can provide them with this update so that your team that you have already formed can continue working along the same lines.”

Some indications come from **travel agencies, tour operators, destination management systems and transport operators** interviewed:

- The Community manager, that is the one who has to take care of how to upload content and what to say in description, and the times, and the graphics, at what time it has to be uploaded; and then there is the one who is in charge of advertising campaigns. People experts in social networks. Before, the agencies only had the owner, sales agents and their accountant. Now they have their own people specialized in social networks. "I think that it will be that, I don't know, a specialty in social networks, a specialty in memes, a specialty in reels, I don't know, that could happen later on because we are seeing a lot of this in terms of new advertising and it is also cheap because the truth is that social networks charge you, they charge you very little".
- The web page creator, the web page designer and the campaign designer. There are many things that the same tourism career has to learn, if you want to have a travel agency for example or any tourism company.
- Customer service. It is very different customer service physically as digitally or phone call. Digitally by WhatsApp customer service is carried, in how you handle with the customer, the words, how far to go. There are times when you have to use the same words, the same language that your client is using, and people also like that because you get close to them, in confidence. Regarding calls, it's important the voice you use. When it comes to problem solving, "the type of tone you use is important, you have to make your voice warmer, slower, do not speak so fast so as not to upset the customer, etc."

Finally, interviewees declare they are really looking for much more versatile and adaptable profiles. For example, if before it was business administration, today it is tourism business administration.

According to **entrepreneurial associations**, there is a need of:

- A logistics or preventive maintenance process manager who can help to prevent from deteriorating or can take advantage of the time to optimize the product assortment times. People who see beyond the technical work, for example: a maid who fixes a bathroom or makes a bed has to see beyond his/her technical work, there are many things that are enclosed there, from the logistics of the necessary products, the quality of the products, the duration of each material.

In general, there is needs of figures who can respond to LGBT+ community that requires special treatment, that you cannot treat them like other guests, that they require a different treatment. Figure whit more critical mentality, with environmental care, because we are evolving in terms of sustainability. "We have to become aware and train ourselves from the generation of garbage, from the recycling of things, from being a less consumerist society, and this is in high school and undoubtedly has an important impact on professional training, but for this it is essential that universities take their role, assume it and assume the commitment".

6. Jobs contents and tasks have changed most noticeably (more manual or cognitive?)

According to Hospitality facilities interviewed about jobs contents and tasks that changed most, nowadays "learning is more experiential, you put them to read a manual and everyone runs, no one reads the instructions, but not even the assembly of a piece of furniture, everything is more like digital platforms, videos, as more didactic." Today the remote becomes close and the scheme has changed from individualism to **teamwork** to encourage employees to work together towards a collective goal efficiently. New scenarios and tools have emerged for online collaboration, videoconferencing, virtual workspaces, online learning and collaboration platforms, YouTube tutorials and more. We now have time management and productivity tools, such as toggl track, Rescue Time, Notion; project management tools, such as Jira, Monday, Basecamp and team management tools, such as Tiny Pulse, 15five, and office vive.

The "multitask generations" favor teamwork. Today's young people are not only capable of doing several things at the same time, but they are also experts at it, so education and virtual work and meetings should be adapted to this characteristic. In terms of interpersonal relationships, applied **emotional coaching** helps to overcome **stress** and promote **resilience** in the business world, as well as courses on Emotion Management and Artificial Intelligence to achieve balance in work relationships. **Business planning** is an essential process for the creation of a mission or objective and for the definition of strategies.

In particular:

- the issue of market research, which has become very important and perhaps it is not so theoretical. Things are really learned with experience. It is important to keep a constant market study, to be studying your tourist, to be analyzing what has changed, what he prefers more, what he stopped consuming, and through that you base on the commitment that all company, that all team can improve or can adapt to the tourism they are receiving.
- For employees, cognitive development has been evolving, growing and this is due to the fact that they have the information within their reach. For example, the tutorials help to teach a lot of things. So, this development, this knowledge that the collaborators are developing, is very good and it also spreads to other personnel.

According to **travel agencies, tour operators, destination management systems and transport operators** interviewed, with today's experience, it's not more important if employees have a degree or not. Nowadays most people already have a degree. But nowadays what is taken into account in job interviews are skills, companies no longer ask you about qualifications, they give you skills tests that gives the company the opportunity to say, "this person has this skill, or this one, customer service, you have an attitude, very tidy, etc., so I'm directing them to this area". Manuals are still very important, it is mandatory. They must be updated, but there must always be a manual.

Creativity has to be something that is part of tourism. Tourism is so noble, it lends itself to everything, someone comes up with an idea, puts it out there, and everyone starts to like it. So, creativity must be a basic tool.

According to entrepreneurial associations there are issues that are not new, but they need to be strengthened due to the times we are living in, and being in daily operation can detect many things. For example, the issue of sustainability is one that should always be present: the excessive use of plastics, the best use of all supplies, the use of products and materials that really contribute to the environment, are issues that we should also have in our educational program because the truth is that on the beaches they have a great advantage, and from the care of the beach itself to the hotels there is a great awareness of sustainability and care for the environment. In the cities there is a bit more carelessness in this matter.

7. Professional figures and skills that companies need and which they have difficulty finding

According to Hospitality facilities there is a general difficult to find personnels. People want to work from Monday to Friday or just want to work in the mornings and do not want to work at night, so that is the complication, it is the willingness to work more than anything else. Professionals almost always leave municipality to look for better quality employment and all because, well, it is small, and the salaries are not that great. Many times, it is precisely the commitment that is lacking. You can have the knowledge, but if you are not committed to what you do, you are not really going to perform as you should. Interviewees ask for:

- more requirements for employees in the reception area
- employees in general maintenance, air conditioning, refrigeration, hydraulic, electrical and kitchen technicians
- People with multiple abilities, general culture and empathy
- Person with experience, call it academic or generational experience in the kitchen, for the elaboration of a master book, the execution of a correct form of a dish, to keep the correct equation in inventories, recipe books, purchases, etc.
- Salesperson: it is not selling for the sake of selling, in sales we have some basic rules, you have to sell to the right person, at the right time, at the right price.
- Professional figures in Agroecology, Health Sciences, Social Media Manager and Community Manager, Renewable Energies and Sustainability, Environmental Engineering, Robotics Engineering, Digital Marketing, Digital Art, Population Aging and Nanomedicine.
- Supervisory personnel, with leadership, knowing how to manage people with good manners.

According to **travel agencies, tour operators, destination management systems and transport operators** interviewed, they claim that should focus more on competencies or skills than anything else. The professional figures and skills which they have difficulty finding are:

- Customer service, because there are people who do not like it, they are embarrassed to talk on the phone, even if they are not looking at you; there are people who are embarrassed to approach a person. "The pandemic has made you a little shy, insecure". The educational system needs to teach competence in how to dress, how to respond in an interview, how to present oneself; activities such as presenting oneself in front of the class, poetry, public speaking, debating, defending a topic in front of classmates. This breaks down barriers, insecurities, allows you to express yourself in front of the public, that also has to do with tourism.
- Marketing skills. Young do not know how to negotiate; it can also be useful to see it at school. The young people don't know how to have a direct relationship with suppliers, they don't know how to express themselves, they don't follow up on requests, they don't call, but it's because of insecurity, because of the fear they feel. So, they have to know that part of negotiation and they have to get into that part of knowing how to negotiate and know how to communicate.

Final, a general consideration is about the difficult "to find someone who wants to work". Unfortunately, social networks and influencers have a negative influence on people, especially young people, because they teach them is that apparently everything is very easy to earn. That also people no longer want to work, that is, it is sad, at the moment. "I do not understand if they do not feel qualified, if they do not feel prepared, if they think they are in a place working and at the moment they feel less, and then the option is "I am satisfied with this, and I do not go out to look for a job". The simple fact of having a person who already works, is really a gain for any company. "We have reached the point that before we had to hire people from 18 to 35 years old, and now we have raised it from 18 to 55, because those from 35 and older are more responsible at the time of work, that is the detail. So, it is not so much a figure in itself, but a person who really wants to work and who is responsible."

According to entrepreneurial associations, many companies have a management or an area in charge of issue of sustainability, but a head, a manager or a director of sustainability is not just "around the corner". It needs to have that perception of things and that technical knowledge that is developed not only in practice but also academically, with the knowledge to be able to contribute to these issues of sustainability and that are issues that are relatively new. People who are perceptive, sensitive and who are prepared to take on these positions, but also people who are not ashamed to make a bed, wash a toilet, because this is part of the training where many things are detected that can contribute to saving energy consumption, saving water, saving chemical products, the area of more care for the ecology.

Other professional figures difficult to hire are receptionists, and much more difficult in the afternoon and night shifts; maintenance areas; waitresses.

8. Main reasons why companies are unable to find these professional figures

According to Hospitality facilities the difficulties in finding professional figures lie in the following causes:

- The lack of opportunities to grow in some little towns. So, young people look for where there is more opportunity to earn more, better salaries, greater competitiveness.
- The rhythm in most businesses is that there is a moment when it becomes monotonous, there is a moment when personnel reach their "limit" and say "now I want something else".
- The lack of interest in studying English; it's not possible to work in tourism sector without English knowledge.
- The lack of general cultural and knowledge about attractions and cultural resources in Mexico and in the region. In the tourist industry, the area of history must be strengthened, because it is important to know the space in which you are working.
- The lack of commitment. This is what Dual Education is good for high school students, at least when they practice, they already know "ah well, I want gastronomy" or "I like more events" or "I like this", so they are already a little more focused, or "it's not what I wanted". Dual education gives them this part of the practice and see what they like the most and where they can develop.
- The night shifts. In tourism, most people leave work late, on weekends, we work when everyone is resting, so that is another idea that young people also choose tourism because they have the vague idea that it is like traveling, it is like "I am going to get to the hotel and be a manager", and then they run into a reality that is not like that, that you have to work weekends, that you work 365 days a year, that you have to be on the job, and you don't have a schedule to keep, but rather if people arrive or you have a group or whatever, you have to wait. "I mean, that sometimes young people think it is not like that and they get a shock".

Finally, there is the general belief that people no longer want to work, because of the social programs. And then, if you hire a young person under a social program like "Jóvenes construyendo el futuro", you have many limitations, "you cannot send them out of the hotel, it is difficult. In labor relations, you can't speak loudly to them, even if you have a voice like that, because it is already an offense, it is difficult".

According to **travel agencies, tour operators, destination management systems and transport operators** interviewed, there are several causes on which lie difficulties in finding people working in the sector:

- The scholarships offered by the government for young people are affecting companies a little, because many young people do not use this scholarship properly. They make agreements with companies/businesses, they pretend they are working, but in reality, they are not, and they receive a scholarship. With that issue you find young people who want to work less and get paid more, the new generations want to work less, they are focused on a good quality of life and with a minimum difficulty.
- The school. The preparation, having classes that are already obsolete, so theoretical that they are no longer useful. Also, many skills are developed by the person, it depends on the personality of each one, but if you as a school do not teach them those skills, for example, to negotiate, to be creative, to open their outlook, etc., if you do not give them the basics, they will have to learn in life, and that makes it more complicated for them and for the companies. The percentage of teachers who have this relationship between a working life and a teaching life is 15%. "The teachers stay and get married to their books and when it comes to teaching the kids, they don't help."

9. Ability of young people, leaving training and education programs, to work independently in tourism businesses

Hospitality facilities interviewed generally think that young people today are technically very well prepared, those who come out of university, but they lack a little of that flexibility that experience gives you. It's necessary learning from more experienced colleagues. "Because I can give you a manual on how to do things, how the machine works. But I can't give you a manual on how the mood of that client or that same colleague is going to be that day." In particular, there will always be a leap from university to the company, there will always be a leap, but there is also the ability of the person to adapt and to seek to be efficient and effective and provide the company with the value it needs:

- hospitality need the practical part; most companies are looking for someone who, apart from knowledge, already has experience in the work area, who not only knows the theoretical part, but who has his own criteria, who can solve problems, who has already been in situations that may arise. Maybe before going out to the labor field, they have some experience in problem solving already in a job. Young people recently graduated from universities, despite their academic background, are not ready to work immediately independently, because as in every beginning, guidance and accompaniment of experienced entrepreneurs is required, of those who already experienced and managed to excel, sometimes spoiling, sometimes winning, but later became successful entrepreneurs. Young people need social relationships, knowledge of the market where they are going to develop in order to do business and consolidate

a prestige in their respective markets. Of course, there will be exceptions, there will be talented young people who will be able to venture immediately on their own and succeed.

- It depends on the position; in other words, if we are talking about a person who is going to be in charge of a cash register, of an operating system, then if he/she requires training, even if he/she has a degree or not, or if he/she has basic computer knowledge, Excel, he/she only needs an average of one month of training; for someone who works at the counter, it is an average of one month of training.
- Currently the curricula are quite complete, but it has more to do with the attitude of the student and future service provider than with the knowledge and experience.
- There are some universities where they leave with one, two or even three languages, but the great majority or the operative part of a hotel does not have a language. Languages would be very important, before a language, to rescue our languages, which would also be very good to be proud of.

According to **travel agencies, tour operators, destination management systems and transport operators** interviewed, all the theory was seen in school, but everything related to the product requires training within the company. The ability of students who left schools/universities depends a lot on:

- Students. "For example, in the company we participated in the "Jóvenes construyendo el Futuro" program, we had two young people, and they turned out very well, we trained them and gave them the right tools so that they can work in any agency without any problem, they already have the tools and the knowledge, they took the program well. They are people who have the attitude to learn".
- Tutor/teacher. "There are teachers who have been in the labor field for 15 or 20 years, and they kept all the theory and everything they see in the book."

Someone interviewed not agree with the value of training at school. That is why when young arrive at the company many times, they do not know what to do, and of course, entrepreneurs need to train them. "And all this because the great majority of the professors do not work in the field of tourism, they have only dedicated themselves to teaching, they are not up to date". Today there are many trends, new technologies, programs, software, which are used in agencies, hotels, restaurants, in the various areas of tourism, but there is a lack of knowledge on the part of teachers. The result of this is that students are leaving without that basic training, without the knowledge that is needed in the labor field. It is important to strengthen the English language skills of young people; it is extremely necessary.

In general, there are some skills, abilities and knowledge that cannot be trained at school/university. For this reason, dual system for tourism is ideal, because there is a way to come to the company and practice and practice and practice. In the manual they will never tell you, you will know how to do, for example, a hotel check in, that is, in the manual they will

teach you, the teacher will tell you about the registration card, the system, whatever you want; but there will be no manual that will tell you "how to handle a hysterical, crazy customer" in front of you, but if you do it, there will be no way. And, above all, since we are talking about a large industry, a smokeless industry that is tourism, we are talking about emotions, about services, something that is not palpable, that is intangible, then it is even worse.

But practices in the way they propose in the dual education system, that they go hand in hand with the theoretical and practical part, not that they do their entire curriculum and in the sixth semester they are sent to do practices, "200 in agencies, 200 in hotel management and 200 in airports". So, they should go hand in hand with their study plan, because it has happened that they either learn new things or they learn things that they have already forgotten because they only studied it for their exam. If you take the theoretical and the practical, it is easier for the type of learning that you want to make it easier because you are living it.

According to entrepreneurial associations, there will be all kinds of people, there will be those who make an extra effort and prepare themselves and are better trained, there will be those who are not or who meet the minimum requirements to achieve the certification or the degree or diploma that is required. What it needs is a greater link with the programmers, to realize professional internships that go from the universities or technical schools, but it also important to have a follow-up programmer and how to evaluate each of the people who are there, how can also have a programmer that is something that really provides with professional growth during their stay in the hotels.

10.Participation in dual training programs and main critical issues of these programs

About dual training program the situation of Hospitality facilities interviewed are very different:

- Someone has not activated this kind of program, but they think that is "what is needed in services such as these". "It is important that you have people who bring all the recent knowledge, but you can also support them so that they can begin to develop in the work environment, and perhaps in the near future or within the same process, they will become part of your work team, of your company, and when they graduate, they can stay permanently with you."
- Someone uses the social service. It depends on school hours, but when they get out of school and see that they will no longer have vacations, the schedules are eight hours, from very early in the morning until very late in the afternoon, they say, "no, I have to leave at two o'clock" ...Or the problem is that July, half of July, the beginning of August are vacations ...They are very concerned about the qualification of their school, more than about getting closer to what the company needs.

- Someone receives interns who come from the schools and go through the areas, for example, through the reception area where they learn how to check in and check out, or learn how to check in, how to use a hotel system, or how to use a restaurant system. One of the criticisms would be the time given, sometimes the hours are very short or sometimes they only allow them to go for two hours from Monday to Friday, "so in two hours you don't see so much, you don't cover so much, how to do it".

In general, Hospitality facilities interviewed are very satisfied with dual education. Young students learn a lot, they also help you do work that you may not have time to do, they make diagnoses.

A suggestion came from someone of people interviewed is about a sort of "tripartite triad". It would be to add the academic, the practical, with the research. In other words, put the young people in a thesis type, a final project, in which student is also a kind of teacher.

Travel agencies, tour operators, destination management systems and transport operators interviewed are in favor of combining theory and practice. If students were given the opportunity to combine theory with practice, they would grow much faster and ahead of many.

The interviewees are not conscious about dual education. They have not experienced about it.

One consideration is about a criticality of dual education. The suggestion is to be very careful, because maybe when a young start for an internship, suddenly it becomes easier for them to "go, leave and start working", and then leave school aside. This could be a critical point, the school drop-out. "On both sides we should play our role and charm them, but we should also generate a commitment on both sides, to allow these students to finish their studies and on the other side, that if these kids are good, they will have a guaranteed job when they finish their studies."

It's also important to determine at what point it is ideal to start doing this, maybe after a year or a year and a half after they entered school, at least that they are sure that they want to study that career, because it happens many times that they start studying and after a year they decide that they do not like. So, it has to be analyzed at what point you can say that the student is ready or sure that they want to go down this path and then jump them to the company in the field they are selecting.

According to entrepreneurial associations, each of the hotels participates in various educational collaboration programmers with young people. For example, with "Young people building the future", many hotels receive these young people who are helping daily. There are others that receive a certain number of young people through a programmer that makes them awaken this vocation for service and passion for working in a hotel; there are others that open their doors only to professional internships for a month, a week, a semester, they receive students who put them to work in the hotel in different areas or in one area. It's fundamental a greater coordination with the academy to be able to follow up and give better results.

11. Interventions to address the difficulty in finding specific professional profiles and improve collaboration with schools and training centers

Hospitality facilities interviewed first indicate the solution to difficult in finding specific professional profiles in government policies. Someone asks to revise some social programs like "Jóvenes construyendo el futuro", because they give to young people a monthly allowance (which is very good!), but at the end of the day they are not trained. The idea is that it is becoming a little counterproductive. Others affirm that the government should implement, support to strengthen young people, through programs ad hoc. These programs used to exist, but they have been removed, but I think they should be reinstated. Because there are young people who have not grown because of lack of support.

Other solutions indicated are:

- Invest resources in actions to improve the work environment. For example, to have a proper employee dining room that inspires; to have a clear visual awareness program, shared, where our values, the organization chart, the objective, the profile of their position, so to speak, what they can expect from us, indicators that they can see, all the time, that they can monitor digitally. Maybe that is where the academy could help us, in some kind of methodology to monitor performance.
- Offering students or candidates, for example, the "housing" that would be the accommodation with transportation to the work center, difficult, because it is delicate because you incur in insurance for the vehicle for the transfer, for the accommodation.
- To improve collaboration with schools and workplaces. Go to the schools, getting interested with students, talking to them, "infecting them", inspiring them, approaching them. And approaching the professors as well! Collaboration can be improved by working together, in a collaborative way, so much so that the school can allow students the freedom to develop within the company, so much so that the company can understand the student's situation, be a little more flexible on both sides so that they do not feel forced, pressured, because that can make them lose interest in, yes, in belonging to the sector.
- Dual training system would be very helpful, because you would already have the profile within the company, you would already make it part of your vision, of your mission, so from there you can take many profiles that can be useful to reinforce your work team. But it's important to facilitate or eliminate the paperwork, which is often what complicates companies, in other words, to put in place requirements that are not so complicated to comply with.
- From the school, it could be useful change the theoretical preparation, to allocate a lot of practical time.

- More vocational orientation reinforcing the importance of this type of services in the tourism sector that has few applicants, using also some strategies that can be planned by educational institutions.
- Making alliances, working groups, where we really set goals, where we can do pilot tests and make feedback of it, having feedback using statistical information.

Travel agencies, tour operators, destination management systems and transport operators interviewed think that it could be good to:

- connect with the Universidad del Mar and with high schools that offer the area of tourism and to do internships with the students, to explain them about the local situations and the complexity of the problems. This could be useful to help them to know and understand tourism companies and how these companies work. So, offer them those approaches and let them know what a travel agency does. It's a win-win, they gain knowledge and see a bit of real life, and companies gain that they are recognized "and in the future good profiles will approach us".
- The schools invite people to give talks at their facilities, people able to engage students. There is a need for a union of businessmen, professionals, and that they give their experiences in the schools, that they tell their history, that they tell how tourism is lived. That the different areas of tourism are invited, from the artisan to the tourist guide. Generate a "real alliance", one that really awakens people's interest, inviting, for example, young people who are about to start their internships to presentations, events, conventions, visits to companies, etc. They should even invite them to carry out real cases, which motivates the students to generate proposals, to be creative and to know how to negotiate. This also allows the young student to feel important, to feel that they are contributing something real, which in turn awakens in them a sense of vocation and belonging.
- Inviting young people to do internships, through the opportunity to make agreements with a hotel, for example, so that students can visit it, see what the service is like, how the hotel is managed, see the different types of hotels, there are hotels on the beach, in the city, boutique hotels, hostels, etc., all this will make them a little hungrier to learn.

The general solution proposed is a link between the company and the educational institution where topics are discussed together, a worktable is set up and it is mentioned what the purpose is, what students want to learn during that semester and that they are analyzed with the companies. So, we believe that it is very important that we link the two parts (academy and companies), that these curricula are being updated, because tourism is changing so fast, and curricula have to be updated every two or three years.

Very important it's to work on emotions, on the "human fragility". In companies there is a lot of personnel turnover, the job search pages are full all the time, because people want to change jobs all the time, because they are not comfortable, because someone gave them a hard time,

because they made a mistake, like a delay, so these are issues that we think are more profound and go beyond how we manage stress, they go beyond the flexibility that a company has. These issues are very profound and need to be corrected, or perhaps they are right. The approach should be very well defined so that companies and managers are not in this situation of "how am I going to keep them happy" when they should be thinking about "how do I do it so that, not so that the company grows, but so that the country becomes a productive country".

According to entrepreneurial associations, it's necessary to improve the relationship with academia,

generate links between companies, schools and young people, a very close coordination between companies, academia and students, to be able to develop profiles in a good time and that they and the companies have benefits, to generate spaces where they can be integrated in an area of service that can awaken the vocation of service in the people who participate in it, and to detect and develop those talents to integrate them into the hotel management.

12. Suggestions for training and education system: necessary changes in training programs and curricula to address the issue of inadequacy among new hires

The suggestions of Hospitality facilities about the training and education system are the following:

- Curricula more up to date; teach them how to manage a little more, because they arrive very shy, or they don't speak or do things unwillingly. The companies must be involved in curricula and program updating.
- Organize course on work motivation, change of attitude, something like that. the psychological issue, the empathy issue. Nowadays the careers are quite good, that is, technically the knowledge is very good, the young people today all know languages, at least there are some. "In general, the training is good, the technical, then the human is missing".
- Encourage ethical and professional values in student training; improve by keeping pace with technological advances, also encouraging the use of the ingenuity of each individual to not make robots without problem-solving skills
- Organize "laboratories" to give students experiences of real life of working in tourism sector, organize continuous visits to properties in all areas of tourism throughout the career, to enlarge their vision and job expectations
- Improve public schools, they have to be on a par with private schools in order to guarantee that all our young people who are forgotten, who do not have the economic capacity to get ahead, can do so in a public school

- Enhance the tutor role in companies. Because often students arrive at the company and everyone is in a hurry, someone who is following students, someone aware that if some area cannot be taught at that moment, he changes it.

The suggestions of **Travel agencies, tour operators, destination management systems and transport operators** about the training and education system are the following:

- Incorporate more debates in schools and universities. A class where they say, "you have 10 minutes to read this topic and defend it with such and such a person in front of the group", then they are already developing skills. Or students that read text in class, in front of the group, explain it, say what they have understood, make a conceptual map of what they understood. "They should do more live practice, in class."
- Change all the educational models. Students they must be taught how to create companies, to aspire to want to be more than a manager. Educational plans should be more focused on encourage young to aspire to more.
- Practical interaction, "theory + practice", is fundamental for people to adapt to what their new job, their new job would be, to get a love for what they are going to do. And if you cannot take the students to the hotels, you can take the hotels to the schools, for example, with zoom presentations, webinars, etc.. Conferences can also be a creative and interesting way to get to know what employees do in tourism companies.
- Educational programs have to be updated hand in hand with the chambers, for example, perhaps using real cases, because we have to focus, on what the young man or woman is going to experience in the work environment and programs or technologies that are already are used.
- Time management classes. If you have an awareness of what time is and value that your time is money and effort and time for your family, your loved ones and time for your leisure, it would be valued more and managed in a better way.
- Public speaking classes. A person who knows how to speak and knows how to express what he feels, is very successful, in whatever field you put him.
- Ethics classes. Formative classes, ethics well given.
- Within the study plans there should be a program in which students move to the work environment, that is, to do internships, to do many internships, to put them in the work field so that they can amalgamate the knowledge acquired in the classroom, in the school, with the activities on field.
- The schools need to rely heavily on the companies and offer them exercises of the strongest things that have happened to them, they should tell them how they solved it. Even simulators are needed, hoteliers, for example, should take a group of young people who are studying hotel management and give them a real example of how to deal with a certain case.

- Regarding the subject of English, it should be there from the very first moment they set foot in the school, not only as an additional subject, but also to teach hospitality classes in English, to have the theory in English, because this language is a necessity. We have to prepare all the students with the tools and updates that are coming so that they can have access to the language and be able to communicate with a foreigner.

According to entrepreneurial associations, both in the academy and in the company, we have to be concerned about how we give these young people tools to be more analytical, more proactive and that they can go beyond the technique they are taught. This is the part that is more difficult to teach, because perhaps there is no exact formula, but there will be subjects or some activities that can develop this aspect, in a sense of critical analysis and positive criticism.

13.Ability of companies in training new hires on the job

Hospitality facilities interviewed they are very confident in their ability to train new hires on the job.

The large hotel chains have a very good training system because they have a structure in their human resources area, and they have established standards and protocols, while there are independent or small hotels that do not have a human resources or training department. So, if the student is going to be taught, but on a day-to-day basis, it is not so standardized. So, the businessman also has to invest capital to be able to train them and provide them with better professionals and give better quality to the citizens because, for example, the companies, small one does not have an area to train new worker.

Furthermore, companies are obliged to have a pool of arguments and patience and very clear people to supervise and improve and foreseen some mechanism for evaluation.

One suggestion is to iterate in job training, depending on the position of those hired, to have a community manager, a talent broker and to have an expert in administration and human resources. In personnel training, terms such as reskilling and upskilling should be applied. The former seeks to train an employee for a new position in the organization and the latter, upskilling, aims to teach a professional new skill that will optimize his or her performance.

Travel agencies, tour operators, destination management systems and transport operators also they believe it is possible to train new hires on the job. Often, it's possible because many companies have taken and have been molding the employee and if by chance you get someone who is committed, that is, and responsible, then company added value because then it has the employee expected to have.

But someone interviewed thinks that right now those who must teach a subject lack that love or that dedication for what they are doing.

According to **entrepreneurial associations** there are the intention and the goodwill, perhaps it needs to find a technique that will lead all to the pursuit of these objectives. But the goodwill exists, we always have it, and it is very important to link efforts, to align efforts that will lead us to achieve the success of what we are looking for, to work as a team.

"Undoubtedly, we have had people in the company for many years, practically since the company opened, we have staff who started from the bottom and who are now managers and we have been training them, and we have even been training them in leadership, in the art of delegating, which is an art, the art of motivating, in how to solve a problem with a guest. We are highly trained in what to do and what not to do; and we also generate awareness, for example, in the care of water, in the care of the environment, and we also do a lot of work on social responsibility, because it is also part of your community and part of your city. We work on all of this with the staff."

14. How motivate a young person to choose tourism as a career field and attend a dual training program, also using apprenticeship programs

Hospitality facilities interviewed thinks that to better involve and motivate a young person to choose tourism as a career field and attend a dual training program, it occurs:

- Explain the tourism sector opportunities. If you have a career in the tourism sector you can work in many companies around the world. If you study law, you can continue preparing yourself, but you will have to practice it in the country where you studied it, because the laws and the constitution are for that country. In the subject of tourism, except for a tourist guide, but in a hotel, what you have to do and all that, that is worldwide. "These opens up a world of possibilities to be able to work and then, because it is a dynamic sector, you meet a lot of people. If you know how to run a hotel, you learn to work above all with human teams, and you also learn a lot of things, you learn languages, you meet people, you learn a lot from the experience of people from other countries, then you end up learning a lot about how a building works, you end up learning about electricity, plumbing, etc. And you also get to know a lot of different companies, laundry, water, hotel and catering sector. You even end up getting to know a lot about the history of your environment. So, it is a career that can give you a general culture and a very nice vision of the world, which nowadays young people are very attracted to. You learn life skills, in the hospitality industry, from the most responsible positions to the medium ones, you are very involved in real life, in the news, in the day to day".
- Enhance culture so that our young people feel the need to promote our country, all the beautiful things that Mexico has.
- Through an influencer, some kind of personality, call him the graphic artist, the musician, the athlete, some person who could have an echo, a noise in their lives.

Obviously, testimonials, testimonials of young collaborators in the company, for example, a reception manager, a room supervisor, a chef, all of them of a generational range between 20 and 30 years old, where they would already be thinking about a medium-term future, where they could see themselves; and healthy, happy people.

- Young people can be motivated to choose tourism by encouraging them to be proud to be natives of one of the most beautiful states in Mexico and one that has received multiple awards. It is imperative to encourage nationalism, love for their homeland, their city, and ethical values in young people.
- Scholarships could be useful to move those who live far from the hotel. This would motivate people who say they can't because of lack of economic resources, especially those young people who come from far away.

Travel agencies, tour operators, destination management systems and transport operators it's fundamental to be clear with young about tourism sector opportunities. You have to tell them that with this program you would have this type of positions, in real life, business administration, human resources, etc. If they want a travel agency, this makes a travel agency and this makes a transporter; what else can you do in the career, hospitality, and tell them all the positions there are in hospitality: reception, concierge, etc., give them all the basics for them to choose. "You have to generate that sense of identity, love and vocation."

Put students to do internships and give them an incentive. So, they know that they have to comply with a schedule, with an activity, that they're already in the labor field, because at the end they have an extra, that was something economic that they could count on.

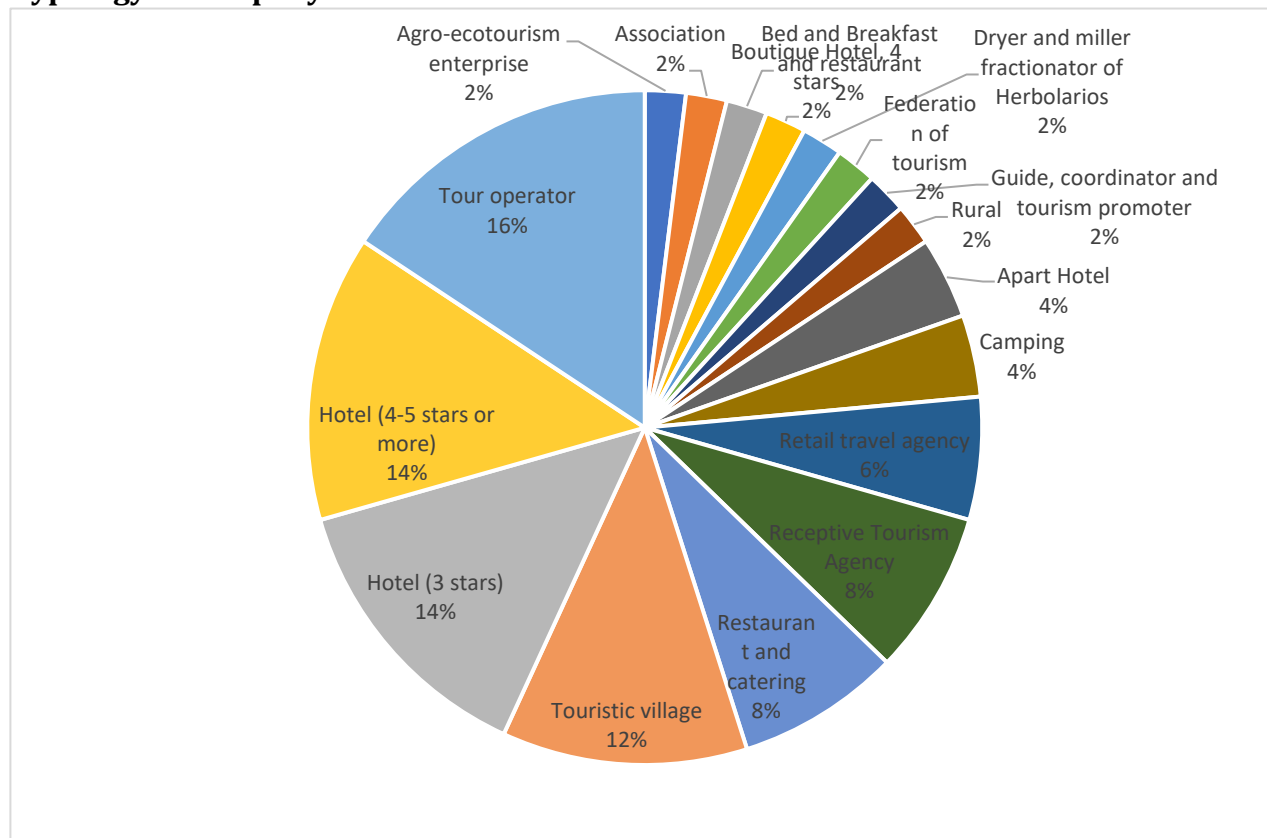
Entrepreneurial associations think this is an area where there is a lot of motivation, the enthusiasm of young people is great, it simply has to make them aware of all the opportunities they have professionally to develop. Tourism is a subject that is currently in fashion. It needs to get young involved so that we can awaken in them this sense of vocation, a real vocation for the activity, so that they can find a way to live and be happy with what they are developing professionally.

4.1. Results of questionnaires in Argentina

In Argentina, a total of 51 questionnaires was administered.

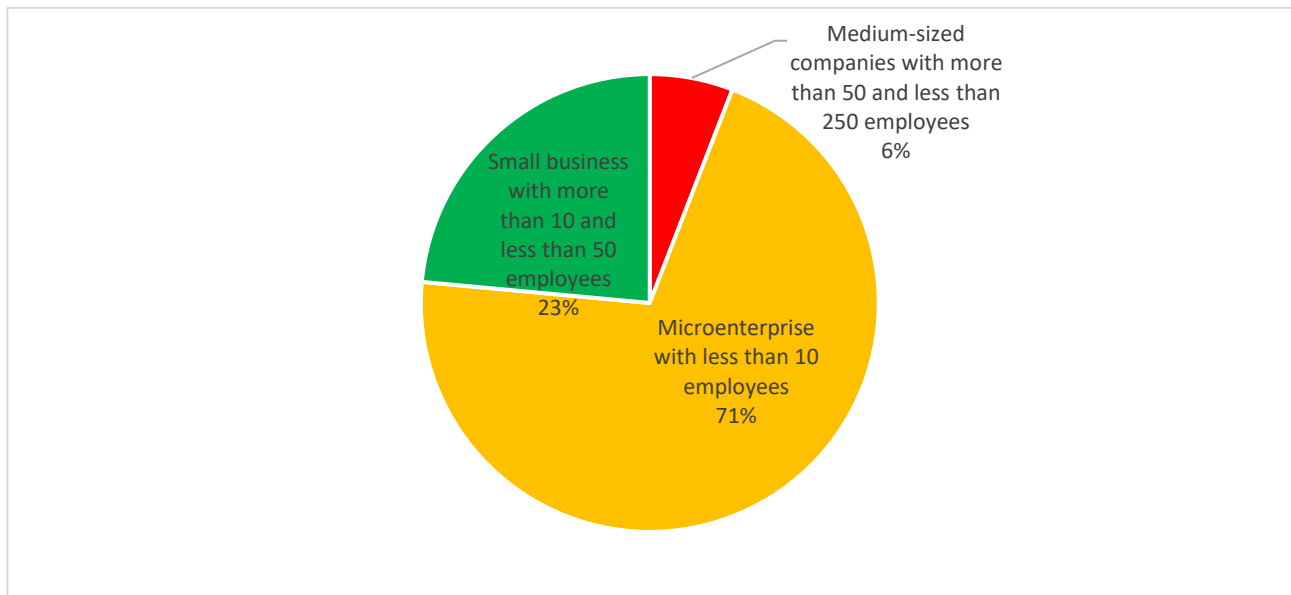
The interviewees belong to many different categories of operators who, in various capacities, deal with tourism. The main category of respondents is that of tour operators, immediately followed by higher category hotels (4 and 5 stars)

Typology of company interviewed



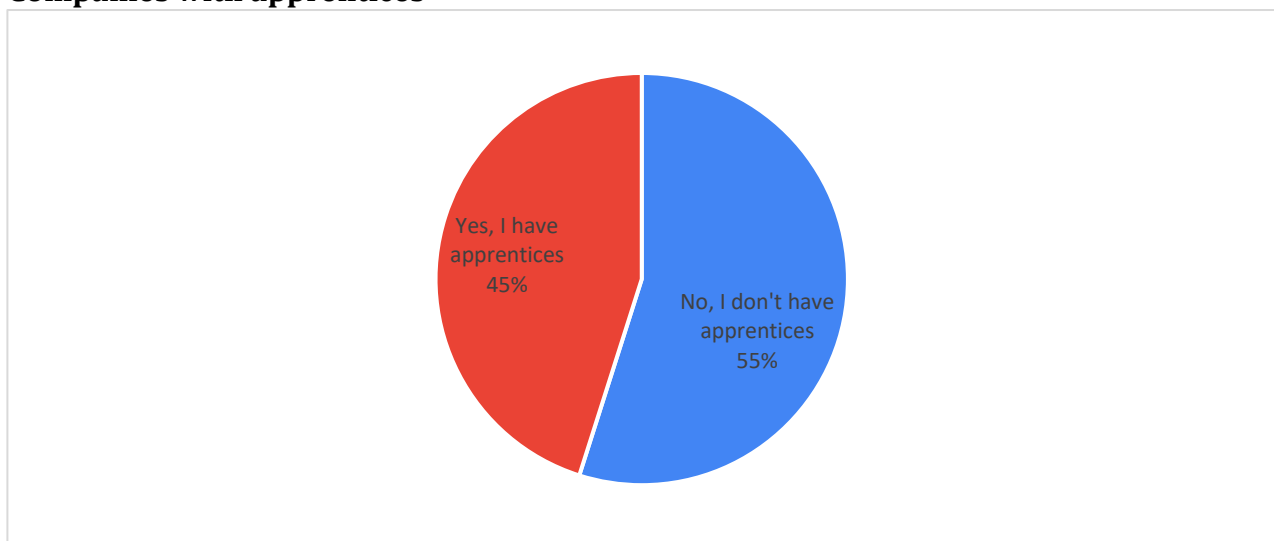
Most of the respondents are micro sized. There are no large companies in the panel of respondents (more than 250 employees)

Company size



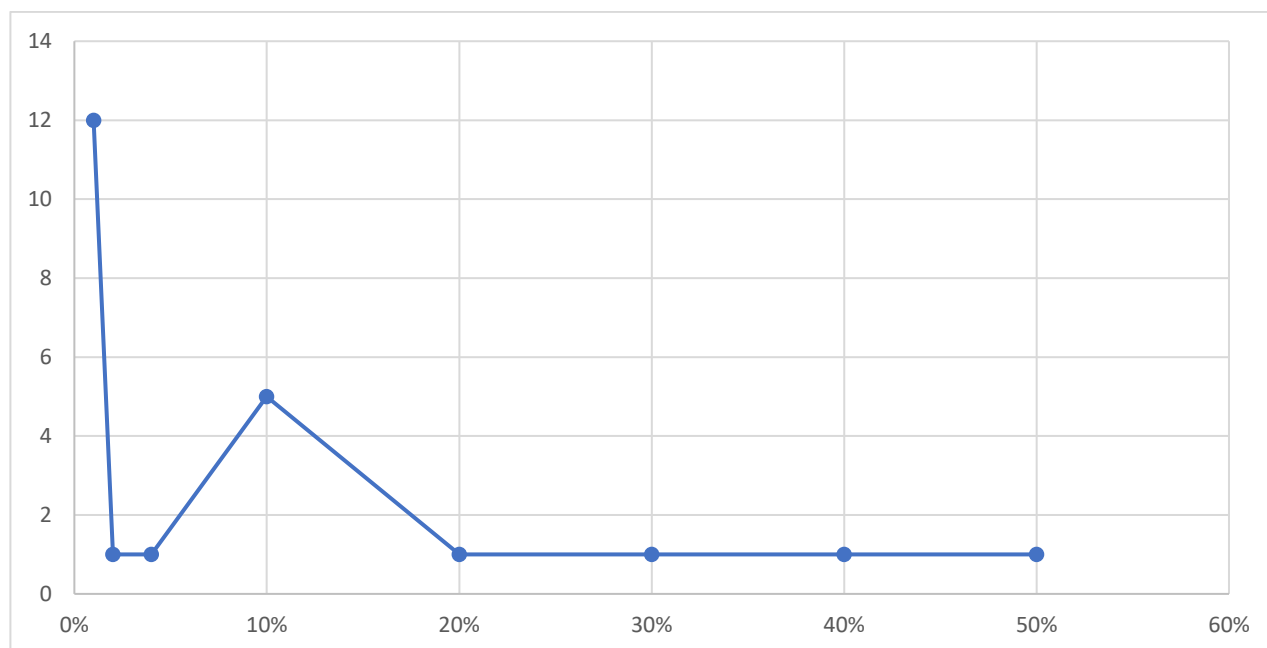
45% of the companies in the sample declare they have apprentices.

Companies with apprentices



The share of apprentices that interviewees declare they have in the company varies between 1 and 50%.

Percentage of apprentices compared to the number of employees



The channels primarily used for staff recruitment¹⁹ are “networks of personal acquaintances (friends, relatives, ...)” immediately following are “applications received directly by the company or presentations received of the workers”. An important role is played by “Social Network” (10.5%), which outperform private also (“Private and public employment agencies”) in the demand and supply matching process. “Vocational training institutions” combined with “Linkage with schools” play a role that could be more reinforced.

¹⁹ The question allowed for the possibility of indicating multiple response options.

Channel of recruitment

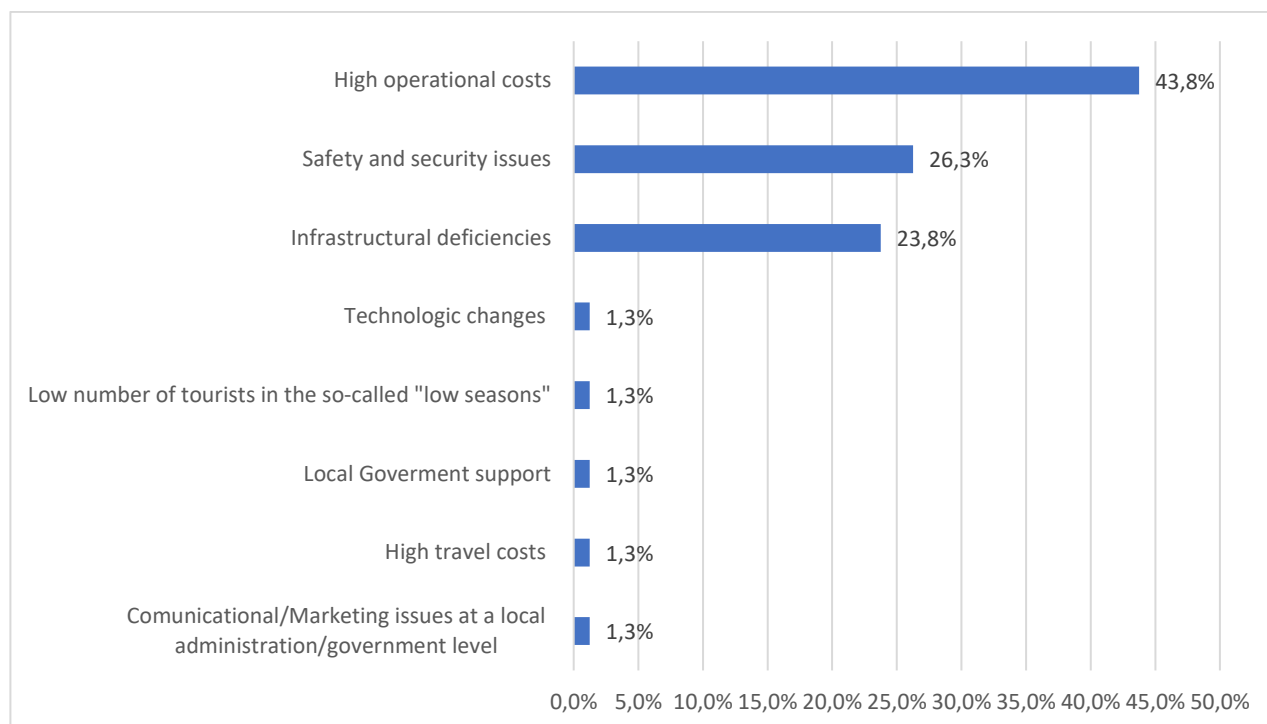


About trends in tourism, 3 questions were asked to the interviewees: main “challenges” company faces in the tourism sector, “opportunities for growth” in the tourism sector and “factors of change” do you expect that will have future effects on your company and its organization.

First, about main challenges²⁰, the most important are “high operational costs”, followed by “Safety and security issue” (maybe related to factors as pandemic). Very important the “infrastructural deficiencies” (23.8%), which shows how much awareness there is regarding the relationship between the state of infrastructure and territorial tourism development.

²⁰ The question allowed for the possibility of indicating multiple response options.

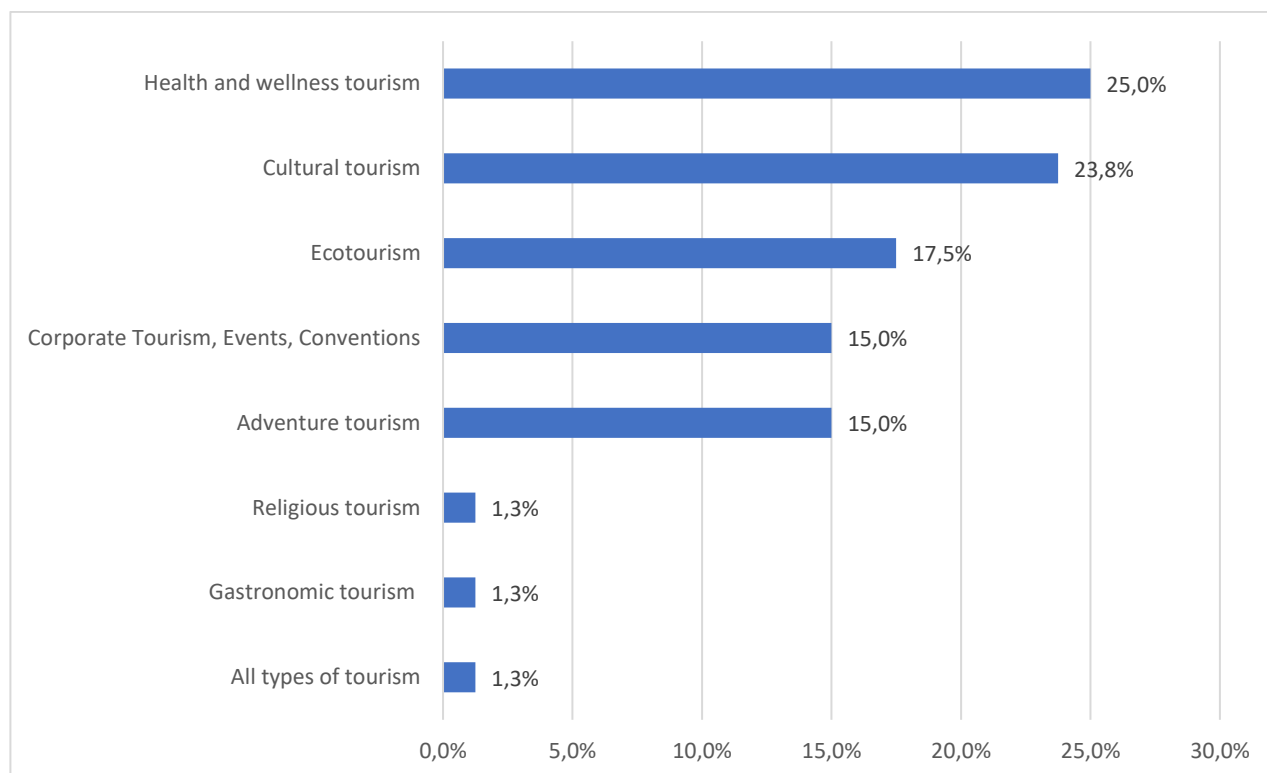
Main challenges in the tourism sector



About the opportunities for growth in tourism sector²¹, the interviewees report market opportunities/customer segments in addition to those listed in the questionnaire, particularly “Corporate tourism, events, conventions” (15%) or “religious” or “gastronomic tourism”. The most important tourism market seems to be “Health and Wellness”.

²¹ The question allowed for the possibility of indicating multiple response options.

Opportunities for growth in tourism sector

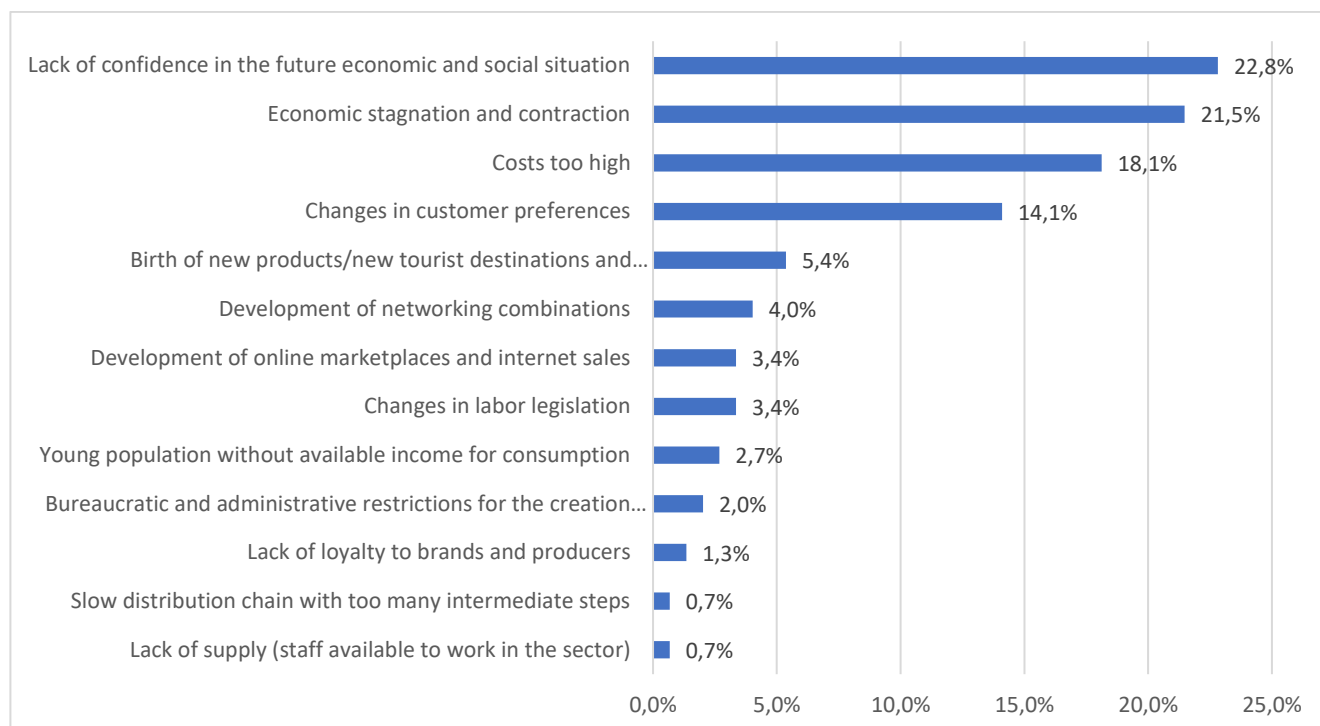


The companies in the sample/panel have identified, in perspective, the key drivers of change²² that could impact the company and its organization more than others. In addition to “Lack of confidence in the future economic and social situation” and “Economic stagnation and contraction”, which are the most mentioned drivers and that they are strictly related, there are significant concerns related to:

- Sociological, social, and psychological aspects (“Changes in consumer preferences,” 14.1%, “Youth population without the availability of income to be used for consumption”, 2.1%)
- Competition in the sector (“Birth of new products/new tourist destinations”, 5.4%, “Developing of networking combinations”, 4%)
- Cost factor (“Costs too high”, 18.1%).

²² The question allowed for the possibility of indicating multiple response options.

Drivers of change

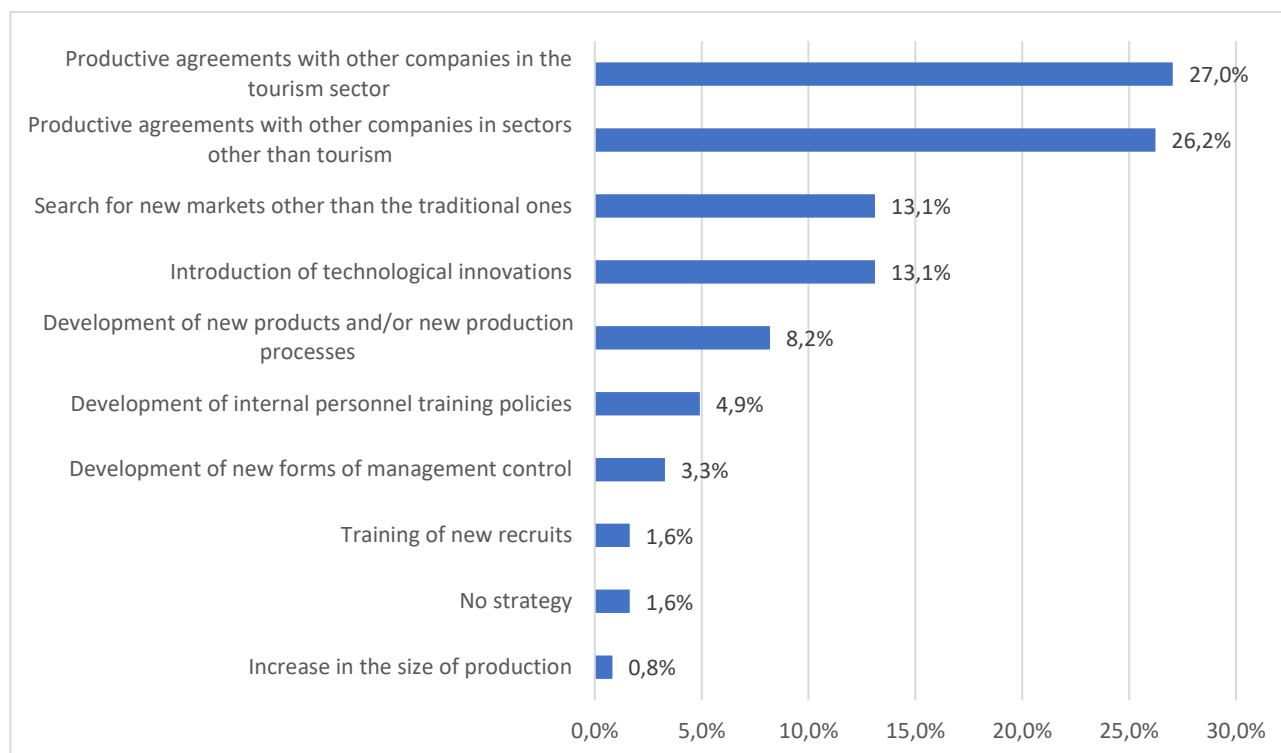


Companies were asked to share their strategies that they have already undertaken or plan to undertake²³. More than half of the sample (33 respondents) emphasized networking (“Productive agreements with other companies in the tourism sector” and “Productive agreements with other companies in sectors other than tourism”). These companies seem very competitive and aggressive because they are looking for “new markets”, different from traditional ones, and to “develop new products”.

Development of training policies for staff growth are between the mentioned solutions, also if not so addressed, targeting both existing staff (6 respondents) and incoming personnel (2 respondents). Only 2 respondents stated that they have no ongoing or planned strategies to deal with the drivers of change seen.

²³ The question allowed for the possibility of indicating multiple response options.

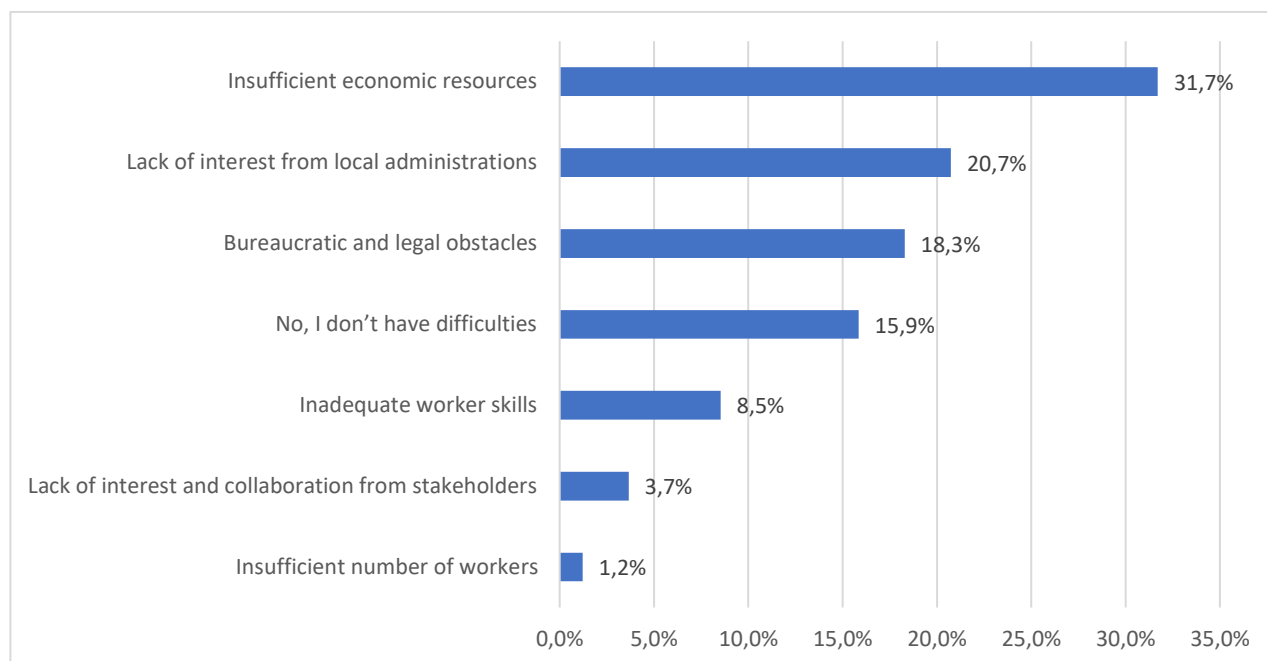
Best strategies already adopted or planned



To implement strategies is not so easy! So, interviewees indicated some problems in implementing them²⁴. First, “Insufficient economic resources”. Labour questions are indicated as an obstacle, because the “Inadequate workers skills” and the “Insufficient number of workers” (in total 8 respondents). But the most important obstacle is related to public sector/administration, because the “Lack of interest from local administration” and the “Bureaucratic and legal obstacles” (32 respondents).

²⁴ The question allowed for the possibility of indicating multiple response options.

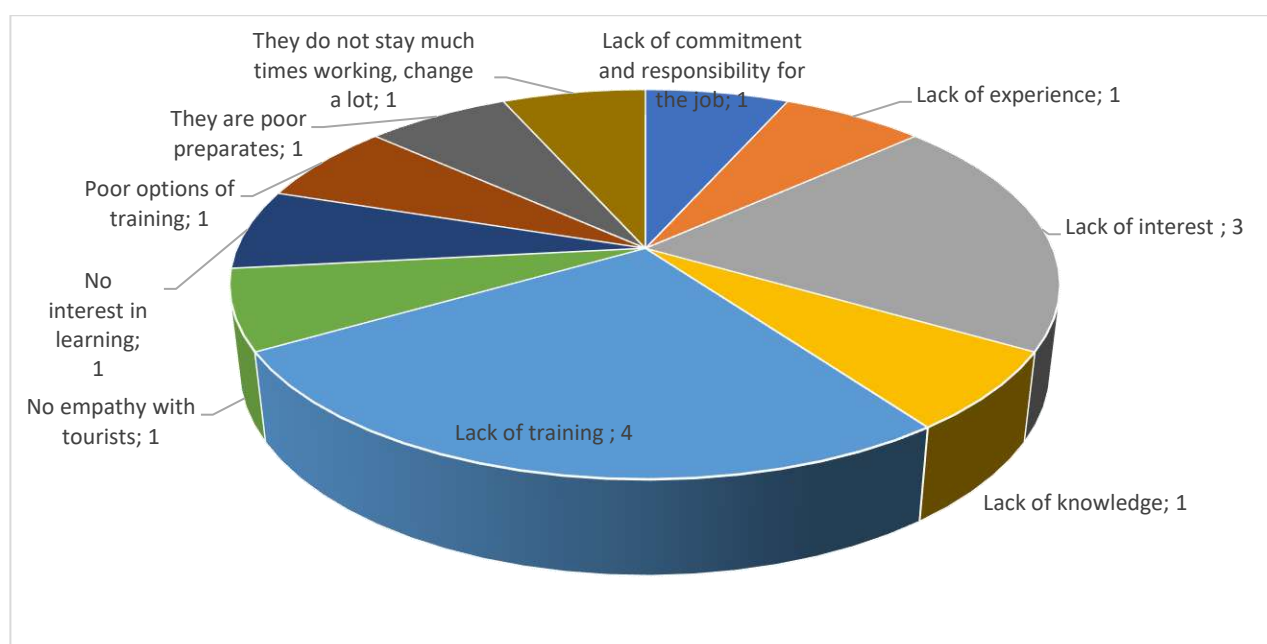
Difficulties to implement strategies



The 8 respondents who indicated the “Inadequate workers skills” as an obstacle in implementing strategies, state that the deficiencies are related to:

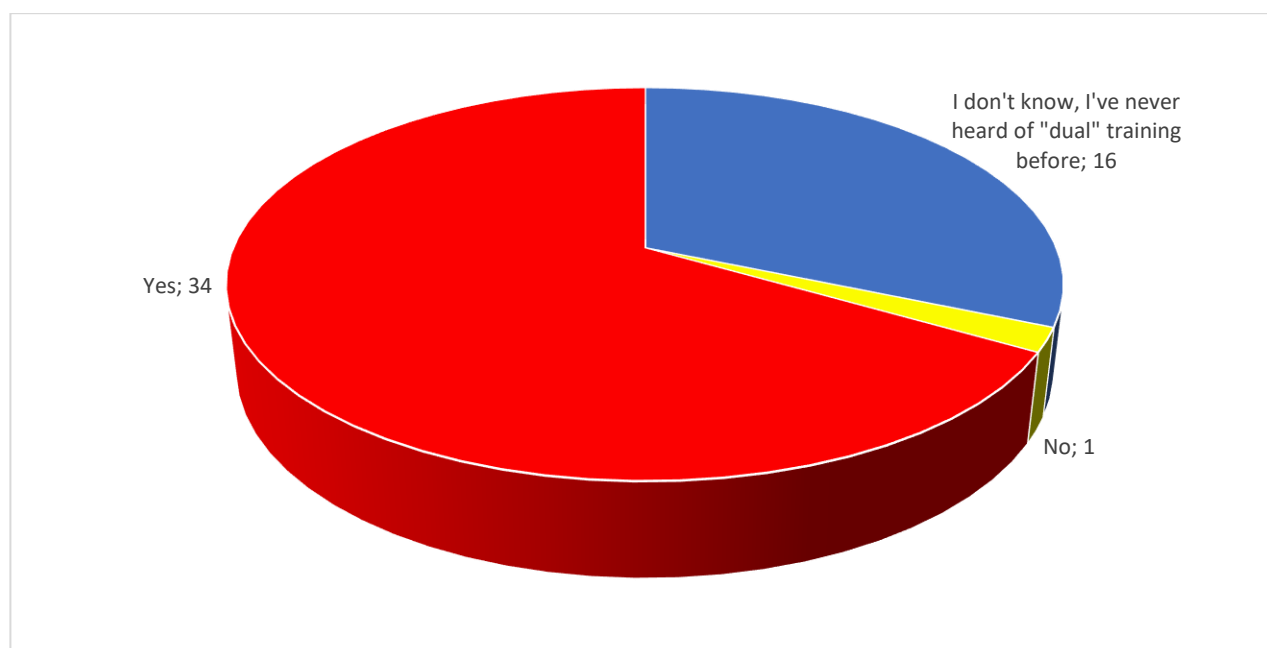
- mainly the attitude of the workers, considered to have little interest in the work or no interest in training
- to a lesser extent, lack of knowledge and poor preparation

Main deficiency of workers

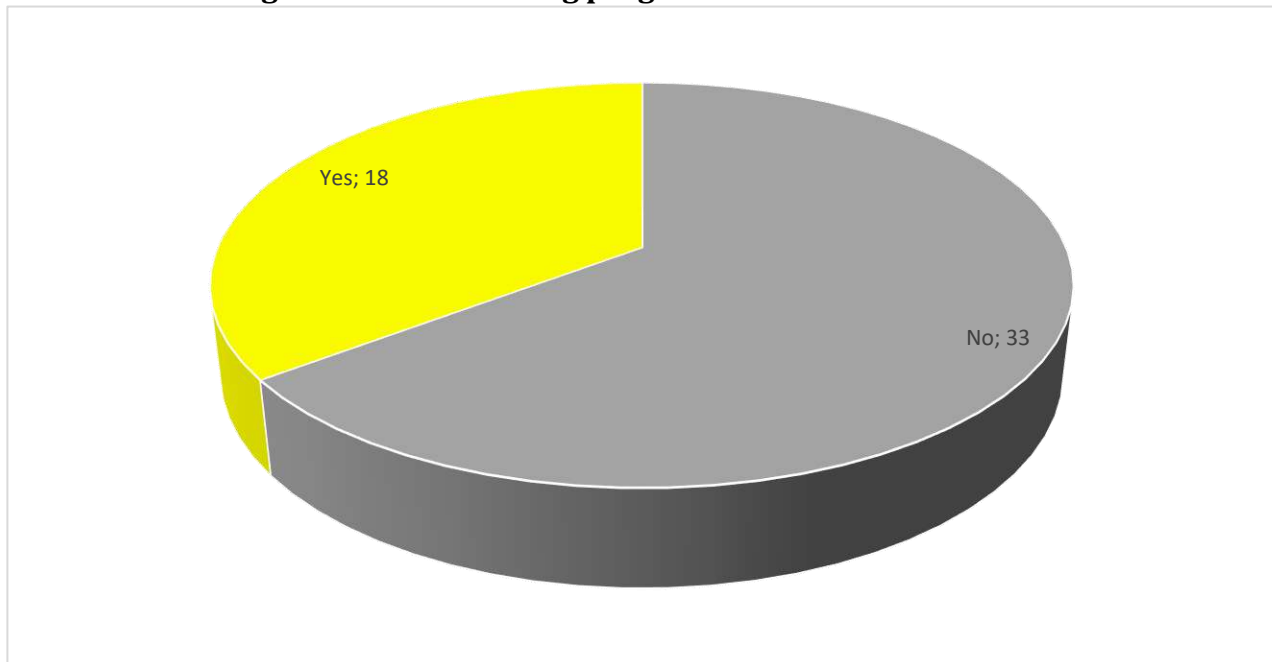


16 respondents state that they are not familiar with the meaning of “dual” training, while those who are familiar with this learning method, based on alternating between classroom training (at an educational institution) and practical training in work settings (at a company/organization), find it useful (66.6%). An exception is represented by 1 respondent who do not recognize its usefulness.

Dual training to favour transition policies between the world of education/training and the world of labour



Although the dual training approach is deemed “useful” by 34 companies, only 18 of them report having hired personnel from programs that have implemented this method. This data may be attributed to a low prevalence of such programs in the region, a lack of awareness among companies about educational institutions offering dual programs, or insufficient communication and collaboration between companies and educational institutions.

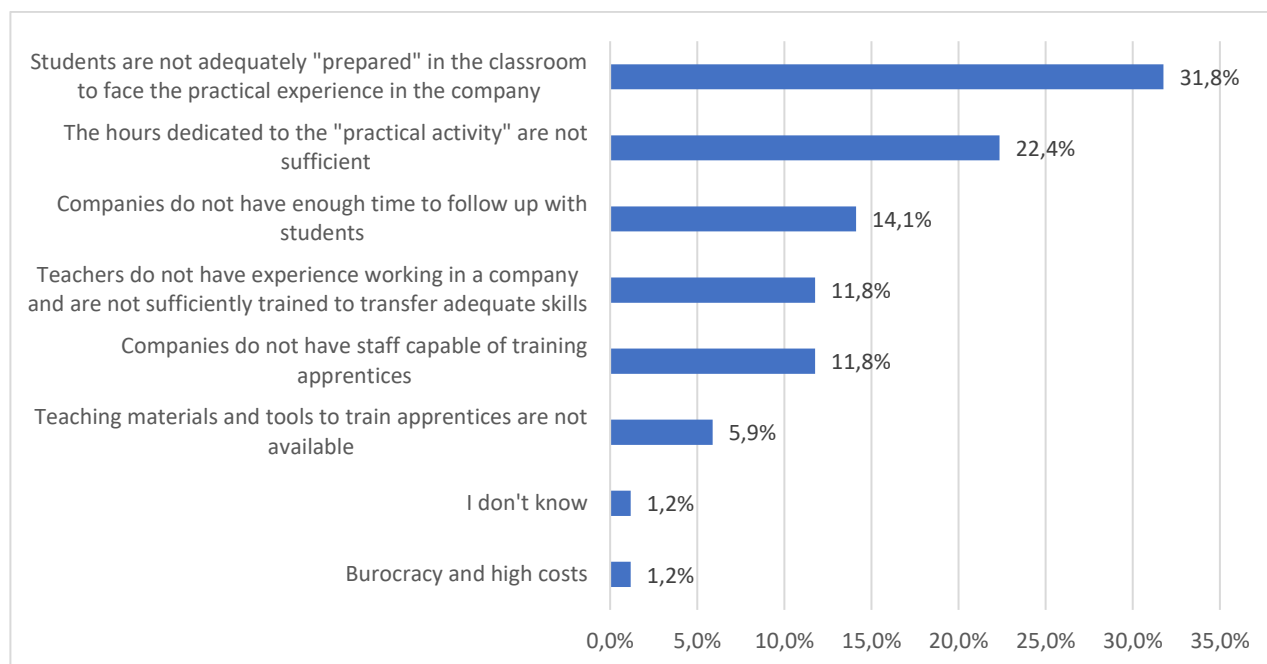
Hired staff coming from a dual training program

According to those interviewed, the management of apprenticeship paths within companies presents some generally known problems²⁵, such as the fact that "Companies do not have enough time to follow up with students" (14.1% of responses and 12 respondents).

What is striking is that "Students are not adequately "prepared" in the classroom to have the practical experience in the company" and also that "Teachers do not have experience working in a company and are not sufficiently trained to transfer adequate skills", aspects which were reported by 37 respondents and which sound like a strong criticism of the school and professional training system.

²⁵ The question allowed for the possibility of indicating multiple response options.

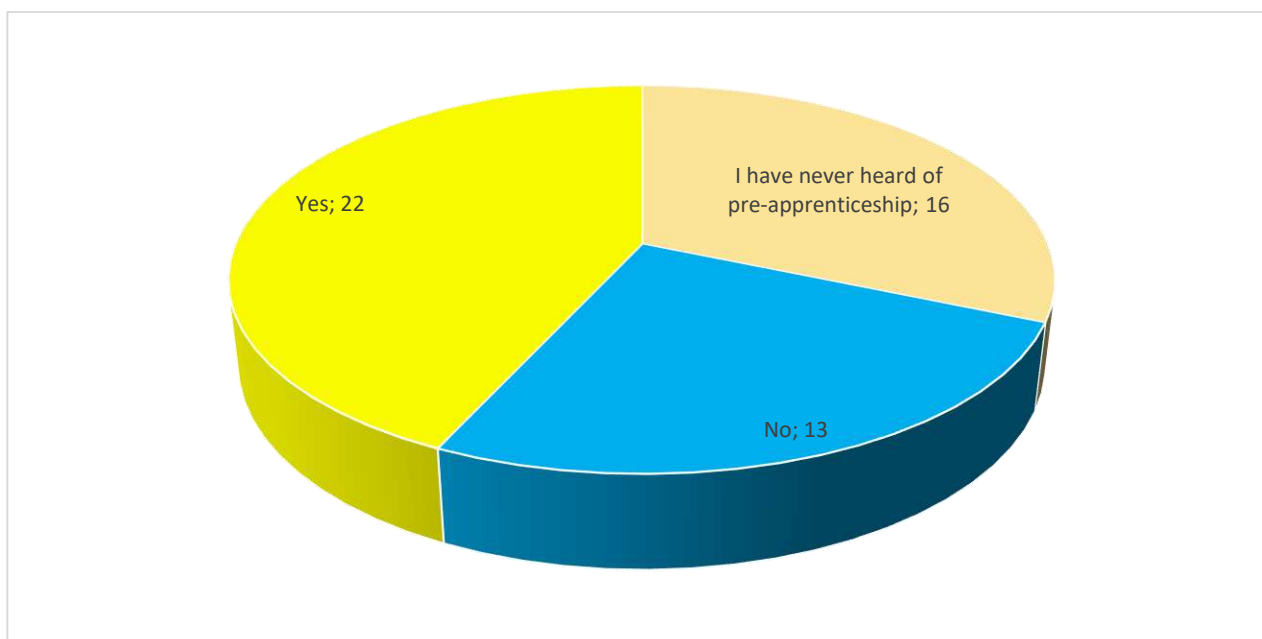
Main critical issues of dual paths in tourism



A specific question was addressed to understand if there are pre-apprenticeship course in the area of interviews and if respondents are aware of these. Pre-apprenticeship provides basic skills and prepares young for apprenticeship courses. The pre-apprenticeship does not involve entry into the company but courses, even of a practical nature, carried out in training centers.

According to 13 respondents there are not these kinds of activities at local level but 43.1% of sample affirms that this kind of education is present. The 31% of interviewees "never heard of pre-apprenticeship".

Awareness of pre-apprenticeship courses in the area



The interviewees were asked two questions specifically referring to skills.

A first question on which skills a pre-apprenticeship path should focus on; a second aspect of attention concerns what skills a worker should have to be inserted into the company as an apprentice. In both cases they were asked to express a vote, from a minimum of 1 to a maximum of 10, to evaluate the importance of the skills listed.

About first question, all soft skills are considered important and useful and have to be trained during a pre-apprenticeship course. Given this, the most important skill is not a soft skill but the ability to “speak the language of my country”, evidently linked to the ability to relate well with customers and collaborators whose prerequisite lies precisely in the ability to express oneself and correctly understand the concepts. In fact, immediately follows in order of preference “Effective communication” which we assume is directly linked to the linguistic skills mentioned. Naturally, the ability to speak a language other than that of one's own country receives a very positive rating (above 9).

In summary, we can say that all the skills proposed received a very positive evaluation, given that all the opinions were above “7”.

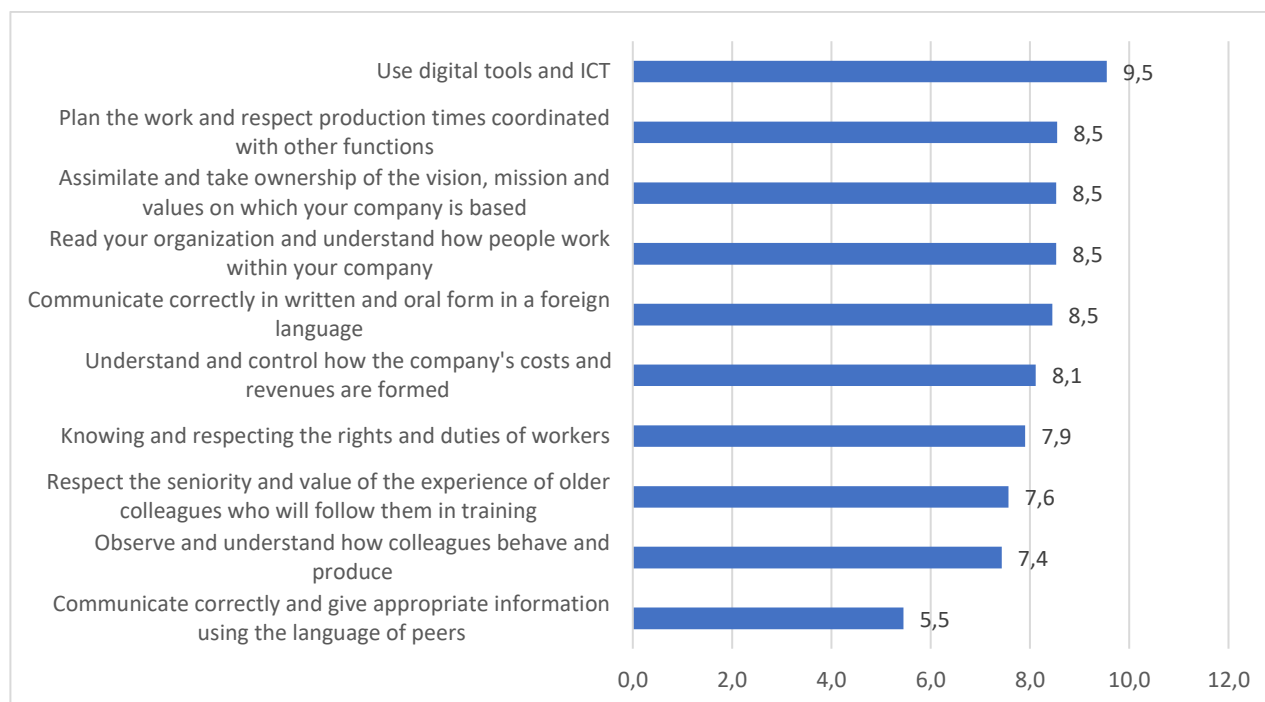
Skills to be trained during a pre-apprenticeship course



As regards the skills that are required of incoming apprentices, the skill of "Use digital tools and ICT" stands out for its importance, receiving a rating of 9.5. This data would seem to contradict what was previously noted regarding the "main challenges" indicated by the respondents. In fact, the "Technological changes" factor in that question had been indicated as main challenges by only 1 respondent.

Skills that are not strictly professional, as they are not directly and specifically linked to the work sector, are also very important, such as "Plan the work and respect production times coordinated with other functions", with a score of 8.5, tied with "Assimilate and take ownership of the vision, mission and values on which your company is based", "Read your organization and understand how people work within your company" and "Communicate correctly in written and oral form in a foreign language". The ability to speak a foreign language (universally understood as English) is therefore omnipresent in the requests of companies.

Skills that an entry level apprentice must possess



An important theme is that of relations with the educational and professional training system²⁶. As many as 22 respondents (30.6% of the responses) declared "I have no relationship with the educational system and the vocational training center". The remainder, who have this type of relationship, are mainly involved in the training co-planning activity ("Collaboration for the development of educational and training programs"), an extremely important activity as it is aimed at having young people leaving the school/training with skills that are actually useful to the world of tourism companies. This collaboration is useful to prevent situations of inefficiency of incoming workers but also of frustration on the part of young people who would otherwise find themselves unable to fully use what they learned in the classroom.

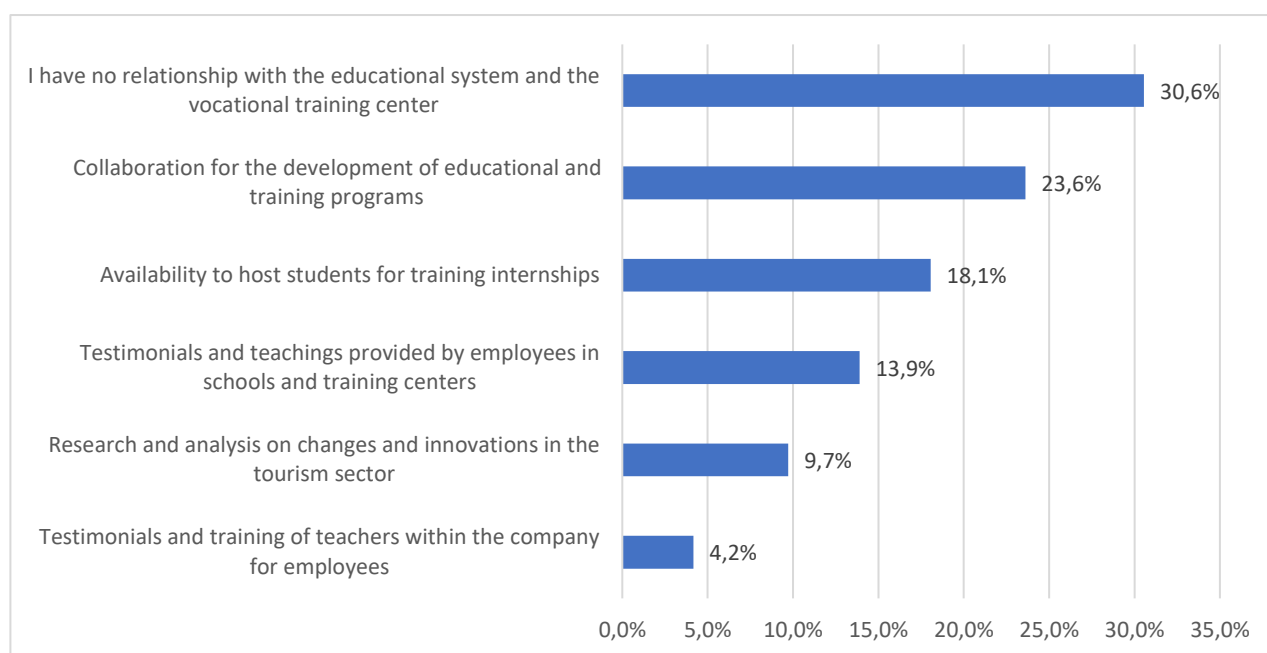
A very interesting form of collaboration highlighted by the respondents, "Research and analysis on changes and innovations in the tourism sector", which can also be considered preparatory to the co-planning activity just mentioned. School and professional training together with companies are the right mix to be able to carry out an activity aimed at understanding what are the factors of change and innovation that can impact the tourism sector. The results of this activity must be incorporated into educational programming and by companies so that they can plan the appropriate strategies to respond to what has been found. However, this activity was highlighted by only 7 respondents. Therefore, this is a factor on which to work in terms of collaboration between businesses and the education and

²⁶ The question allowed for the possibility of indicating multiple response options.

professional training system, to consolidate relationships making them more useful and productive for all parties involved.

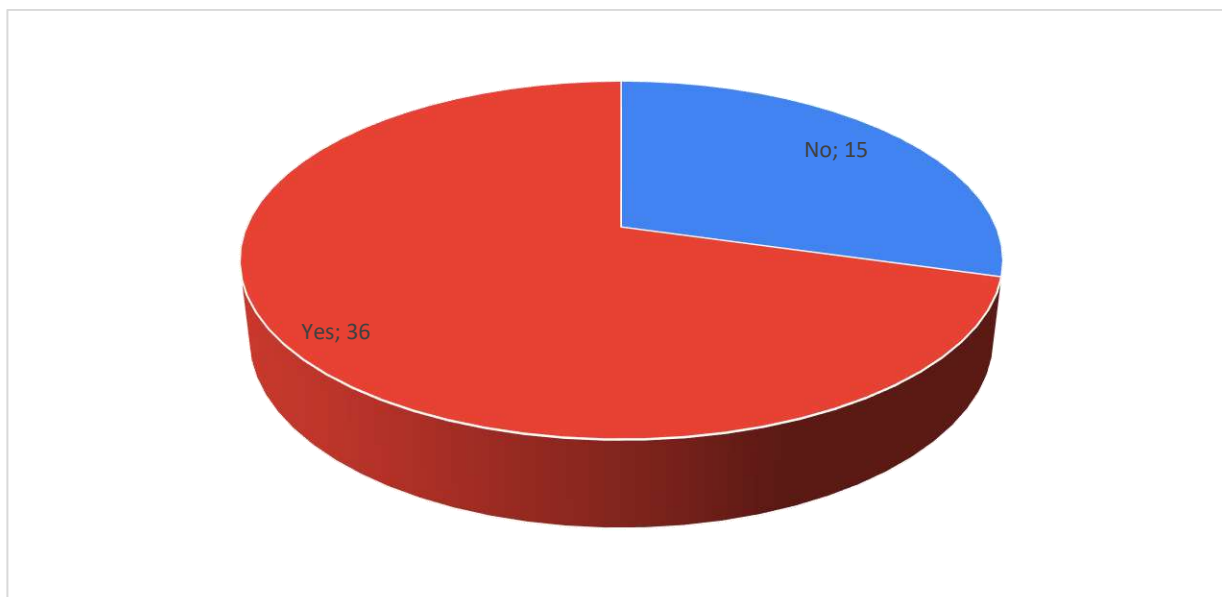
Also interesting is the exchange of know-how that is generated through "Testimonials and teachings provided by employees in schools and training centers" (13.9% of responses) which however records little significant values when the school teachers provide the training ("Testimonials and training of teachers within the company for employees", 3 respondents, 4.2% of the answers).

Collaborative relationships with the education system and vocational training centers



As many as 70% of those interviewed declared having carried out training activities in the company in the last 3 years. The declared value is very high if we consider it to be in line with the continuous training rates recorded in Europe.

Training activities for employees in the last three years



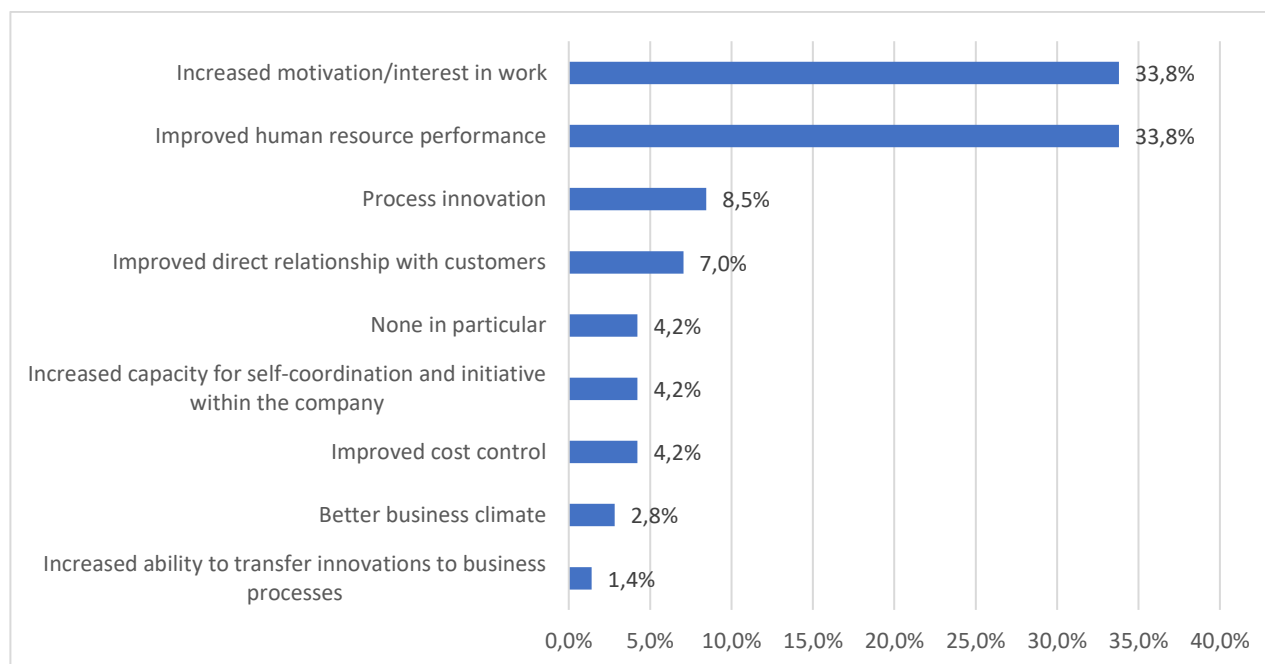
Those who reported engaging in training in the last 3 years identified the primary effect as an increase in motivation/interest in their work (33.8%)²⁷. The same “value” is registered by the “Improved human resource performance” (33.8%). Only 4.2% of responses (3 respondents) did not highlight any effect following the completion of training programs.

Some noteworthy effects mentioned include improvements in the relationship with customers (7.0%), which is particularly crucial in-service industries such as restaurants and tourism. But the percentage could be higher on this aspect.

Training appears to have a limited impact the ability to transfer innovations into business processes (1.4%) and in “better business climate” (2.8%).

²⁷ The question allowed for the possibility of indicating multiple response options.

Effects derived from participation in continuous training activities



The main reason why interviewees do not do training is linked to the "Lack of information on the training offer available to companies" (9 respondents, 37.5% of the answers). Therefore, there is no lack of desire to provide training but there is a complaint about the lack of adequate promotion of the training opportunities that companies can access.

The perception of "Excessive cost of training and lack of incentives and financial support" is high. In fact, a quarter of the responses focus on this item. Evidently, the interviewees believe that compared to the costs to be borne for training there are no adequate benefits; furthermore, there would appear to be a lack of incentive systems to cover the costs linked to continuous training (costs of teaching, classrooms, tutoring, etc.).

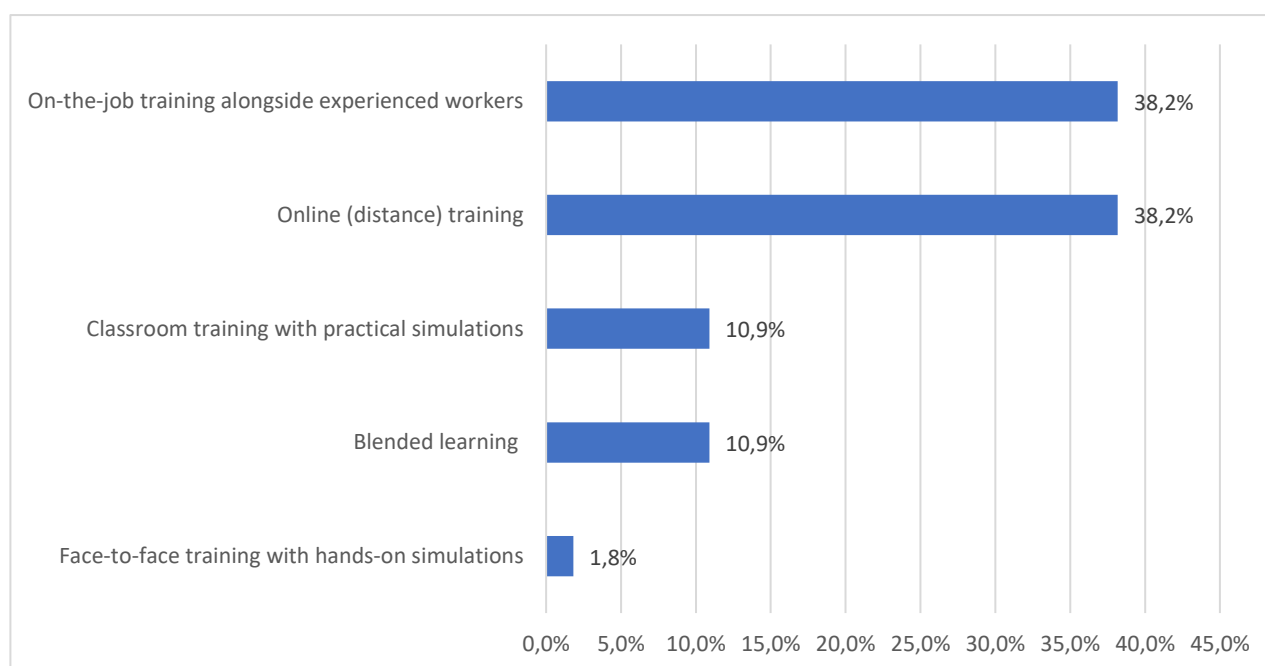
The other reasons evidenced are somehow connected to the lack of resources: "Lack of modern technologies to support training" and "Lack of adequate spaces for training activities".

Reasons why continuous training is not carried out



The methodology for training in the company considered most effective by those interviewed is "On-the-job training alongside experienced workers" (according to 21 respondents), a methodology evidently considered more effective also because it does not distract workers from normal company production activities.

Methodology to carry out training in a company

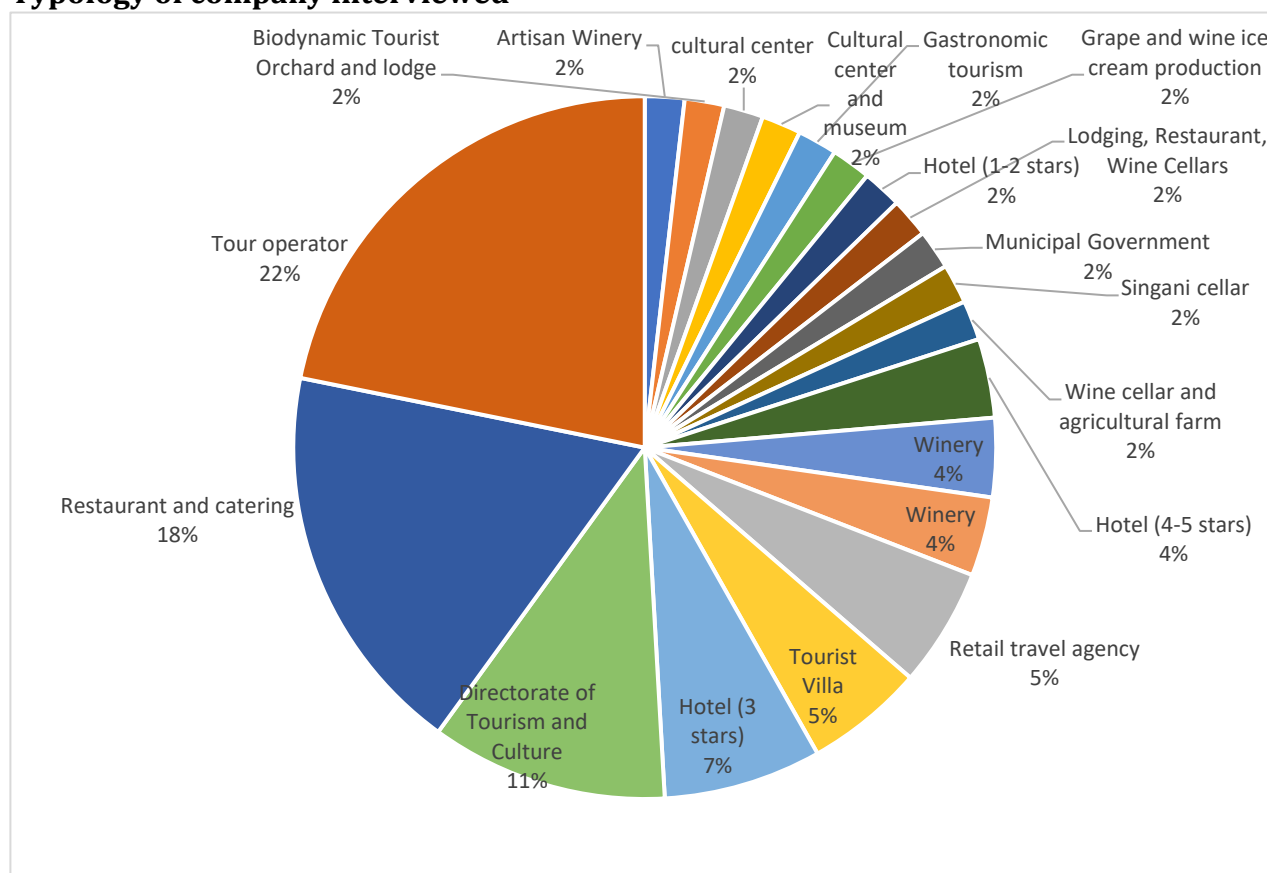


4.2. Results of questionnaires in Bolivia

In Bolivia, a total of 55 questionnaires was administered.

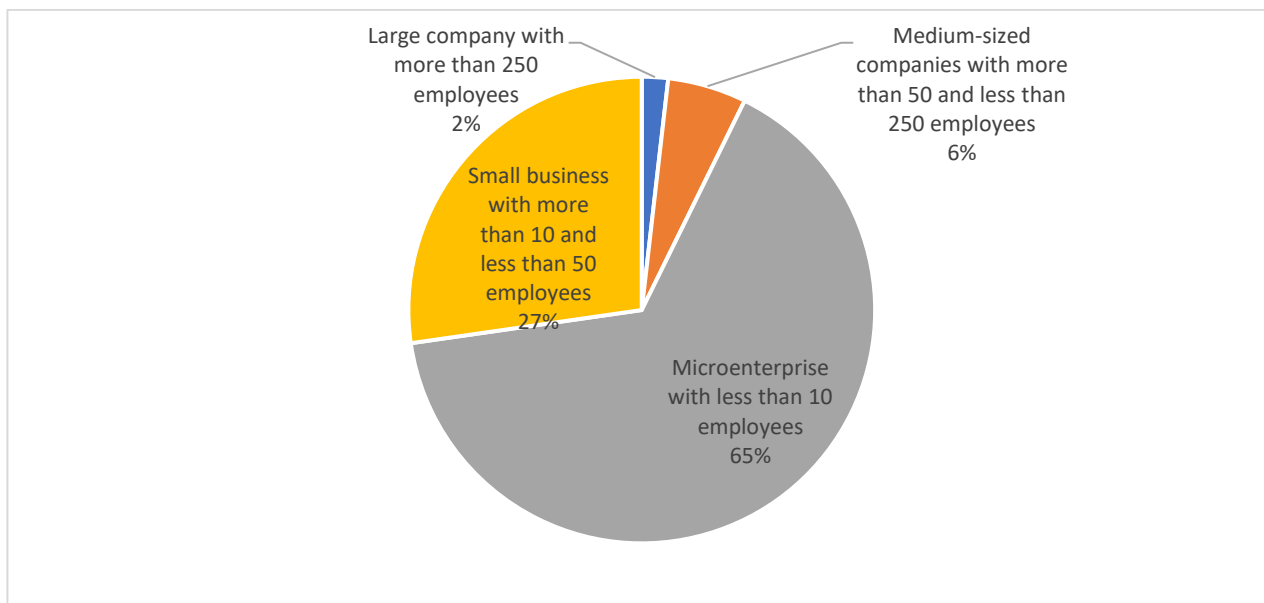
The interviewees belong to a lot of different categories of operators who, in various capacities, deal with tourism. The main category of respondents is that of tour operators (22%), immediately followed by restaurants and catering (18%). The presence, among those interviewed, of public entities that deal with tourism at a territorial organization level is also highlighted. Another interesting aspect is the presence of structures that complete the tourist offer and express the vocation of the area, such as cellars. Finally, some interviewees carry out multiple activities ("Lodging, Restaurant, Wine Cellars").

Typology of company interviewed



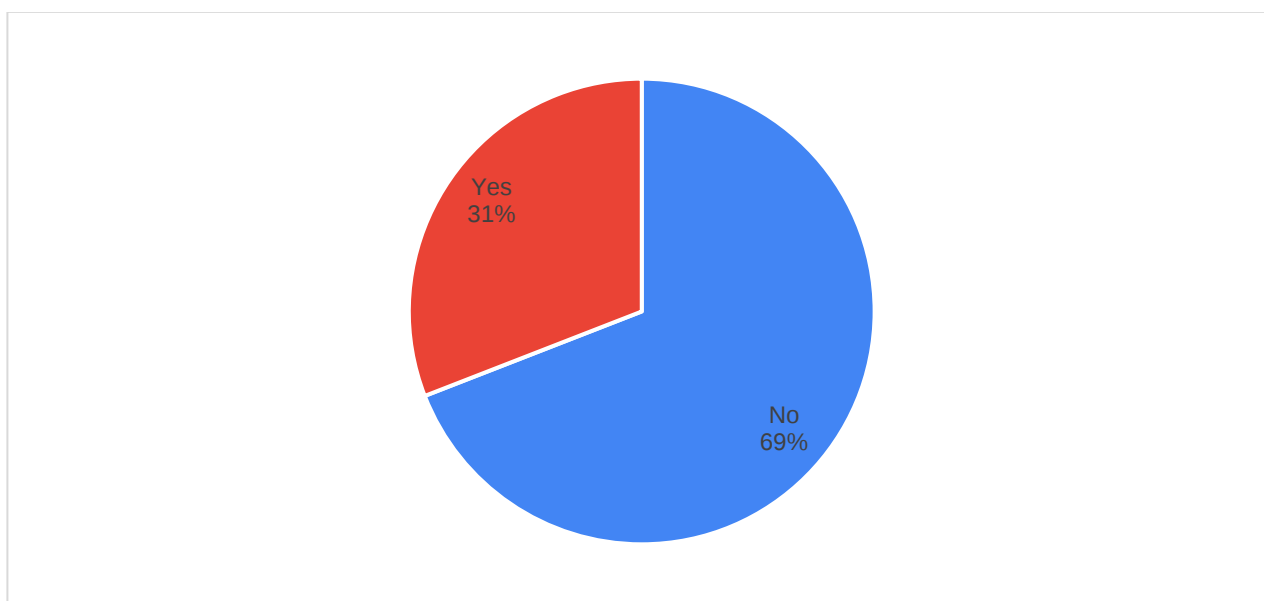
Most of the respondents are micro sized (65%). There are also large companies in the panel of respondents, albeit in a small percentage (2%).

Company size



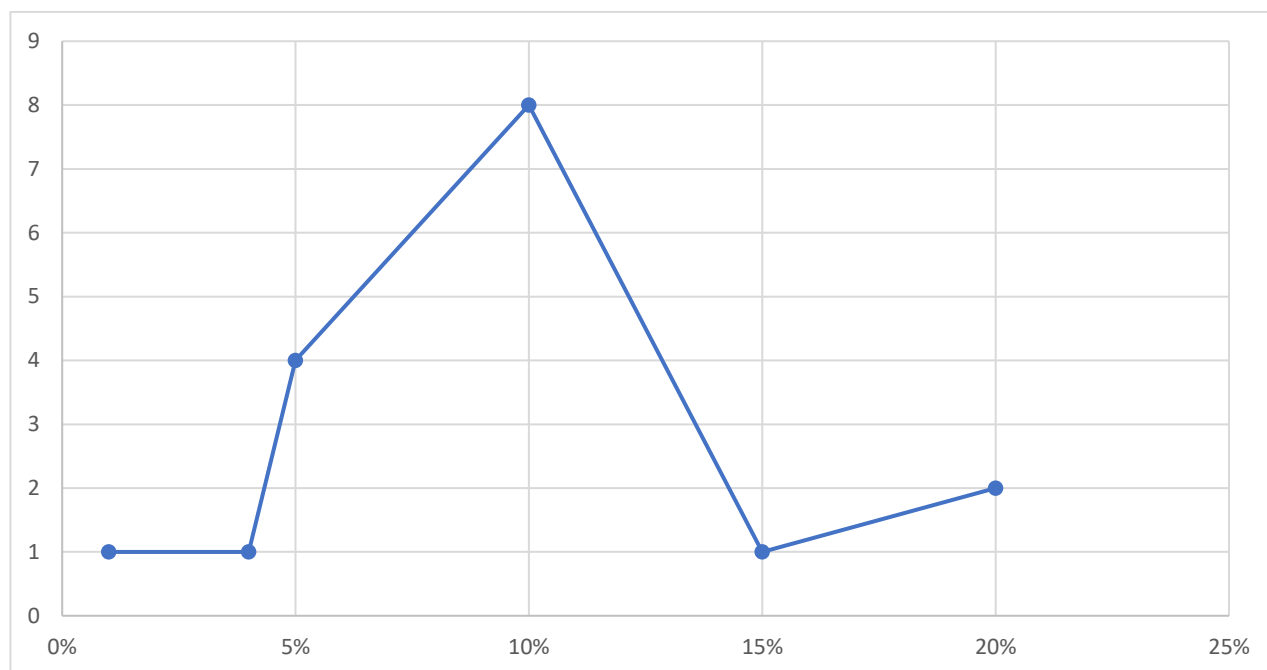
31% of the companies in the sample declare they have apprentices.

Companies with apprentices



The share of apprentices that interviewees declare they have in the company varies between 1 and 20%. 8 interviewees declared that they have 10% of apprentices compared to the company workforce.

Percentage of apprentices compared to the number of employees

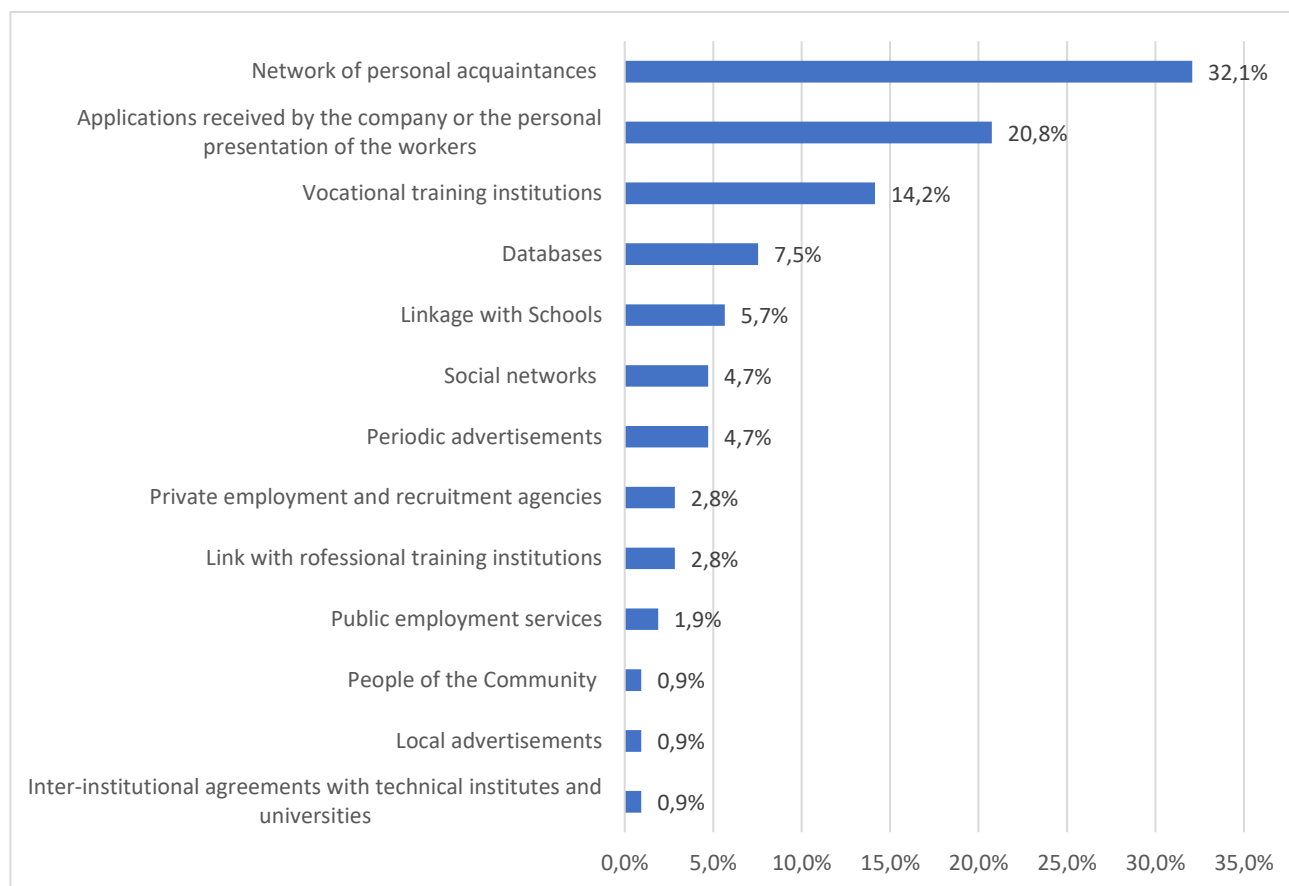


The channels primarily used for staff recruitment²⁸ are “networks of personal acquaintances (friends, relatives, ...)” immediately following are “applications received directly by the company or presentations received of the workers”. An important role is played by “Vocational training institutions” combined with “Linkage with schools”: the two channels total approximately 20% of the responses.

“Social Network” (4.7%) are not so used although they outperform both private and public employment services.

²⁸ The question allowed for the possibility of indicating multiple response options.

Channel of recruitment



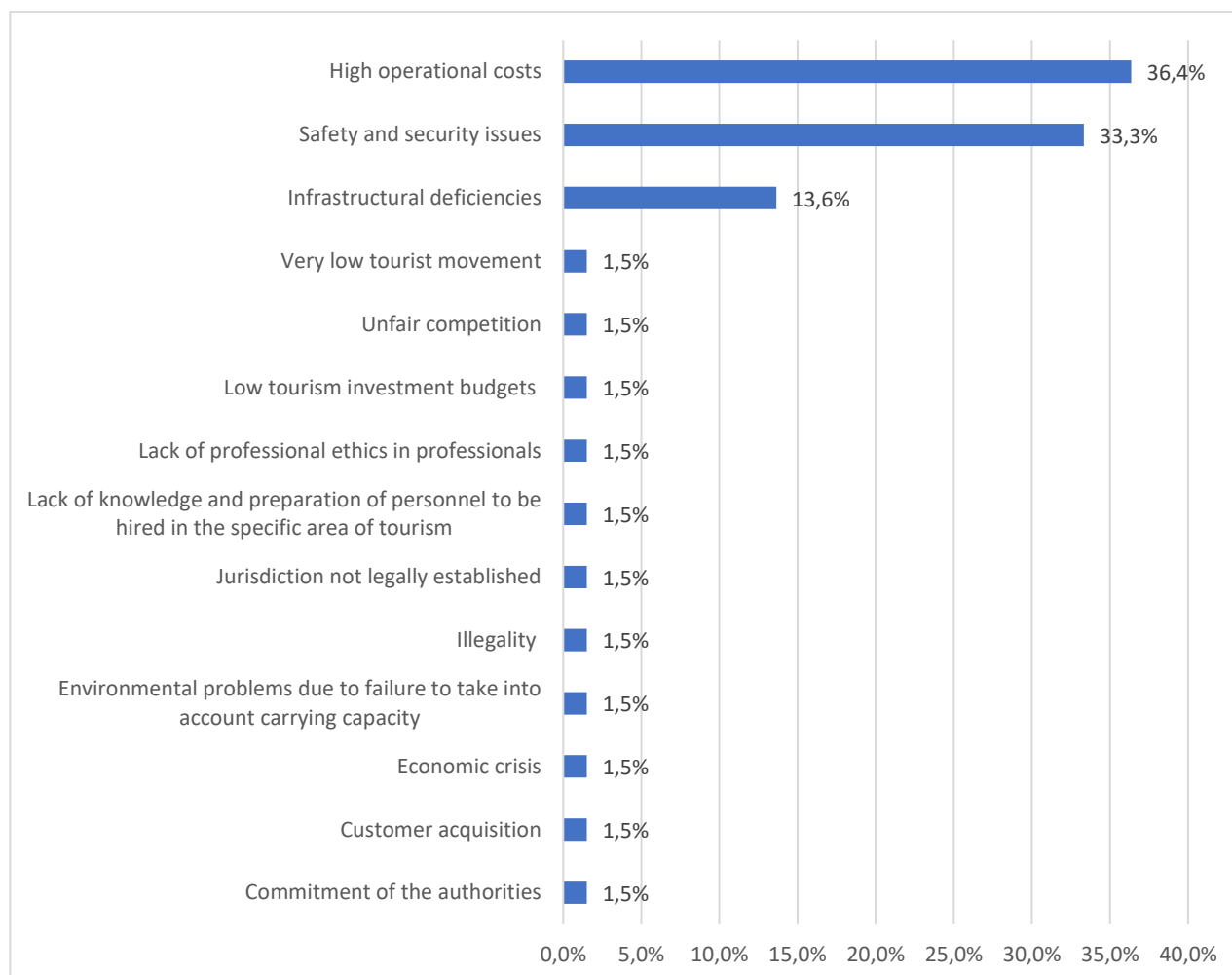
About trends in tourism, 3 questions were asked to the interviewees: main “challenges” company faces in the tourism sector, “opportunities for growth” in the tourism sector and “factors of change” do you expect that will have future effects on your company and its organization.

First, about main challenges²⁹, the most important are “high operational costs”, followed by “Safety and security issue” (maybe related to factors as pandemic). Very important the “infrastructural deficiencies” (13.6%), which shows how much awareness there is regarding the relationship between the state of infrastructure and territorial tourism development.

All the other challenges are not so important, according to respondents.

²⁹ The question allowed for the possibility of indicating multiple response options.

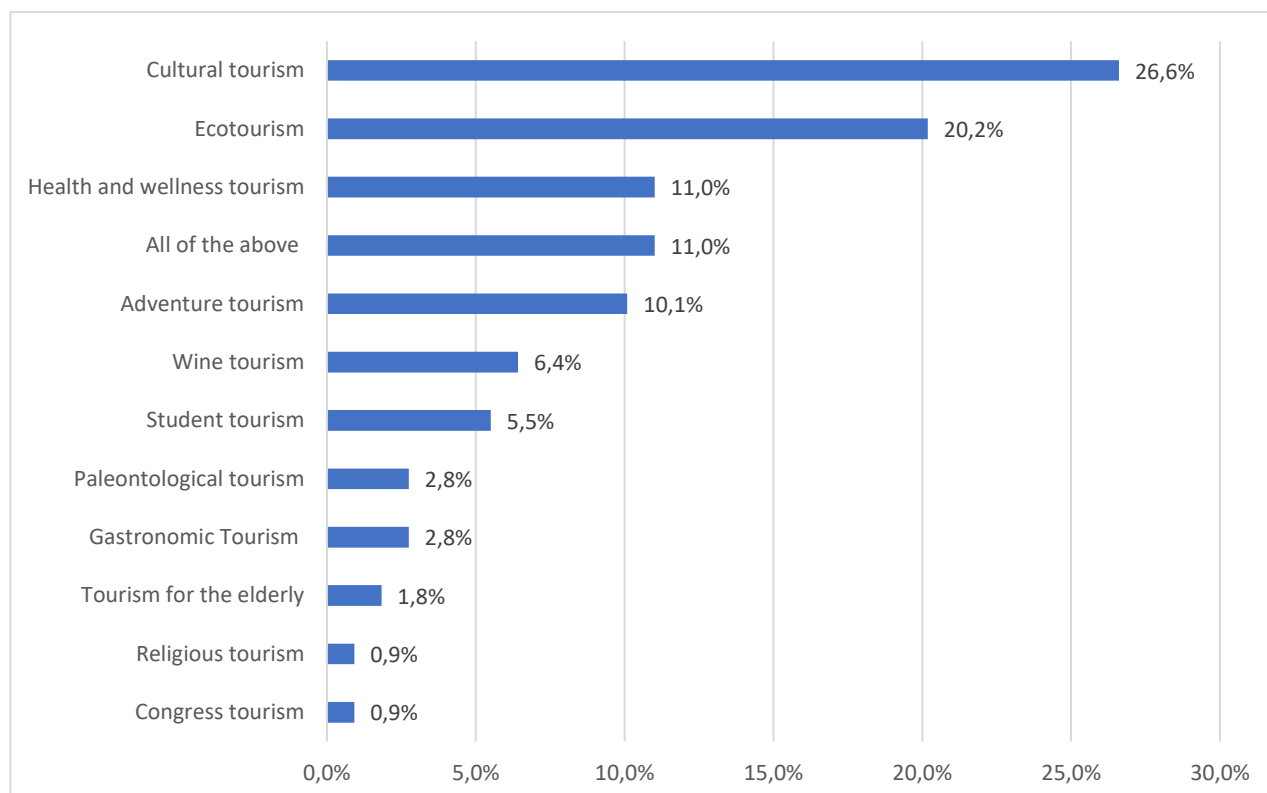
Main challenges in the tourism sector



About the opportunities for growth in tourism sector³⁰, the interviewees report a lot of market opportunities/customer segments in addition to those listed in the questionnaire: “wine tourism”, “student tourism”, “paleontological tourism” etc.. These varied indications regarding the different types of tourism to focus on are attributable to the presence, among those interviewed, of subjects coming from different fields of activity (museums, wineries, public bodies, etc.).

³⁰ The question allowed for the possibility of indicating multiple response options.

Opportunities for growth in tourism sector

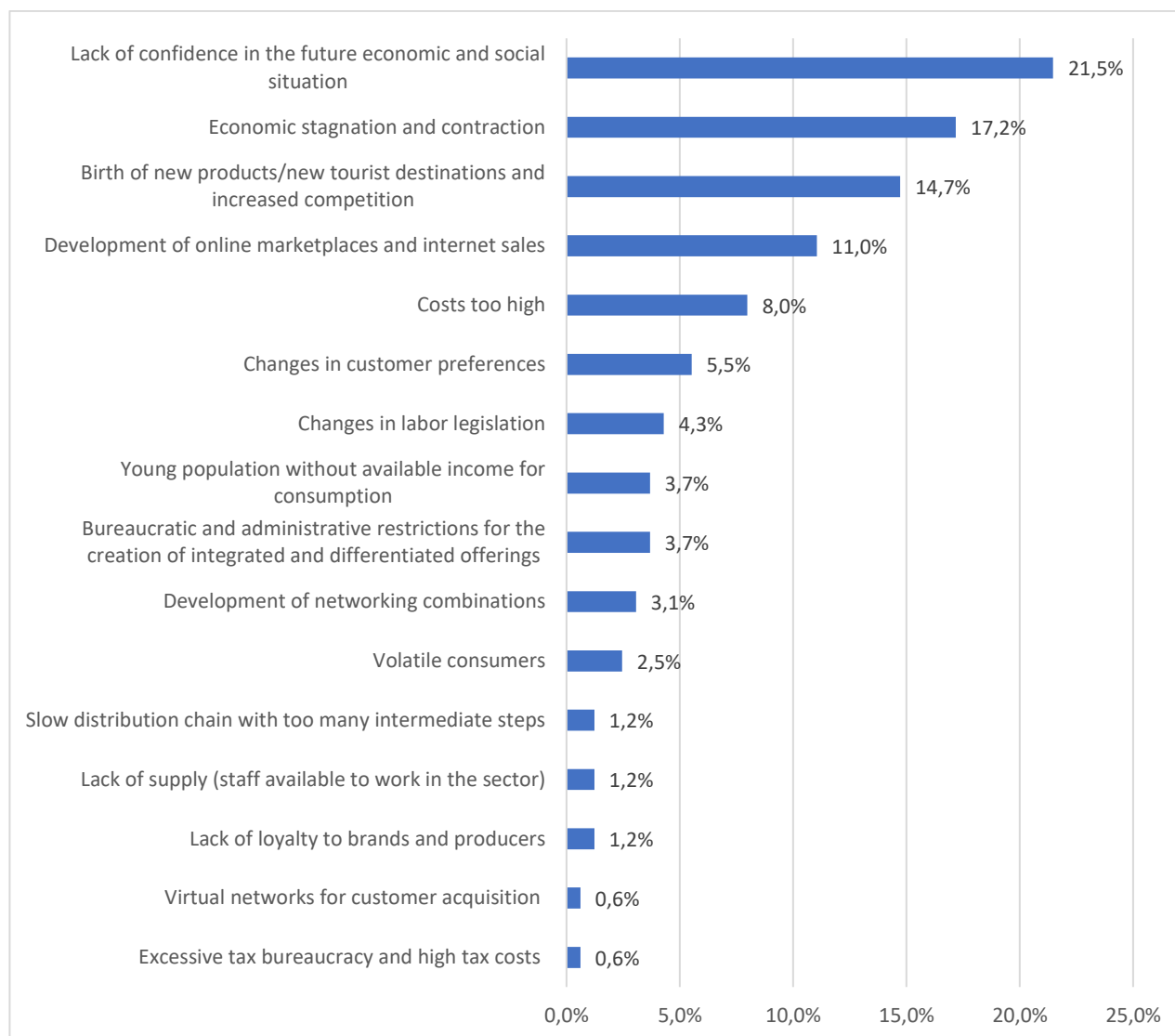


The companies in the sample/panel have identified, in perspective, the key drivers of change³¹ that could impact the company and its organization more than others. In addition to “Lack of confidence in the future economic and social situation” and “Economic stagnation and contraction”, which are the most mentioned drivers and that they are strictly related, there are significant concerns related to:

- Competition in the sector (“Birth of new products/new tourist destinations”, 14.7%, “Development of online marketplaces and internet sales”, 11%)
- Sociological, social, and psychological aspects (“Changes in consumer preferences,” 5.5%, “Youth population without the availability of income to be used for consumption”, 3.7%, “Volatile consumers”, 2.5%)
- Cost factor (“Costs too high”, 8.0%).

³¹ The question allowed for the possibility of indicating multiple response options.

Drivers of change



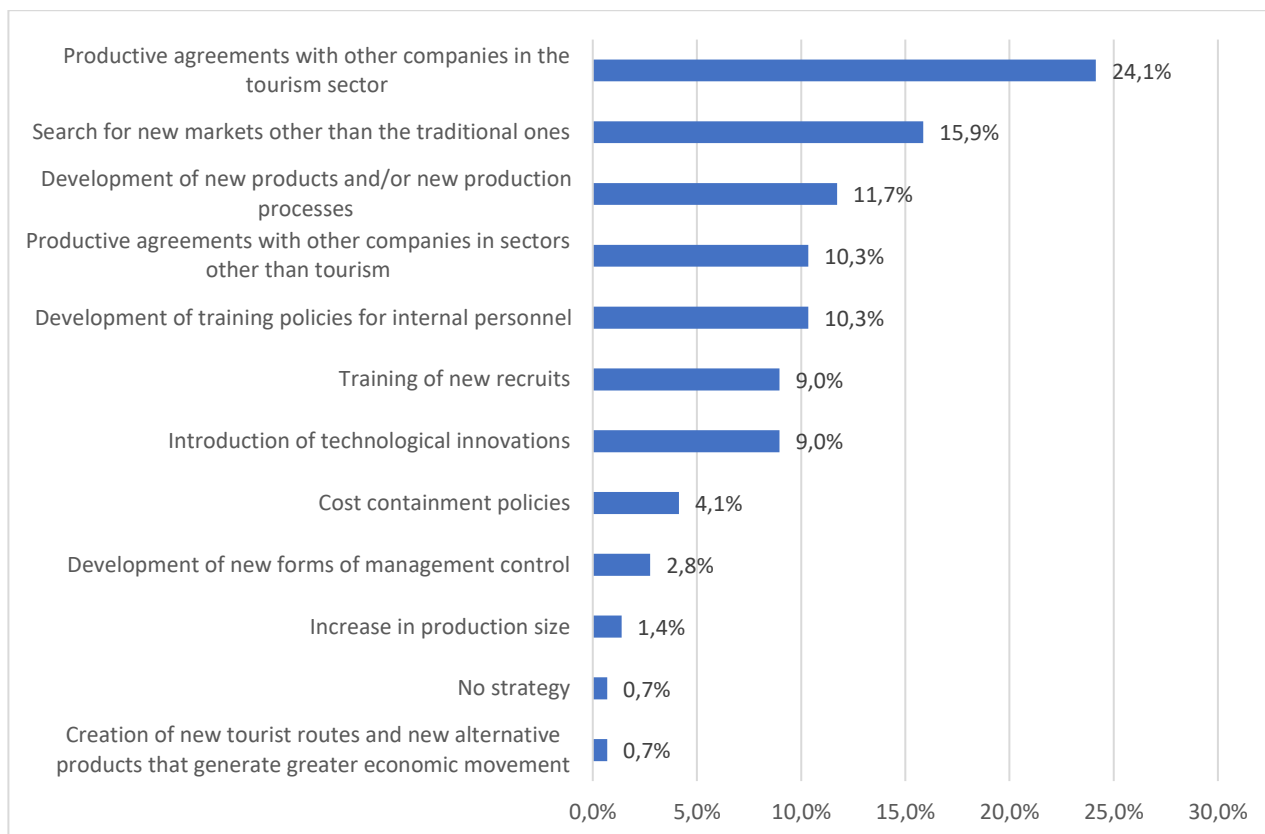
Companies were asked to share their strategies that they have already undertaken or plan to undertake³². More than half of the sample (35 respondents) emphasized networking (“Productive agreements with other companies in the tourism sector” and “Productive agreements with other companies in sectors other than tourism”). These companies seem very competitive and aggressive because they are looking for “new markets”, different from traditional ones, and to “develop new products”.

Development of training policies for staff growth are between the mentioned solutions, targeting both existing staff (15 respondents) and incoming personnel (13 respondents). Only

³² The question allowed for the possibility of indicating multiple response options.

1 respondent stated that he has no ongoing or planned strategies to deal with the drivers of change seen.

Best strategies already adopted or planned

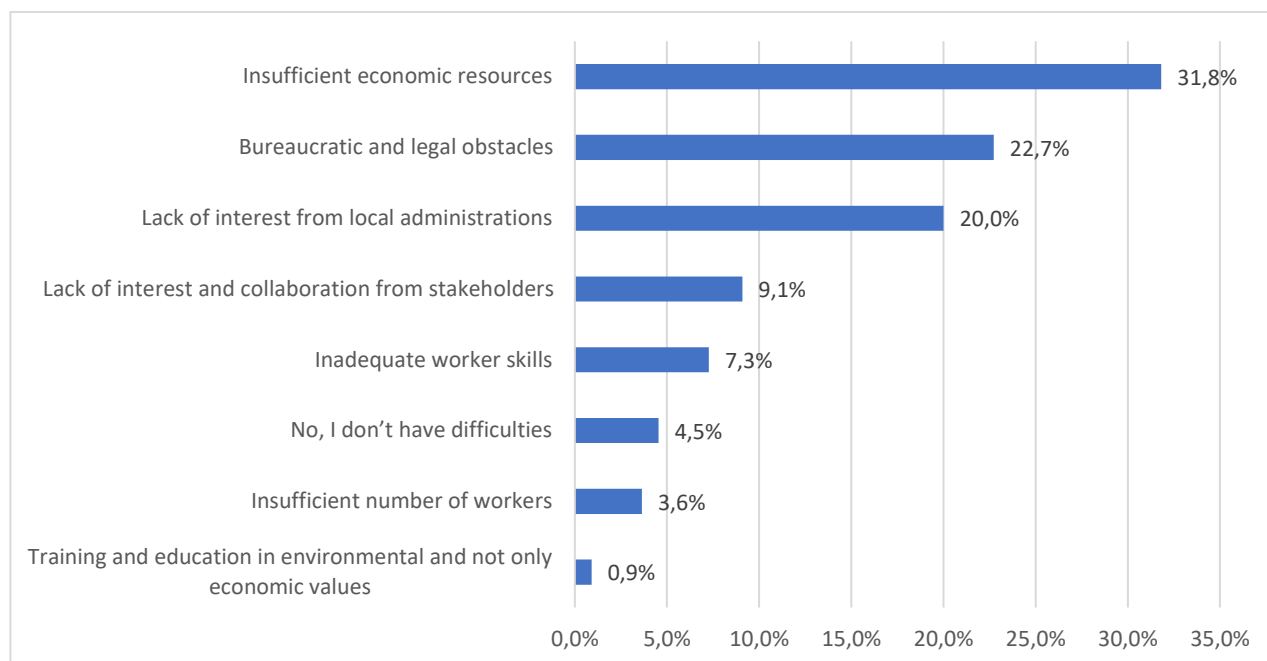


To implement strategies interviewees indicated some problems³³, first of all “Insufficient economic resources” (31.8% of responses). Important obstacles are related to public sector/administration, because the “Bureaucratic and legal obstacles” (25 respondents) and the “Lack of interest from local administration” (22 respondents).

Another critical factor is "Lack of interest and collaboration from stakeholders", highlighting the desire to network which however does not find a response in the territory.

³³ The question allowed for the possibility of indicating multiple response options.

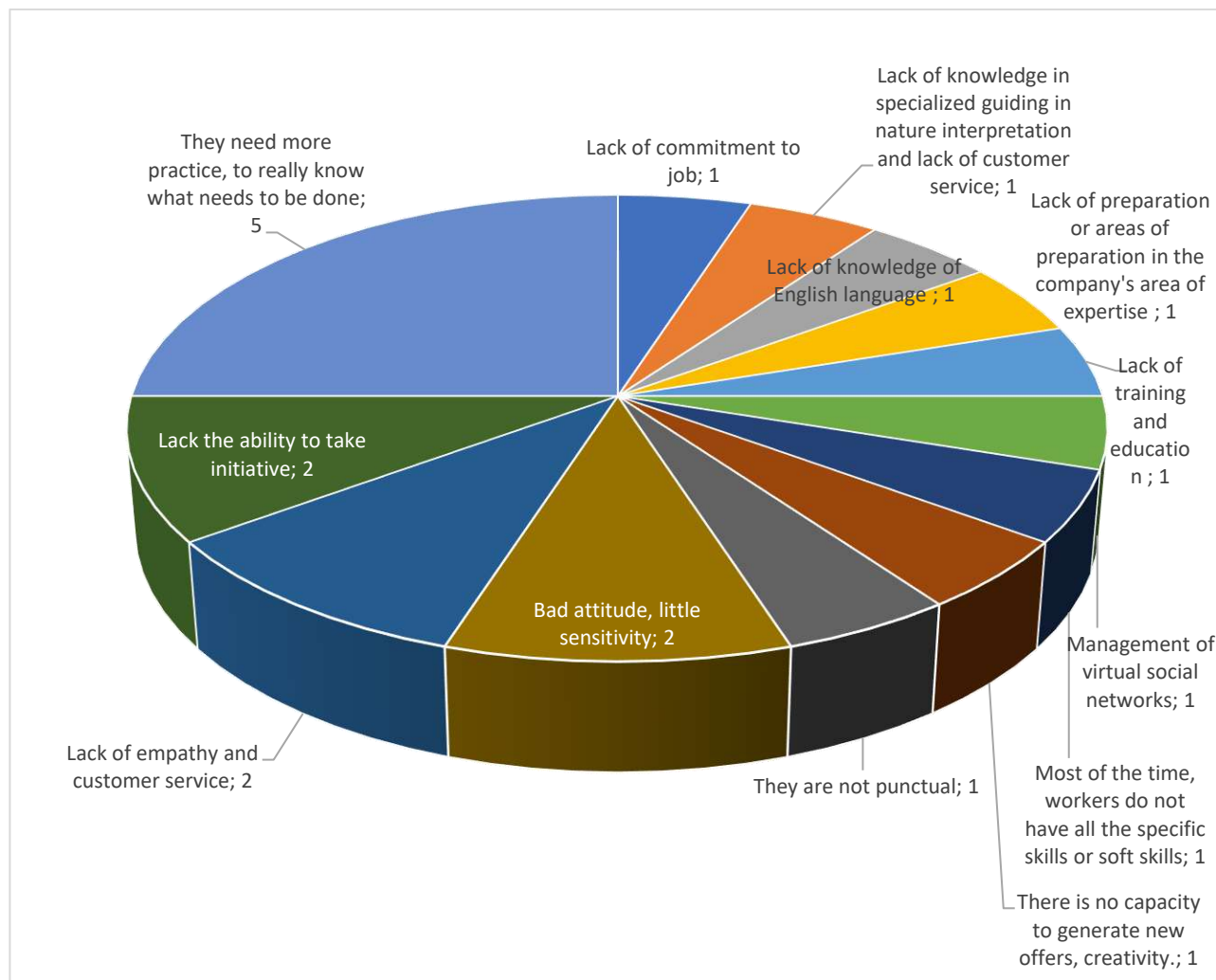
Difficulties to implement strategies



The 11 respondents who indicated the “Inadequate workers skills” as a difficult in implementing strategies, state that the deficiencies are related to:

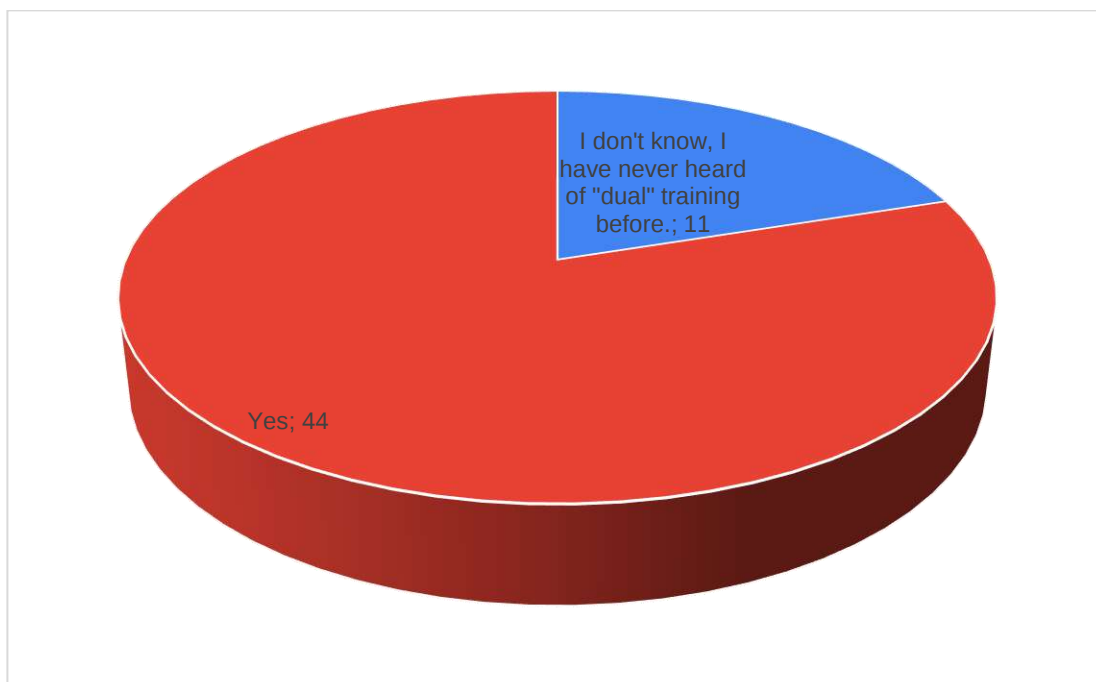
- Need of more practice
- mainly the attitude of the workers, as lack of empathy, lack of commitment to job, lack of creativity, not punctuality
- lack of skills (specific and soft), of preparation (also in the specific company' areas of expertise), of ability in English language, etc.

Main deficiency of workers



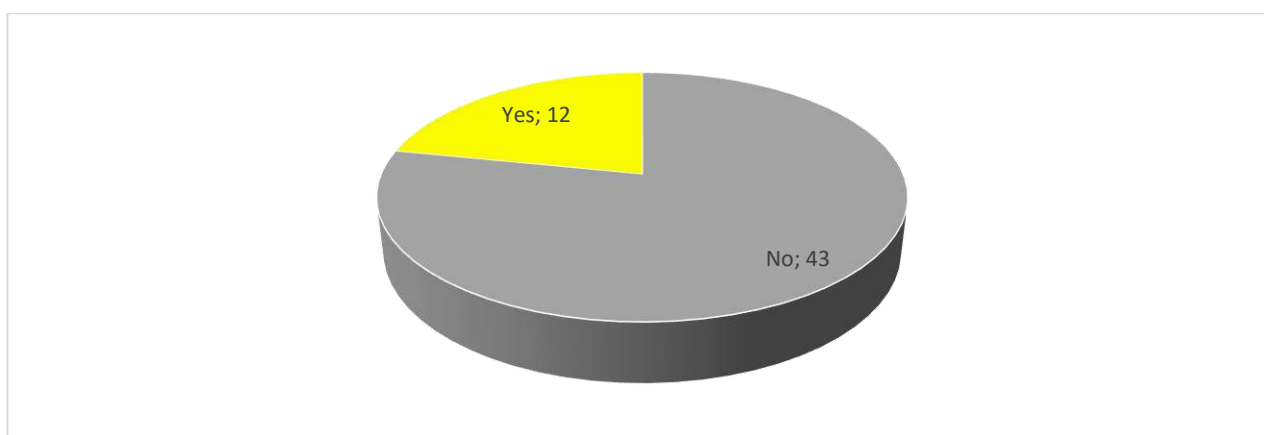
11 respondents state that they are not familiar with the meaning of “dual” training, while all those who are familiar with this learning method (the other 44 respondents), based on alternating between classroom training (at an educational institution) and practical training in work settings (at a company/organization), find it useful.

Dual training to favour transition policies between the world of education/training and the world of labour



Although the dual training approach is deemed “useful” by 44 companies, only 12 of them report having hired personnel from programs that have implemented this method. This data may be attributed to a low prevalence of such programs in the region, a lack of awareness among companies about educational institutions offering dual programs, or insufficient communication and collaboration between companies and educational institutions.

Hired staff coming from a dual training program

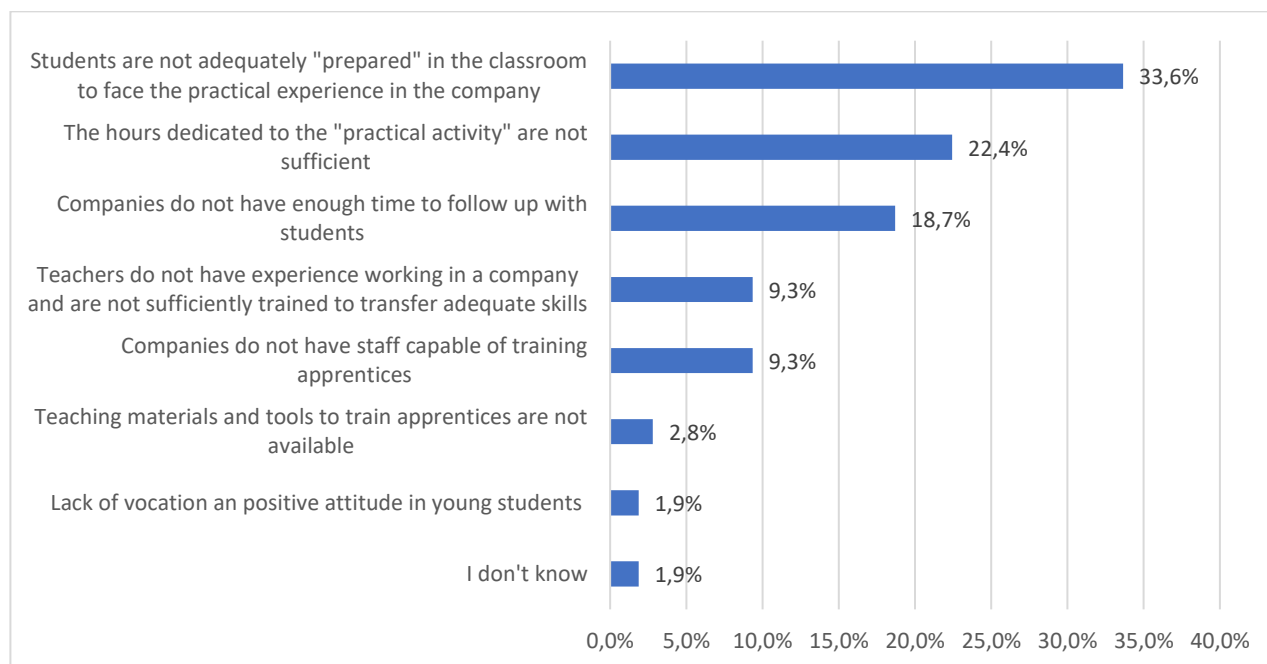


According to those interviewed, the management of apprenticeship paths within companies presents some generally known problems³⁴, such as the fact that "Companies do not have enough time to follow up with students" (18.7% of responses and 20 respondents).

What is striking is that "Students are not adequately "prepared" in the classroom to have the practical experience in the company" and also that "Teachers do not have experience working in a company and are not sufficiently trained to transfer adequate skills"; the first aspect is reported by 36 respondents. All the 2 items sound like a strong criticism of the school and professional training system.

Another element to reflect on in terms of educational and training programming is that "The hours dedicated to the practical activity are not sufficient" (22.4% of responses). Therefore, it is necessary to strengthen, in dual programs, all those activities that are connected to experiential aspects, starting from direct participation in company activities but also the carrying out of exercises, workshops, etc.

Main critical issues of dual paths in tourism

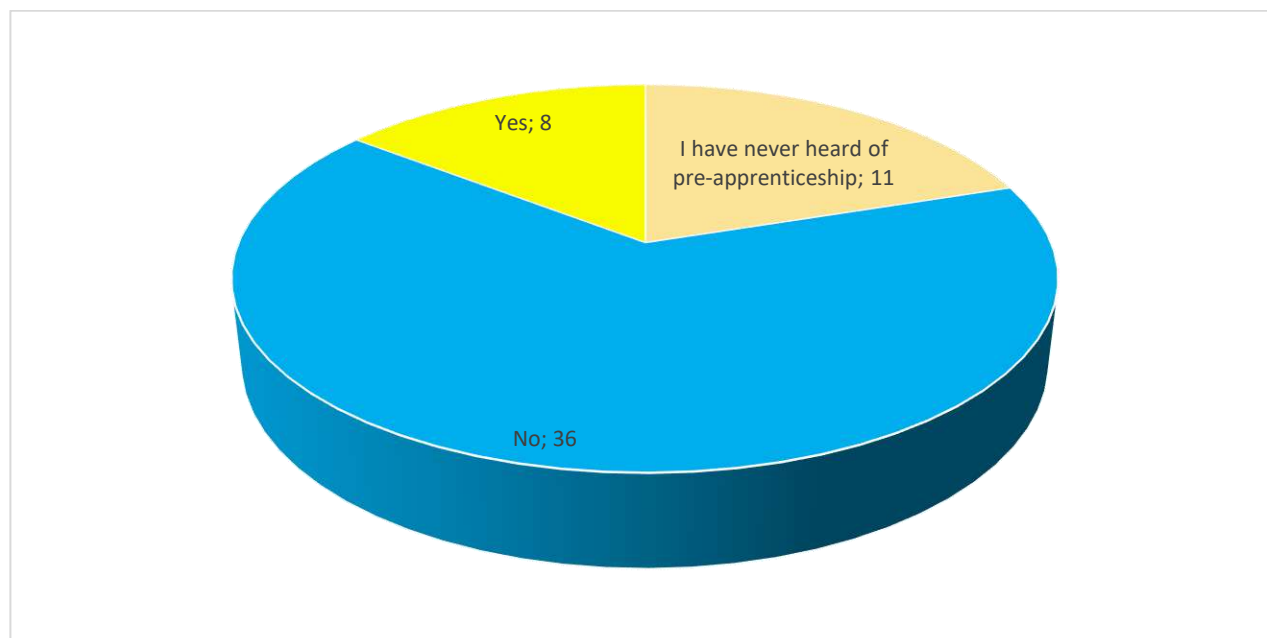


A specific question was addressed to understand if there are pre-apprenticeship course in the area of interviews and if respondents are aware of these. Pre-apprenticeship provides basic skills and prepares young for apprenticeship courses. The pre-apprenticeship does not involve entry into the company but courses, even of a practical nature, carried out in training centers.

³⁴ The question allowed for the possibility of indicating multiple response options.

According to 36 respondents there are not these kinds of activities at local level but 65% of sample affirms that this kind of education is present. The 20% of interviewees “never heard of pre-apprenticeship”.

Awareness of pre-apprenticeship courses in the area



The interviewees were asked two questions specifically referring to skills.

A first question on which skills a pre-apprenticeship path should focus on; a second aspect of attention concerns what skills a worker should have to be inserted into the company as an apprentice. In both cases they were asked to express a vote, from a minimum of 1 to a maximum of 10, to evaluate the importance of the skills listed.

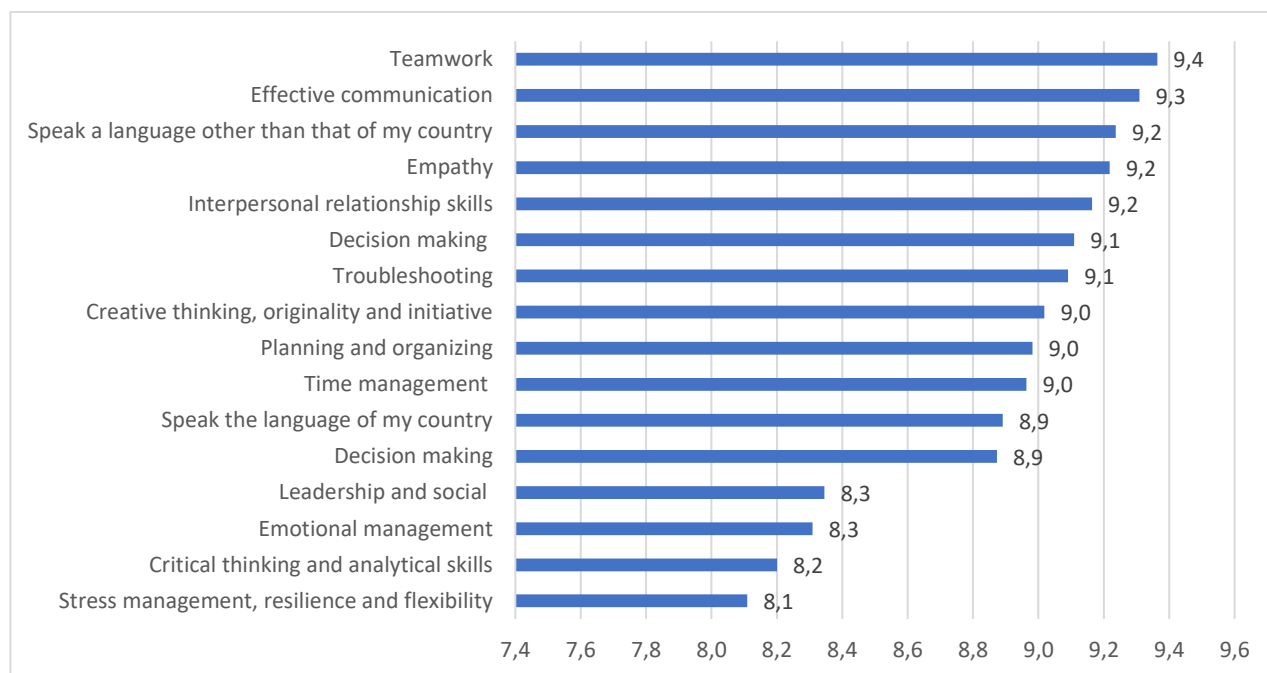
About first question, all skills indicated in questionnaire are considered important and useful and have to be trained during a pre-apprenticeship course. In fact, all the skills proposed received a very positive evaluation, given that all the opinions were above "8".

Given this, the most important skill is “Teamwork” that combined with “Effective communication” probably reveals the need, felt by the respondents, to improve the corporate climate, considered to be the factor underlying the company's success.

Great success was confirmed for a non-soft skill such as "Speak a language other than that of my country", certainly the English language, a need generally felt by most businesses in the tourism sector.

The set of skills relating to customer relations is important, such as "Effective communication", "Empathy" and "Interpersonal relationship skills".

Skills to be trained during a pre-apprenticeship course

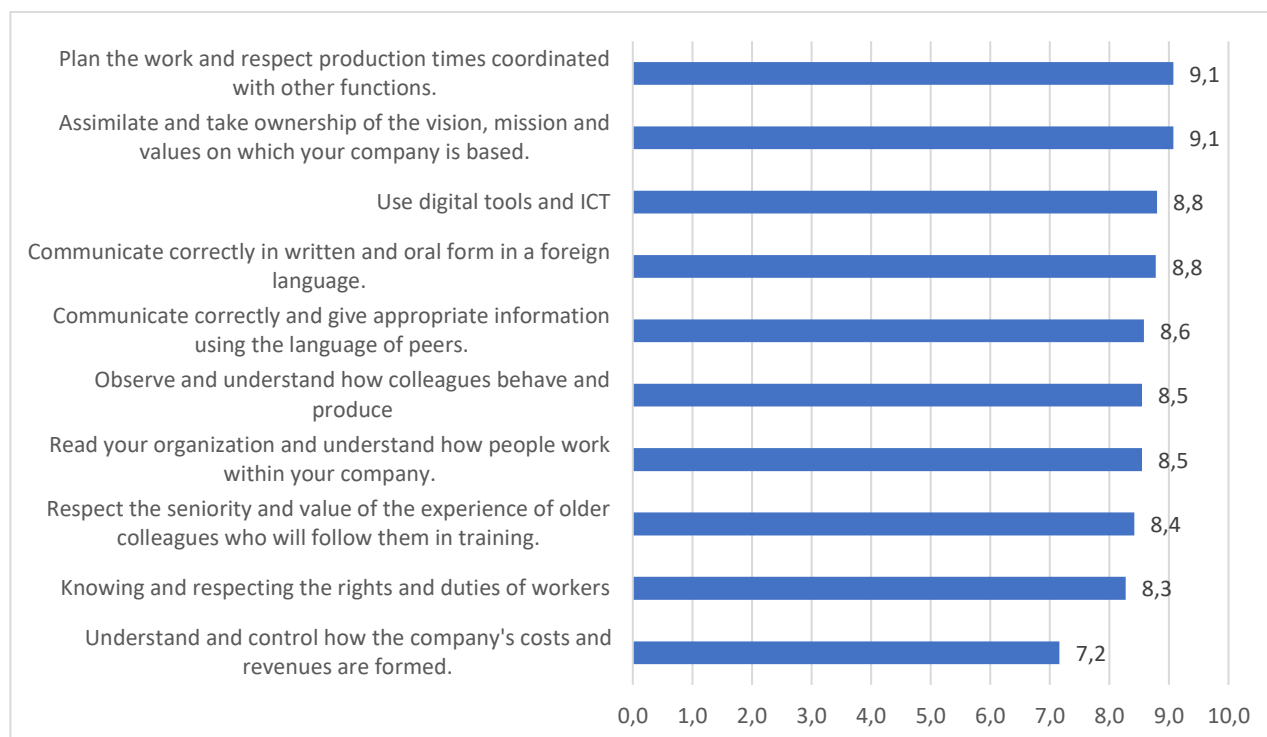


As regards the skills that are required of incoming apprentices, are strictly related to the “commitment”, often considered as the Achilles' heel for young people entering the job market: “Plan the work and respect production times coordinated with other functions” and “Assimilate and take ownership of the vision, mission and values on which your company is based”. These are symptomatic factors of the need for personnel who are in strong relationship with the company, with its values and its rules. Often, it emerges from the questionnaires as well as from the interviews carried out that entrepreneurs register a low affection of young workers for the company which translates into an almost “inconstant” working relationship, in the lack of punctuality, in the inability to manage stress and in summary management of customer relations. These phenomena risk also influencing the behavior of those who, instead, would be more faithful and constant and for this reason companies' expectations focus on these 2 factors to which the highest score is attributed (9.1).

The “Use digital tools and ICT” stands out for its importance, receiving a rating of 8.8.

Behaviors based on observation and learning through observation are also fundamental: “Read your organization and understand how people work within your company” (8.5), “Observe and understand how colleagues behave and produce” (8.5), “Respect the seniority and value of the experience of older colleagues who will follow them in training” (8.4).

Skills that an entry level apprentice must possess



An important theme is that of relations with the educational and professional training system³⁵. As many as 19 respondents declared "I have no relationship with the educational system and the vocational training center".

The remainder, who have this type of relationship, they are primarily in collaboration with educational and vocation systems because they provide "availability to host students for training internships".

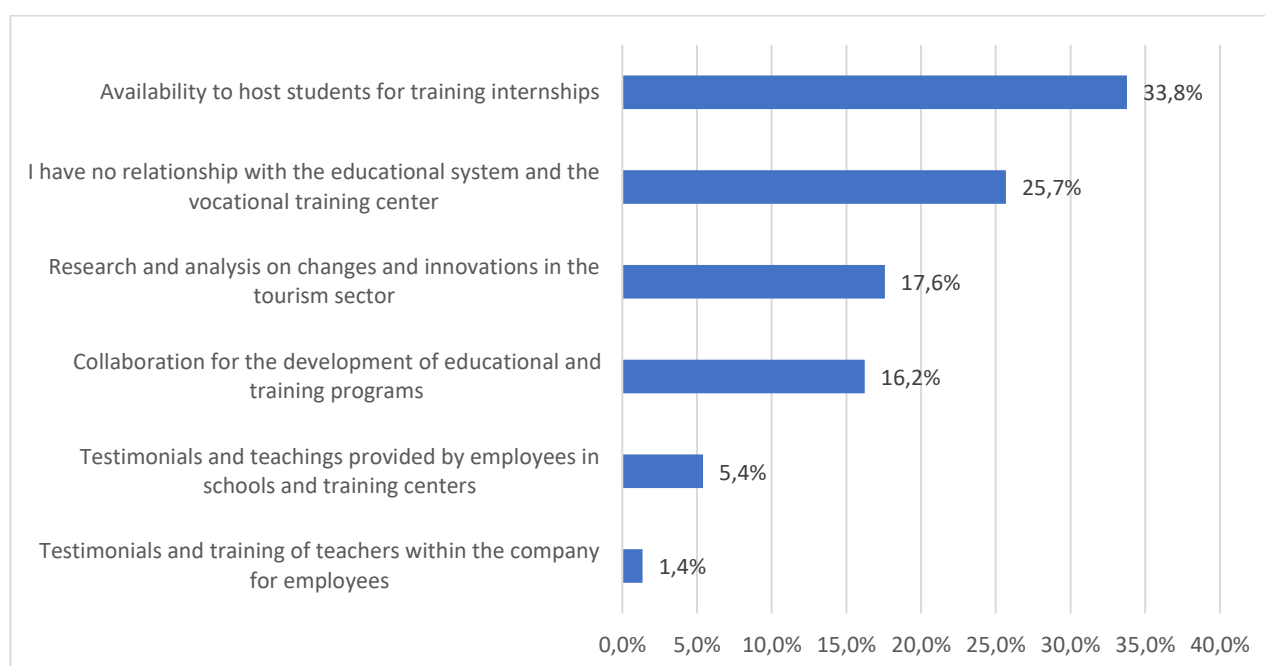
A very interesting form of collaboration highlighted by the respondents is "Research and analysis on changes and innovations in the tourism sector", which can also be considered preparatory to the co-planning activity ("Collaboration for the development of educational and training programs"). School and professional training together with companies are the right mix to be able to carry out an activity aimed at understanding what are the factors of change and innovation that can impact the tourism sector. The results of this activity must be incorporated into educational programming and by companies so that they can plan the appropriate strategies to respond to what has been found. This activity was highlighted by 13 respondents and is a important factor on which to work in terms of collaboration between businesses and the education and professional training system, to consolidate relationships making them more useful and productive for all parties involved.

³⁵ The question allowed for the possibility of indicating multiple response options.

Strictly related to the previous factor, it's the Collaboration for the development of educational and training programs" (12 respondents), an extremely important activity as it is aimed at having young people leaving the school/training with skills that are useful to the world of tourism companies. This collaboration is useful to prevent situations of inefficiency of incoming workers but also of frustration on the part of young people who would otherwise find themselves unable to fully use what they learned in the classroom.

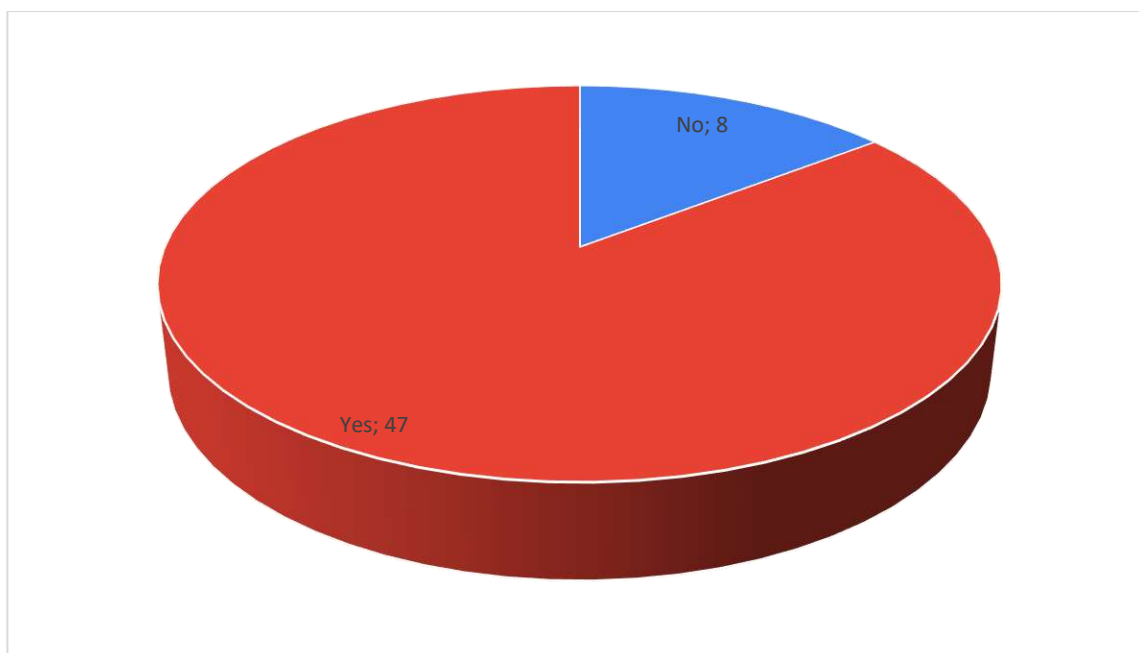
According to results of the questionnaire, maybe it would be important enhance collaboration using know-how exchanges, "Testimonials and teachings provided by employees in schools and training centers" and "Testimonials and training of teachers within the company for employees". These options have been selected by only 5 respondents.

Collaborative relationships with the education system and vocational training centers



As many as 85% of those interviewed declared having carried out training activities in the company in the last 3 years. The declared value is very high if we consider it to be higher percentage respect to the continuous training rates recorded in Europe.

Training activities for employees in the last three years



Those who reported engaging in training in the last 3 years³⁶, identified the primary effect as an “Improved human resource performance” (34,4% of responses).

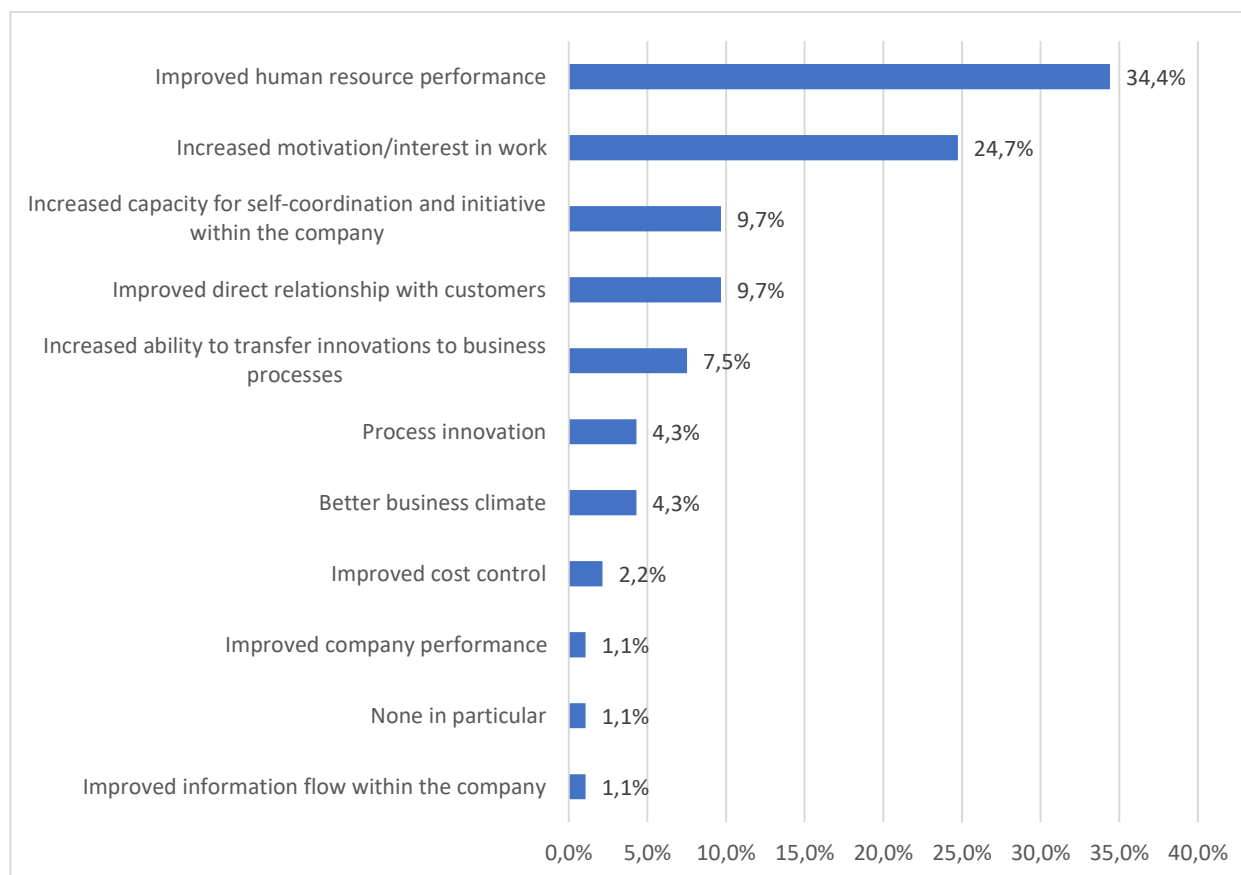
“Increased motivation/interest in work” is also high selected (24.7%). Only 1.1% of responses (1 respondent) did not highlight any effect following the completion of training programs.

Some noteworthy effects mentioned include improvements in the relationship with customers (9.7%), which is particularly crucial in-service industries such as restaurants and tourism. But the percentage could be higher on this aspect; also, with the “Increased capacity for self-coordination and initiative within the company”, at the same level of the previous item.

Training appears to have a limited impact in a “better business climate” (4.3%) and in a “improved information flow within the company” (1.1%) that is a factor related to the company’s climate.

³⁶ The question allowed for the possibility of indicating multiple response options.

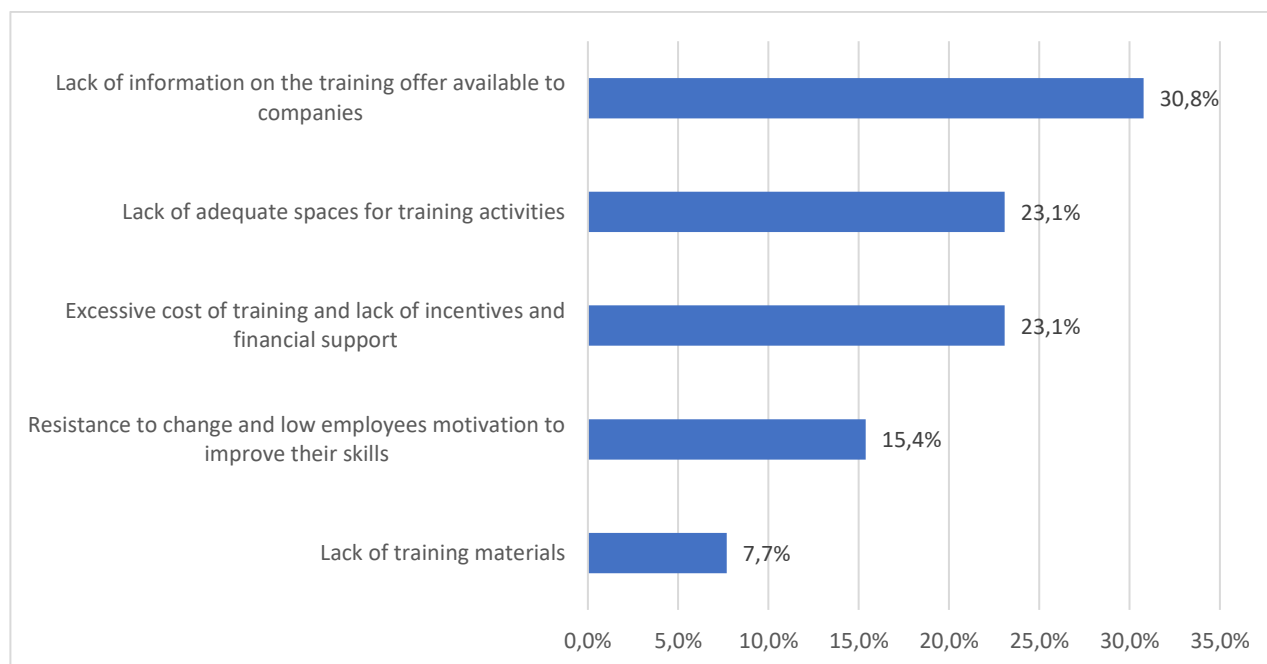
Effects derived from participation in continuous training activities



The main reason why interviewees (8 respondents) do not do training is linked to the "Lack of information on the training offer available to companies" (4 respondents, 30.8% of the answers). Therefore, there is no lack of desire to provide training but there is a complaint about the lack of adequate promotion of the training opportunities that companies can access.

The perception of "Excessive cost of training and lack of incentives and financial support" is high. In fact, more than 23% of the responses focus on this item. Evidently, the interviewees believe that compared to the costs to be borne for training there are no adequate benefits; furthermore, there would appear to be a lack of incentive systems to cover the costs linked to continuous training (costs of teaching, classrooms, tutoring, etc.). Another reason evidenced is somehow connected to the lack of resources is the "Lack of adequate spaces for training activities" (also this option totals 23% of answers).

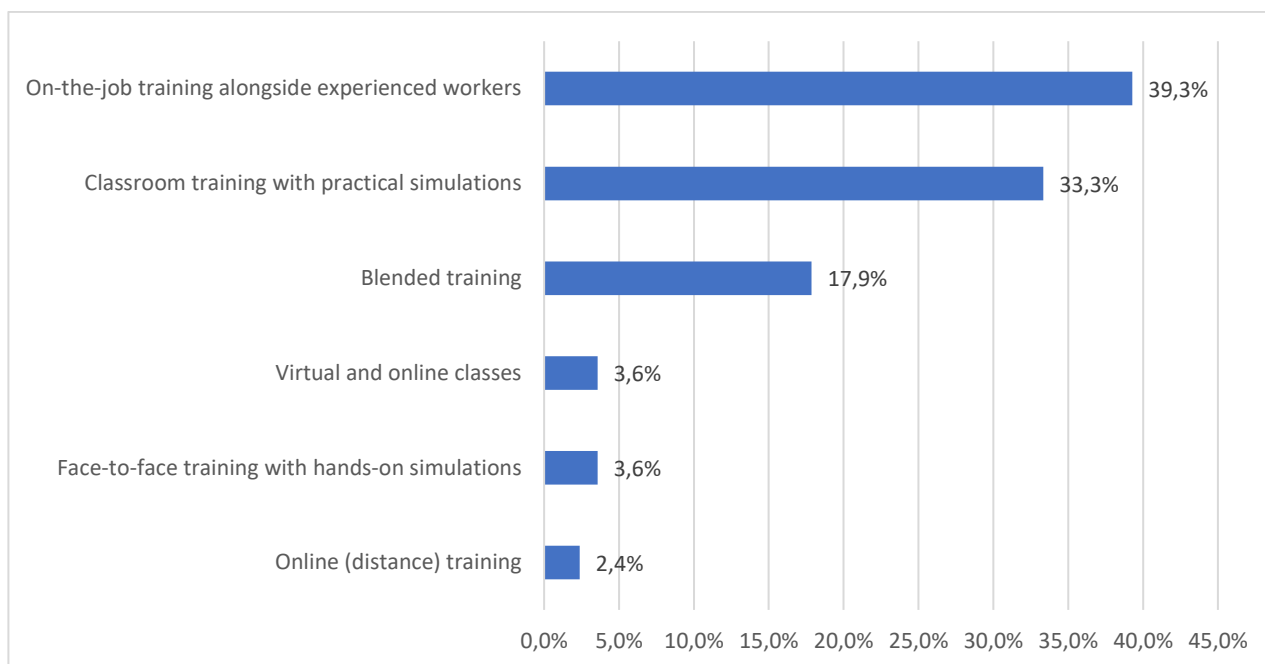
Reasons why continuous training is not carried out



The methodology for training in the company considered most effective by those interviewed is "On-the-job training alongside experienced workers" (according to 33 respondents), a methodology evidently considered more effective also because it does not distract workers from normal company production activities.

The practical aspects in training are considered very important; for this reason, "Classroom training with practical simulations" collects a third of the answers. Finally, the "Virtual and online classes" option, not included in the questionnaire and indicated by 3 respondents, is interesting.

Methodology to carry out training in a company



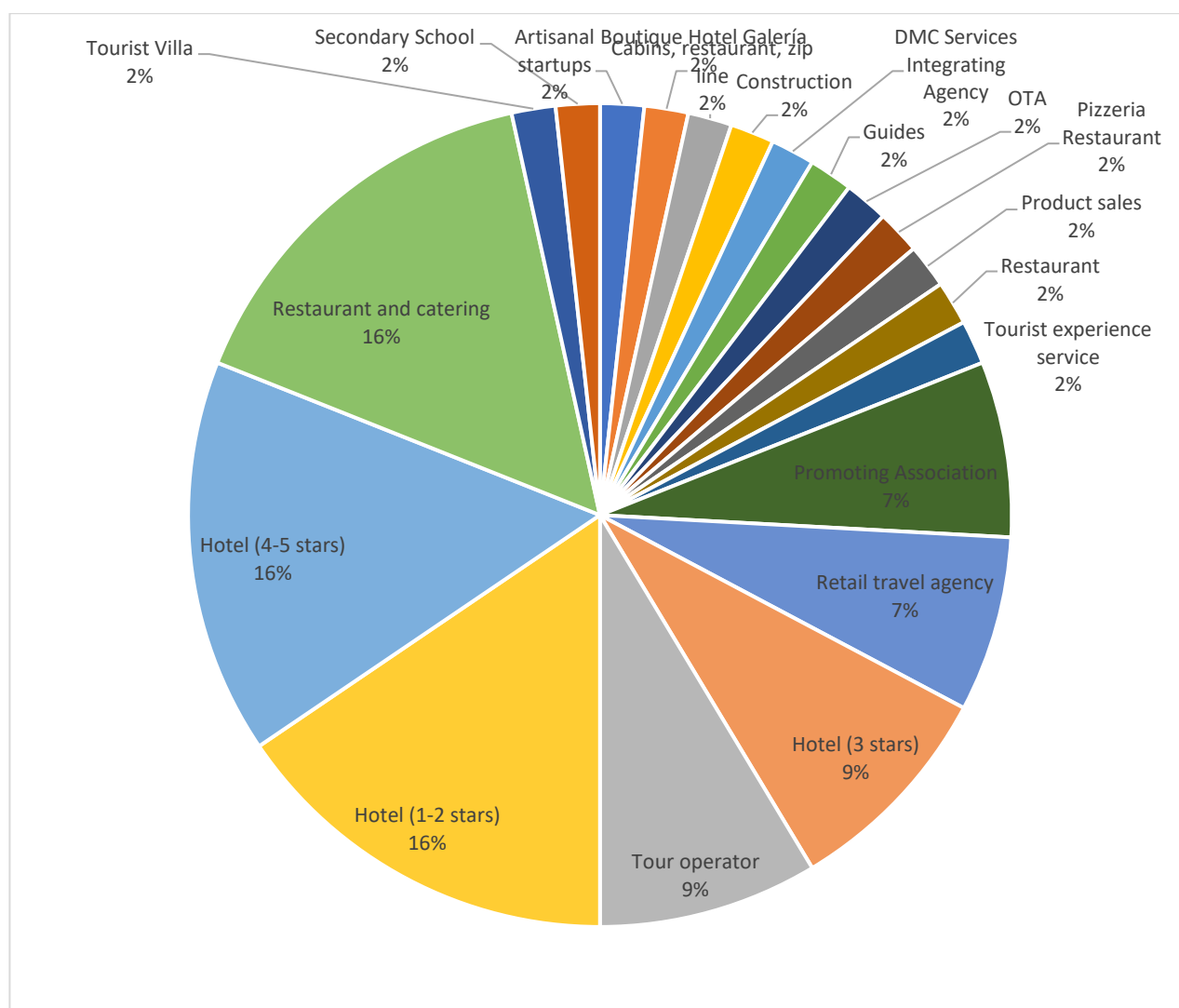
4.3. Results of questionnaires in Mexico

In Mexico, a total of 58 questionnaires was administered.

The interviewees belong to a lot of different categories of operators who, in various capacities, deal with tourism. The main category of respondents is that of restaurants and catering, hotel (4-5 stars), Hotel (1-2 stars): every one of these categories totals the 16% of respondents.

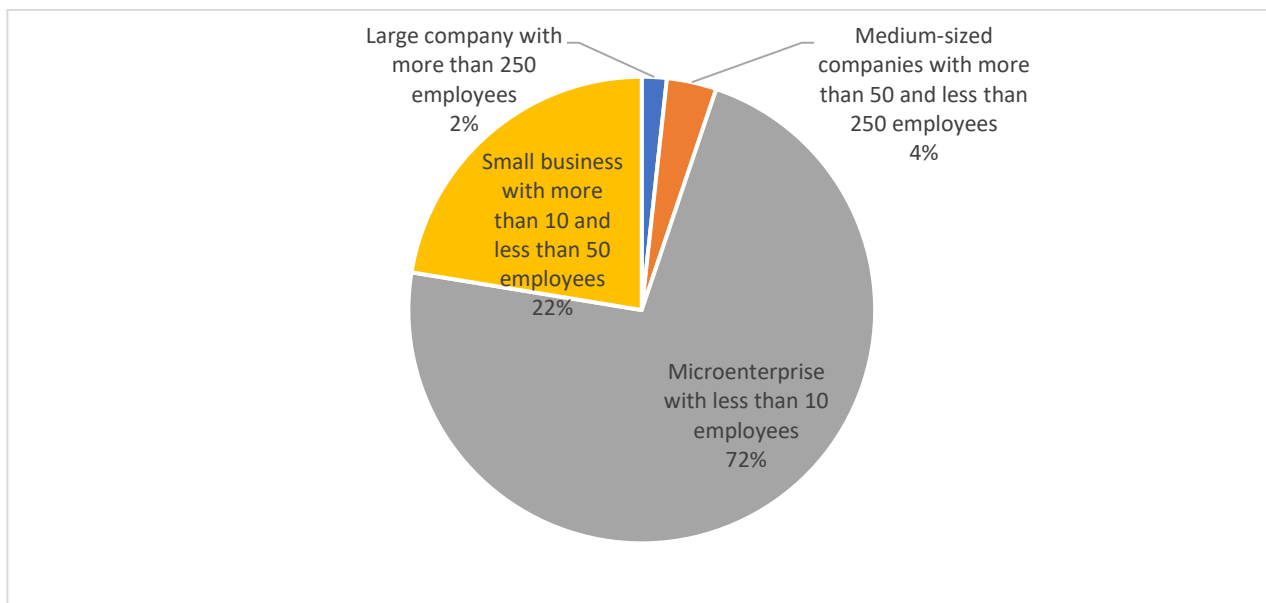
An interesting aspect is the presence of structures that complete the tourist offer and express the vocation of the area, such as Artisanal startups or Promoting association. Finally, aspect to be underlined is the presence, between interviewees, of a Destination management agency and of a secondary school.

Typology of company interviewed



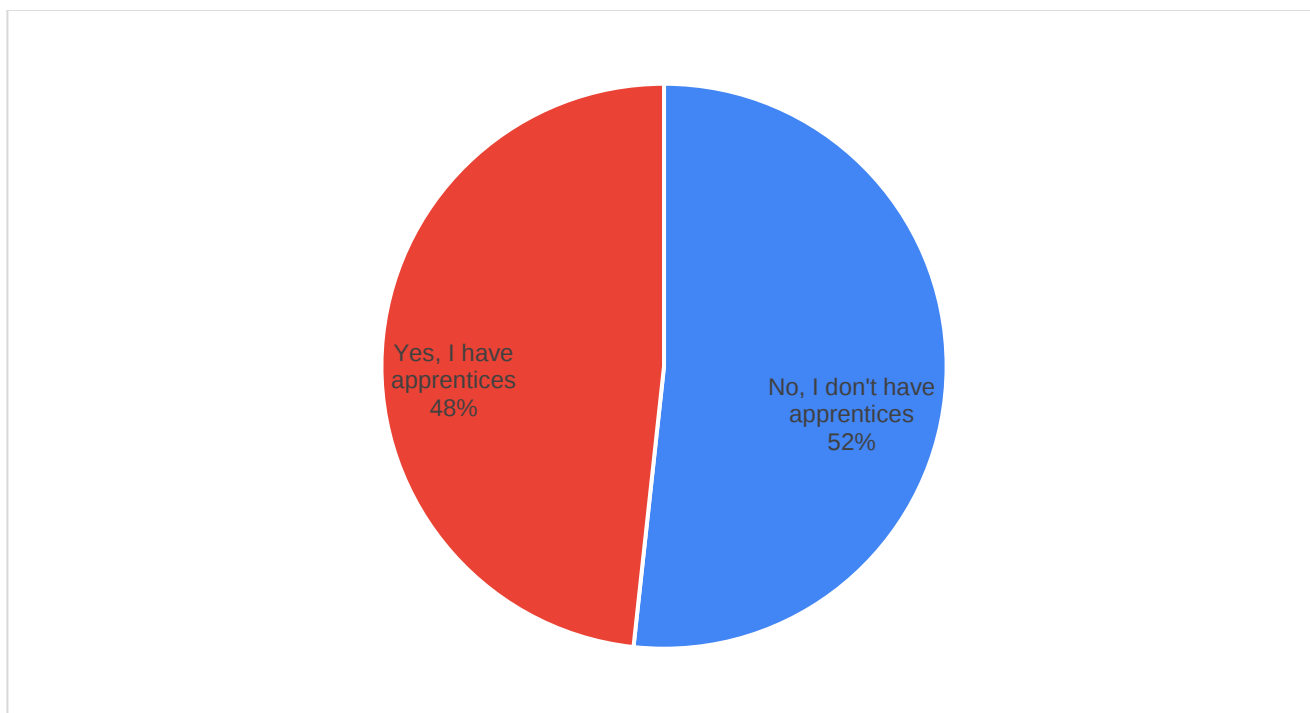
Most of the respondents are micro sized (72%). There are also large companies in the panel of respondents, albeit in a small percentage (2%).

Company size



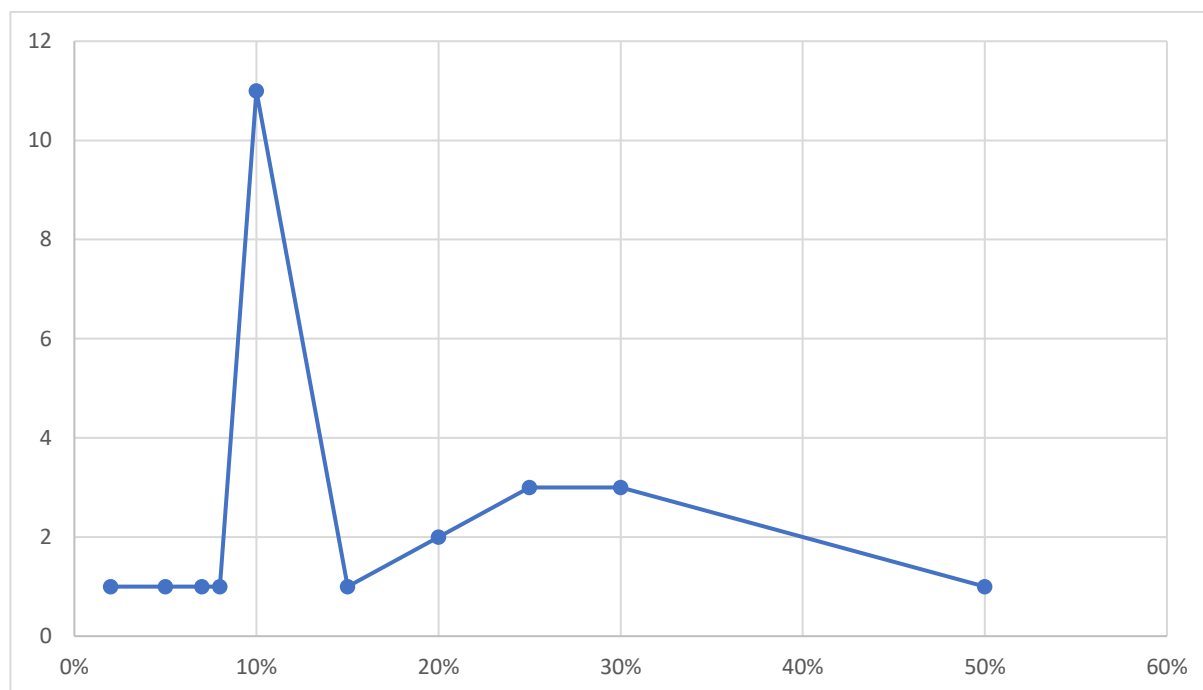
A significant percentage of the companies in the sample (48%) declare they have apprentices.

Companies with apprentices



The share of apprentices that interviewees declare they have in the company varies between 2 and 50%. 11 interviewees declared that they have 10% of apprentices compared to the company workforce.

Percentage of apprentices compared to the number of employees



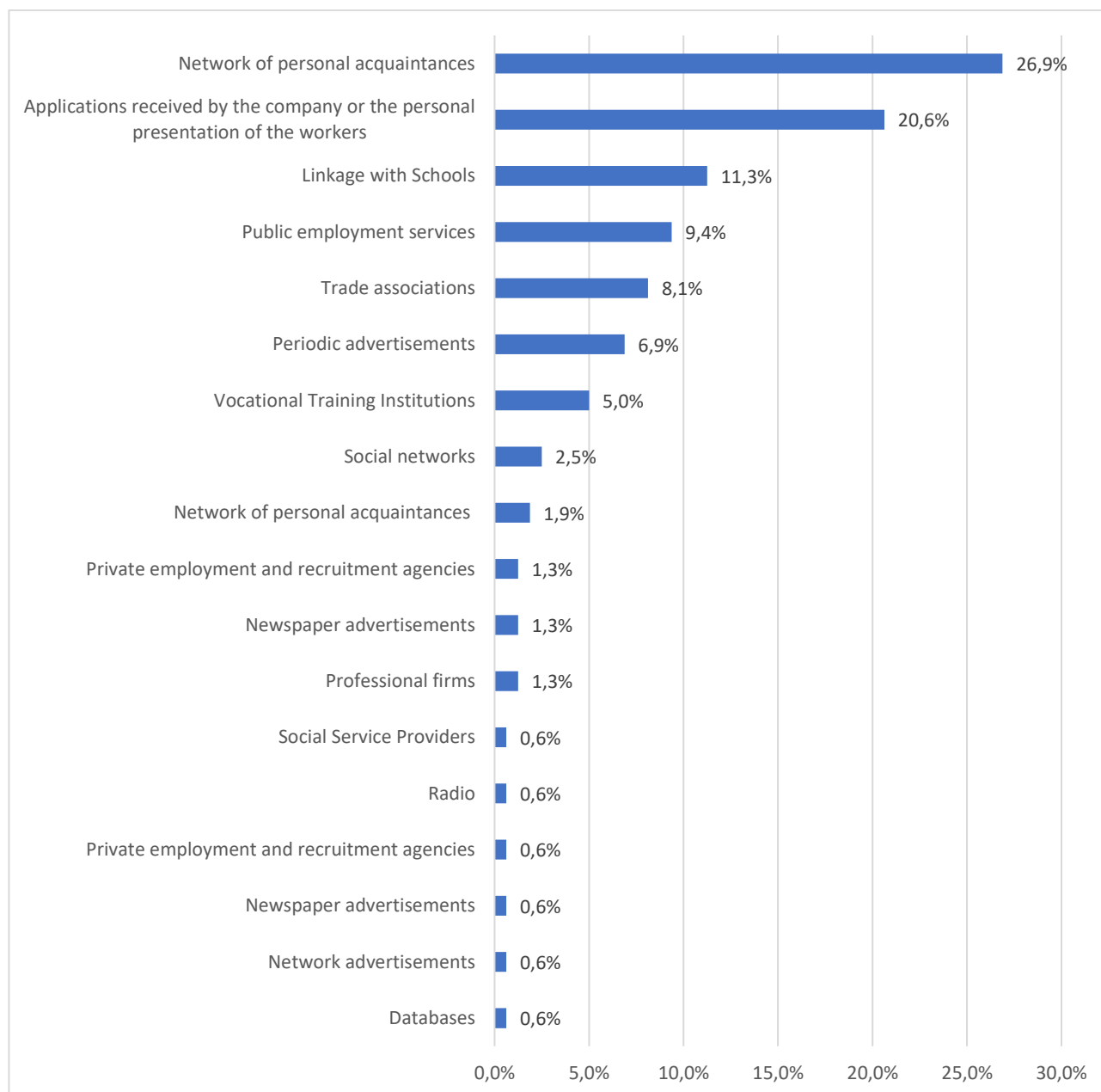
The channels primarily used for staff recruitment³⁷ are “networks of personal acquaintances (friends, relatives, ...)” immediately following are “applications received directly by the company or presentations received of the workers”. An important role is played by “Linkage with schools” combined with “Vocational training institutions”: the two channels total more than 16% of the responses.

“Social Network” (2.5%) are not so used although they outperform private employment services.

It seems that “public employment services” play a non-secondary role between channel of recruitment (according to 15 respondents).

³⁷ The question allowed for the possibility of indicating multiple response options.

Channel of recruitment



About trends in tourism, 3 questions were asked to the interviewees: main “challenges” company faces in the tourism sector, “opportunities for growth” in the tourism sector and “factors of change” do you expect that will have future effects on your company and its organization.

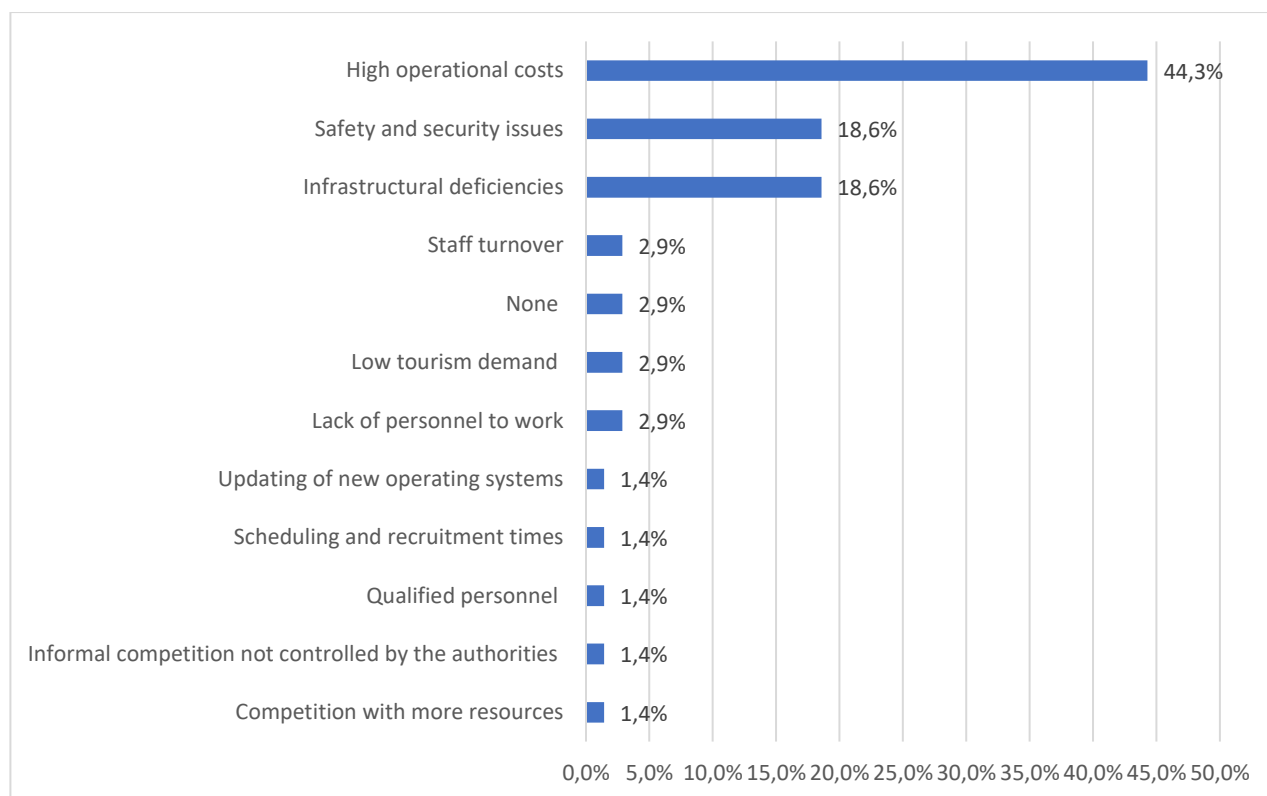
First, about main challenges³⁸, the most important are “high operational costs”, followed by “Safety and security issue” (maybe related to factors as pandemic). Very important the

³⁸ The question allowed for the possibility of indicating multiple response options.

“infrastructural deficiencies” (18.6%), which shows how much awareness there is regarding the relationship between the state of infrastructure and territorial tourism development.

All the other challenges are not so important, according to respondents.

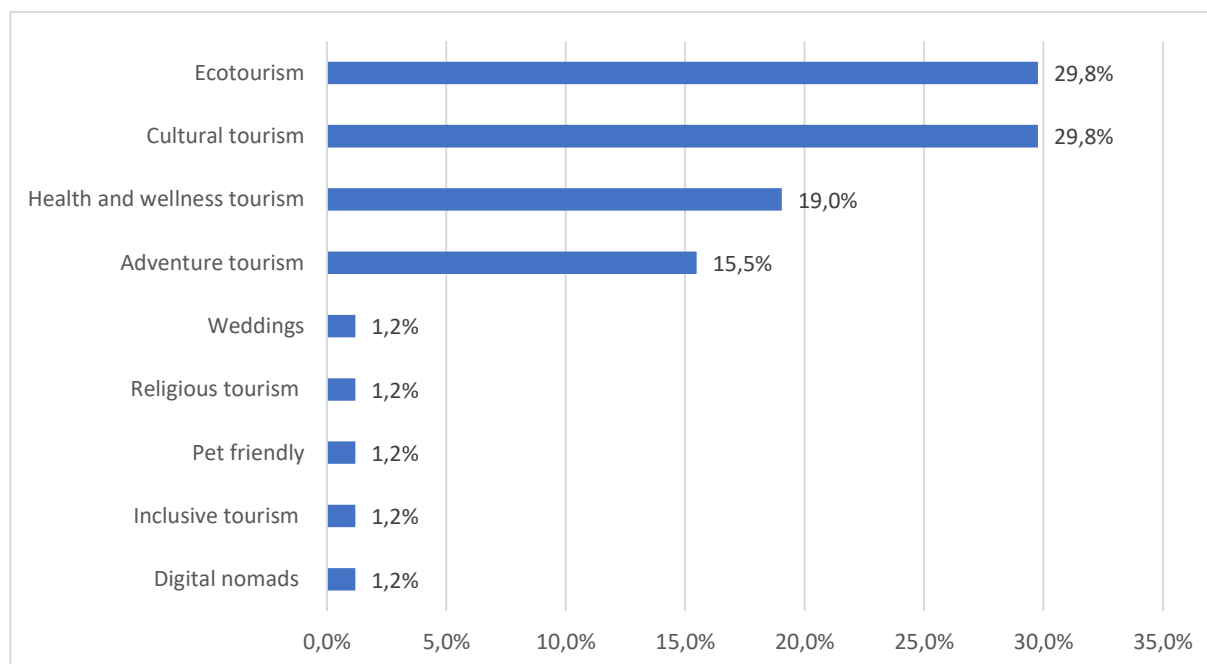
Main challenges in the tourism sector



About the opportunities for growth in tourism sector³⁹, the interviewees report some market opportunities/customer segments in addition to those listed in the questionnaire: “wedding”, “student tourism”, “religious tourism”, “inclusive tourism”, etc.. Most relevant opportunities come from “ecotourism” and “cultural tourism”, everyone with near 30% of preferences.

³⁹ The question allowed for the possibility of indicating multiple response options.

Opportunities for growth in tourism sector

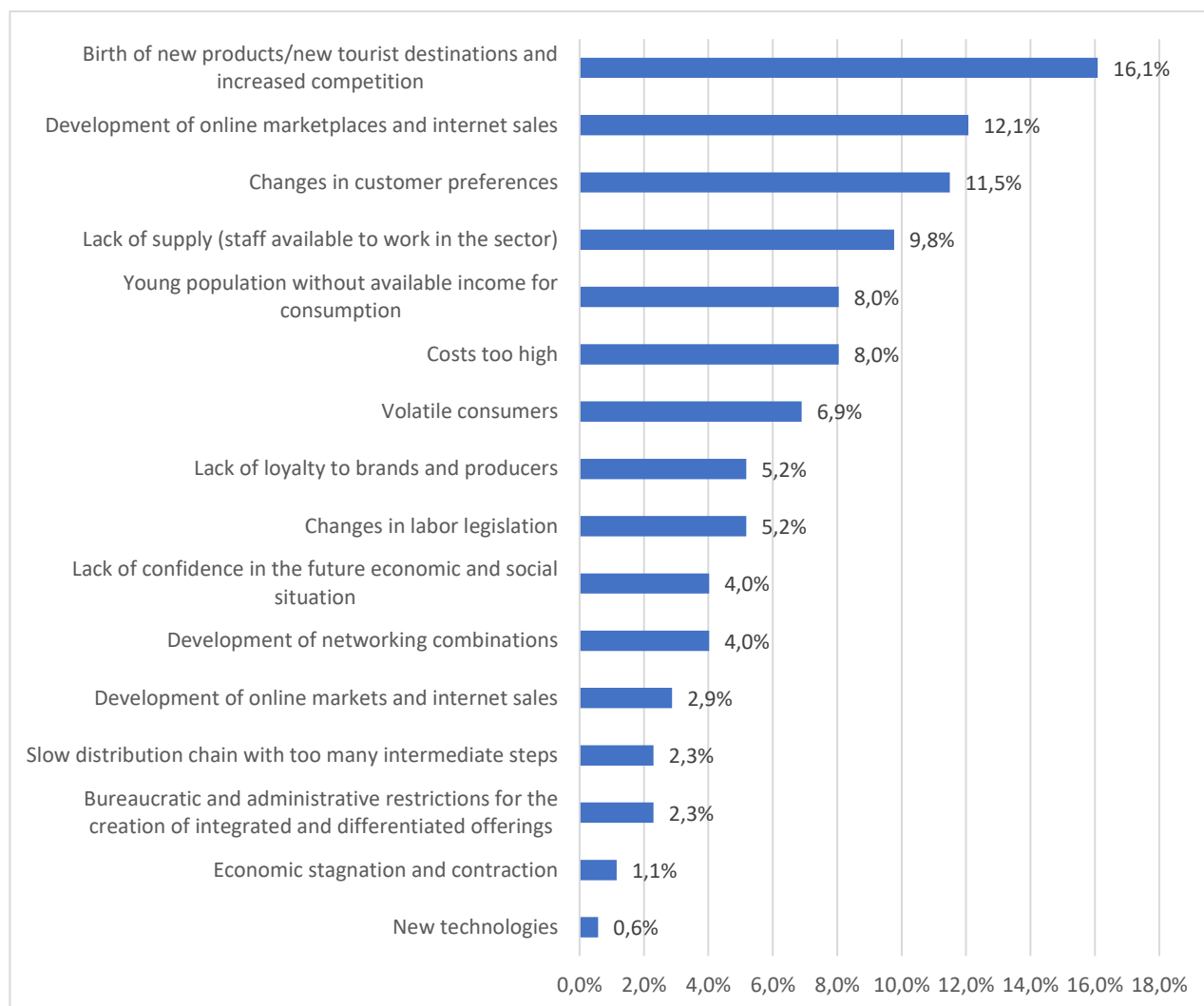


The companies in the sample/panel have identified, in perspective, the key drivers of change⁴⁰ that could impact the company and its organization more than others. The significant concerns are related to competition in the sector ("Birth of new products/new tourist destinations", 16.1% and "Development of online marketplaces and internet sales", 12.1%). Following, sociological, social, and psychological aspects (as "Changes in consumer preferences," 11.5%, "Youth population without the availability of income to be used for consumption", 8%, "Volatile consumers", 6.9%) are considered factors to worry about.

A factor worthy of attention is the perception of the interviewees regarding the difficulty of finding staff ("Lack of supply, staff available to work in the sector"), a factor which is also having a negative impact on the European labor market. While factors more closely linked to economic trends, such as "Economic stagnation and contraction" and "Lack of confidence in the future economic and social situation", do not cause concern.

⁴⁰ The question allowed for the possibility of indicating multiple response options.

Drivers of change



Companies were asked to share their strategies that they have already undertaken or plan to undertake⁴¹. Almost half of the sample (27 respondents) emphasized networking (“Productive agreements with other companies in the tourism sector” and “Productive agreements with other companies in sectors other than tourism”). These companies seem very competitive and aggressive because they are looking for “new markets”, different from traditional ones, and to “develop new products” (10.9% of responses).

There are two significant and maybe contradictory aspects:

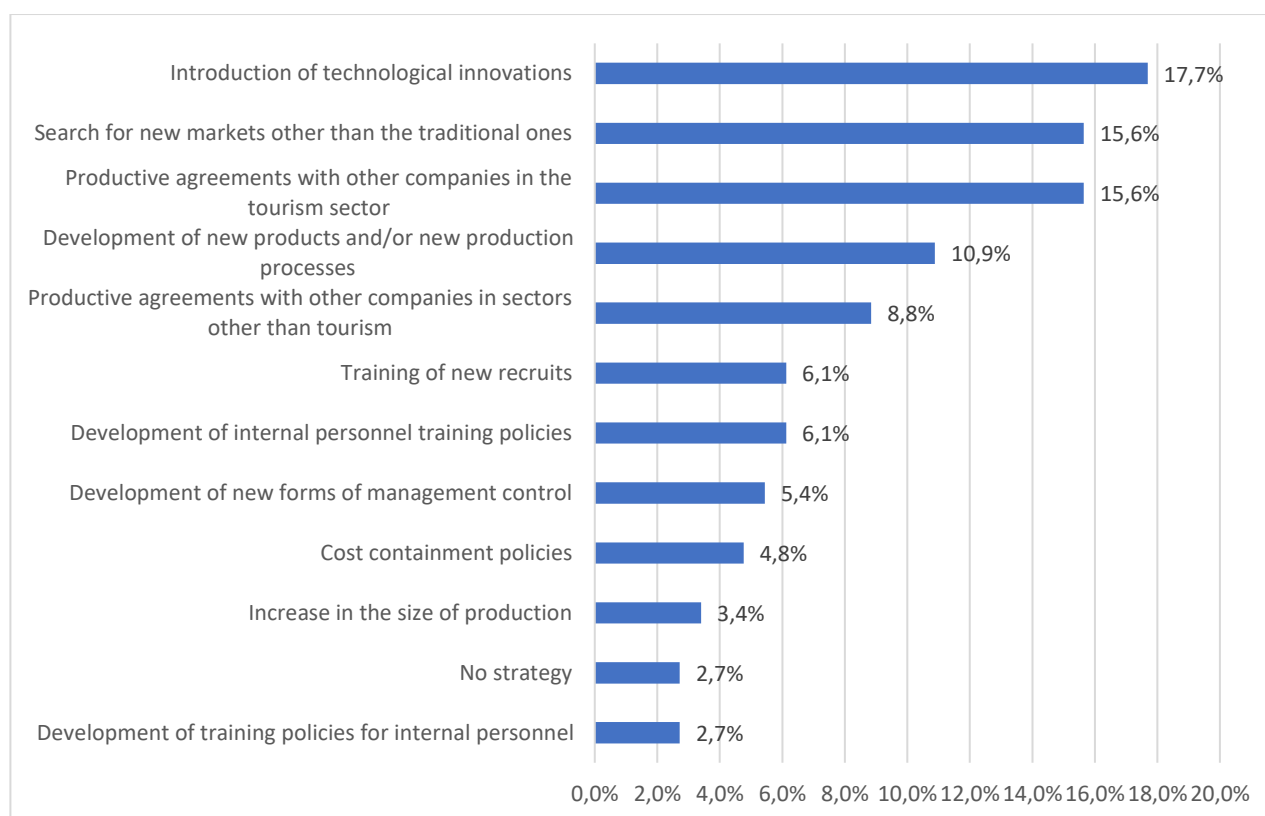
- New technologies are not indicated as a driver of changes, in the previous question (only 1 respondent) but the most important strategy is based on “Introduction of technological innovations” (17.7%)

⁴¹ The question allowed for the possibility of indicating multiple response options.

- The lack of staff available to work in tourism sector is a criticality but only 2.7% of responses are referred to “Development of training policies for internal personnel”, which could, instead, represent a strategy both to attract and retain staff.

Four respondents stated that they have no ongoing or planned strategies to deal with the drivers of change seen.

Best strategies already adopted or planned

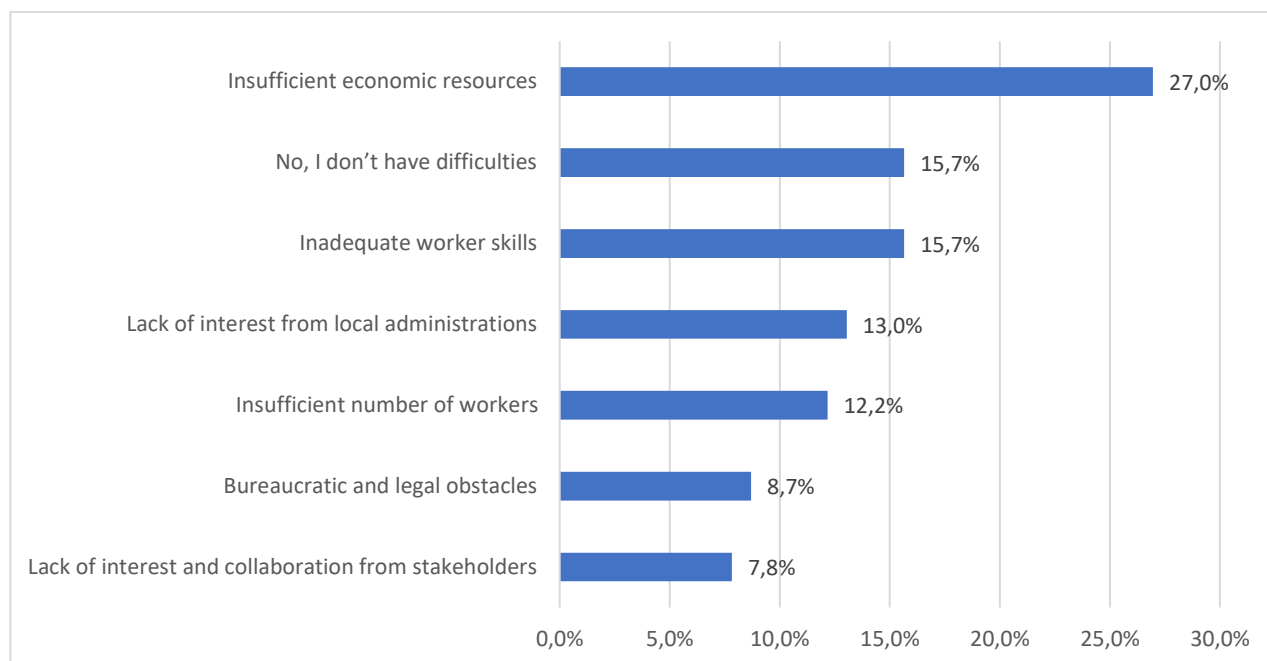


To implement strategies interviewees indicated some problems⁴², first “Insufficient economic resources” (27% of responses). Important obstacles are related to public sector/administration, because the “Lack of interest from local administration” (15 respondents) and the “Bureaucratic and legal obstacles” (10 respondents). But also in this case, it emerges that a big problem is about the human resources. Respondents evidence the “Inadequate worker skills” (15.7%) and “Insufficient number of workers” (12.2%).

As many as 18 respondents declared that they had no difficulty in implementing their strategies.

⁴² The question allowed for the possibility of indicating multiple response options.

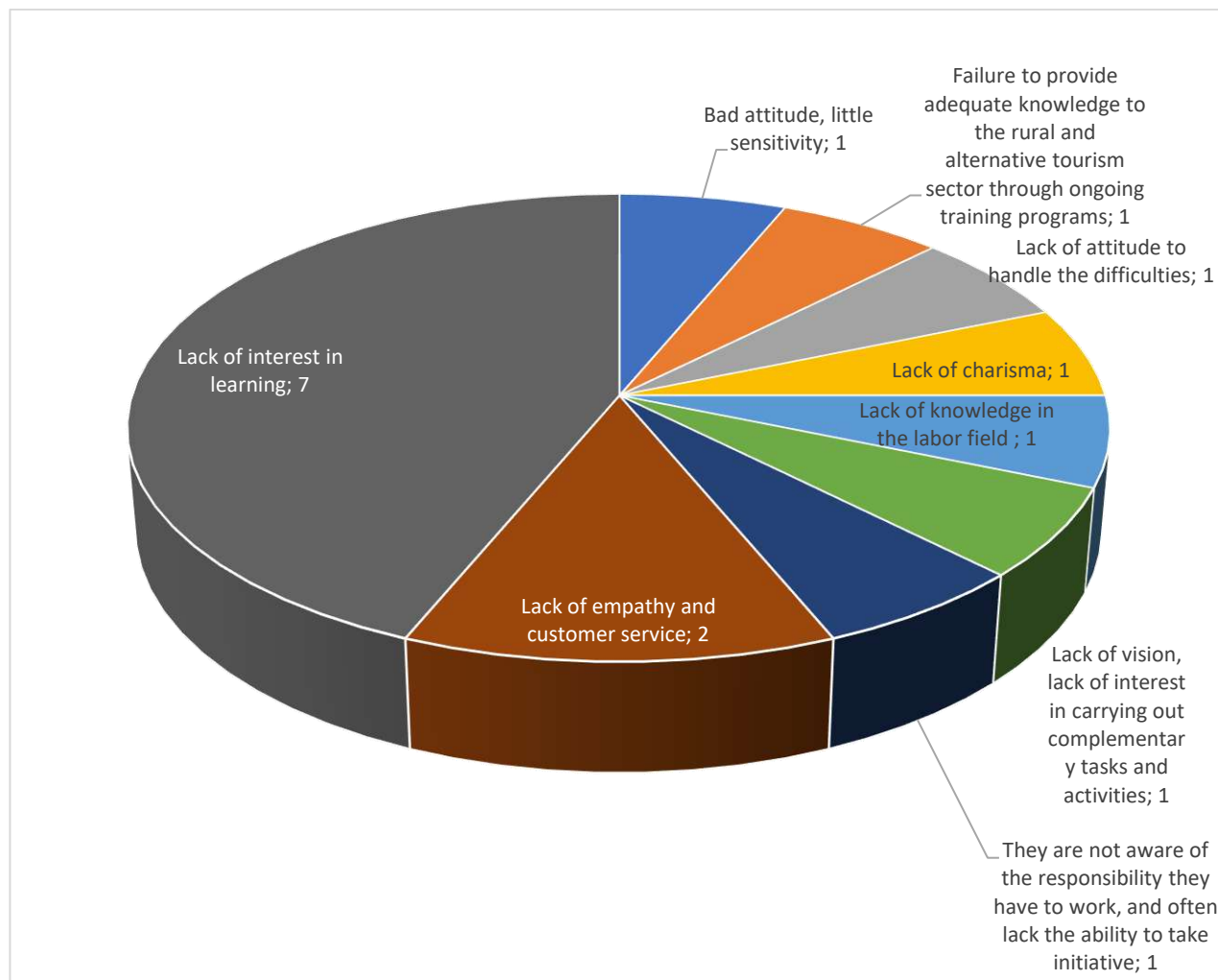
Difficulties to implement strategies



The 18 respondents who indicated the “Inadequate workers skills” as a difficult in implementing strategies, state that the deficiencies are related to:

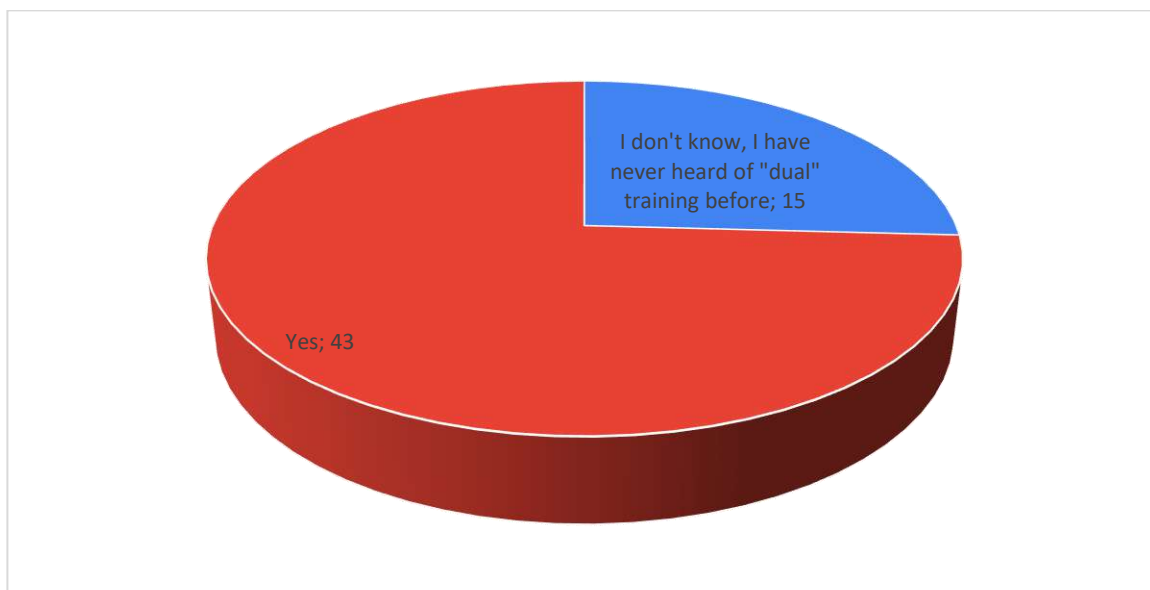
- Lack of interest in learning (the most important factor)
- Other elements that could be reconducted to the attitude of the workers (“bad attitude, little sensitivity”), as lack of empathy and customer service, lack of charisma, lack of interest in carrying out complementary task and activities, lack of attitude to handle the difficulties
- Less important is the lack of skills or knowledges.

Main deficiency of workers



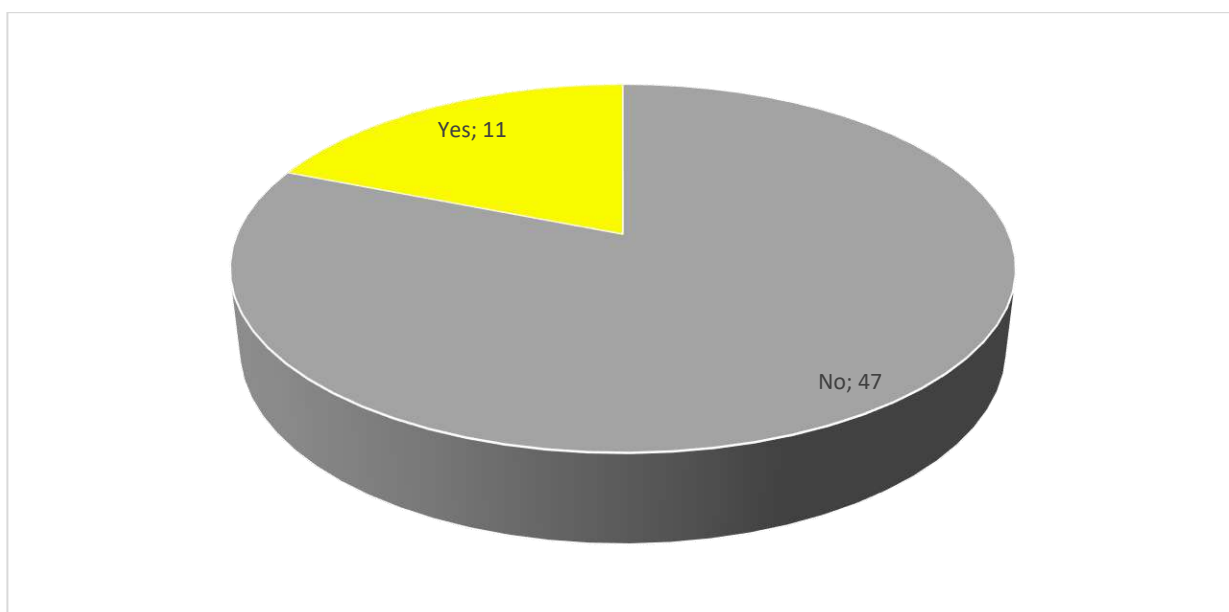
15 respondents state that they are not familiar with the meaning of “dual” training, while all those who are familiar with this learning method (the other 43 respondents), based on alternating between classroom training (at an educational institution) and practical training in work settings (at a company/organization), find it useful.

Dual training to favour transition policies between the world of education/training and the world of labour



Although the dual training approach is deemed “useful” by 43 companies, only 11 of them report having hired personnel from programs that have implemented this method. This data may be attributed to a low prevalence of such programs in the region, a lack of awareness among companies about educational institutions offering dual programs, or insufficient communication and collaboration between companies and educational institutions.

Hired staff coming from a dual training program

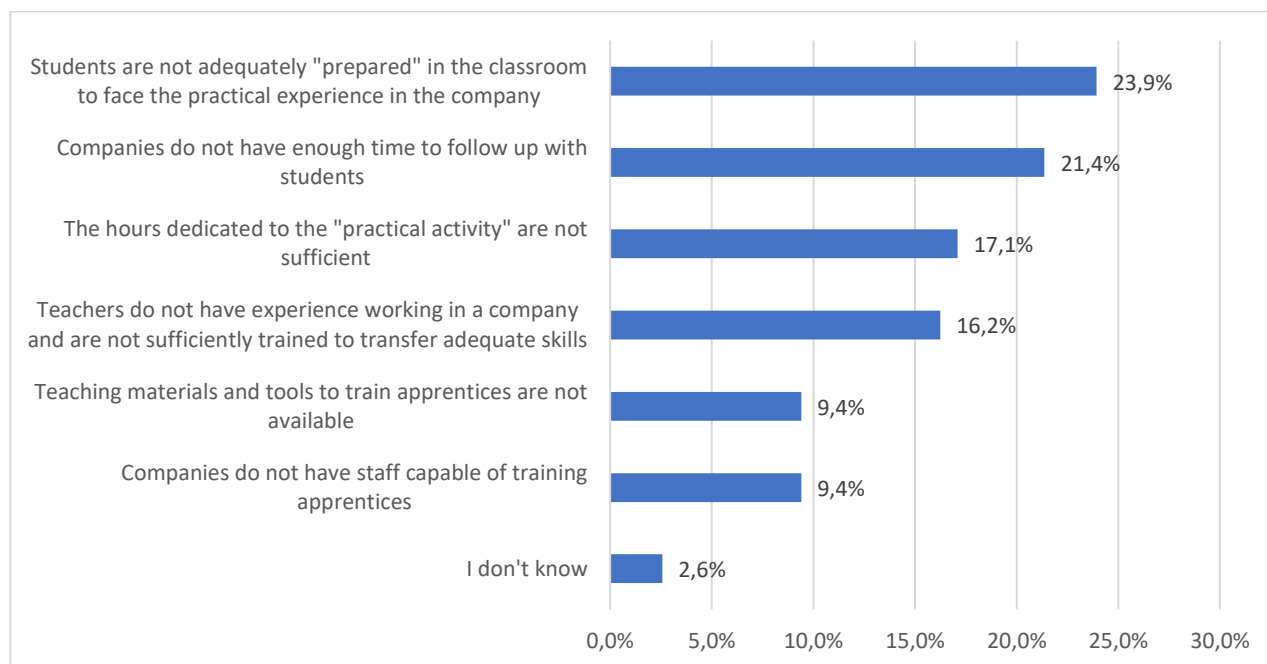


According to those interviewed, the management of apprenticeship paths within companies presents some generally known problems⁴³, such as the fact that "Companies do not have enough time to follow up with students" (21.4% of responses and 25 respondents).

What is striking is that "Students are not adequately "prepared" in the classroom to have the practical experience in the company" and also that "Teachers do not have experience working in a company and are not sufficiently trained to transfer adequate skills"; the first aspect is reported by 28 respondents. All the 2 items sound like a strong criticism of the school and professional training system.

Another element to reflect on in terms of educational and training programming is that "The hours dedicated to the practical activity are not sufficient" (21.4% of responses). Therefore, it is necessary to strengthen, in dual programs, all those activities that are connected to experiential aspects, starting from direct participation in company activities but also the carrying out of exercises, workshops, etc.

Main critical issues of dual paths in tourism

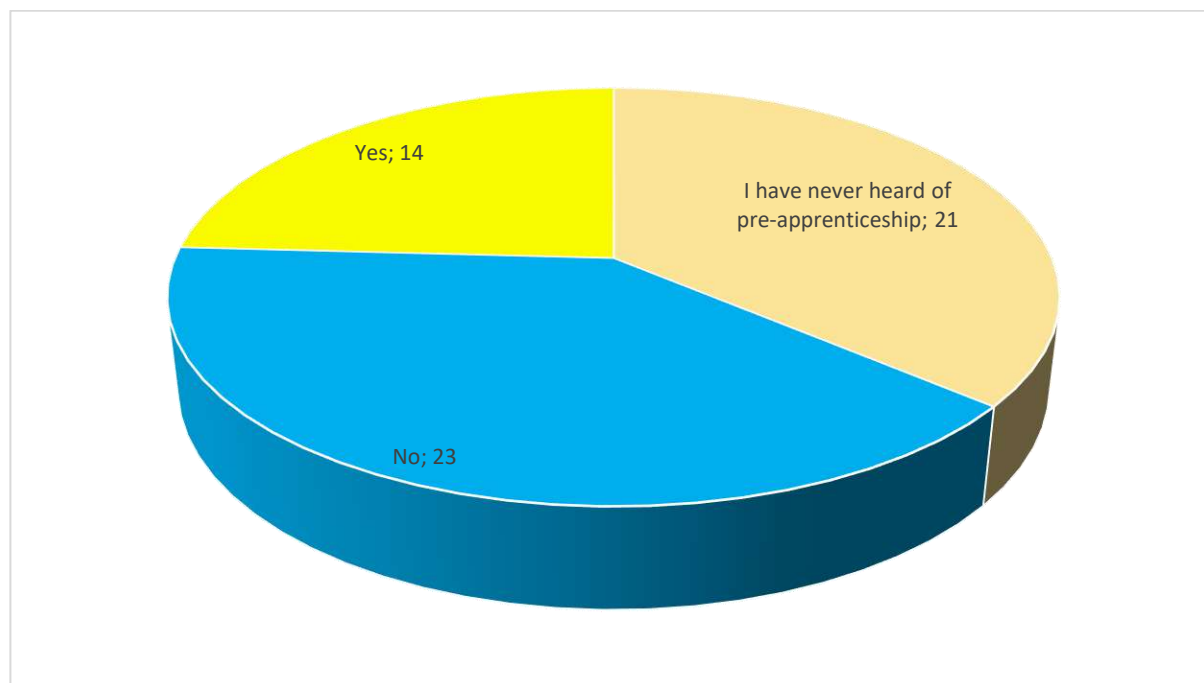


A specific question was addressed to understand if there are pre-apprenticeship course in the area of interviews and if respondents are aware of these. Pre-apprenticeship provides basic skills and prepares young for apprenticeship courses. The pre-apprenticeship does not involve entry into the company but courses, even of a practical nature, carried out in training centers.

⁴³ The question allowed for the possibility of indicating multiple response options.

According to 23 respondents there are not these kinds of activities at local level, but 14 interviewees affirms that this kind of education is present. The 36% of interviewees “never heard of pre-apprenticeship”.

Awareness of pre-apprenticeship courses in the area



The interviewees were asked two questions specifically referring to skills.

A first question on which skills a pre-apprenticeship path should focus on; a second aspect of attention concerns what skills a worker should have to be inserted into the company as an apprentice. In both cases they were asked to express a vote, from a minimum of 1 to a maximum of 10, to evaluate the importance of the skills listed.

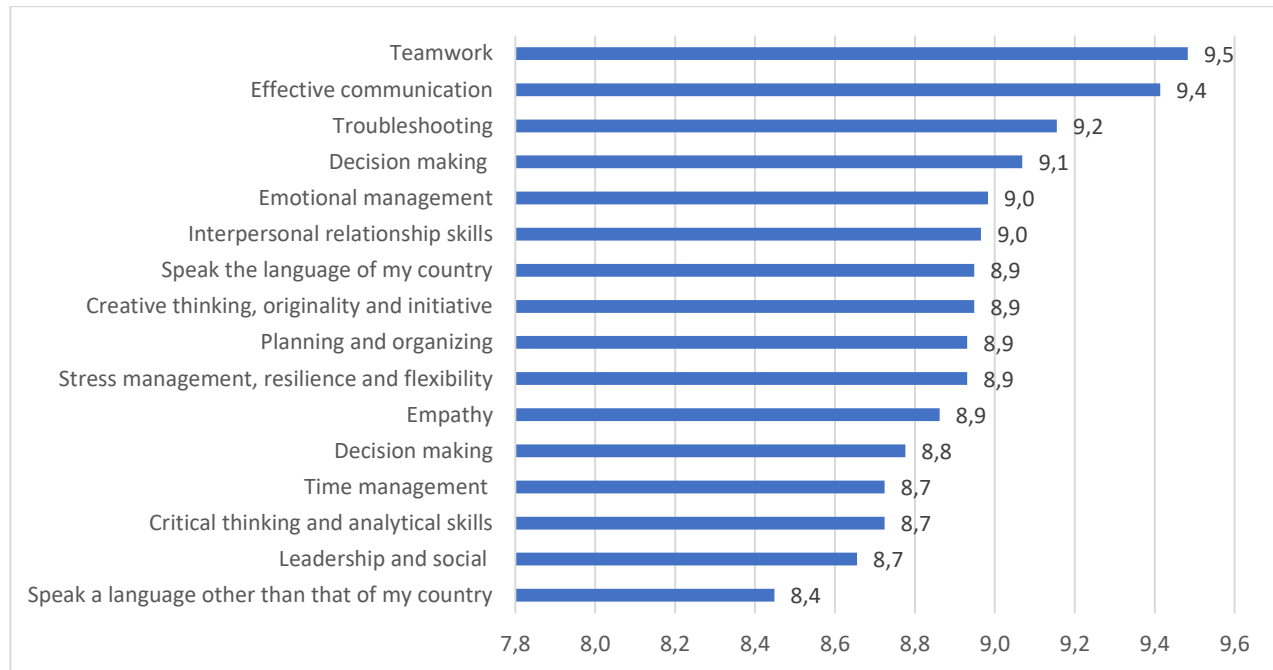
About first question, all skills indicated in questionnaire are considered important and useful and have to be trained during a pre-apprenticeship course. In fact, all the skills proposed received a very positive evaluation, given that all the opinions were above "8".

Given this, the most important skill is “Teamwork” that combined with “Effective communication” probably reveals the need, felt by the respondents, to improve the corporate climate, considered to be the factor underlying the company’s success.

Very interesting that “Speak the language of my country” it is more appreciated than “Speak a language other than that of my country”. All the two skills are valued with a vote higher than 8 but perhaps this element is symptomatic of a situation in which it is not always easy to find staff who have good skills in using the mother tongue. In any case, this is a data consistent with a pre-apprenticeship path often aimed at young people who leave school prematurely and

who, therefore, may have difficulty expressing themselves correctly even in their mother tongue.

Skills to be trained during a pre-apprenticeship course

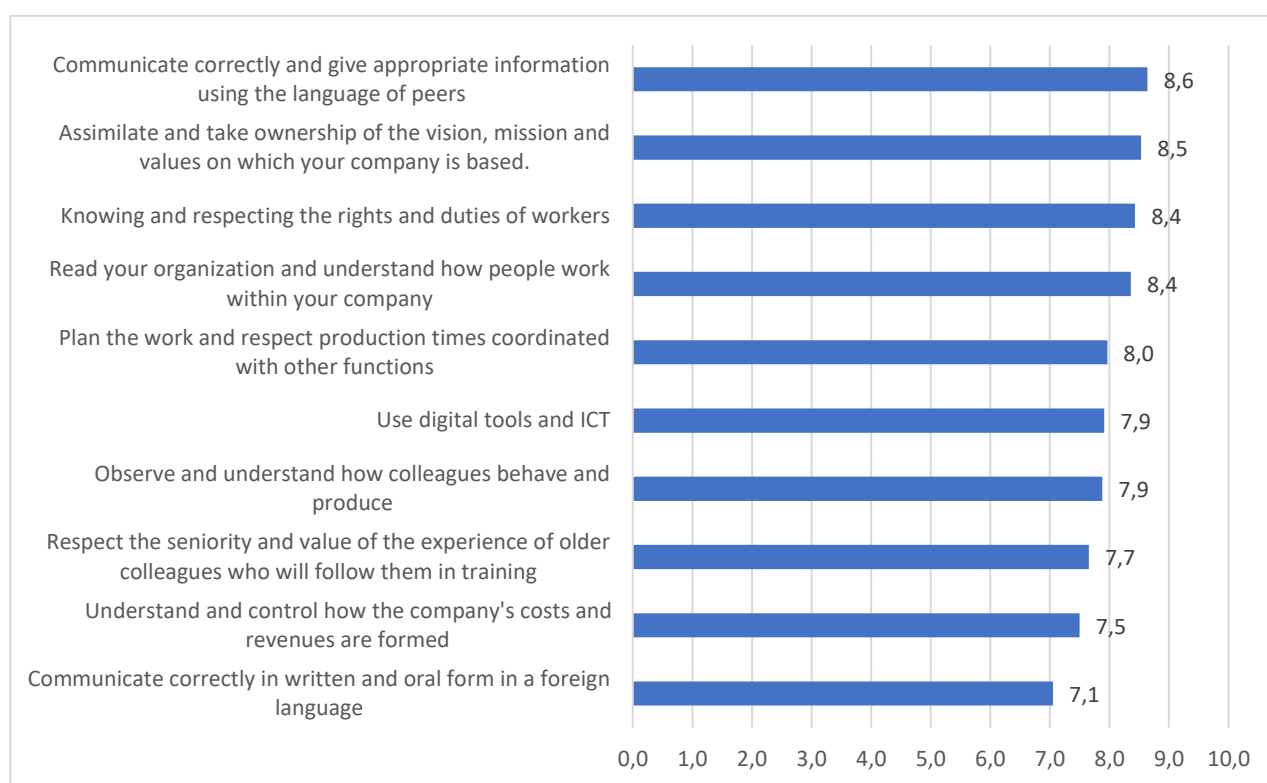


As regards to skills that are required of incoming apprentices, are strictly related to the criticalities emerged in previous questions:

- The ability to speak in mother tongue
- the “commitment”, often considered as the Achilles' heel for young people entering the job market: “Assimilate and take ownership of the vision, mission and values on which your company is based” and “Knowing and respecting the rights and duties of workers”. Also similar to previous items is the ability to “Read your organization and understand how people work within your company” that is fundamental to create a to create a feeling of affection and belonging to the company.

The "Use digital tools and ICT" stands out for its importance, receiving a rating of 7.9, but less important of previous items concerning the relationship between the worker and the company.

Skills that an entry level apprentice must possess



An important theme is that of relations with the educational and professional training system⁴⁴. 34 respondent declared "I have no relationship with the educational system and the vocational training center".

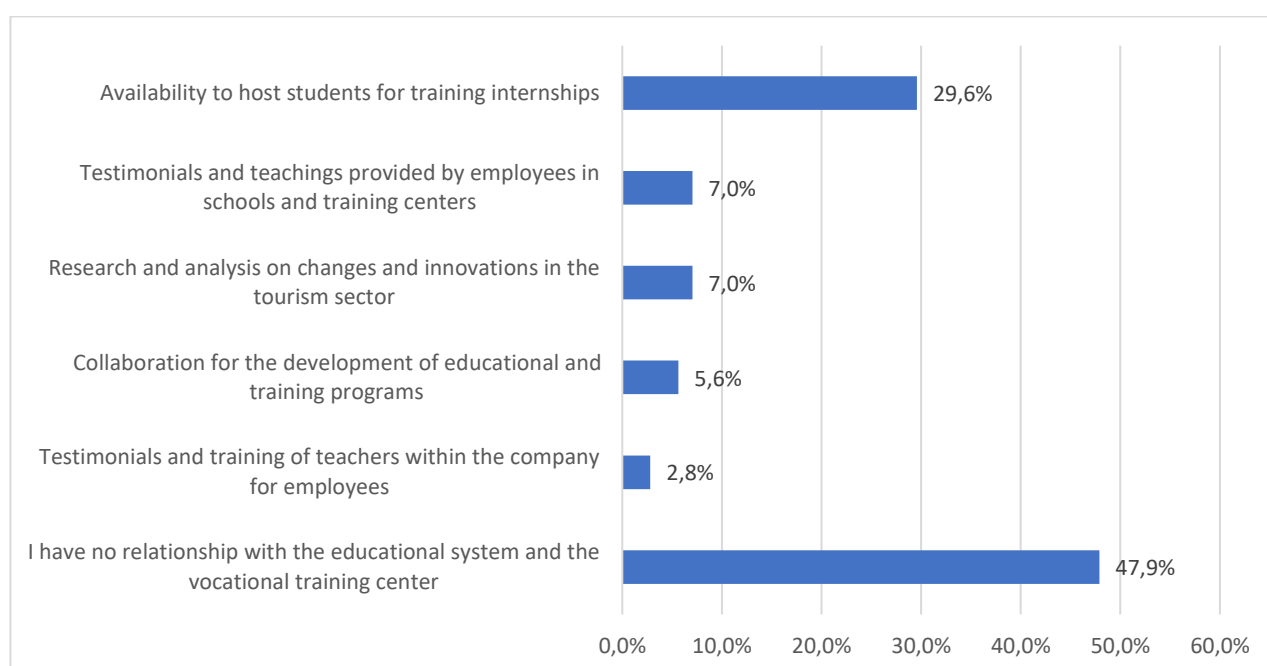
⁴⁴ The question allowed for the possibility of indicating multiple response options.

All the other interviewees, who have this type of relationship, they are primarily in collaboration with educational and vocation systems because they provide “availability to host students for training internships” (29.6% of responses and 21 respondents).

The other kind of collaboration are not so familiar with the panel of companies interviewed. There is a little, too little, collaboration in developing educational and training programs (only 4 companies) and some exchange between teachers and employees who provide training in companies and schools respectively.

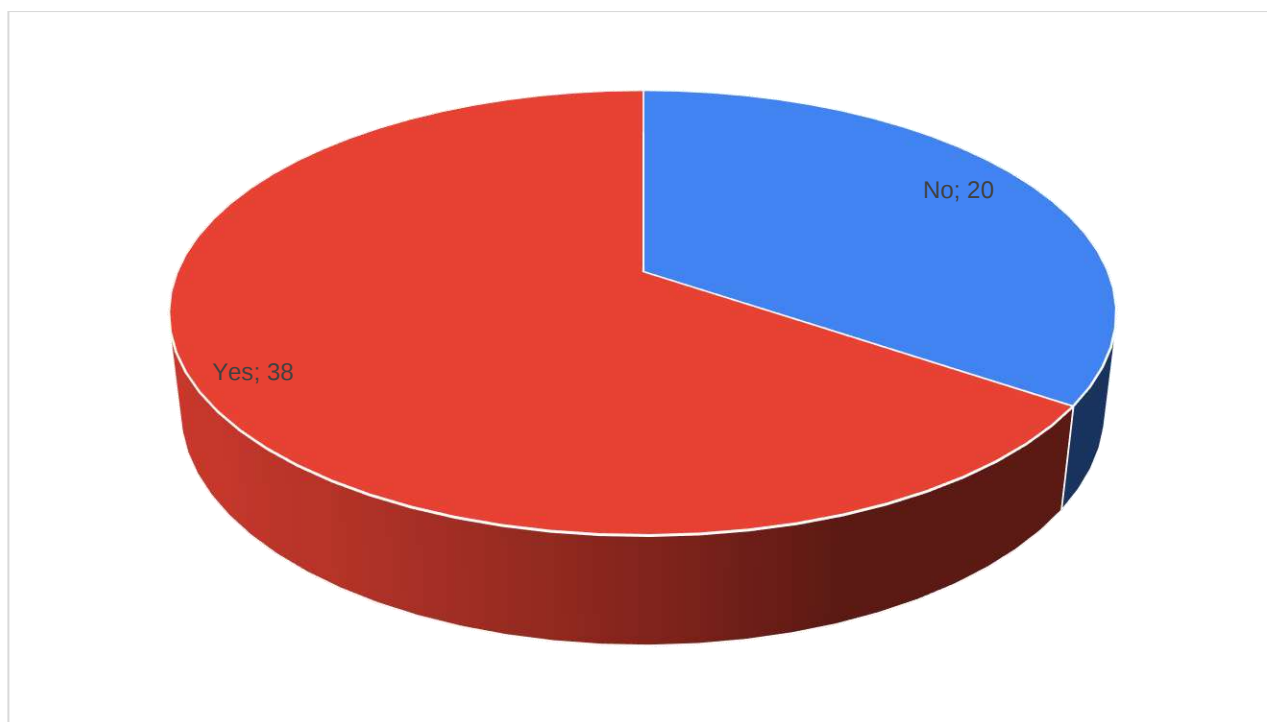
Poor collaboration (only 7 companies’ respondents) in the field of conjoint research between schools/vet centers and companies to identify changes and innovations in the tourism sector.

Collaborative relationships with the education system and vocational training centers



As many as 65% of those interviewed declared having carried out training activities in the company in the last 3 years. The declared value is high if we consider it to be in line with the continuous training rates recorded in Europe.

Training activities for employees in the last three years



Those who reported engaging in training in the last 3 years⁴⁵, identified the primary effect as an “Increased motivation/interest in work” (29,7% of responses).

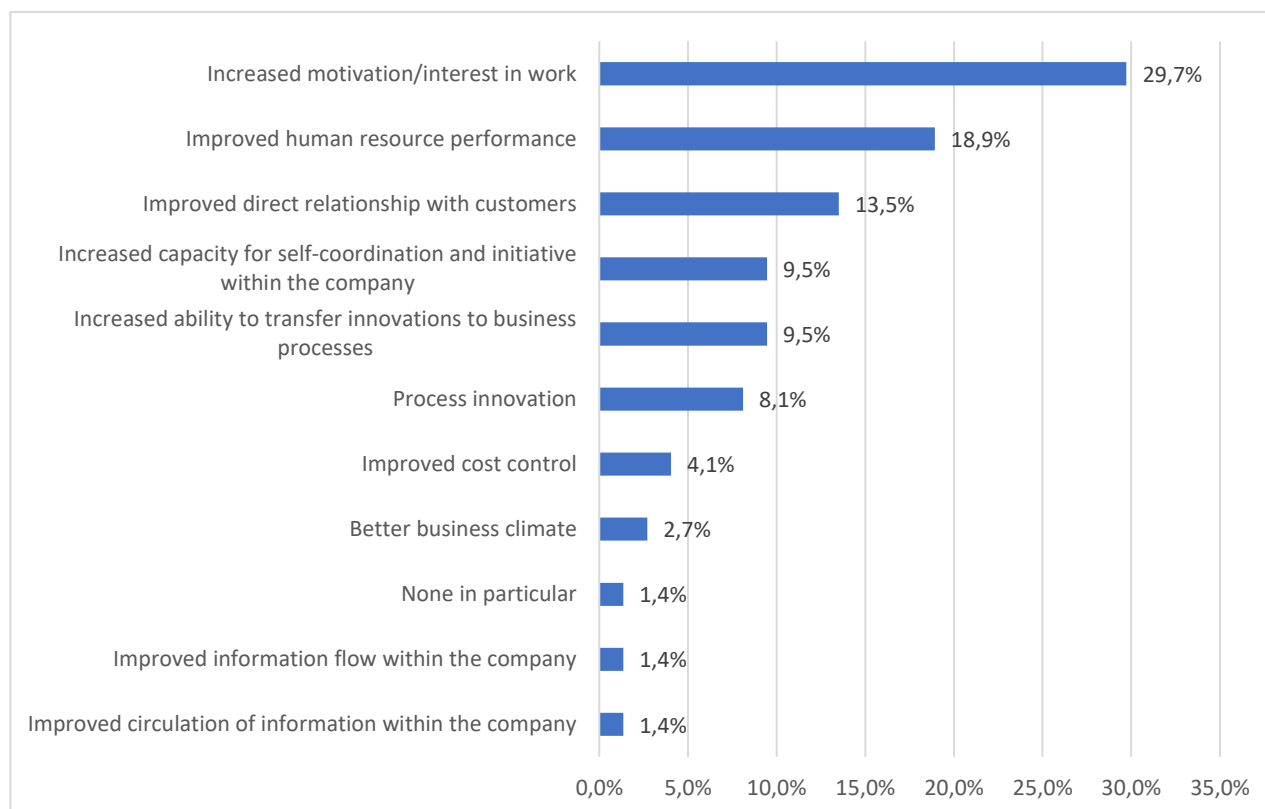
“Improved human resource performance” is also high selected (18.9%). Only 1.4% of responses (1 respondent) did not highlight any effect following the completion of training programs.

Some noteworthy effects mentioned include improvements in the relationship with customers (13.5%), which is particularly crucial in-service industries such as restaurants and tourism. But the percentage could be higher on this aspect; also, with the “Increased capacity for self-coordination and initiative within the company”, at the same level of the previous item.

Training appears to have a limited impact in a “better business climate” (2.7%) and in a “improved information flow within the company” (1.4%) that is a factor related to the company’s climate.

⁴⁵ The question allowed for the possibility of indicating multiple response options.

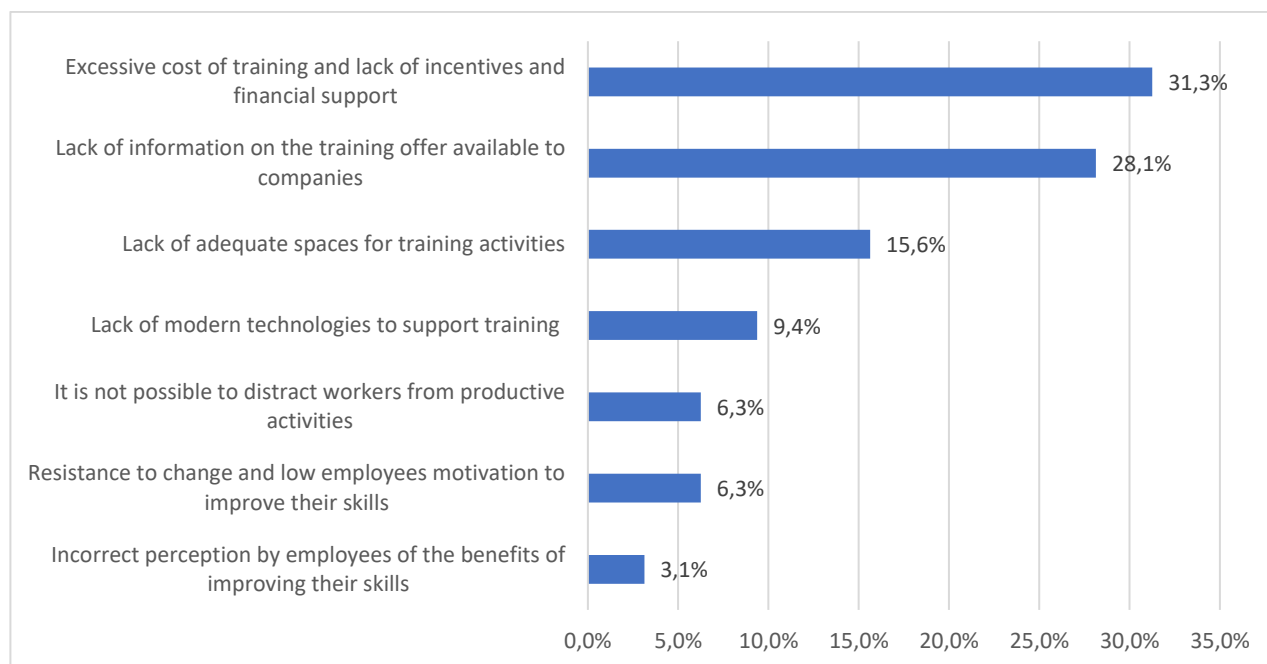
Effects derived from participation in continuous training activities



The main reason why interviewees (20 respondents) do not do training is the perception of "Excessive cost of training and lack of incentives and financial support". In fact, more than 31% of the responses focus on this item. Evidently, the interviewees believe that compared to the costs to be borne for training there are no adequate benefits; furthermore, there would appear to be a lack of incentive systems to cover the costs linked to continuous training (costs of teaching, classrooms, tutoring, etc.). Another reason evidenced is somehow connected to the lack of resources is the "Lack of adequate spaces for training activities" (also this option totals 15.6% of answers).

According to linked to 28.1% of responses (9 respondents) a negative factor is the "Lack of information on the training offer available to companies". Therefore, there is no lack of desire to provide training but there is a complaint about the lack of adequate promotion of the training opportunities that companies can access.

Reasons why continuous training is not carried out



The methodology for training in the company considered most effective by those interviewed is “On-the-job training alongside experienced workers” (according to 33 respondents), a methodology evidently considered more effective also because it does not distract workers from normal company production activities.

The practical aspects in training are considered very important; for this reason, “Classroom training with practical simulations” collects a 16.9% of the answers. The “blended training” mode receives a certain interest”, an approach to education that combines online educational materials and opportunities for interaction online with physical place-based classroom method.

Methodology to carry out training in a company

