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

V.E.C.T.O.R. Touristic Destination Manager

A VOCATIONAL AND EDUCATIONAL CURRICULUM DESIGN FROM A SECTOR SKILLS ALLIANCE ON TOURISM (VECTOR)

DELIVERABLE D2.2

TRAINING AND SKILLS NEED ANALYSIS REPORT

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CHAPTER 1 - INTRODUCTION

The aim of this deliverable is to gather all the information collected related with the labor market needs in order to identify and analyze the skills and competences that are most suitable for the Destination Manager profile.

To achieve this goal the following activities have been carried out:

1. Tourism sector analysis in each country
2. Online surveys to the stakeholders of the tourism sector
3. In-depth interviews with relevant stakeholders
4. Focus groups with experts of the sector

The first task was developed by one partner per country:

- Chamber of Commerce of Valladolid, Spain;

- University of Algarve, Portugal;

- University of Florence, Italy.

The remaining tasks have been developed by the whole consortium, in order to cover most European countries, with the aim to investigate and collect as much data as possible and to contact all the valuable entities operating in this field of interest.

Furthermore, the report will define the most suitable skills/knowledge/competences/ needs to structure a curriculum for Destination Manager able to cope with the sustainable development issues.

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CHAPTER 2 - TOURISM SECTOR ANALYSIS

2.1 Focus on Italy

2.1.1 The tourism sector in Italy

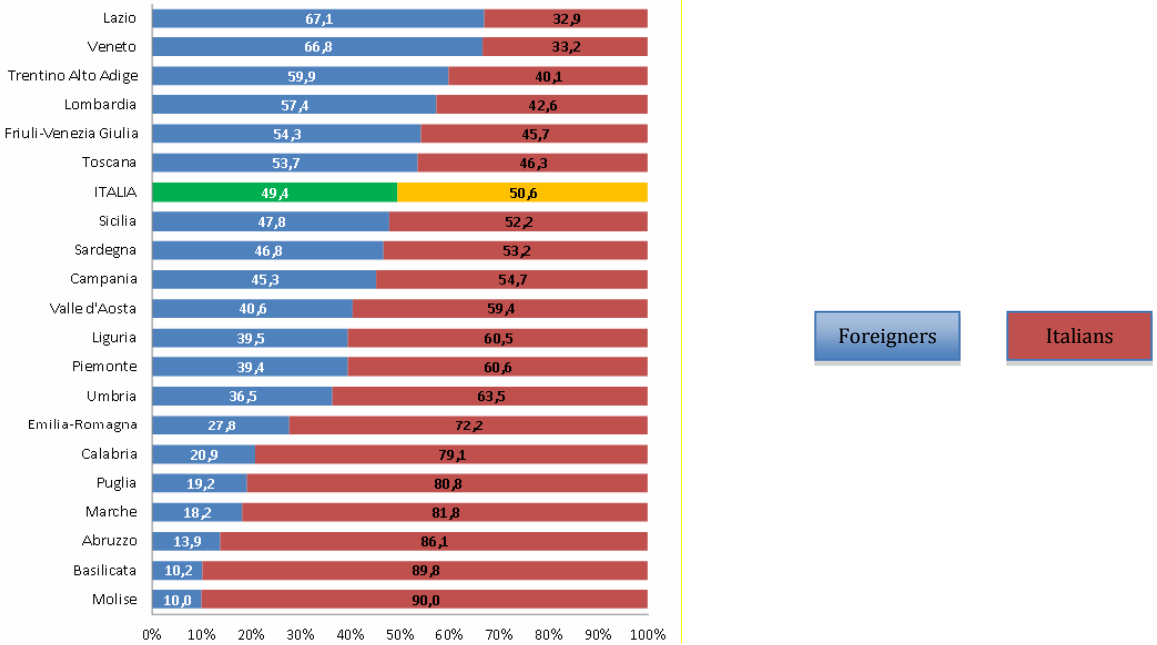
2.1.1.1 The dimension of tourism demand

The tourism market developed in Italy about 375 million of nights, in 2014. Of these, about 50.6% is generated by domestic tourism, 49.4% is produced by international tourists.

As the following graph shows, there are regions where the degree of internationalization is more than 50%, especially in Lazio, Veneto, Trentino Alto Adige, Lombardia, Friuli Venezia Giulia and Toscana), others, especially the regions of Southern of Italy, where national tourism dominates.

The following graph shows that, in some regions such as Lazio, Veneto, Trentino Adige, Lombardia, Friuli Venezia Giulia and Toscana, the degree of internationalization is more than 50%, while domestic tourism prevails in the southern regions

Graph 2.1.1 Level of internationalization of the tourist presences in the Italian regions - Year 2014



Source: ENIT processing on ISTAT data

According to ISTAT data, in the third quarter of 2015 (data available), the arrivals in accommodation establishments were equal to 42.7 million units, and the presences over 191.4 million, with increases, compared to the third quarter of 2014, respectively of 3.1% and 2.7%. The

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presences in hotels reached approximately 114.3 million units, representing 59.7% of total presences, while the presences in the complementary accommodations were about 77.2 million.

The growth of presences in the third quarter of 2015, compared to the same period of 2014, was driven mainly by domestic demand, increased by 3.5%, compared to a 1.7% increase of international demand.

The presences by type of exercise showed increases in both types: +2,8% hotels and +2,4% complementary accommodations.

The average stay has slightly decreased, from 4.5 days in the third quarter of 2014 to 4.48 in the third quarter of 2015, with falling values only in domestic demand (-0.04 days).

2.1.1.2 The characteristics of the tourism offer

In 2014, in Italy, the hospitality system was composed by more than 150,000 accommodations (for 79% hotels and 21% complementary accommodations) for a total availability of almost 4.8 million beds, distributed as follows: 54% in the complementary accommodations and 46% in hotel accommodations.

Table 2.1.1: Accommodations in 2014[1]

type of accommodation	number of exercises	number of beds	average size beds
Hotels	33.290	2.241.239	67
Other Accommodation	125.122	2.608.193	21
Total accommodation	158.412	4.849.432	31

Source: Istat

Even though over the past years, the Italian tourism offer system has seen significant changes, caused by the birth of new types of accommodation, the main problem is still the huge pulverization. The size of the accommodations - primarily small-medium - (in 2014, as shown in the table above, the average size of the accommodations was/amounted to 31 Sleeping Places) and also the management models, often family-size, put the sector in front of a cultural problem prone to change and innovation.

If the world trend sees the development of big hotel structures, mainly concentrated in the well-known chains, in Italy, the aggregation phenomenon seems still limited to a few cases. Despite the proliferation of associations and consortia formulas with a brand, there are few cases of hotel groups that have developed a widespread system of accommodation choices at national and international level.

The same is true in other tourism sectors, especially for the catering sector, in absolute made up of the largest number of companies, more than 126,000 restaurants and an even greater number of coffee and beverage businesses, most of them are micro-sized enterprises.

[1] Complementary exercises include: Camping, holiday villages, rented accommodation, agritourism company, youth hostels, holiday homes, mountain lodges, bed & breakfast, other accommodation establishments.

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The tourism intermediation activity, from planning to the sale of tourist packages, is carried out by the incoming and outgoing operators. This is a vital link in the production and economic chain of the sector. In Italy, this intermediary role is carried out by a total of 11,191 operators (total registered businesses, including travel agencies and tour operators).

The Italian tourism offer is completed with a variety of additional facilities including the widespread network throughout the territory of transport infrastructure, sports tourist attractions, spa facilities, museums, congress and exhibition centers.

Table 2.1.2 Other kinds of tourism offer

Other types of tourism offer	Italian dimension
Transport infrastructure	254 ports, marinas and mooring points 2277 railway stations 48 airports
Sports facilities	386 golf clubs
SPA facilities	204 spa establishments
Museums	480 state museums and archaeological sites 4339 non-state museums and similar institutions
Business	264 congress centers 186 Exhibitions held in the territory

Source: Our elaboration by the report of the National Observatory on Tourism (2011)

2.1.1.3 Contribution to GDP and employment

Tourism is playing a very important role in the country's economy, as demonstrated by the contribution to GDP and employment.

In 2014, the direct contribution of the sector "Travel and Tourism[2]" was 4.1% of total GDP, amounting to 66 billion euros (source data processed by WTTC). For 2015 a further increase of around 1.8% is expected, (it is estimated that by 2025 the contribution to GDP will reach the 4.6%, equivalent to approximately 82.4 billion euros.)

Graph 2.1.2: Italy Direct contribution of travel & tourism to GDP

[2] The sector "Travel and Tourism" and its data, mainly reflecting the economic effects of the activity generated by the tourism industry such as hotels, travel agencies and airlines including services to passengers. It is noted that the data also includes other areas that are directly affected by the impact tourism, such as restaurants and leisure and entertainment activities.

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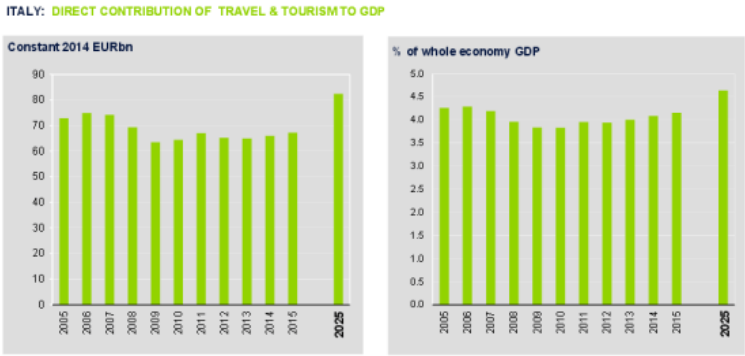
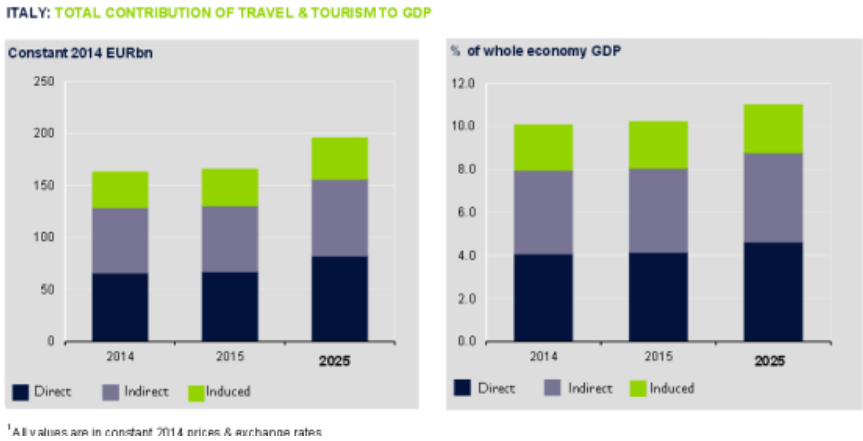


Source: http://www.wttc.org/

In 2014, the total contribution, which takes account of the direct, indirect and induced effects to GDP of the tourism sector in Italy, was 162.7 billion euros, equal to 10.1% of total GDP. The forecasts are positive for 2015 (1.7%) and long term (+ 1.7% by 2025, equivalent to a quantified contribution in about 195.5 billion euros).

Graph 2.1.3: Italy Total contribution of travel & tourism to GDP



Source: http://www.wttc.org/

Looking at the two main types of tourism, business and leisure, in 2014, leisure tourism (international and domestic) generated a direct impact of tourism on GDP of 81.9% (99.6 billion euros), while the business tourism had a share of 18.1% (generating 22 billion euros). For both segments, growth is expected in 2015 (1.4% and 1.1% respectively), with a trend of + 2.4% in 2025 for the leisure segment and + 0.9% for the business tourism.

Graph 2.1. 4: Italy Travel & Tourism's contribution to GPD "Business and Leisure"

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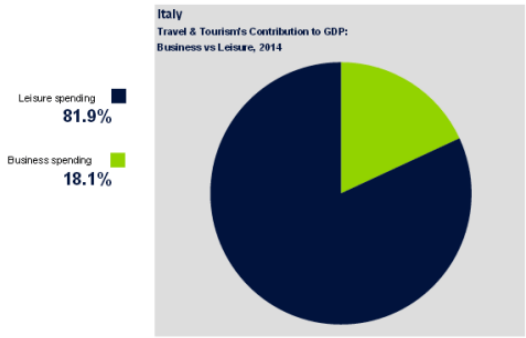
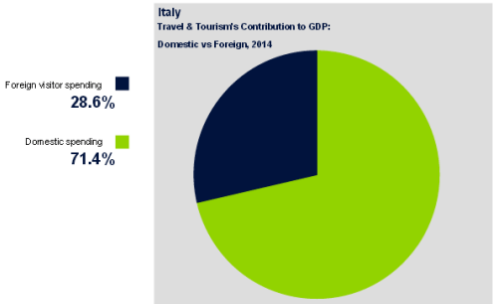


Source: http://www.wttc.org/

Lastly, we may remark that domestic tourism generated 71.4% of the direct contribution of tourism to GDP, while the incoming foreign tourism represented 28.6%. Tourist expenditure generated by the Italian domestic market, according to WTTC forecasts, will grow by 0.9% in 2015 and 2.2% in 2025. That of foreign tourists will grow by + 2.25% in 2015 and +2.0 % in 2015.

Graph 2.1.5: Italy Travel & Tourism's contribution to GPD "domestic and foreign"



Source: http://www.wttc.org/

As far as employment is concerned, in 2014, tourism played an important role generating an induced and direct[3] effect? of about 1,082,000 jobs, representing 4.8% of total employment in Italy. For 2015 this is expected to increase by approximately 1.7% and in a long-term perspective (2025) of 2.3%, which translates into about 1,375,000 jobs.

Graph 2.1.6: Italy Direct contribution of travel & tourism to employment

[3] hotels, travel agencies, airlines, restaurants and businesses related to leisure and entertainment

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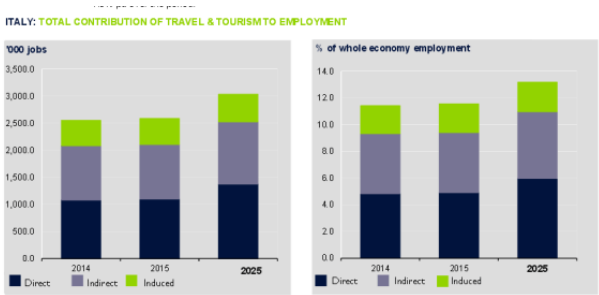
Source: http://www.wttc.org/

In 2014, the total contribution to employment, was equal to 2.553 million jobs, that is to say 11.4% of total employment. Also in this case the forecasts are optimistic, respectively + 1.4% in 2015 and 1.6% by 2025.

Graph 2.1.7: Italy total contribution of travel & tourism to employment



Source: http://www.wttc.org/

2.1.1.4 The dimension of online travel market

Just a few years ago, the web was used simply as "an amplification tool and widespread dissemination of the image of the Italian destinations", while today it surely is a real marketplace, or a "place" where new markets and new tourism products take form. The web has facilitated the creation of communities that are formed around common interests, generating new needs and therefore new tourism arrangements to satisfy them.

Thanks to the network, the tourists can be the architects of their own holiday, having the opportunity to evaluate all the alternatives available, choose the ones that best meet their needs, form their own preferences, plan their trip, express opinions and make suggestions. The online tourist is dynamic, versatile, unidentifiable in a single segment of demand, but full of interests and passions, interested in living the experience rather than visiting specific places.

From the tourism supply side, traders have the opportunity to make known their offer to the whole world, directly reaching every corner of the globe so that "tourism competition becomes truly global."

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In recent years, in Italy, the e-commerce phenomenon has gained an important dimension. Consider that in 2011 online shopping accounted for about 18.97 trillion euros with a growth in revenues of about 32% in 2014. In 2014 the e-commerce tourism sector represents about 24.8% of the total.

As regards 2015, the tourism market in Italy has generated transactions of 51 billion euros, an increase of 3% compared to 2014. Online transactions increased from 17% to 19%, for a value of 9.5 billion. Amongst the most important trends: the purchases through smartphones and tablets (respectively + 70% and + 20%), the boom of other types of accommodations, which represent 30% of the receptive market, and the growing phenomenon of disintermediation with direct purchases growing by 10% (source: Digital Innovation in tourism of the Politecnico di Milano).

As regards the distribution of online expenditure we highlight the data of the following table:

Table 2.1.3 Breakdown of online expenditure in the tourist sector in Italy

	2014	2015	Var % 2014-15	% composition in 2015
Hotels	937.500.000	1.050.000.000	12%	11%
Other Accommodation	401.800.000	450.000.000	12%	5%
Transport (planes and railways)	6.238.500.000	6.800.000.000	9%	71%
Travel packages	1.061.940.000	1.200.000.000	13%	13%
total	8.639.740.000	9.500.000.000		100%

Source: Observatory of Digital Innovation in tourism of Politecnico di Milano

Purchases arising from the direct online channels (sites of accommodation facilities, transport services and tour operators that sell directly to the public) grew by 10% in 2015 while the indirect channels (OTA and Metasearch) grew by 14%.

Lastly, a survey in collaboration with Doxa, conducted on over 1,000 representative users of the Italian population, shows the behavior of the Digital Tourist during the stages of the journey.

It highlights that most of those surveyed (around 80%) say they use the Internet to be inspired by the type of trip, to carry out research on the destinations and types of travel, to book the trip before departure.

With percentages under 50%, the Internet is used by travelers to make reservations during the journey, to share travel experiences, to write reviews and, finally, to post trip actions.

Figure 2.1.1 Phases of Online Travel

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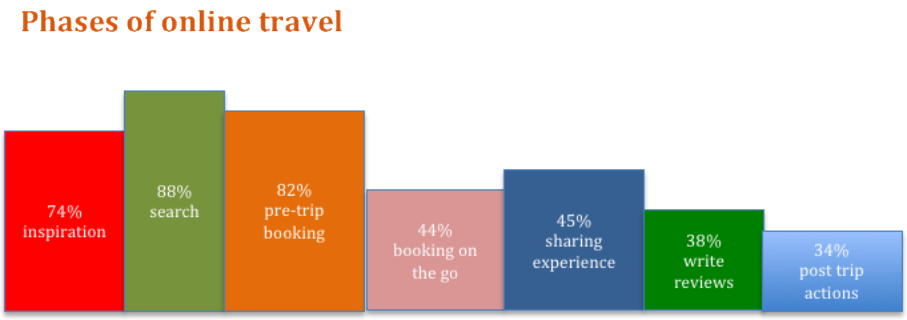


Source: Survey by Doxa

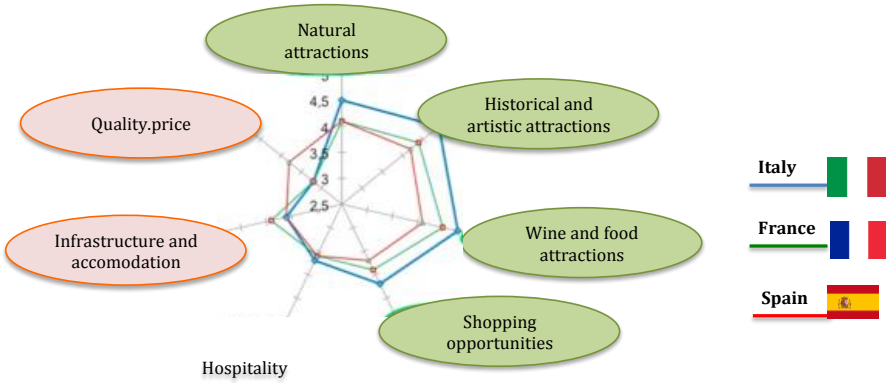
2.1.1.5 Strengths and weaknesses of the Italian tourism system

Tourism is an important sector for the Italian economy, perhaps the only sector where Italy has a strong and long-lasting competitive advantage.

A study conducted by the University of Bologna on a sample of 350 international buyers shows that Italy is well positioned as regards the offer of art, history, gastronomy, natural attractions and shopping. While, if compared to its main global competitors, Italy shows some weaknesses in value for money, infrastructure and hospitality.

The study therefore underlines the importance for Italy to focus on brand and on value perceived, enhancing it.

Figure 2.1.2: Comparison of the characteristics of interest Italy, France and Spain



Source: "Acquistare Italia", Study of Management Department at the University of Bologna in collaboration with the Department for Development and Competitiveness of Tourism

The "Strategic Plan for the development of tourism in Italy" (TURISMO ITALIA 2020), drawn up by the Work Group of Minister for Regional Affairs, Tourism and Sport, outlines the main problems that emerged as a result of analysis, studies and surveys to tour operators.

As shown in Figure 2.1.3, the critical issues are classified as "permanent" and "temporary" assets, where "permanent" indicates the Italian areas with prestige and reputation (natural, gastronomic,

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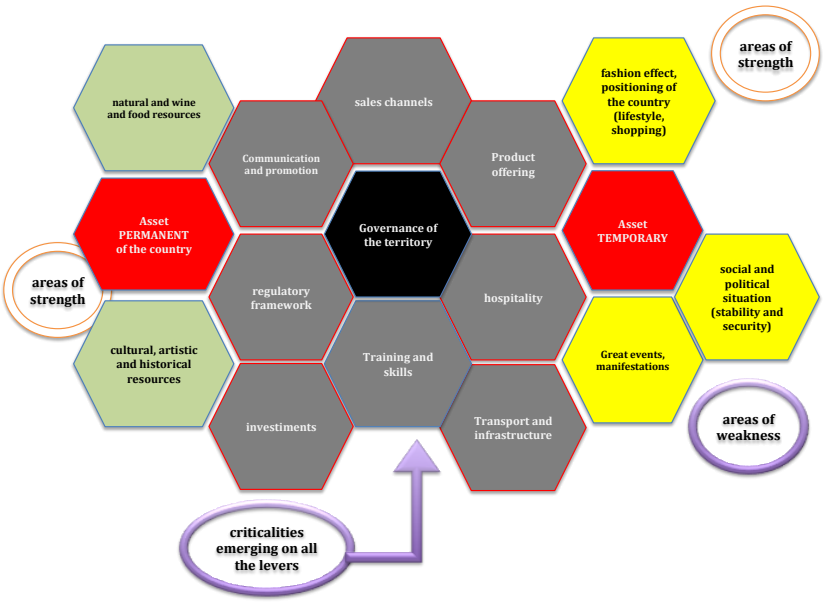
artistic-cultural resources) while "temporary" means the current positioning of the country (for example, lifestyle and shopping), the social political context and major events.

Figure 2.1.3: Overview of Italy: strong asset criticality of intervention levels



Source: Analysis Working Group for the Strategic Plan

The critical aspects that emerged for each action are:

a) **Governance of the Territory:** absence of a strong central governance; marginality of the tourism sector in the development policy of the country and strong fragmentation of the decision-making chain between the Government and local authorities; few resources and investments for the development of tourism; poor local supply capacity to influence in global competition; absence of a reliable and rapidly updated database on tourism; absence of structured coordination mechanisms between government, regions and associations;

b) **Communication and promotion**: absence of coordination in the promotion of tourism at the level of "Italian System"; absence of a digital strategy of tourism; absence of an "Italian Commercial Direction" to take care of set priorities and develop key products;

c) **Sales Channels:** inadequate use of digital distribution channels, absence of structured arrangements at country level with International Tour Operators; inhomogeneity among the rating systems of hotels (e.g. a star rating system), strong fragmentation of product supply and incoming services;

d) **Product offering**: lack of a central coordination of the Regions on the products to be developed and promoted on priority segments of demand; absence of a central plan regarding the structuring and promotion of an events calendar to support of tourism events; absence of "APP" service for smartphones / tablet aimed at foreign tourists; lack of priorities and focus on tourist products/centers to be developed and offered misaligned to the needs of target segments; absence of focus on key target segments in terms of size and expense; undervalued

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cultural heritage both for tourism (number of visitors) and in economic terms (revenues per tourist) compared to international benchmarking; lack of innovation in tourism products and in the hospitality industry; lack of adequate infrastructure to accommodate international conferences;

e) **Receptive:** High incidence of obsolete structures, low average size of the hotels; low reliability of quality and standard variables, low reliability of classification systems;

f) **Transport and infrastructure**: weak infrastructure to accommodate the increasing flow of tourists who will arrive in the next ten years in the "Top 4 Towns" (Rome, Venice, Milan, Florence); shortage of connections and quantity of direct flights with high-growth countries, much lower than competitor countries; unfinished enhancement of destinations with attractive potential through low-cost carriers;

g) **Training and skills**: low attractiveness of the tourism professions for young people; shortage of vocational schools for directors and managers of tourism; inadequate level to the sector needs of the vocational schools for Tourism;

h) **Investments:** absence of key requirements to attract foreign investment; low investor confidence towards the "Italian partners"; tax burden and difficult access to credit; lack of a structured approach and coordination in order to attract both Italian and foreign investment in tourism;

i) **Legal framework**:(time and visa issuance process with strong issues?) compared to the number of incoming requests from fast-growing countries; bureaucracy perceived as an obstacle to the development of new tourist poles; absence of effective mechanisms to encourage the creation of Corporate networks even if the presence of phenomena of spontaneous aggregation is spreading.

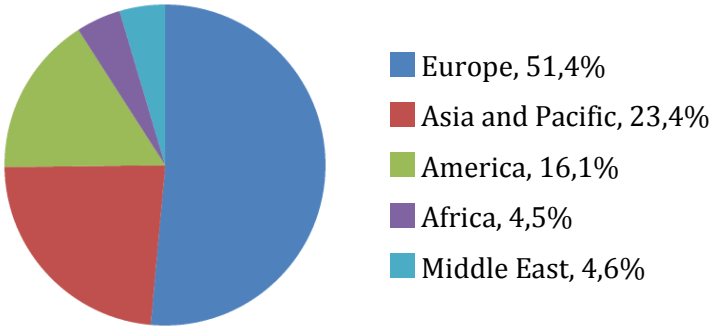
2.1.2 Foreign Tourism in Italy

2.1.2.1 The Italian destination in the international context

At world level, 2015 was a good year for international tourism; the international arrivals were 1.184 billion, with an increase of 4.4%, or 50 million more than in 2014 (Data Source UNWTO, World Tourism Barometer - January 2016).

The most significant growth concerns Europe with approximately 28.8 million increase in arrivals as related to 2014 (+ 5%), which is confirmed as being the most visited area in the world, reaching a share of 609.1 million of arrivals. Just follow the Americas (+ 4.9%), Asia and the Pacific (+ 4.8%), finally, the Middle East (+ 3.1%); only Africa is in decline (-3.3%).

Graph 2.1.8: International arrivals by macro-areas in 2015



Source: UNWTO, World Tourism Barometer – January 2016

According to *UNWTO* in the 2014 ranking of the world's top tourism destinations, Italy is confirmed as being on 5th position among the most visited places by foreign tourists as it descends to 7th place for the revenue.

Table 2.1.4: Top 10 destinations for international tourism

International arrivals (millions)				revenues (billions US$)			
Ranking list 2014	2013	2014	Var.%	Ranking list 2014	2013	2014	Var% local currency
1 France	83.6	83.8	0.2	1 USA	172.9	177.2	2.5
2 USA	70.0	74.8	6.8	2 Spain	62.6	65.2	4.2
3 Spain	60.7	65.0	7.1	3 France	56.6	57.4	1.5
4 China	55.7	55.6	-0.1	4 China	51.7	56.9	10.2
5 Italy	47.7	48.6	1.8	5 Macao (China)	51.8	50.8	-1.9
6 Turkey	37.8	39.8	5.3	6 UK	41.0	45.9	6.2
7 Germany	31.5	33.0	4.6	7 Italy	43.9	45.5	.7
8 UK	31.1	32.6	5.0	8 Germany	41.3	43.3	4.9
9 Russia	28.4	29.8	5.3	9 Thailandia	41.8	38.4	-2.7
10 Mexico	24.2	29.3	21.5	10 Hong Hong (China)	38.9	38.4	-1.5

Source: UNWTO World Tourism Barometer - January 2016

As regards the period January-October 2015, ISTAT provisional data show an increase in foreign tourists in Italy, both in terms of arrivals (+ 2.9%) and presences (+ 1.7%).

In comparison with 2013 arrivals (51,635,500), the 2014 final data showed an increase of 2.7%. Overnight stays reached 186,792,507, with an increase of 1.1%.

Table 2.1.5: International arrivals and presences in Italy

year	arrivals	presences	Average stay	Variation % arrivals	Variation % presences
2008	41.796.724	161.797.434	3,9	-2,5	-1,0
2009	41.124.722	159.493.866	3,9	-1,6	-1,4
2010	43.794.338	165.202.498	3,8	6,5	3,6
2011	47.460.809	176.474.062	3,7	8,4	6,8
2012	48.738.575	180.594.988	3,7	2,7	2,3
2013	50.263.236	184.793.382	3,7	3,1	2,3
2014	51.635.500	186.792.507	3,6	2,7	1,1
January-October 2015*	49.441.822	179.367.710	3,6	2,9	1,7

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*Source: Istat; * provisional data*

The destinations of historical interest are those most visited by foreign tourists, representing 45% of total arrivals and 33% of presences, followed by the seaside destinations, lake destinations, mountain, hilly and spa.

Foreign tourists, representing 45% of total arrivals and 33% of presences, visit Italy mainly for its attractions of high historical interest; then follow seaside destinations, lake destinations, mountains and hills, spa.

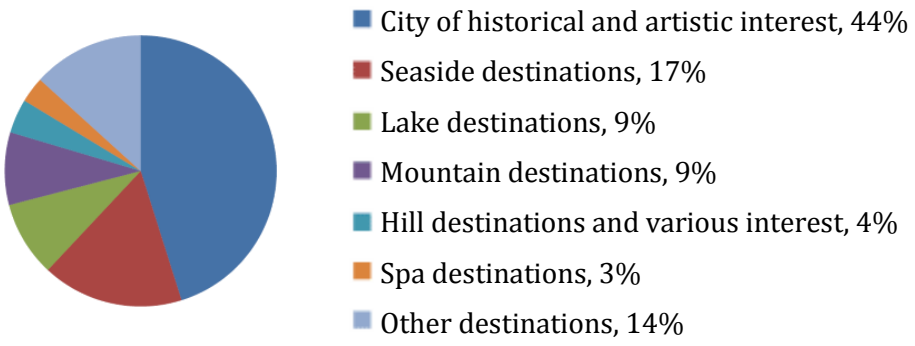
In 2014 the average stay of foreigners in Italy is about 3.6 days.

Table 2.1.6: Foreign tourists by type of place visited

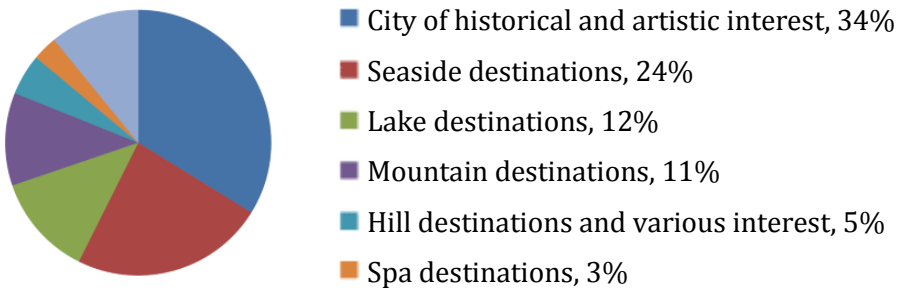
tourist places	2013			2014			Variation %	
	arrivals	presences	Average stay	arrivals	presences	Average stay	arrivals	presences
City of historical and artistic interest	22.691.248	62.453.041	2,8	23.003.495	63.151.472	2,7	1,4	1,1
marine destinations	8.453.558	43.599.622	5,2	8.777.012	44.034.290	5	3,8	1
lake destinations	4.517.620	22.915.971	5,1	4.604.681	23.012.413	5	1,9	0,4
mountain destinations	4.350.977	20.859.784	4,8	4.582.478	21.369.632	4,7	5,3	2,4
hill destinations and various interest	2.052.254	9.199.162	4,5	2.104.059	9.167.429	4,4	2,5	-0,3
spa destinations	1.542.042	5.593.040	3,6	1.555.737	5.571.009	3,6	0,9	-0,4
other destinations	6.655.537	20.172.762	3	7.008.038	20.486.262	2,9	5,3	1,6
TOTAL	50.263.236	184.793.382	3,7	51.635.500	186.792.507	3,6	2,7	1,1

Source: Istat

Graph 2.1.9: arrivals of foreigners by type of destination



Graph 2.1.10: presences of foreigners by type of destinations



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Other destinations, 11%

The most attractive regions are Veneto, Lombardia, Toscana, Lazio and Trentino Alto Adige. In terms of attendance Veneto keeps the first position, followed by Trentino Alto Adige, Toscana and Lazio.

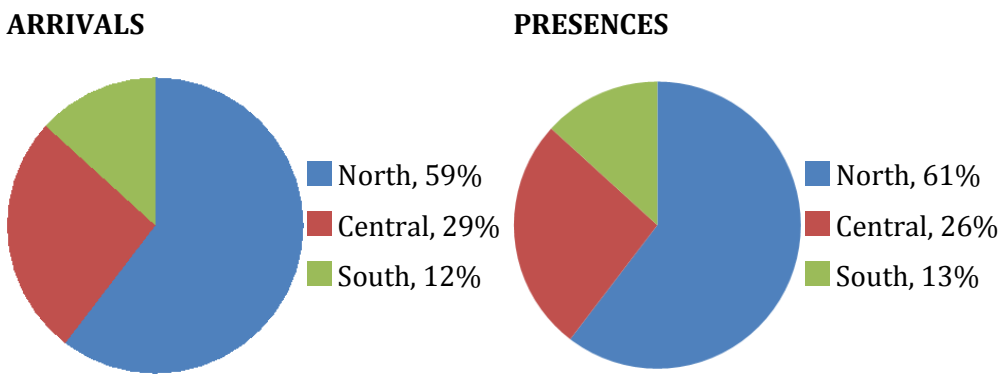
Table 2.1.7: Foreign tourists in the Italian regions

Regions		2013		Regions		2014		Variation %	
		arrivals	presences			arrivals	presences	arrivals	presences
1	Veneto	10.471.016	40.877.288	1	Veneto	10.597.803	41.306.004	1,2	1
2	Lombardia	6.989.200	19.300.473	2	Lombardia	7.297.664	19.677.303	4,4	2
3	Toscana	6.747.165	23.166.029	3	Toscana	6.821.947	23.154.147	1,1	-0,1
4	Lazio	6.664.244	20.516.459	4	Lazio	6.758.348	20.675.157	1,4	0,8
5	Trentino Alto Adige	5.299.763	26.039.520	5	Trentino Alto Adige	5.479.355	26.242.808	3,4	0,8
6	Emilia-Romagna	2.504.803	9.838.480	6	Emilia-Romagna	2.524.689	9.822.981	0,8	-0,2
7	Sicilia	2.003.018	7.148.069	7	Sicilia	2.042.506	7.107.368	2	-0,6
8	Campania	1.876.610	8.115.338	8	Campania	1.949.634	8.176.727	3,9	0,8
9	Liguria	1.685.872	5.230.950	9	Liguria	1.808.941	5.321.684	7,3	1,7
10	Piemonte	1.490.737	5.054.548	10	Piemonte	1.570.864	5.151.959	5,4	1,9
11	Friuli-Venezia Giulia	1.027.529	4.141.763	11	Sardegna	1.095.489	5.316.299	9,3	8,3
12	Sardegna	1.002.046	4.908.201	12	Friuli-Venezia Giulia	1.049.572	4.132.771	2,1	-0,2
13	Umbria	633.083	2.072.217	13	Umbria	687.215	2.136.726	8,6	3,1
14	Puglia	607.990	2.446.689	14	Puglia	663.713	2.547.305	9,2	4,1
15	Marche	389.313	1.960.732	15	Marche	399.459	2.065.448	2,6	5,3
16	Valle d'Aosta	344.385	1.117.940	16	Valle d'Aosta	377.245	1.211.654	9,5	8,4
17	Calabria	254.330	1.663.416	17	Calabria	241.268	1.618.710	-5,1	-2,7
18	Abruzzo	188.658	980.193	18	Abruzzo	174.171	870.288	-7,7	-11,2
19	Basilicata	70.550	172.223	19	Basilicata	81.576	215.011	15,6	24,8
20	Molise	12.924	42.854	20	Molise	14.041	42.157	8,6	-1,6
	ITALIA	50.263.236	184.793.382		ITALIA	51.635.500	186.792.507	2,7	1,1

Source: Istat

In addition (furthermore) 59% of foreign tourist flows are concentrated in Northern Italy, 29% in Central Italy and just 12% in Southern Italy.

Graph 2.1.11: Arrivals and presences of foreigners in Italy (2014)



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The main source markets are Germany, the US, France and the United Kingdom. It is interesting to emphasize the growth in 2014 of arrivals and presences of tourists from China, Spain and Poland, while a decline is registered for tourists from Russia, Japan and Belgium.

Table 2.1.8: The main markets of origin – 2014

countries of origin		2014		Var. % 2013/2014		% share of total 2014	
		arrivals	presences	arrivals	presences	arrivals	presences
1	Germania	10.531.441	52.569.730	2	0,7	20,4	28,1
2	Stati Uniti	4.732.116	12.024.911	4,2	2,5	9,2	6,4
3	Francia	3.902.742	11.883.632	0,6	-0,1	7,6	6,4
4	Regno Unito	3.108.283	11.863.040	5,2	4,2	6	6,4
5	Svizzera	2.402.444	9.319.774	3,8	1,3	4,7	5
6	Cina	2.297.699	3.481.280	24,2	23	4,4	1,9
7	Austria	2.212.556	8.617.673	4,7	3	4,3	4,6
8	Paesi Bassi	1.914.225	10.545.405	-0,6	-5,4	3,7	5,6
9	Russia	1.785.000	6.822.174	-7,4	-4,1	3,5	3,7
10	Spagna	1.712.441	4.728.258	6	5,9	3,3	2,5
11	Giappone	1.309.943	2.579.169	-8,5	-6,7	2,5	1,4
12	Belgio	1.118.179	4.685.279	-1,6	-4	2,2	2,5
13	Polonia	1.104.871	4.320.330	12,6	9	2,1	2,3
14	Australia	866.552	2.259.555	-0,5	-1,4	1,7	1,2
15	Brasile	762.845	1.878.526	2,1	2,6	1,5	1

Source: Istat

The majority of foreign tourists interested in the Italian destination come from Europe; the old continent is, followed by North America, Asia and South America.

Table 2.1.9: Foreign tourists by continent of origin

	2014		Var. % 2013/2014		% share of total	
	arrivals	presences	arrivals	presences	arrivals	presences
Europa	36.661.377	151.347.786	1,8	0,4	71	81
Nord America	5.476.998	14.078.769	3,8	2,3	10,6	7,5
Asia	5.116.707	9.256.438	9,8	9,4	9,9	5
Sud America	1.767.177	4.401.113	-0,4	0,2	3,4	2,4
Oceania e altri	1.479.334	3.800.319	-0,5	-1,3	2,9	2
Africa e M.O.	1.133.907	3.908.082	6,4	8,5	2,2	2,1
TOTAL	51.635.500	186.792.507	2,7	1,1	100	100

Source: Istat

2.1.2.2 The expenditure of foreign travelers in Italy

The Bank of Italy data show that in the period from January to November 2015, the expenditure of foreign travelers in Italy, amounting to 34078 million euros, grew by 4.5% over the corresponding period of 2014 (it is 1,475 million euros more). The increase in spending is higher if we consider only the holiday motif (+ 6.1%) or just the accommodation at hotels and resorts (+ 7.0%).

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Also in 2014 the trend was positive: foreign travelers in Italy spent a total of 34.24 billion euros, with an increase of 3.6% compared to 2013 (equal to 1,176 million euros more).

Table 2.1.10: Expenditure of foreign travelers - Time Series

Year	currency revenues (millions of euro)	Variation%
2008	31.090	-0,1
2009	28.856	-7,2
2010	29.257	1,4
2011	30.891	5,6
2012	32.056	3,8
2013	33.064	3,1
2014	34.240	3,6
January-November 2015	34.078	4,5

Source: Banca d'Italia database

A breakdown of expenditure trends by region shows different variations.

Table 2.1.11: Expenditure of foreign travelers for areas and regions in 2014

areas and regions	Expenditure (in millions of euro)		variation % 2013/2014
	2013	2014	
northwest	**8.650**	**9.011**	**4,2**
Piemonte	1.332	1.361	2,2
Valle d'Aosta	277	332	19,9
Lombardia	5.545	5.800	4,6
Liguria	1.495	1.518	1,5
North East	**9.009**	**8.971**	**-0,4**
Trentino Alto Adige	1.601	1.629	1,7
Veneto	4.709	4.769	1,3
Friuli Venezia Giulia	830	848	2,2
Emilia Romagna	1.869	1.725	-7,7
Center	**10.161**	**10.708**	**5,4**
Toscana	3.802	4.005	5,3
Umbria	255	270	5,9
Marche	331	302	-8,8
Lazio	5.774	6.131	6,2
South and islands	**4.145**	**4.629**	**11,7**
Abruzzo	202	195	-3,5
Molise	26	23	-11,5
Campania	1.433	1.545	7,8
Puglia	621	521	-16,1
Basilicata	43	83	93
Calabria	136	168	23,5
Sicilia	1.100	1.496	36
Sardegna	584	597	2,2
**Data can not be divided*	*1.100*	*922*	*-16,2*
TOTAL	**33.064**	**34.240**	**3,6**

Source: Banca d'Italia database

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The daily per capita expenditure of foreign travelers in Italy in 2014 is estimated by ENIT around 104.90 Euros, *an increase compared to 2008*.

Table 2.1.12: Per capita daily expenditure of foreign travelers

2008	2009	2010	2011	2012	2013	2014
€ 93,67	€ 91,76	€ 93,87	€ 94,38	€ 97,78	€ 102,77	€ 104,90

Source: processing ENIT on Banca d'Italia database

2.1.3 Focus on the tourist "products" of Italy

Mountain

The mountain accounts for around 17% of total tourist flows of the destination Italy, with a total number of accommodation establishments around 30,000 units, 20% of the total.

The mountain destinations are most popular in Northern Italy. It is prevalently a domestic tourism (about 60%), made up of young adults, married with children, or singles who travel in pairs and with friends. Word of mouth and the Internet are the two main channels of communication; they are followed by the travel agent's advice, personal experiences, proposals of catalogs and tourist guides

Intermediate commercialization of this offer is weak, for the majority of travelers (80%) in the mountains holiday is DIY.

The mountain holiday is synonymous of relaxation (48%): 46% choose the destinations for the beauty of the natural and environmental heritage, 31% for playing sports.

During their stay, tourists are dedicated mainly to the practice of sport (85%), to excursions (27%), go on wine tours (27%), shopping (15%), they attend health centers (20% foreigners). Moreover, Italians who seek tourist information during the winter holiday at tourist information points are 26%, while foreigners prefer the contact with the operators of accommodation facilities.

The tourist who chooses a mountain vacation considers important for the success of his/her stay a widespread culture of hospitality among the local population, the local environmental protection, a rich offer of entertainment and food and wine quality offer. Among the most satisfying elements both offer quality food and wine that the kindness and hospitality of the local population are identified.

Marine

Beach tourism moves approximately 41% of the tourist flows to Italy. The accommodation facilities of the beach destinations include about 49,000 structures. The most attractive beach destinations are located in Emilia Romagna, Liguria, Toscana, Sardegna, Calabria, Puglia and Sicilia. Among the main reasons for the visit, besides the beauty of the coast and, in general, the natural and environmental heritage, other factors contribute such as the presence of entertainment opportunities and the perception of "exclusivity" of the chosen destination.

Word of mouth from friends and relatives is the first communication channel, followed by the Internet. In particular, in addition to information found online, we underline promotional offers from big portals or booking websites, accommodation and other stakeholders of the tourism industry.

The majority of tourists who have a holiday in the beach destinations, travel in pairs (35%), with their children (23%) or friends (22%). During the holiday, in addition to sunbathing, the tourists look for information on places and services available in the destination and its surroundings, explore the territory with daily excursions, by widening the visit also to cultural resources, the programmed events and leisure and sports activities.

The most satisfying elements of the experience are: the quality of the food, the atmosphere of local hospitality, the local accommodation system, in particular, cleaning, the environmental protection, the level of urbanization of the coasts and, overall, the respect for the environmental ecosystem, and the entertainment offer.

Lake

Lakes attract Tourism by about 9% of tourist flows. Lake tourism is characterized by a high incidence of foreign tourism. The hospitality system of the lake destinations has a total of 5,600 accommodation facilities.

The Italian destinations with more concentration of lake destinations are Lombardia and Piemonte, followed by Veneto, Trentino Alto Adige and Umbria.

The factors that influence the choice of holiday in the lake destinations are word of mouth from friends and parents (38%), previous personal experiences (32%) and the Internet (18%), although only 4% buy a package on the Web. Finally, films and documentaries influence the extra European tourists. It is a tourism DIY. Lake tourists are mainly adults, married with children, couples traveling together or friends.

What moves tourists towards lakes is a mix of natural beauty and practical opportunities, in particular, the richness and beauty of the landscape, the quiet of the destination, the opportunity to practice a sport.

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During their holiday, lake tourists are dedicated to sports (swimming, cycling and sailing) and excursions of the territory, visiting historical centers, shopping and tasting local products. Satisfaction with the experience is high, the greater satisfaction elements concern the offer of accommodation facilities and restaurants, and of course the hospitality of the local population.

Art Cities

The art cities produce 25% of tourist flows. It is the top Italian product in international markets, a flywheel that often pulls others to offer products. The cities of art have also an ability to seasonally adjust, especially the "greater" centres that are able to attract tourists all year round, even for short stays. In Italy, in the cities of art, there are over 27,000 accommodations. The presence of art cities in our country is widespread particularly in central Italy.

In the choice of destination Italians are influenced mainly by previous personal experience and word of mouth; foreigners are using the web as a communication channel to be informed and search promotional offers and social networks.

In the city of art, tourists travel in pairs, alone or with friends. Among Italians 15% travel with children; among foreigners 7.5% are organized travel groups.

A vacation in a city of art is organized in complete autonomy for 90% of Italians, while the share of individual tourists among foreigners is only 70% and the remaining 30% make use of tour operators or agencies to organize the trip.

In addition to the wealth of artistic, historic and monumental cities, the main motivations that drive tourists to choose the artistic cities are numerous: from the opportunity to see again friends and family and enjoy their hospitality to curiosity aroused by the Italian art city.

During the stay in the city of art, tourists enjoy popular activities, in addition to tours of the historic centers, museums, monuments and archaeological sites. They also participate in musical performances, food and wine tastings, day trips and shopping.

In addition, during their holiday, 32.2% of Italians and 50.5% of foreigners traveling in art cities search for tourist information: the main sources of information are the staff of the accommodation facilities, the tourist information offices or the Internet. 5% of Italians and 13% of foreigners also use their smartphone to search for tourist information.

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Religious

Religious tourism has a total of more than 2000 sanctuaries and 3000 accommodations dedicated (religious houses, holiday homes, hotels, hostels, etc.). The estimated weight of this product on the total of tourist flows is 1.5%.

In the regional ranking, the Lazio region occupies the first place, along with other areas such as Umbria and Puglia.

The tourist who travels for religious interests is motivated by the opportunity to participate in events or simply by the desire to visit places of worship. For this product the tourist is predominantly adult, aged between 31 and 40 years old or over 60. The traveling tourists are mostly couples, with friends, or with organized tour groups.

What influences the choice of destinations are word of mouth from friends and relatives (44%) or that from parish and the information received on the occasion of religious events (24%). Among Italians, the positive previous personal experience also has a great impact while, among foreigners, reading articles in the press and the advice of the travel or tourist guides. The Internet is also a privileged channel of communication but acts in different ways depending on the target consumer: for Italians especially it constitutes a source of information, foreigners make use of it also booking.

During their holiday, 59% of tourists search information on places to visit, schedules and other useful info, paying particular attention to the tourist accommodation staff and tourist information points or other offices of the local authorities.

Religious tourists consider particularly important for the success of their holiday the quality of food and beverages (essential for 46.3% of tourists) and the quality of accommodation facilities where they reside, as well, of course, the climate of hospitality local population, cultural offer and the entertainment.

Other tourism products

Product parks and nature has about 3.6% of the tourists. The accommodation system in the naturalistic destinations records a total of 8,900 structures, 78% of which non-hotel accommodation. The tourist interested in holiday "en plein air" is mainly Italian (63%), foreigners are 37%.

The origin of the choice of this type of holiday is the contact with nature, desire to relax or, alternatively, sports practice.

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In the selection of naturalistic destinations, the tourists are relying on word of mouth for 30%, 29% use the internet to gather information. 80% of tourism organizes the "nature holidays" independently, only in 19% of cases, rely on an organized intermediation operator.

Enogastronomic tourism counts for 5.4% of tourist flows. The businesses of the accommodation system that mostly offer this product are those of Piedmont, Tuscany, Campania and Trentino Alto Adige, followed by Umbria, Puglia and Sicily, destinations where the needs and consumption habits of the demand linked to food and wine tourism impact more on strategic and promotional choices of the operators of the tourism industry.

The holiday of "taste" is associated with culture: to know the historical and artistic resources of the territory, attend cultural events and learn about local traditions. For the choice of destination, 43% of tourists rely on the Internet to look for information about places and tourist product offers (13.8%), but also to exchange opinions via social networks (3%). The web is a great showcase of local knowledge, especially for foreigners. During their holiday, tourists participating in tours, taste local products and take part to food and wine events. Moreover, tourists spend their leisure time in shopping and practicing sports activities (walking, swimming, cycling and hiking).

Spa & Wellness Product: The spas welcome 4% of tourist flows in Italy, in particular 4.6% of Italian demand and 3.2% of the foreign demand. The accommodation system of the spa towns counts 3,200 structures. The receptive entrepreneurs who consider their offer geared towards a spa or health specialization are located in the Trentino Alto Adige, Campania, Emilia Romagna and Tuscany Regions.

For Italians, the holiday is DIY in 85% of cases, while 15% of Italian tourists address to a travel agency or a tour operator to choose their holiday destination and organize their stay, buying an all-inclusive package in 69.7% of cases. The demand for spa and wellness tourism is extended to all age groups, but it emerges that 24% of Italian tourists are over 60 while 50% of foreigner tourists are mainly adults between 41 and 60 years . The spa holiday is primarily associated to the desire to relax (which moves the 42.7% of tourists) and destinations are chosen to guarantee a prestigious natural environment. Relaxing holidays but also active, where the visits in health centers are often associated with the practice of sports activities (39% of tourists). Moreover, 35% of tourists make day trips, 18% visit historic centers, 17% participate in wine tasting, 13% go shopping and 10% visit museums and exhibitions.

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Sports Tourism: The sport motivation to make a holiday in Italy involves 10.3% of Italian tourists and 8.5% of international tourists. The most attractive Italian destinations are: Valle d'Aosta, Trentino Alto Adige and Liguria, destinations where the presence of sports infrastructure and natural resources promote the use of specific disciplines (from skiing to sailing, from golf to cycling, from diving to hiking, etc.).

In these holidays there are also other reasons, such as the search of relax and the choice of places by naturalistic beauties. In Italy, sports tourism is not very intermediated. In addition to practicing sports during their holiday these tourists make excursions (52% foreigners, 39% of Italians), taste the local products (21% of Italians, 21% of foreigners) and do shopping (20% of Italians, 17% of foreigners).

Italians also purchase typical arts and crafts, while foreigners prefer to attend musical performances, go to the beach/lake or spas. The fundamental aspects considered for the success of the sports tourist travel are: the courtesy of the local people, the quality of food and drink and respect for the environment. For Italians the entertainment offer is important, for foreigners the hospitality in accommodation is a priority.

Business and Conference Tourism: the weight of the business and congress tourism on total movements in Italy is equal to 3.6% of the Italian flows and 4.2% of international ones. There are 260 convention centres located throughout the country, with excellence in Lombardia, Emilia Romagna and Veneto.

Only 6.5% of these stays is organized by travel agencies or tour operators.

In addition to business activities, the businessmen in Italy make trips (39.4%), practice sports activities (30.6%), participate in conferences (26.3%), visit the historical centers (20.6%), purchase typical products and crafts (13.2%), visit museums (10.9%) and taste the local products (10.4%).

Tourism Made in Italy: during their holiday, 39% of tourists dedicate their time to shopping and / or to the rediscovery of the territory, buy enogastronomic products and local handicrafts. Tourism “Made in Italy” recalls the modern concept of "experience economy".

Tourists arrived in the country devote their holiday to discover the local flavors and authenticity, to purchase products labelled “Made in Italy”, in the broadest sense: from clothing to shoes, from design products to artisanal handicrafts.

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This type of tourism has a special appeal on foreign tourism demand. Made in Italy impact, to a greater extent, on holiday decisions to the regions of Umbria, Lombardia, Friuli Venezia Giulia, Lazio, Calabria, Trentino Alto Adige, Liguria, Abruzzo and Molise.

Tourism "Made in Italy" is also characterized by the desire to relax, the reputation of inatural and environmental beauty, the presence of entertainment, wealth from the artistic and monumental heritage, blended with the desire to spend a holiday dedicated to quality shopping and to discover the territory, creating a mix of products that are born from the merger of tourism made in Italy and the green holiday or culture or even an active vacation, etc.

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2.2 Focus on Spain

2.2.1 The tourism sector in Spain

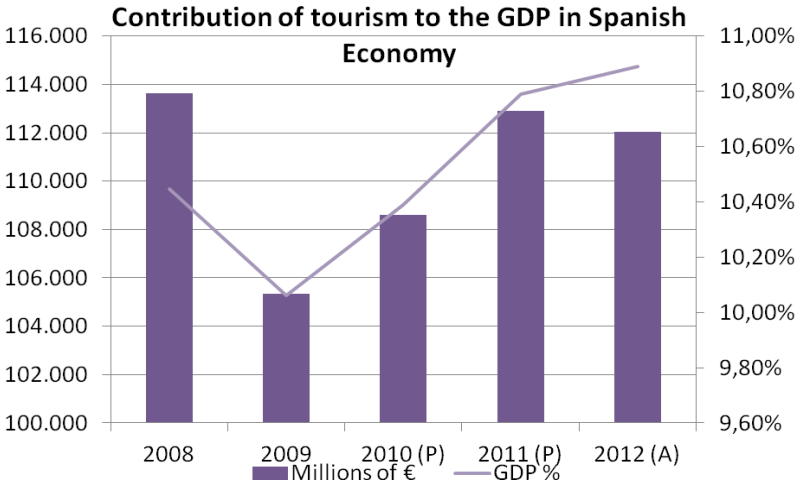
In order to measure the significance of the tourism sector in Spain, we will consider its contribution to the Spanish GDP as well as to employment.

The references used have been taken from the Tourism Satellite Account in Spain (CSTE), developed by the National Statistical Institute[4] and the statistics published by the Spanish Tourist Studies Institute[5].

2.2.1.1 Tourism sector in relation to Spanish GDP

According to CSTE, Tourism contribution to the Spanish Economy GDP, in 2012, is set up in 112.035 million Euros, that means the 10,9% of total GDP.

Graph 2.2.1: Contribution of tourism to the GDP in Spanish



Source: Tourism Satellite Account in Spain (CSTE)

[4] The CSTE consists on a combination of accounts and tables, based on the national accounting methodological principles, which show different economic frameworks of Spanish tourism, for a reference date given.
Latest data published belong to 2008-2012 accounting serie.
Source: http://ine.es/jaxi/menu.do?type=pcaxis&path=%2Ft35/p011&file=inebase&L=0

[5] Source: http://estadisticas.tourspain.es/es-es/estadisticas/fichadecoyuntura/paginas/default.aspx

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Table 2.2.1: Tourism Contribution to Spanish Economy GDP

Tourism Contribution to Spanish Economy GDP					
	2008	**2009**	**2010 (P)**	**2011 (P)**	**2012 (A)**
Million euros	113.628	105.355	108.599	112.908	112.035
Percentage above the total GDP	10,45%	10,06%	10,39%	10,79%	10,89%
Notes: (P) : Provisional Estimate (A) : Advance Estimate					

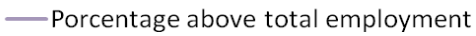
Source: National Statistics Office

From 2008 to 2012, tourism contribution to economy decreased in 1.593,2 million euros, but the weight about the total of economy rose up to 0,5%.

2.2.1.2 Tourism sector in labor market

According to CSTE, during 2012, there have been 2.123.700 employees in tourism branches. This meant 11,9% above total employment.

Graph 2.2.2: Contribution of tourism to EMPLOYMENT in Spain



*Source :*Tourism Satellite Account in Spain (CSTE)

Table 2.2.2: Tourism Contribution to Employment in Spain

Tourism Contribution to Employment in Spain					
	2008	**2009**	**2010 (P)**	**2011 (P)**	**2012 (A)**
Employment in tourism branches	2.452,3	2.267,1	2.240,9	2.239,2	2.123,7
Percentage above total employment	11,9%	11,7%	11,8%	12,1%	11,9%
Notes: (P) : Provisional Estimate (A) : Advance Estimate					

Source: National Statistics Office

Between 2008 and 2012, tourism contribution to employment decreased to 328.660 people, but its weight above total employment was kept by 11,9%.

On the other hand, as the Spanish Tourist Studies Institute points out, the number of workers registered in social security with activities regarding tourism is slightly inferior to the number referred by the CSTE.

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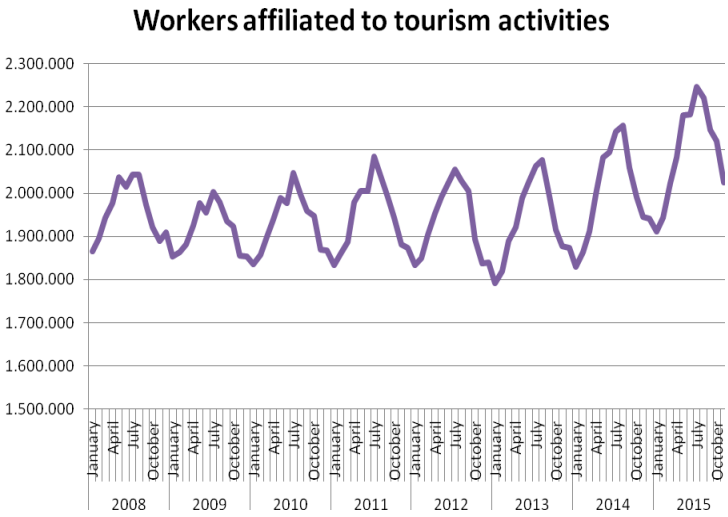
According to the Spanish Tourist Studies Institute publication, there were 2.034.742 people registered in social security with activities regarding tourism (latest data available from December 2015). Considering that, on the same date, the total number of people liable to social security was 17.180.590, according to Employment and Social Security Ministry data, we can conclude that the tourist sector implies 11.84%.

The data collected by the Spanish Tourist Studies Institute show the hard seasonal nature that characterizes employment in this sector, showing activity peaks during July and August and valleys in December.

The nature of Seasonal Employment has increased during the peaks and valleys months in 2008 and 2015. In this way, the difference between the months with higher peaks of employment in the tourism sector and the months with the lower ones turns out to be 178.335 people in 2008, while this difference stands at 335.337 people in 2015.

Graph 2.2.3: Workers affiliated to tourism activities



Source: Institute of Tourism in Spain and Ministry of Employment and Social Security

We should also point out that seasonal activity is reflected as well in the percentage of workers enrolled in social security system.

In this way, during July and August 2015 the percentage of workers registered in the social security system affiliated to the tourism sector exceeds 13%, a percentage that drops to 11,84% in December 2015.

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Graph 2.2.4: Percentage of workers in the tourism sector over total affiliated workers (2015)

Source: Institute of Tourism in Spain, Ministry of Employment and Social Security and the author.

2.2.2 Tourist supply

We have analyzed the relevance of the tourism sector in Spain and, with supporting data, have confirmed that this sector contributed 10,9 % of the GDP and 11,9% of the total employment.

In this paragraph we will analyze the tourism offer in Spain. Considering this analysis we notice how the above mentioned results regarding the GDP and employment have been achieved.

2.2.2.1 Companies and tourist establishments

In order to better understand what tourist amenities offer, we will consider the analysis of tourism enterprises.

This data are compiled in the Service Annual Survey, drawn up by the National Statistical Institute[6], latest available data from 2013.

We will take into account the considerations carried out by the Tourism Institute[7] of Spain to define the scope of economic activities in the tourism sector.

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[6] The Service Annual Survey is a survey with structural character, aimed to all enterprises concerning Commerce, Transport and storage, Accommodation, Information and communication, Real Estate, Professional Activities, Scientific, Technical, Administrative Activities and Auxiliary Services, Artistic Activities, Arts, Entertainment and Recreation and other Services (Repair of computers, personal effects and domestic use articles, and other personal services). Source: http://www.ine.es/jaxi/menu.do?type=pcaxis&path=/t37/e01/&file=inebase
http://www.ine.es/jaxi/tabla.do?path=/t37/e01/cnae09/a2013/l0/&file=04001.px&type=pcaxis&L=0

[7] The economic activities considered in the tourism field are the following: (we include the code according to Standard Industrial Classification SIC 2009):

55 y 56 Accommodation
491 Passenger rail transport, interurban transport.
493 Other passenger land transport
501 Sea and coastal passenger water transport

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It should be noted that the statistical information resulting from the activity of the aggregate employment in the tourism sector, constitutes, at the same time, an underestimation and an overestimation of the employment belonging to the sector.

It constitutes an underestimation since it does not consider other economic activities which can contribute to tourism sector activity; on the other hand, it is an overestimation as long as activities branches considered do not develop any exclusive activity for this sector and tourist demand.

According to the Service Annual Survey, there were 431.895 enterprises in 2013 related to tourism industry, that is to say 33.70% of the total enterprises.

Table 2.2.3: Service Annual Survey

Service Annual Survey (CNAE-2009). Year 2013	
	Number of Enterprises
491, 492 Passenger rail transport, interurban and freight rail transport	13
493 Other passenger land transport	62.157
501, 503 Sea and coastal passenger water transport and inland passenger water transport	275
511 Passenger air transport	100
522 Warehousing and support activities for transportation	14.803
551 Hotels and similar accommodation	11.691
552 Holiday and other short- stay accommodation	9.269
553 Camping grounds, recreational vehicle parks and trailer parks	976
559 Other accommodation	694
561 Restaurants and mobile food services activities	74.666
562 Event catering and other food services activities	9.875
563 Beverage serving activities	168.301
771 Renting and leasing of motor vehicles	2.706
773 Renting and leasing of other machinery, equipment and other tangible goods	10.991
791, 799 Travel agency, tour operator and other reservation service and related activities	10.859
900 Creative, arts and entertainment activities	23.636
910 Libraries, archives, museums and other cultural activities	2.950
931, 932 Sports activities and amusement and recreation activities	27.933
Total Tourism Industry	431.895
Total	1.281.706
% Tourism Industry	33,70%

Source: National Statistical Institute

503 Inland passenger water transport
511 Passenger air transport
522 Support activities for transportation
791 Travel Agency and tour operations activities
799 Other reservation services
771 Renting and leasing of motor vehicles
773 Renting and leasing of other machinery, equipment and tangible goods.
900 Creative, arts and entertainment activities
910 Libraries, archives, museums and other cultural activities
931 Sports Activities
932 Amusement and recreation activities

Source: http://estadisticas.tourspain.es/es-ES/estadisticas/otrasestadisticas/empleoturistico/afiliacionss/ficha/Ficha%20Tecnica%20Afiliacion.pdf

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2.2.2.2 Employment features linked to tourism supply

In the previous pages, we have compiled the main characteristics of tourist industry in relation to two dimensions: GDP and number of enterprises.

In this section we develop employment features related to this sector.

We have taken into account last data about occupied population in tourist sector; these data have been acquired from the Spanish Tourist Studies Institute and they are, at the same time, a statistical activity from the Annual Community Labor Force Survey.

a. Employees' features

According to the Annual Community Labor Force Survey, the total number of employee population in tourist industry activities, rises to 2.458.797, that means 13,62% of the total of occupied population.

Occupied population according to age

We should point out that 21,99% of the total of occupied population working in tourist sector, 540.628 people, are between 16 and 29 years old. This percentage is 8.34 points higher than the registered in the total of occupied population (13.65%).

In the same way, it is noted that among people working in passenger transport area, a percentage of 51.79% (132.633 people) are 45 years old or even more, versus the 35.31% of the total sector.

Table 2.2.4: Occupied population according to age

OCCUPIED POPULATION ACCORDING TO AGE Third Trimester 2015. Final Data.				
	Total	**16-29**	**30-44**	**45 and more**
Total Tourism Industry Activities	**2.458.797**	**540.628**	**1.049.868**	**868.300**
Accommodation	1.606.512	403.226	668.842	534.443
Accommodation Services	396.596	70.386	181.169	145.041
Food and Drink Services	1.209.916	332.840	487.674	389.402
Passenger Transport	256.079	17.607	105.838	132.633
Other Tourism Industry activities	596.207	119.795	275.188	201.224
Service-Producing Sector Activities: Total	13.737.601	1.977.024	5.979.503	5.781.074
Total Activities at National Level	18.048.706	2.463.560	8.012.715	7.572.431
Percentage Distribution				
Tourism Industry Activities	100,00%	21,99%	42,70%	35,31%
Service-Producing Sector Activities	100,00%	14,39%	43,53%	42,08%
Total Activities at National Level	100,00%	13,65%	44,39%	41,96%

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Source: Turespaña. – Based on data provided by Annual Community Labor Force Survey

Occupied population according to training

As regards the training level, the distribution of occupied population in the tourism sector, denotes that only the 27,85% (684.760 people), have higher education. Considering the total of occupied population, this percentage rises to 41,52%.

Table 2.2.5: Occupied population according to training

OCCUPIED POPULATION ACCORDING TO TRAINING Third Trimester 2015. Final Data.				
	Total	**Primary Education**	**Secondary Education**	**Higher Education**
Total Tourism Industry Activities	2.458.797	207.746	1.560.440	684.760
Accommodation	1.606.512	179.288	1.102.436	318.936
Accommodation Services	396.596	44.342	248.771	103.323
Food and drink Services	1.209.916	134.946	853.665	215.613
Passenger transport	256.079	14.008	172.135	69.936
Other Tourism Industry activities	596.207	14.450	285.868	295.888
Service-Producing Sector Activities: Total	13.737.601	786.676	6.707.803	6.221.642
Total Activities at National Level	18.048.706	1.204.345	9.309.602	7.493.503
Percentage Distribution				
Tourism Industry Activities	100,00%	8,45%	63,46%	27,85%
Service-Producing Sector Activities	100,00%	5,73%	48,83%	45,29%
Total Activities at National Level	100,00%	6,67%	51,58%	41,52%

Source: Turespaña. - Based on data provided by the Annual Community Labor Force Survey

Occupied population according to autonomous community

Balearic Islands and Canary Islands are the Autonomous Communities where employment mainly depends on tourism .

In this way, in the Balearic Islands, the occupied population dedicated to tourism is equal to 31.08% of the total occupied population; In the Canary Islands, it is something like 28.47 %. This percentage does not overtake the 15% in the rest of Communities.

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Table 2.2.6: Occupied population according to autonomous community of residence

OCCUPIED POPULATION ACCORDING TO AUTONOMOUS COMMUNITY OF RESIDENCE Third Trimester 2015. Final Data.					
	Total Activities	**Service-producing Sector Total Activities**	**Tourism Industry Total Activities**	**% tourism industry / service-producing**	**% tourism industry / total activities**
Total National	18.048.706	13.737.601	2.458.797	17,90%	13,62%
Andalusia	2.758.068	2.186.191	389.639	17,82%	14,13%
Balearic Islands	555.323	467.618	172.569	36,90%	31,08%
Canary Islands	793.476	688.393	225.867	32,81%	28,47%
Catalonia	3.110.858	2.294.929	406.349	17,71%	13,06%
C. of Valencia	1.882.944	1.372.603	265.839	19,37%	14,12%
Madrid (C. of)	2.806.363	2.388.064	357.063	14,95%	12,72%
Rest of Autonomous Communities	6.141.675	4.339.804	641.473	14,78%	10,44%

Source: Turespaña. – Based on data provided by the Annual Community Labor Force Survey

Occupied population according nationality

Almost one fifth of the population dedicated to tourism industry activities are foreign workers. The percentage of foreign working population in the tourism Industry reaches 18.69%, while it is only 10.74% in average in the other sectors.

Table 2.2.7: Occupied population according nationality

OCCUPIED POPULATION ACCORDING NATIONALITY Third Trimester 2015. Final Data.			
	Total	**Spanish**	**Foreigner**
Total Tourism Industry Activities	2.458.797	1.999.181	459.616
Total Service-Producing Sector Activities	13.737.601	12.279.729	1.457.872
Total Activities at National Level	18.048.706	16.109.755	1.938.950
Percentage Distribution			
Tourism Industry Activities	100,00%	81,31%	18,69%
Service-Producing Sector	100,00%	89,39%	10,61%
Total Activities at National Level	100,00%	89,26%	10,74%

Source: Turespaña. – Based on data provided by the Annual Community Labor Force Survey

Occupation according to professional status

We shall now continue with a study on the distribution of the occupied population in tourism according to their professional status.

The data show that the 79,63% of occupied workers in the tourism sector are paid staff. This percentage is similar to the percentage registered for the total occupied population (82,63%).

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We should highlight that 94,33% of occupied workers in accommodation services are paid staff; this percentage is significantly higher than in other areas.

Table 2.2.8: Occupied according to professional status

OCCUPATION ACCORDING TO PROFESSIONAL STATUS Third Trimester 2015. Final Data.			
	Total	**Employees**	**Freelance**
Total Tourism Industry Activities	2.458.797	1.958.024	499.547
Accommodation	1.606.512	1.266.572	338.888
Accommodation services	396.596	374.104	22.492
Food and drink services	1.209.916	892.468	316.396
Passenger Transport	256.079	181.381	74.697
Other Tourism Industry activities	596.207	510.071	85.962
Total Service- Producing Sector Activities	13.737.601	11.524.870	2.207.340
Total Activities at National Level	18.048.706	14.948.933	3.094.383
Percentage Distribution			
Tourism Industry Activities	100,00%	79,63%	20,32%
Service- Producing Sector Activities	100,00%	83,89%	16,07%
Total Activities at National Level	100,00%	82,83%	17,14%

Source: Turespaña. – Based on data provided by Annual Community Labor Force Survey

b. Salaried employees' features

Now, we will focus on the characteristics of salaried employees in the tourism sector.

Salaried employees according to labor contract

Data from the third trimester of 2015 point out that 38,10 % of salaried employees related to Tourism Industry Activities have a fixed-term contract. This percentage is almost twelve points higher than the percentage recorded in the total of activities at national level.

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Table 2.2.9: Salaried employees according to labor contract

Salaried Employees according to labor contract Third Trimester 2015. Final Data.			
	Total Contract type	**Open-ended Contract**	**Fixed-term contract**
Total Tourism Industry Activities	1.958.024	1.212.020	746.004
Accommodation	1.266.572	714.425	552.147
Accommodation Services	374.104	218.363	155.741
Food and drink Services	892.468	496.062	396.406
Passenger Transport	181.381	154.100	27.281
Other Tourism Industry Activities	510.071	343.495	166.576
Total Service-Producing Sector Activities	11.524.870	8.638.805	2.886.066
Total Activities at National Level	14.948.933	11.039.190	3.909.742
Percentage Distribution			
Tourism Industry Activities	100,00%	61,90%	38,10%
Service-Producing Sector Activities	100,00%	74,96%	25,04%
Total Activities at National level	100,00%	73,85%	26,15%

Source: Turespaña. – Based on data provided by Annual Community Labor Force Survey

Salaried employees according to agreed daily wage (working day type)

One of every four salaried employees in the tourism sector is working part – time.

The 26,07% of salaried employees of the tourism sector, 510.399 people, have a part-time work; this percentage stands at 9,75 points above the recorded percentage in the total activities at national level.

We should stress that 30% of salaried employees working in the field of accommodation services and food and drink services have a part-time contract.

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Table 2.2.10: Salaried employees according to working day type agreed daily wage

SALARIED EMPLOYEES ACCORDING TO WORKING DAY TYPE *agreed daily wage* Third Trimester 2015. Final Data.			
	Total working Day Type	**Full- time contract**	**Part- time contract**
Total Tourism Industry Activities	1.958.024	1.447.625	510.399
Accommodation	1.266.572	880.441	386.131
Accommodation Services	374.104	319.061	55.042
Food and Drink Services	892.468	561.380	331.088
Passenger Transport	181.381	163.261	18.121
Other Tourism Industry Activities	510.071	403.923	106.147
Total Service-Producing Sector Activities	11.524.870	9.277.018	2.247.852
Total Activities at National Level	14.948.933	12.509.753	2.439.180
Percentage Distribution			
Tourism Industry Activities	100,00%	73,93%	26,07%
Service Sector Activities	100,00%	80,50%	19,50%
Total Activities at National Level	100,00%	83,68%	16,32%

Source: Turespaña. – Based on data provided by Annual Community Labor Force Survey

Salaried employees with part-time contracts according to age

Workers under 30 years of age represent more than 40% of part-time contracts.

The 42,27 % of salaried employees with part-time contract from the tourist sector, 315.320 people, are between 16 and 29 years of age. This percentage is 9,71 points higher than the one observed above relevant the total salaried population with part-time contract.

Table 2.2.11: Salaried employees with part-time contracts according to age

SALARIED EMPLOYEES WITH PART-TIME CONTRACTS ACCORDING TO AGE Third trimester 2015. Final Data.				
	Total	**16-29**	**30-44**	**More than 45**
Total Tourism Industry Activities	746.004	315.320	296.595	134.088
Total Service- Producing Sector Activities	2.886.066	1.022.351	1.251.800	611.915
Total Activities at National Level	3.909.742	1.273.110	1.771.546	865.087
Percentage Distribution				
Tourism Industry Activities	100,00%	42,27%	39,76%	17,97%
Service-Producing Sector Activities	100,00%	35,42%	43,37%	21,20%
Total Activities at National Level	100,00%	32,56%	45,31%	22,13%

Source: Turespaña. – Based on data provided by Annual Community Labor Force Survey

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2.2.3 Tourism demand

2.2.3.1 Foreign tourists

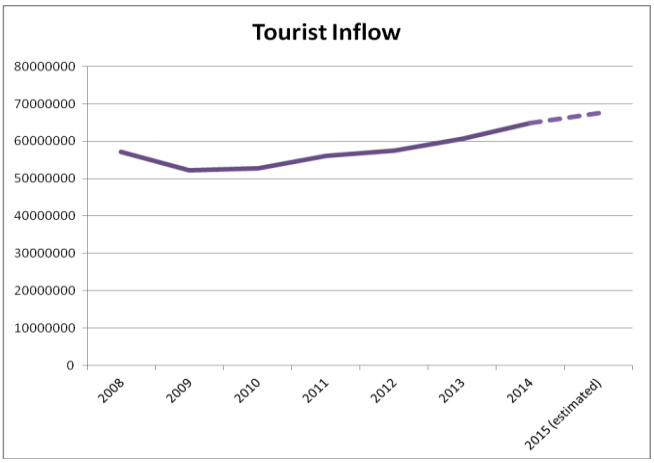
The data given below about tourism demand refer to the inflow of foreign tourists based on the Frontur[8] study.

a. Inflow evolution

In the years analyzed, except for the years 2008 and 2009, which reflect a decrease mainly caused by the economic crisis, we see a growing trend in foreign tourists entering Spain.

Thus, between 2009 and 2014, the number of foreign tourists entering Spain rose by 13.55%, over 7,746,931 tourists.

Graph 2.2.5: Tourist inflow



Source: Institute of Tourism of Spain. Survey of Tourist Movements at Borders (Frontur)

The data collected in 2015 confirm this growth. Thus, between January and September, compared to 2014, the number of tourists increased by 2,092,043, representing an increase of 4%. If this growth continues, at the end of the year, Spain would have received more than 67 million foreign visitors, representing a new record.

b. Distribution of foreign tourists by country of residence

The origin of the tourists coming to Spain is clearly focused in three countries: UK, France and Germany account for over 55%

[8] Frontur, a survey which has been made since 1996 by the Institute of Tourism Studies, aims to quantify and describe the inflow of visitors arriving to Spain.

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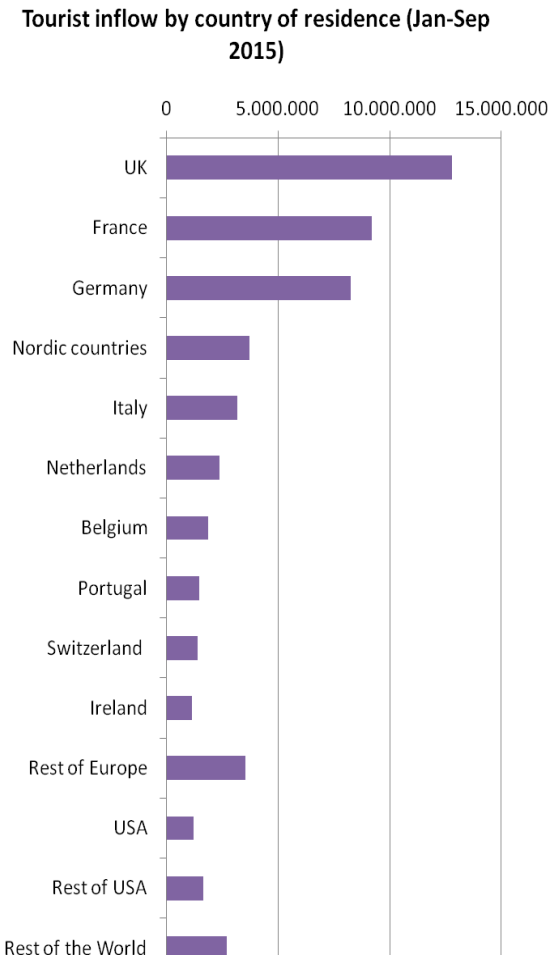
Graph 2.2.6: Tourist inflow by country of residence (jan-sep 2015)



Source: Institute of Tourism of Spain. Survey of Tourist Movements at Borders (Frontur)

c. Tourism expenditure

As far as the analysis of tourist expenditure is concerned, we refer to the Tourist Expenditure Survey (EGATUR[9]).

In the years analyzed, again excepting 2008 and 2009, a growing trend in the total expenditure of foreign tourists visiting Spain is observed.

Thus, between 2009 and 2014, the total expenditure of foreign tourists entering Spain rose by 31.43%, representing an increase in spending of 15.074 million Euros.

The data collected from 2015 also confirm this growth. Thus, between January and September, compared to 2014, the expenditure made by foreign tourists rose to 3,314,000, representing an increase of 6.55%. If this growth continues, by the end of the year total revenues will amount to more than 67,000 million Euros.

[9] EGATUR is a continuous border operation, made monthly on the main road crossing points, airports, trains and seaports. The survey is done by personally interviewing non-residents.

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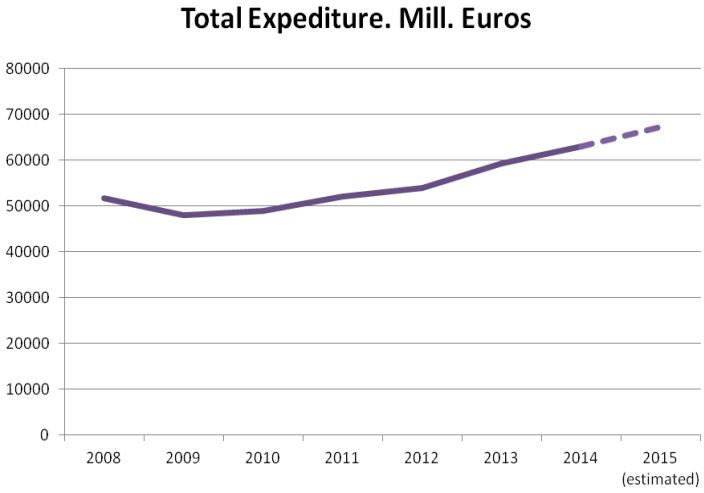
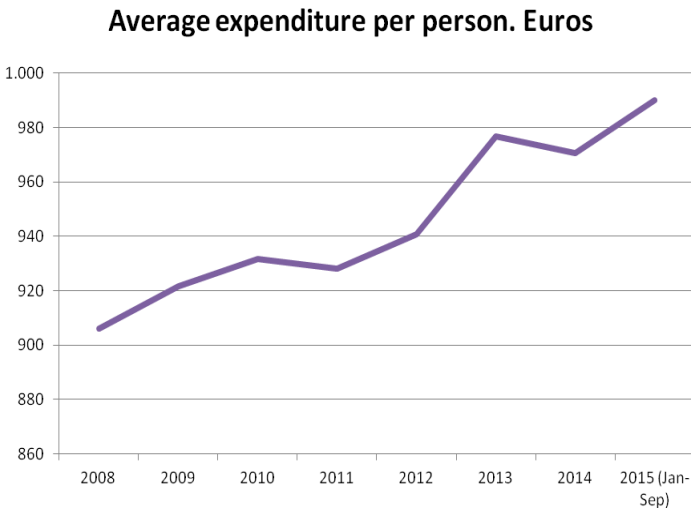
Graph 2.2.7: Total expenditure



Source: Institute of Tourism of Spain. Tourist Expenditure Survey (EGATUR)

Meanwhile, the average expenditure per person has had an upward trend, thus increasing from 906 € to 990 € between 2008 and 2015, which represents an increase of 9.25%.

Graph 2.2.8: average expenditure per person



Source: Institute of Tourism of Spain. Tourist Expenditure Survey (EGATUR)

In the analyzed period, the average daily spending has increased by an amount of 17 €, equal to 17.79%, from 95 € in 2008 to 112 € in 2015.

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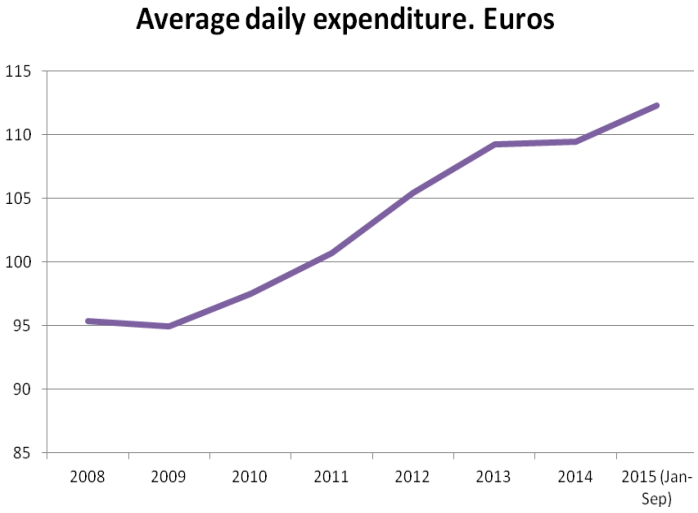
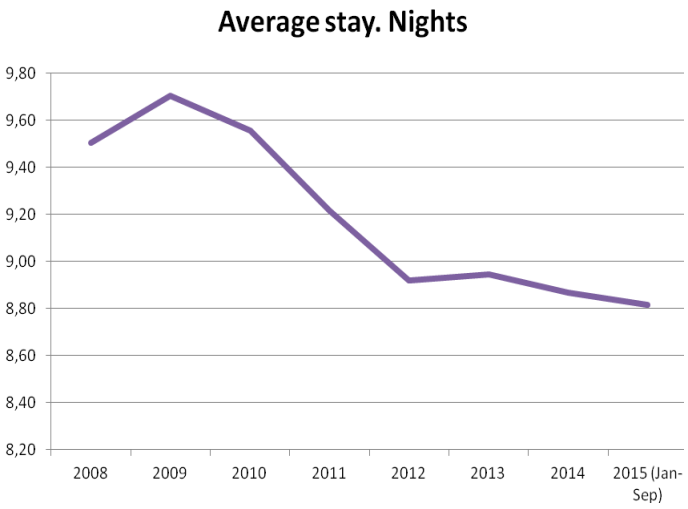
Graph 2.2.9: average daily expenditure



Source: Institute of Tourism of Spain. Tourist Expenditure Survey (EGATUR)

Finally, the average stay of foreign tourists has suffered a decline from 2008 to 2012,2015 ? from 9.51 nights to 8.82 in 2015.

Graph 2.2.10: average stay - nights



Source: Institute of Tourism of Spain. Tourist Expenditure Survey (EGATUR)

2.2.3.2 Spanish tourism

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In order to complete the vision of tourism in relation to demand, here are some data about Spanish tourism which have been collected in the Spanish Tourist Movements Statistics (Familitur[10]).

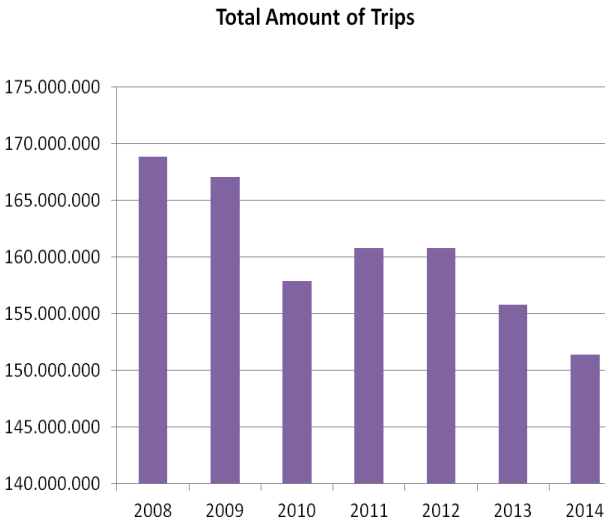
The latest available data refer to January 2015.

a. Number of journeys

The number of trips made by the Spaniards has decreased between 2008 and 2014.

In 2008, the number of trips amounted to 168,843,820, while in 2014, it was equal to 151,397,320, with a decrease of 10.33%.

Graph 2.2.11: Total amount of trips



Source: Institute of Tourism of Spain. Tourist Movements of Spaniards (Familitur).

b. Tourist destinations

Regarding trip destinations made by residents in Spain during 2014, over 92% of them have their destination in their own territory.

[10] Since 1996 the Institute of Tourism Studies (Institute of Tourism of Spain?) has been making statistics on the Spanish Tourist Movements (Familitur) by conducting households surveys.. The study focuses on domestic tourism, by quantifying and characterizing the travel of residents in Spain both in Spain and abroad.

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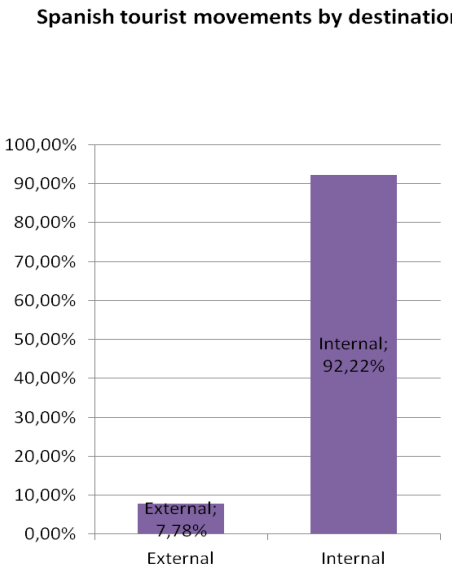
Graph 2.2.12: Spanish tourist movements by destination (2014)



Source: Institute of Tourism of Spain. Tourist Movements of Spaniards (Familitur).

Four Autonomous Regions are listed as destinations for more than 50% of domestic tourism.

These regions are:

- Andalusia, with more than 23 million visitors, 16.75% of the total domestic tourism.
- Catalonia, with more than 20 million, up 14.77%.
- Valencia, 16.6 million, 11.91%.
- Castilla y León, 15.6 million, up 11.18%.

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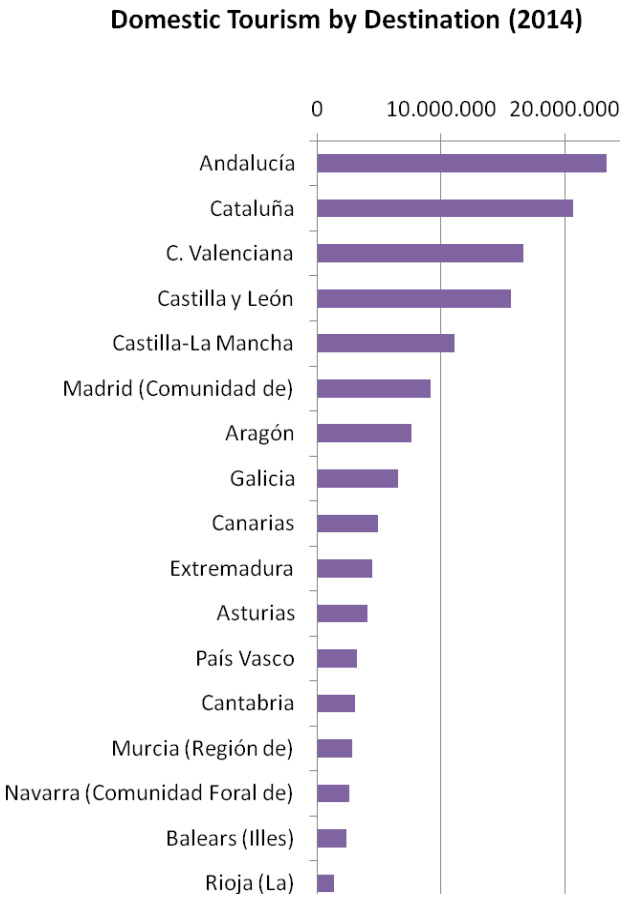
Graph 2.2.13: Spanish tourism movements by Region of destination (2014)



Source: Institute of Tourism of Spain. Tourist Movements of Spaniards (Familitur).

2.2.4 The educational offer related to the tourism sector

The tourism industry is characterized by diversity, complexity and fragmentation of labor relations, since it includes a wide range of jobs, both directly and indirectly related to tourism.

We have based the research of the training offered in tourism industry on the following documents:

- Demographic and competency profiles of Tourism Sector Employees, by Spanish Public Employment Service[11].
- Study of training needs of the tourism sector developed by the Council of Labor and Economic Social of Catalunya[12].
- The quality of tourism. Labor market: training and human capital. José L. Noriega[13].

[11] Source: https://www.sepe.es/contenidos/observatorio/mercado_trabajo/1855-1.pdf
[12] Source: http://ctesc.gencat.cat/doc/doc_93437493_1.pdf
[13] Source:http://www.publicacionescajamar.es/publicaciones-periodicas/mediterraneo-economico/mediterraneo-economico-5-las-nuevas-formas-del-turismo/59/

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The following table provides, in a simple way, several types of jobs that can be identified in tourism sector as starting point to study for training needs of companies in the sector.

Table 2.2.12: Main areas of occupation in the tourism industry in Catalunya

AREA	OCCUPATIONS
Transverse Areas	Management of Tourism Organizations
	Marketing
	Maintenance and Cleaning Service.
Accommodation and Catering Industry	Chefs and Cooks
	Maîtres and Waiters
	Kitchen help
	Reception
Tourist Escorting	Tourist Animation
	Travel Guide
	Intermediaries
	Event Management
	Tourist Assistance

Source: Study of training needs of the tourism sector developed by the Council of Labor and Economic Social de Catalunya

As mentioned above, for example, in the development of Social Security affiliation, tourism activities have a seasonal component, concentrated mainly in the second and third quarter.

That means that the sector is perceived as unstable, from labor perspective, and this situation makes it difficult to attract talent to tourism enterprises and discourages the investment in training.

2.2.4.1 Educational offer

Here is, in general terms, the existing training related to occupations and tourism activities; some training activities are usually included in the "hotel industry and tourism" sub-sector, and include catering activities, tourism mediation and event management. Therefore, we did not include transversal training that can also be aimed to professionals in the sector, like leadership and management or languages.

Table 2.2.13: Structure of the educational offer in Spain

University Education	University Degree
	University master and PhD
	University extension courses
Vocational Training	Initial vocational training program
	Intermediate educational cycle
	Upper-level training cycle
Vocational Education for Employment	Training for Workers and Unemployed People
	Training for Workers
Other Training activities	Training not included above

Source: Study of training needs of the tourism sector developed by the Council of Labor and Economic Social de Catalunya

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2.2.4.2 Tourism sector enterprises educational demand

According to the "*Training needs of the tourism industry*" study, in general, the minimum level of education required by the companies for the people who have jobs in the tourism sector is low (no study, primary, secondary or intermediate vocational training).

Most tourism companies believe that experience is more important than training to have a career in the tourism sector. However, when recruiting, training is considered quite important.

On the one hand, training has more value and counts in the process of recruitment for these occupations related to mediation and tourist escorting, for example, intermediary agents (travel agencies employees and online sales agents), tour assistance (flight attendants, stewardesses, waiters in planes, ships and trains and ground hostesses), and tour guide (employees of visitor information centers, tourism offices and tour guides).

The above mentioned occupations have the lowest satisfaction rate related to the training offer even if training requirements are really high (high school, higher vocational training or college) – the number of non-regulated training activities is low, as there are few training activities classified as "other training activities", which generally tend to be more specific and flexible in terms of content and duration - in general, in the occupations of this area more training deficiencies are detected.

Although the shortage of skills in occupations in the area of mediation and tourist accompaniment is the lowest of all, the jobs in the category of tours and intermediary agents are the most difficult to cover because of the lack of trained personnel and tourism professionals in that area.

On the other hand, for the occupations in the field of accommodation and catering industry, training is less valuable and the level of studies required is low (no study, primary, secondary, intermediate level). In the recruitment process, experience is more valuable than training, mostly in the categories of kitchen help (kitchen help, bakery help, dish washers and fast food cooks) and maîtres and waiters (waiters, maîtres and sommeliers, owners of bars and cafeterias).

2.2.4.3 Tourism sector workers' view about educational offer

The Survey of Quality of Life at Work (ECVT - Encuesta de Calidad de Vida en el Trabajo) provides an approach to the assessment of training as an important factor of "quality of life at work" (Chapter II. Satisfaction with the organization, implementation and training).

The training of workers in the tourism sector is considered correct in relation to the position held for 73.7% of the ECVT respondents in 2010, while 23.0% think that they have a lower position with respect to their training, almost five percentage points less than the overall economic activities.

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Table 2.2.14: Relation between worker education and position held

Relation between worker education and position held (%)				
Activities	Correct	Lower than training	Higher than training	With training needs
Total Economic activities	73,8	18,4	1,4	2,5
Total Tourism sector	73,7	23	0,9	2,3
Shipping and Storage	77,4	20,3	0,3	1,9
Hotel Industry	71,7	24,7	1,1	2,5
Arts, entertainment and other service activities	71,5	24	1,7	2,8

Source: Occupational Observatory. Public Employment Service.

The usefulness of training is seen by the workers, mainly, as positive (43.6% consider it quite or very useful). But there is a significant percentage (28.5% in the whole sector and 39.2% in the industry) who consider that the training has little or very little utility.

Table 2.2.27: Usefulness of the training for the position held

Usefulness of the training for the position held (%)					
Activities	Very Little	A Little	Medium	Quite Useful	Very Useful
Total Economic activities	16,3	7	2,9	27,9	26,1
Total Tourism sector	20,6	7,9	28	24,5	19,1
Shipping and Storage	17,9	6,4	33,2	28,7	13,8
Hotel Industry	25,6	8,6	28,5	20,4	16,8
Arts, entertainment and other service activities	7,6	6,6	23,3	33,8	28,7

Source: Occupational Observatory. Public Employment Service.

The assessment of training utility between 2006 and 2010 has followed an erratic path, with discreet figures around 5-6 points on a scale of 0 to 10

Table 2.2.15: Evolution of assessment of utility of training (2006-2010)

Evolution of assessment of utility of training (2006-2010)		
Years	**Assessment**	**% Annual Variation**
2010	6	11,10%
2009	5,4	12,50%
2008	4,8	-7,70%
2007	5,2	2,00%
2006	5,1	-

Source: Occupational Observatory. Public Employment Service.

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2.2.5 Synthesis and Conclusions

1. The tourism sector is one of the most important sectors of the economy of Spain, accounting for 10.9% of GDP and 11.9% of employment.
2. According to data from the Annual Survey of Services, in 2013 there were 431,895 businesses related to the tourism industry, which accounted for 33.70% of all enterprises.
3. The employment related to the tourism industry has a clear seasonal trend, whose activity peaks in July and August and reduces in December. This has the following implications:
   - Job seekers do not take it as an alternative to long-term employment.
   - Because of the high staff turnover, the companies are not committed with the workers training.
   - There is a high percentage of people seeking their first jobs in this sector. 21.99% of the total employees of the sector is between 16 and 29 years old. This rate is 8.34 points higher than in the total employed population (13.65%).
   - There is a lower percentage of workers with higher education, only 27.85% have higher education. If we look at the total employed population, this figure rises to 41.52%.
   - 8.10% of the working population of the tourism industry has a temporary contract, compared with 26.15% at the general level.
   - One in four employees is working part-time, representing a 26.07% of employees in the sector; for the total of activities at national level the percentage is 16.32%.
   - More than 40% of employees with temporary contracts are under 30 years old. The 42.27% of employees with temporary contracts are between 16 and 29 years old. For the total of activities at national level the percentage is 32.56%.
4. In the Balearic Islands and the Canary Islands more than 28% of employment is directly related to tourism.
5. Almost a fifth of the population who works in tourism sector is foreigner (18.69% versus 10.74% at the general level).
6. An increasing trend in the number of foreign tourists visiting Spain is observed.
7. 55% of tourists arriving to Spain are from UK, France and Germany.
8. Between 2009 and 2014, the total expenditure of foreign tourists entering Spain rose by 15.074 million euros, 31.43%
9. Between 2008 and 2015, the average spending per person of foreign tourists has risen, from 906 € to 990 €, which represents an increase of 9.25%.

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10. The current training related to occupations in tourism sector is shown below:

University Education	University Degree
	University master and PhD
	University extension courses
Vocational Training	Initial vocational training program
	Intermediate educational cycle
	Upper-level training cycle
Vocational Education for Employment	Training for Workers and Unemployed People
	Training for Workers
Other Training activities	Training not included above
Source: Study of training needs of the tourism sector developed by the Council of Labor and Social Issues and Economy of Catalunya	

11. The tourism industry believes that experience is more important than training. However, in the recruitment processes training is generally considered quite important.
12. The occupations that require a high level of training are in mediation and tourist escorting.
13. The occupations of tourist escorting and mediation have the lowest satisfaction rate of educational offer.
14. 43.6% of workers consider the training received quite or very useful. On the other hand, 28.5% of workers believe that training has little or very little usefulness for the development of their professional activity.
15. The assessment of training utility between 2006 and 2010 followed an erratic path, with discreet figure.

Bibliography and Sitography

Tourism Satellite Account in Spain (CSTE), developed by the National Statistical Institute (www.ine.es)

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Ministry of Employment and Social Security: http://www.empleo.gob.es

Public Employment Service: https://www.sepe.es/

Occupational Observatory. Public Employment Service: https://www.sepe.es/contenidos/que_es_el_sepe/observatorio/observatorio.html

Council of Labor and Economic Social de Catalunya: http://ctesc.gencat.cat

2.3 Focus on Portugal

2.3.1 The tourism sector in Portugal

Portugal is integrated in the world's major touristic region – Europe, which represents more than 50% of international arrivals and 43% of tourism incomes. Within this international framework, Portugal figures in the 20th position of 140 countries in the competitiveness global ranking, accordingly the Travel and Tourism Competitiveness Index (2013) elaborated by the World Economic Forum. Having in consideration the major indicators analysed (Travel and Tourism competitiveness; regulatory framework; business environment and infrastructures; and, human, natural and cultural resources), Portugal is positioned in the 3rd place when compared to its main competitors (Spain, France, Italy, Greece, Croatia, Turkey, Morocco, and Egypt). In addition, the country represents 2,5% of Europe's total international tourism incomes, having increased 2,8% in foreign tourists between 2007 and 2013 (more 0,6% than the Mediterranean region and more 0,3% than Europe region).

2.3.1.1 .Economic impact of tourism in Portugal

Tourism is one of the most important economic activities in Portugal. Besides the weight of its impacts on national Gross Domestic Product and its role in job creation, investment and income, tourism is also recognised as a structural sector to develop other economic sectors and activities.

Figure 1 – Tourism in GDP

Year	%
2000	2,6
2001	2,8
2002	2,7
2003	2,5
2004	2,6
2005	2,4
2006	2,4
2007	2,6
2008	2,5
2009	2,4
2010	2,6
2011	2,9
2012	3,4
2013	3,6
2014	4,1

Source: PORDATA (2014)

As Figure 1 shows, from the years 2000 to 2014 the economic performance of tourism sector in Portugal increased 1,5% representing in 2014 a weight of 4,1% of GDP and 6% of country total

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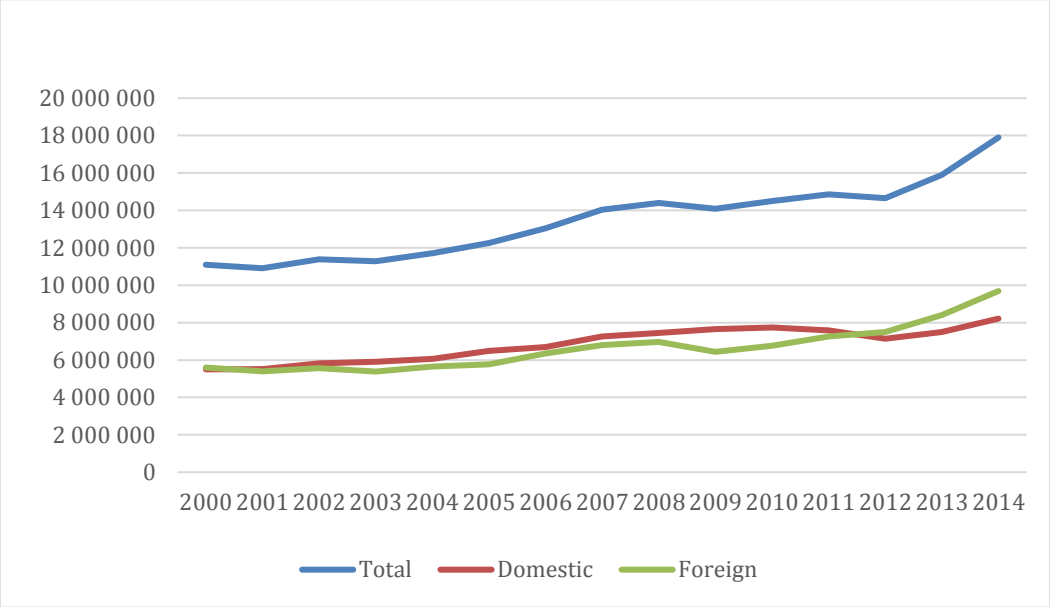
exportation. This economic performance is a direct consequence of the growth of entries of tourists in the country (Figure 2). Through the analysis of the evolution of tourists' entries, it is possible to state that through time Portugal has a positive evolution in tourism growth.

Figure 2 – Entries of Tourists in Portugal (Collective Accommodation)



Source: INE (2015)

Tourism sector also plays an important role in job creation, being one of the main employer sector. Despite its seasonal performance and consequent influence in the precariousness of labor, as Figure 3 shows the number of persons employed in tourism establishments evolved. In 2013, the number of persons employed in hotels establishments was 44.753. In 2009 there was a slight contraction in employment, rising to 46,154 the number of employees, while in 2010 this figure was 47,452 people (INE, 2014). Thus, it can be said that in 2009 there was a contraction of around 3.6% and in 2010 and growth of 2.8%, respectively employability in hotels.

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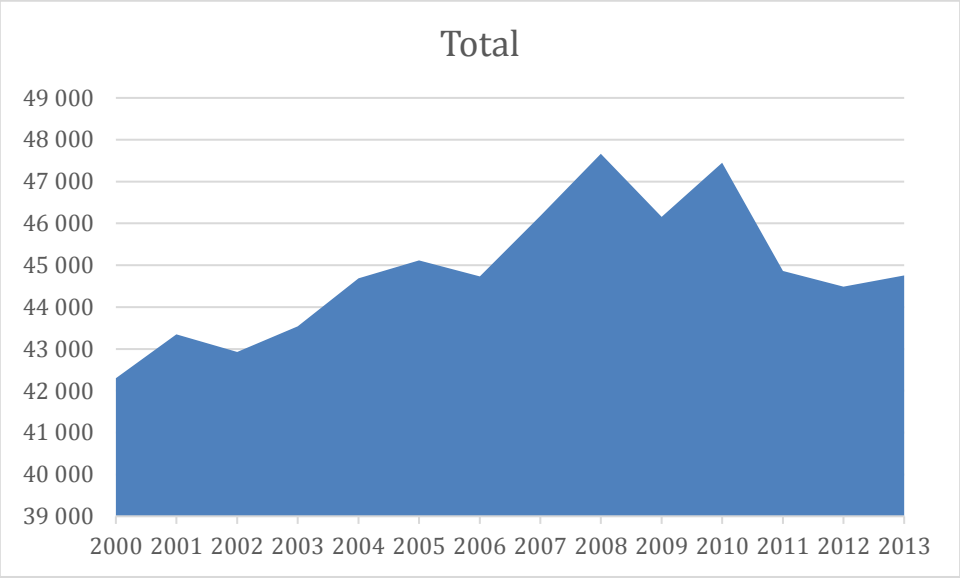
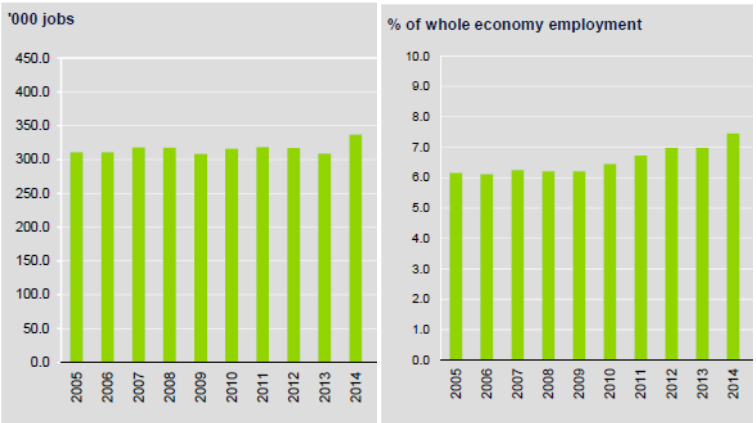
Figure 3 – Number of employees in hotel establishments (Total)



Source: INE (2014)

However, for WTTC (2015), the tourism sector in Portugal in 2014 generated more than 330,000 jobs representing 7.4% of total employment. The organization justifies this number because it includes, in addition to accommodation establishments, travel agents, airlines and other passenger transportation services (excluding commuter services) and the activities of restaurants and leisure industries directly supported by tourists. **Figure 4** represents the evolution of employment, the absolute level and a percentage of the whole economy.

Figure 4 – Tourism contribution to Employability (2005-2014)



Source: WTTC, *Travel & Tourism Economic Impact* (2015)

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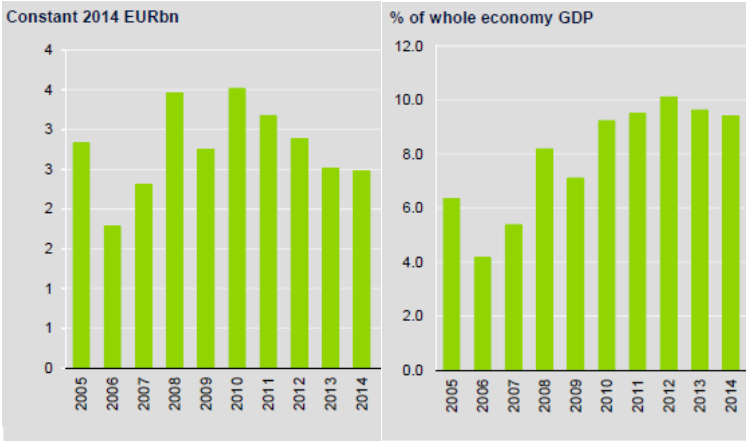
For WTTC, it is expected that by 2025 travel and tourism will support the creation of 420.000 new jobs, increasing this indicator in 1,8% in the next ten years. Already at the level of investment in the country in 2014 (Figure 5), the value of attracted capital investment achieved almost 3 billion euros and it is expected this value to increase 0,5% per year until 2025.

Figure 5 - Capital investment in travel and tourism (2005-2014)



Source: WTTC, *Travel & Tourism Economic Impact* (2015)

2.3.1.2. Characteristics of Tourism Offer

Portugal mainly focused tourism in one product since the 1960's, which is well known as the traditional product "Sun and Sea". The need to answer to high dependence of Sun and Sea product and to become more competitive in relation to other markets as Spain, France, Turkey and Greece, Portugal as been settled a Nacional Strategic Plan for Tourism to foster the emergence of new touristic products and services. Thus, this National Plan was divided in 5 main strategical axes:

1. "Territory, Destinations and Products, where the focus is on the development of new products and new touristic territories (focus on regions);
2. Brands and Markets, developing the brand of Portugal as a touristic country as well as the promotion of this brand in new markets;
3. Human Resources Qualification, which main goal was the qualification of services, human resources and, as consequence, the destinations;
4. Distribution and commercialisation, by enhancing the presence of the country in dissemination channels as online platforms;
5. Innovation and Knowledge, improving the knowledge transfer to tourism sector.

This Plan implementation made possible the development of new products, which the country sees nowadays as good opportunities to grow: Golf; Touring; City Breaks; Business Tourism; Nature Tourism; Nautical Tourism; Residential Tourism; Health and well being. These products

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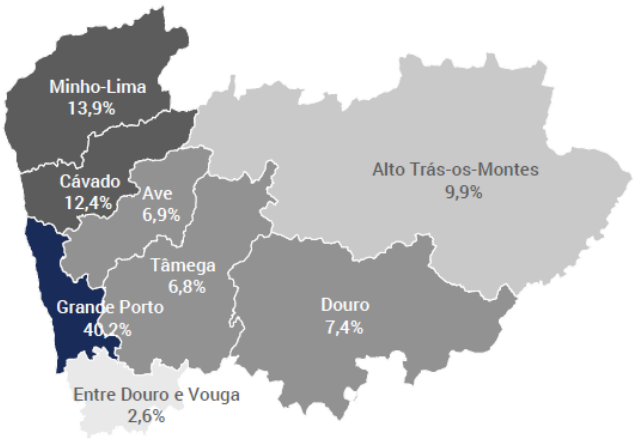
development are aligned with the Portuguese regions' particularities. In this sense, it is possible to divide the tourism offer by regions as follows (Tourism of Portugal, 2015).

North Region



The North region represents 14,9% of the tourism accommodation offer in Portugal, being 66,5% concentrated in the costline. The NUTS III – Grande Porto – which include the city of Porto is responsible for 40,2% of the North region tourism offer. The main tourism products can be divided in 4 areas: Cultural and historical heritage, business infrastructures and architecture (Porto), Enotourism (Port Wine cellars, Douro region as a certified winery region, and traditions associated), World Heritage (Porto Historical Center, Côa Archaeological Park and Guimarães Historical center as examples of World Heritage recognitions) and Nature Tourism associated with health and well being activities.

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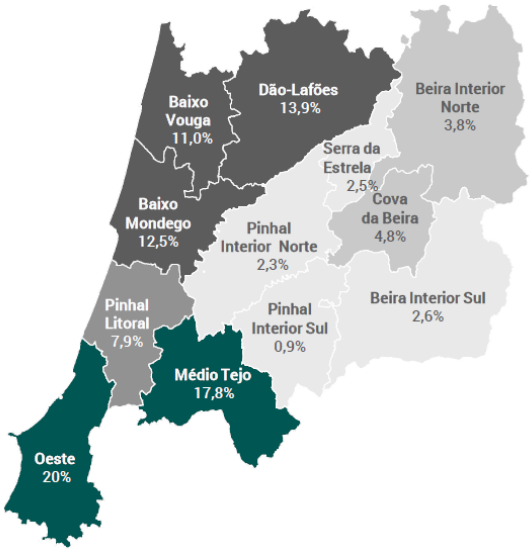
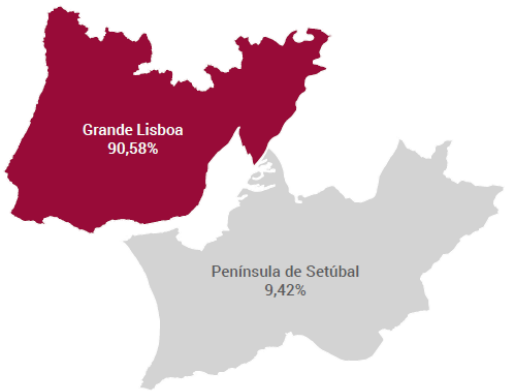
Centre Region

The Centre region of Portugal represents 14,2% of the tourism accommodation offer in Portugal, being 51,4% concentrated in the costline. The main tourism products are offered in Aveiro (Cultural and architectural heritage), Coimbra (World Heritage), Viseu (Health and well being, Nature tourism), Serra da Estrela (Enotourism and gastronomy, Natural heritage), Castelo Branco (Geological heritage), Fátima (Natural and religious heritage) and the West (mainly Golf activities, Nature Tourism).



Lisbon

The Lisbon region concentrates 18,4% of the tourism accommodation offer in Portugal. Regarding the tourism products, this region represents a huge diversity of tourism activities: Golf; Touring; City Breaks; Business Tourism; Nature Tourism; Nautical Tourism (Lisbon, Cascais, Sintra, Almada, Tejo River nearby cities and Arrábida Natural Park). In 2013, this region represented 10 millions of nights spent and the trend is to growth significantly in next years.



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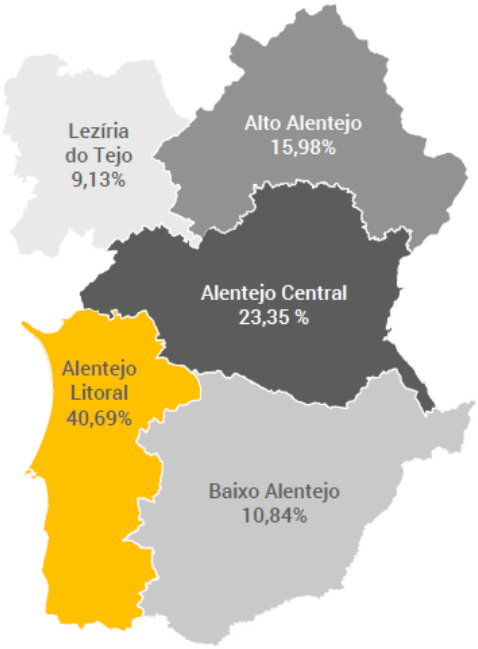
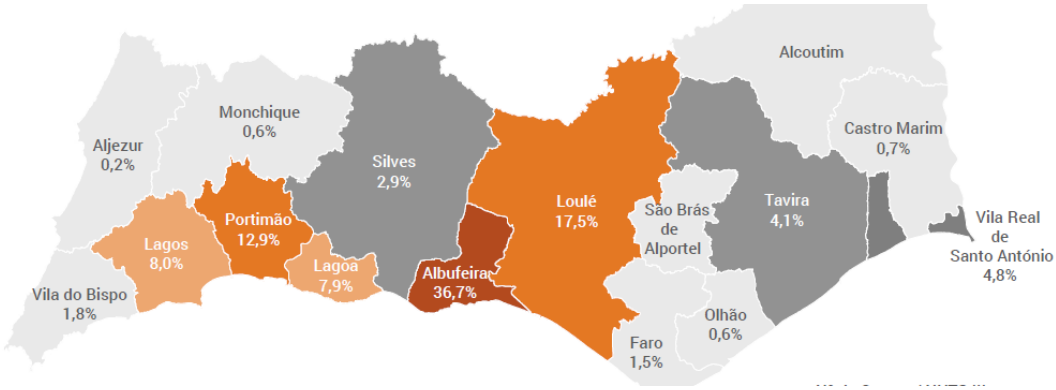
Alentejo Region

Alentejo Region represents 5,1% of the tourism accommodation offer in Portugal, being 40,7% concentrated in its coastline. The main tourim products are related with heritage: historical (including UNESCO heritage), religious, ethnographic and natural.



Algarve Region

Algarve region is the most touristic region of Portugal. In terms of tourism accommodation, it represents 34,8% of the national offer. The cities of Albufeira, Loulé and Portimão concentrate 67,1% of the regions' total tourism accommodation.



The main tourism products offered in Algarve region are related with Sun and Sea product. Because of its seasonality character, tourism strategies have been settled to diversify the offer and foster the growth of nature tourism, health and well being activities, and gastronomy and

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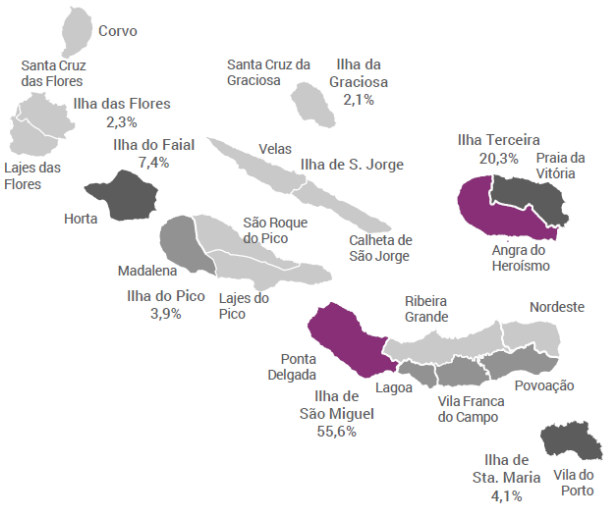
enotourism activities. Besides this new trends, Algarve region is one of the most important Europe destinations to Sun and Sea tourism, as well as for Golf.

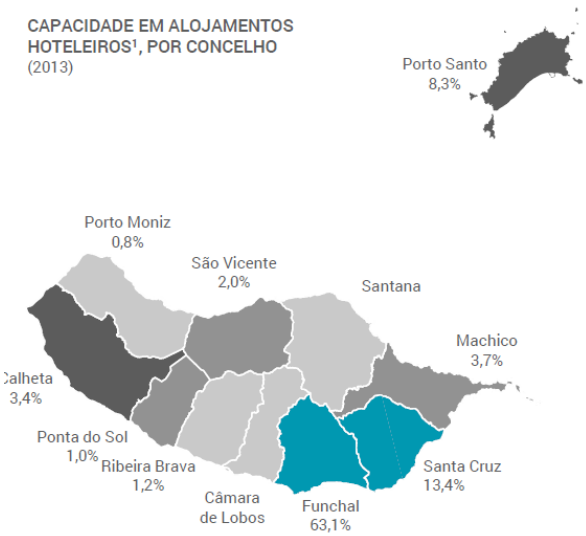
Azores

Azores concentrate 3% of the tourism accommodation and its main products are associated with the huge natural heritage, being a region growing in nature tourism and health and well being activities. Besides this natural identity, Azores counts also with natural and historical heritage classified as world heritage by UNESCO.



Madeira

The Madeira Region aggregates 9,6% of the Portuguese capacity for tourism accommodation, being the islands of Funchal and Santa Cruz the most representatives in this indicator. The tourism offer is concentrated in three main products: Nature tourism (associated with biodiversity, vulcanic and mountain landscapes), Cultural tourism (including gastronomy and enotourism), and nautical tourism.



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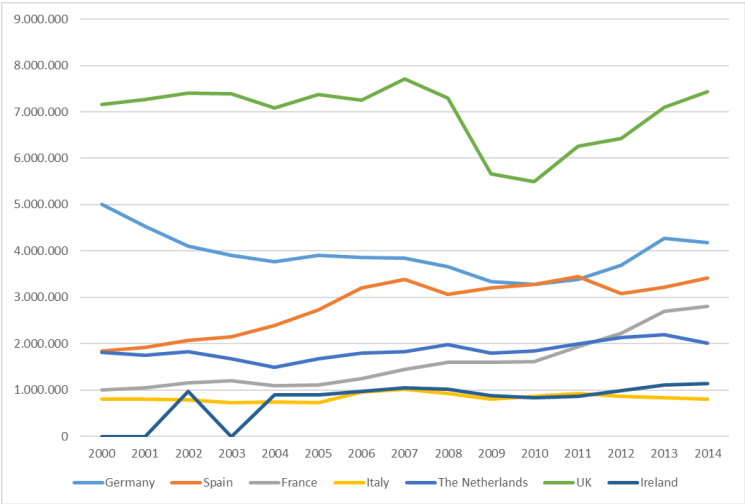
2.3.1.3. Characteristics of Tourism Demand

The most representative countries of tourists visiting Portugal are Germany, Spain, France, the Netherlands and the United Kingdom (Figure 7). In 2014, UK tourists occupy the first place in the ranking. Following are German tourists, Spanish, Dutch and French. If still analyzing the average stay of major emitting countries, we come to the conclusion that the UK is the country whose tourists stay more days in hotels, followed by the Netherlands and Germany. The French and Spanish tourists are those with lower average stay. (INE, 2015). These five countries represent 4/5 of tourists' entries, which makes Portugal very dependent on a small number of markets.

Figure 7 – Nights spent by country



Source: INE, 2015

As the data shows, Portugal had an an incresement in night spending, hosts and revenues with particular intensity from 2010 (in 2013, tourism revenues represented a higher value than goods exportation - 4% to 3,5%), representing a profit of 6.2 billion € in the tourism balance and around 41,6 million nights spent – export activity representing 13,5% of Portuguese exportation of goods and services.

Algarve, Lisbon and Madeira regions represents 74% of the foreign night spending in Portugal. As the Figure 8 shows, the regional performance in tourism accommodation capacity and night spending is different accordingly with the state of the consolidation of the tourism products, with a direct consequence in the tourism demand.

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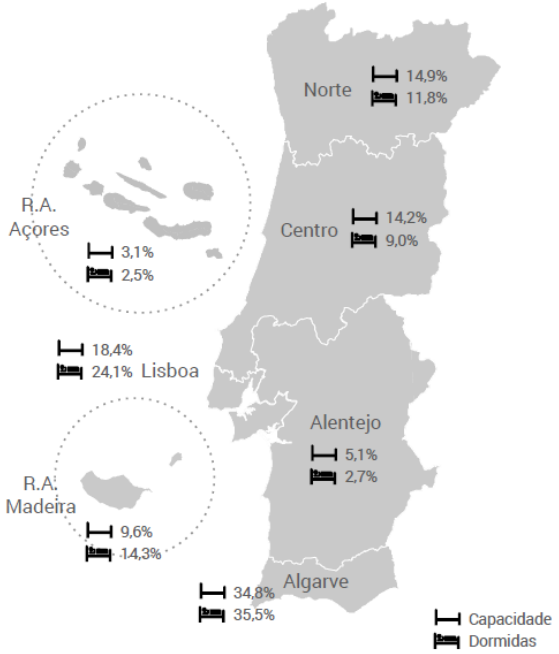
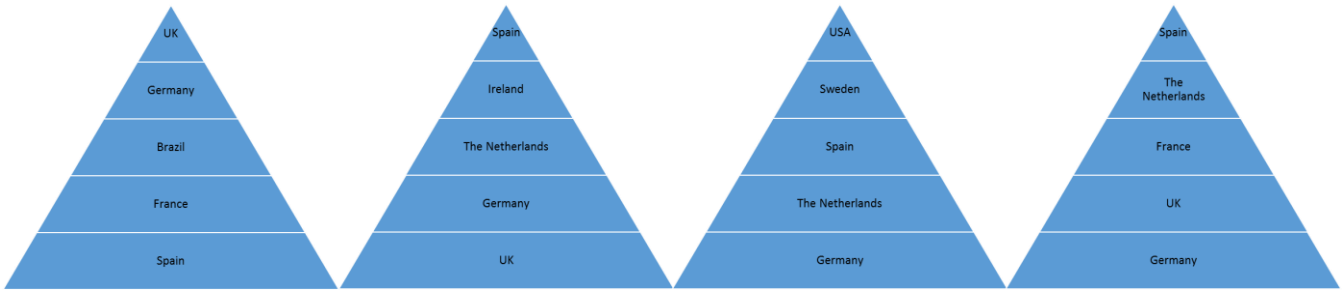
Figure 8 – Accommodation Capacity vs. Nights Spent



Source: Turismo de Portugal, Action Plan for Tourism 2020 (2015)

The main markets per region are distributed as follows:



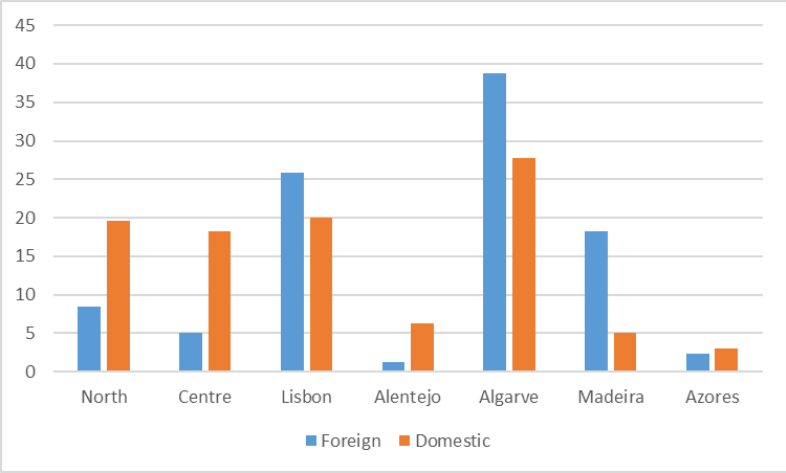
North
Madeira
Centre
Lisbon
Alentejo

Algarve

Azores

Besides the importance of the foreign tourism, it is important to stress that domestic tourism represents a considerable weigh in the Portuguese tourism sector performance. In fact, in the regions not so well consolidated as tourism destination at the internacional panorama, the domestic tourism is of major importance for the development of the tourism sector (Figure 9).

Figure 9 – Foreign vs. Domestic Tourism



Source: INE (2015)

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CHAPTER 3 - Training and skills need analysis report

3.1 The methodology

The analysis was conducted in each partner country to identify the professional skills needs of a destination manager as well as the existing weaknesses. The methodology used consisted in the following actions:

Online survey (ANNEX I)

The questionnaire was designed with closed answers and 9 questions divided in 2 parts: A) context analysis and B) destination manager profile.

The first part focused on questions aimed at evaluating the territorial context, in particular what are the main strengths and weaknesses of the territory, which the priorities for local tourism development, as last who are the actors that play an effective role in promoting local tourism.

The second part was dedicated to deepen the Destination Manager profile, more precisely to investigate, according to the views of the interviewees, the knowledge, skills and competences that a DM should possess, as well as the organizations with which it should operate. Lastly under this section an open question was formulated in order to verify, in accordance with the opinion of the interviewees the actual usefulness of this professional profile.

The interviewees were local actors (accommodation, catering, trade, cultural institutions, convention/exhibition etc); tourist intermediation (Tour Operators, Tour Organizer); organizations/institutions which are involved in promoting local tourism (public administrations, convention bureaus, tourist offices and tourism promotion); local and regional organizations and institutions dealing with training in tourism. In addition, the survey was made at European level to the same actors.

The online questionnaire administered (http://goo.gl/forms/BVneBR1DP7) in the period between December 2015 and May 2016 was preceded by an accompanying letter explaining the purpose and how to fill that has been sent by mail.

In depth survey to stakeholders (ANNEX II)

Realized through in depth interviews with stakeholders, such as: representatives of regional public authorities, national and regional representatives of tourism trade-unions and associations, experts of tourism training (responsible of degree programs, training institutions and directors of master), experts in the definition / construction of professional profiles at the national, ministerial and regional levels.

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Focus Group to report and validate the results

Focus groups with stakeholders to validate the results of the survey: experts of the tourism sector discussed the results of the survey, with particular reference to the skills and competencies that the destination manager profile should possess.

3.2. Online survey: results

The online survey has been sent through the distribution list of all partners at national and international level aim to gather all the possible information from several tourism-related actors, to define labor market needs.

The target audience has been:

- Tour Operators
- Tour Operators associations
- Educational and Training Institutions
- Public authorities (local, national and international)
- Catering Industry
- Accommodation Industry
- Travel agencies
- Tourism associations

We have received 407 responses:

- Italy: 128
- Spain: 136
- Portugal: 96
- EU: 47

3.2.1 Online survey analysis in ITALY

The needs analysis for a Destination Manager profile has been carried out through a semi-structured questionnaire consisting of 8 closed questions and one open question. The questionnaire was administered online to a selected panel of public and private belonging to the tourism sector and training (accommodation, food and beverage, trade and crafts, cultural organization, local government agency, training agency, travel agency, local information and promotion entity, congress and fairs organization).

Table 3.2.1 – The sample surveyed stakeholders

The sample surveyed stakeholders	
Accommodation	52,2%
Food and Beverage	9,2%
Trade and crafts	0,4%
Cultural organization	6,1%
Local government agency	2,8%
Training agency	1,7%
Tour Operator, Travel Agency, Tour Organizer	0,9%
Local information and promotion entity	2,8%
Congress and fairs organization	0,4%
Other[14]	23,4%
Total	**100%**

In Italy the questionnaires collected were 128 equal to 28% of the total sample distributed according to the categories represented in Table 3.2.2.

Table 3.2.2 - Categories of those who filled out the questionnaire

Type of activity you are involved in:	
Accommodation	32,8%
Food and Beverage	0,0%
Trade and crafts	0,8%
Cultural organization	22,7%
Local government agency	18,0%
Training agency	6,3%
Tour Operator, Travel Agency, Tour Organizer	1,6%
Local information and promotion entity	5,5%
Congress and fairs organization	0,8%
Other	11,7%
Total	**100%**

In the following part of the chapter we describe the online survey results.

[14] The "other" category included the actors whose sector was unknown, but only their territorial location. Specifically it comes to groups of actors working in several Tuscan destinations, specifically Magliano in Toscana, Manciano, Poppi and Fiesole, whose local governments have joined the "*Toscana turistica sostenibile & competitiva*" project by starting a phase of testing for establishment of a regional network of tourist destinations which have applied a model based on the principles and strategies shared by NECSTouR network.

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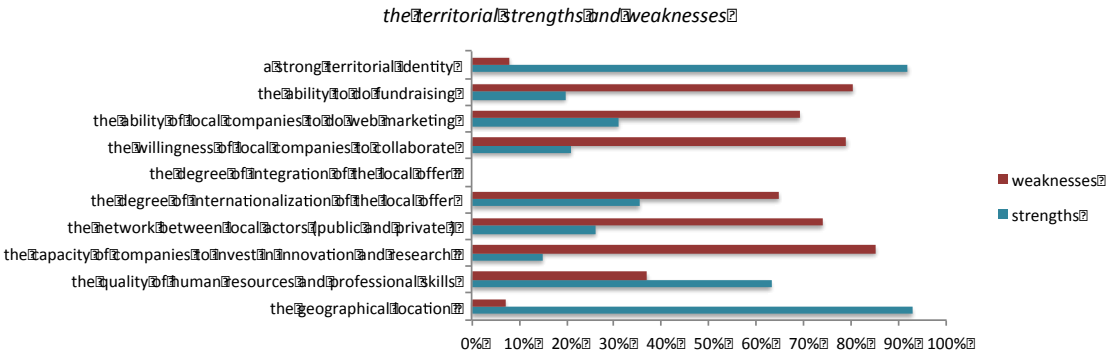
Part A - Context analysis

Question n.1: Which are the main strengths and weaknesses in the area where you operate?

1) Which are the main strengths and weaknesses in the area where you operate?	strengths	weaknesses
the geographical location	116	9
the quality of human resources and professional skills	75	44
the capacity of companies to invest in innovation and research	17	96
the network between local actors (public and private)	32	90
the degree of internationalization of the local offer	40	73
the degree of integration of the local offer		
the willingness of local companies to collaborate	24	90
the ability of local companies to do web marketing	36	80
the ability to do fundraising	23	93
a strong territorial identity	114	10

In the opinion of the interviewees the main territorial strengths are the geographical localization (93%), a strong territorial identity (92%) and the quality of human resources and professional skills (63%). While the main weakness are the capacity of companies to invest in innovation and research (85%), the network between local actors (public and private) (74%), the degree of internationalization of the local offer (65%), the willingness of local companies to collaborate (79%) and the ability of local companies to do web marketing (69%) and to do fundraising (80%).

Graph 3.2.1: The territorial strengths and weaknesses



Question n.2: Which of the following items do you consider a priority for the tourism development of your area?

2) Which of the following items do you consider a priority for the tourism development of your area? (Select up to three answers)		Total
The companies' development	15	128
The association and integration among companies	96	128
The local system's ability to operate on the international market	100	128
The technological innovation	55	128
The creation of new professional profiles	43	128

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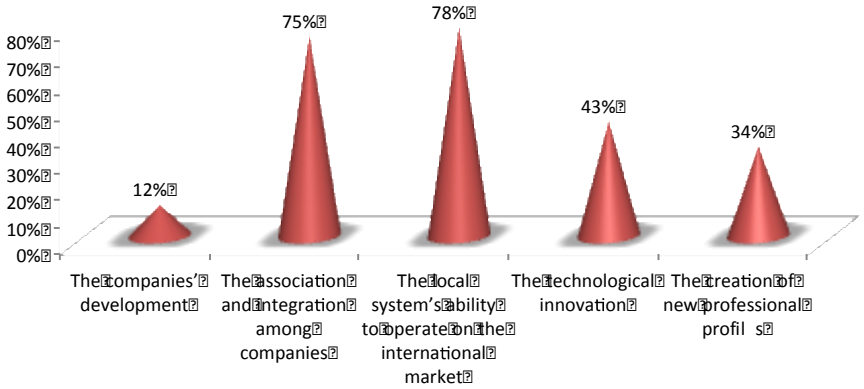
In the opinion of the interviewees the ability of the local system to operate on the international market (78%) and the association and integration among companies (75%) are seen as a priority for tourism development, followed by the tecnological innovation (43%) and the creation of new profiles (34%).

Graph 3.2.2: The priority for tourism development in the opinion of the Italian interviewees



Question n.3: Among the following actors, who is now playing an effective role in local tourism promotion?

3) Among the following actors, who is now playing an effective role in local tourism promotion?	Not present	Present	Total
Local authorities	4	124	128
Chambers of Commerce	16	112	128
Local touristic partnerships	18	110	128
Local tourist information officers	4	124	128
Professional congress and visitors organizers	22	106	128
Network of local businesses	22	106	128
The incoming services operator	34	94	128
The tour package & holiday experience integrator	17	111	128

Analyzing the table above are deduced some answers that indicate the presence and "non-presence" in the territory of local tourism promotion organizations. The actors who have collected the highest number of positive responses were in the order "Local authorities" and "Local tourist information officer" (both with 96.9%) followed by "Chambers of Commerce," "The package tours & holiday experience integrators "and" local touristic partnerships ".

In cases of an affirmative answer the respondents were asked to provide an assessment on a scale of 1 to 5 (1 minimum - 5 maximum) on the role / importance played by each actor in promoting tourism in the territory. All organizations receive an average rating of between 2.1 and 2.6 points, therefore, a judgment below the sufficiency. Only the Local authorities (2,6) and Professional cogress and visitors organizers (2,5) get a “just enough” score, while the role of the remaining organizations is evaluated with a lower impact.

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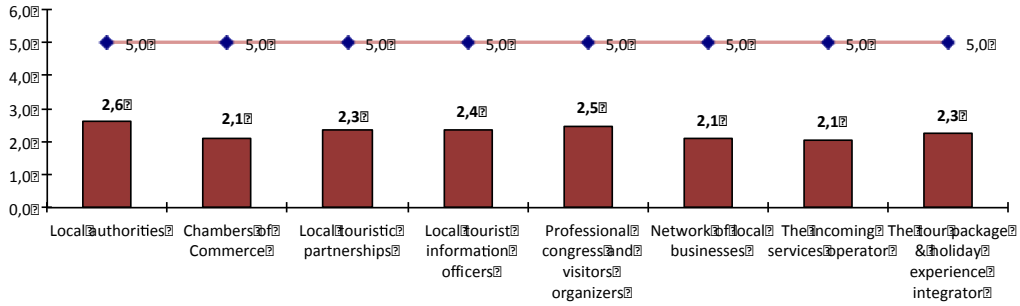
Graph 3.2.3: The Italian actors playing a role in local tourism promotion



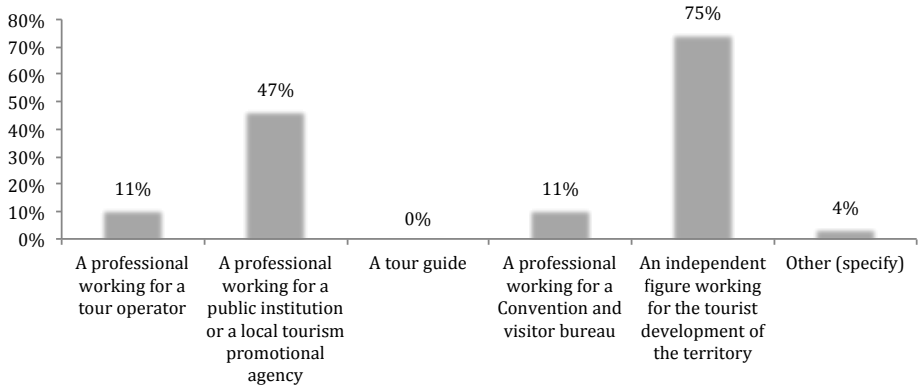
Part B - Destination manager profile

Question n. 4: In your opinion who is the Destination Manager?

4) In your opinion who is the Destination Manager (maximum 3 choices)?		Total
A professional working for a tour operator	14	128
A professional working for a public institution or a local tourism promotional agency	60	128
A tour guide	0	128
A professional working for a Convention and visitor bureau	14	128
An independent figure working for the tourist development of the territory	96	128
Other (specify)	5	128

In the opinion of the respondents the Destination Manager should be considered as an independent figure (75%), other as a professional working for a public institution or a local tourism promotional agency (47%). Nobody believes that the DM is a tour guide, and a minor part of interviewed believes that the DM is a professional working for a tour operator, or for a convention and visitors bureau.

Graph 3.2.4: The opinion of the interviewees about the Destination Manager profile



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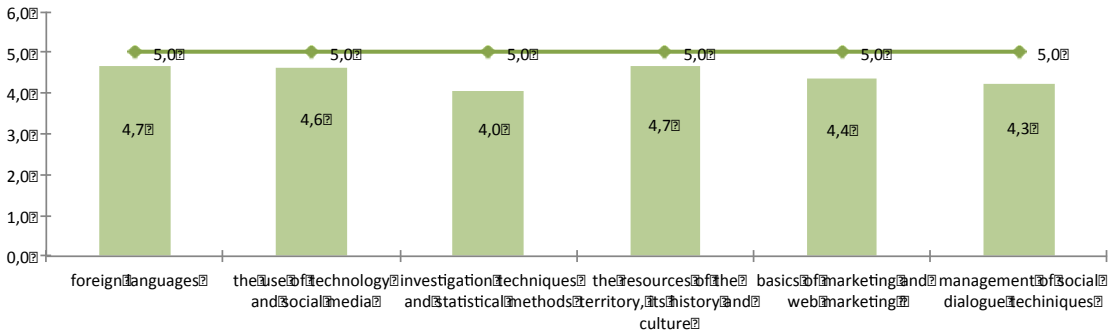
Question n.5: In your opinion, what should a Destination Manager know?

In the opinion of the interviewees the Destination Manager should know foreing languages, use of technology and social media, investigation techniques and statistical methods, the resources the territory, its history and culture, basics of marketing and web marketing and management of social dialogue techniques. But the most important knowledge that the DM should have are attributed to foreing languages (4,7 points of 5), to use of technology and social media (4,6 points of 5) and to the knowledge of the territory and his resources, history and culture (4,7 points of 5).

Graph 3.2.5: The opinion of the interviewees on the Destination Manager Knowledge



Question n.6: In your opinion, what should a Destination Manager do?

6) In your opinion , what should a Destination Manager do ? (multiple choice is allowed)		
A) ANALYZYING		**Total**
the peculiarity of the area to develop coherent proposals	110	128
the characteristics of tourist flows	38	128
statistical, economic or financial reporting	34	128
b) COORDINATING		
the offer of tourist products or services	84	128
the actors and the institutions operating on the area	101	128
the creation of networks	46	128
C) PROMOTING		
new tourist itineraries and routes	35	128
integrated tourist offers	88	128
the emotional aspects of places	60	128
the area through social media	53	128
the area through fundraising for local development	36	128
Other (specify)	3	128

In the opinion of the interviewees the Destination Manager should analyze the peculiarity of the area to develop coherent proposals, should coordinate the actors and the institutions operating on the area, and should promote an integrated tourist offers and the emotional aspects of places.

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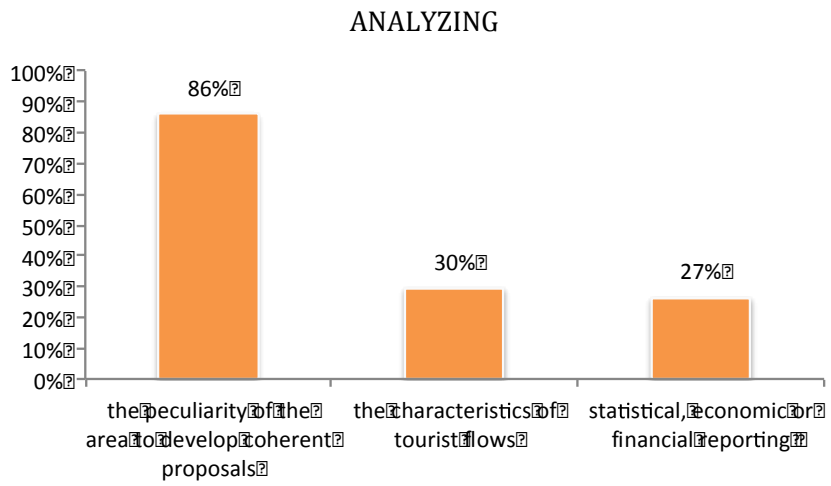
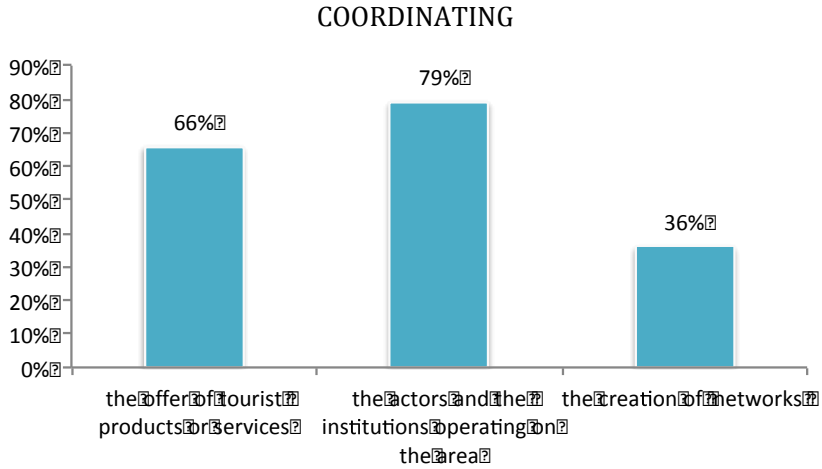
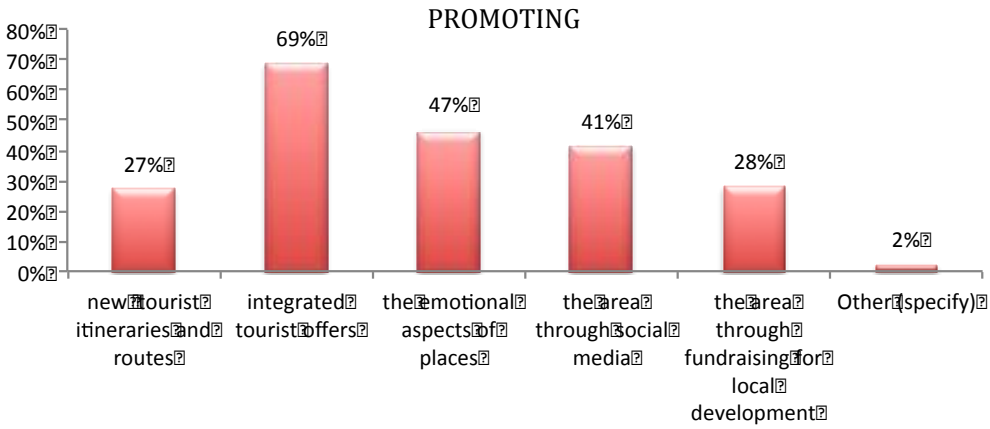
The following graphs show the percentage weight given by interviewees to each answer:

Graph 3.2.6: The opinion of the interviewees on the Destination Manager Competences







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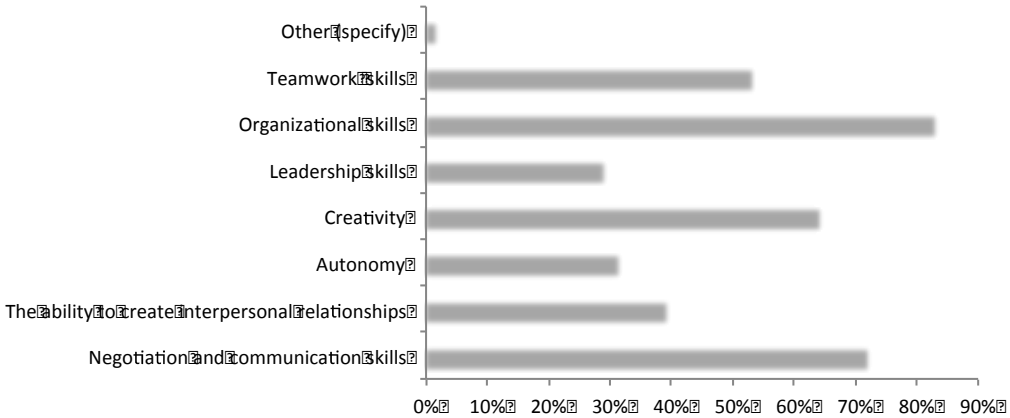
Question n.7: In your opinion, which skills should a Destination manager possess?

7) In your opinion, which skills should a Destination manager possess?		Total
Negotiation and communication skills	92	128
The ability to create interpersonal relationships	50	128
Autonomy	40	128
Creativity	82	128
Leadership skills	37	128
Organizational skills	106	128
Teamwork skills	68	128
Other (specify)	2	128

In the opinion of the interviewees the Destination Manager should have organizational skills (83%), negotiation and communication skills (72%), creative skills (64%), and teamwork skills (53%).

Graph 3.2.7: The opinion of the interviewees on the Destination Manager skills



Question n.8: Which are the organizations where a Destination manager could operate or collaborate?

8) Which are the organizations where a Destination manager could operate or collaborate?		Total
Tour operators	67	128
local authorities	95	128
local firm networks	97	128
tourist consortiums / associations	94	128
with local SMEs	45	128
Other (specify)	6	128

In the opinion of the interviewed the Destination Manager should operate or collaborate with local firm networks, local authorities and tourist consortiums or tourist associations.

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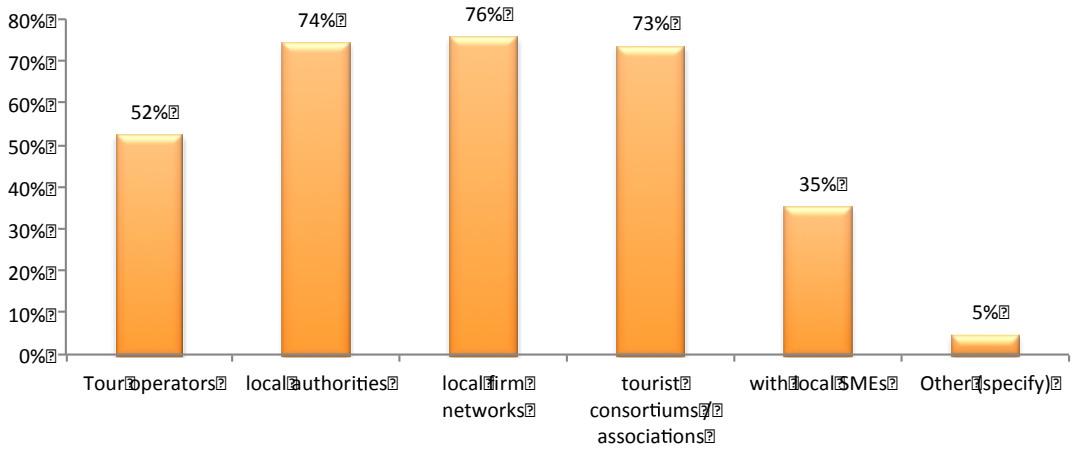
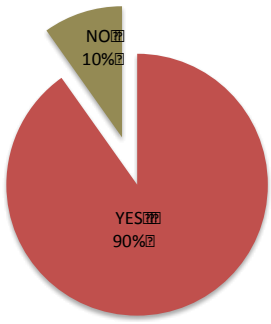
Graph 3.2.8: The main organization where a DM could operate or collaborate



Question n.9: In your opinion, is it useful to create a Destination Manager profile?

In the opinion of 90% of the interviewed the Destination Manager is very useful.

Graph 3.2.9: The opinion of the interviewed about the useful to create a DM



<u>Following describes the motivations of the interviewees:</u>

The main opinions of those who believe <u>not useful</u> to create a Destination Manager profile:

"... the Destination Manager's not a necessary figure for the areas highly tourist as are most Italian destinations".
" ... I do not believe in the idea of a tourist destination ".
" ... It could make better use of the skills and professionalism of the staff of the Public Administration ".
"... both at national and local level there is little coordination in tourism promotion activities of the territory ".
"... the Destination Manager functions are already carried out by private entrepreneurs who invest in tourism. Moreover, the figure of DM could cause damage to the specificity of places promoting the standardization of of the tourist offer destinations".

The main opinions of those who believe useful to create a Destination Manager profile:

... to enhance and promote the area by optimizing the available resources ...
"... It is an innovative figure able to exploit and utilize the resources and opportunities of a destination, meeting the needs of tourists and local operators". "... It promotes the area also in foreign markets and enhances the lesser-known destinations ". "... The DM must coordinate and aggregate supply, defining strategies to communicate the uniqueness of the tourism product and creating new proposals that take account of social change and the changing needs of travelers "... The DM is a figure useful to optimize and coordinate the use of human and financial resources of the place, in order to enhance the destination

... to differentiate their offerings with integrated proposals and quality ...
"... It encourages the development of new types of tourism, integrating the various local resources (nature, sports, culture, gastronomy, spas) and creating alternative routes ". "... encourages the seasonal adjustment and the decentralization of tourist flows ". "... It combines the need to develop the tourism offer and respect for the environment, focusing on the quality of complementary proposals to traditional agricultural activities ". "... his work would serve to qualify more and better land supply" "... It should also improve the quality of tourist flows "

... to coordinate, to systematise local actors (public and private) ...
"... It supports cooperation and synergies between local actors and the creation of new cross-sectoral networks to expand and qualify the local tourism offer ". "... The DM must represent an intermediate figure, for coordination between local administrators and private companies: on the one hand must raise the level of professionalism of the entire tourism governance, giving credibility to the institutional political party (tourism boards, ministries and institutions of the world of goods cultural, universities, public information office), the other must give substance to the operational / economic (business)". "... The DM has to manage in a coordinated way and without subservience shared projects, even long-term, on which converge public and private economic resources " "... you need to give life to a professional able to communicate with the entire chain of stakeholders in the tourism sector " "... The DM must be an independent figure from political influence "

... to ensure sustainable development of the area and give an identity to the offer ...
"... promotes a model of sustainable development of tourism, focusing on an integrated supply system, economically attractive and linked to the "culture of travel" rather than to the holiday consumption "

"... It is crucial in terms of destination brand, emotional marketing and especially brand awareness" "... It needs a professional who knows the destination with its excellence and its potential, and that with its skills favors the tourist identity of the territories ". "... It represents a figure required to set up a strategic plan of communication starting from the aggregation and enhancement of local resources (human and cultural). The same museum and eco-museum it would significantly benefit".

... to commercialize the destination ...
"... the figure of DM must be highly specialized in territorial marketing techniques and be highly innovative skills; through coordination with local operators must commercialize the destination".

... with knowledge, skills and abilities ...
"…beyond the statistical summaries should develop new models of use of the territory"
"…in addition to the organizational skills should also have financial / economic expertise to evaluate the sustainability of events"
"... It must be able to identify local resources that will attract tourists from domestic and international markets, in order to respond quickly to the demands of the tourism " "... it would be useful to have a professional with specific skills and a deep knowledge of the area " "... The DM is a figure useful only if it operates on a vast territory (at least the provincial)" "... It must be an integrated figure in the territory who already works in the promotion of the destination and not a "mercenary manager" "... It would be a useful figure for the area but it is unclear who might hire her ".

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3.2.2. Online survey analysis in SPAIN

In Spain the questionnaires collected were 136 equal to 30% of the total sample distributed according to the categories represented in Table 3.2.2.

Table 3.2.2 - Categories of those who filled out the questionnaire

Type of activity you are involved in:	
Accommodation	42%
Food and Beverage	6%
Trade and crafts	2%
Local Administration/Public Administration	6%
Training agency	2%
Tour Operator, Travel Agency, Tour Organizer	26%
Local information and promotion entity	6%
Congress and fairs organization	1%
Other	9%
Total	**100%**

In the following part of the chapter we describe the online survey results.

<u>Part A - Context analysis</u>

Question n.1: Which are the main strengths and weaknesses in the area where you operate?

1) Which are the main strengths and weaknesses in the area where you operate?	**strengths**	**weaknesses**	**tot**
the geographical location	104	16	120
the quality of human resources and professional skills	88	28	116
the capacity of companies to invest in innovation and research	28	84	112
the network between local actors (public and private)	53	49	102
the degree of internationalization of the local offer	53	48	101
the degree of integration of the local offer	63	42	105
the willingness of local companies to collaborate	55	43	98
the ability of local companies to do web marketing	53	50	103
the ability to do fundraising	18	90	108
a strong territorial identity	88	20	108

In the opinion of the interviewees the main territorial strengths are the geographical localization (87%), a strong territorial identity (82%) and the quality of human resources (76%), the degree of integration of the local offer (60%), the willingness of local companies to collaborate (56%),. the degree of internationalization of the local offer (53%), the network between local actors (public and private) (52%) and the ability of local companies to do web marketing (52%) .While the main weakness are the capacity of companies to invest in innovation and research (75%), the ability to do fundraising (83%).

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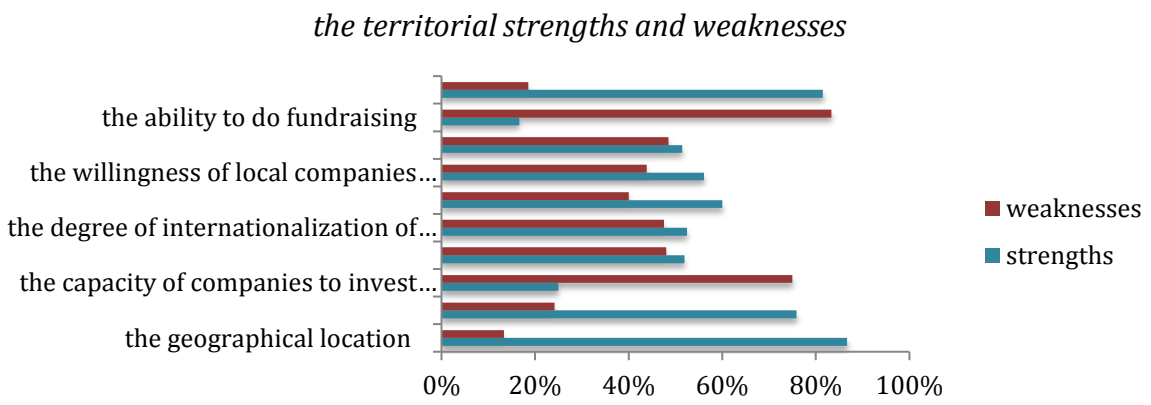
Graph 3.2.1: The territorial strengths and weaknesses

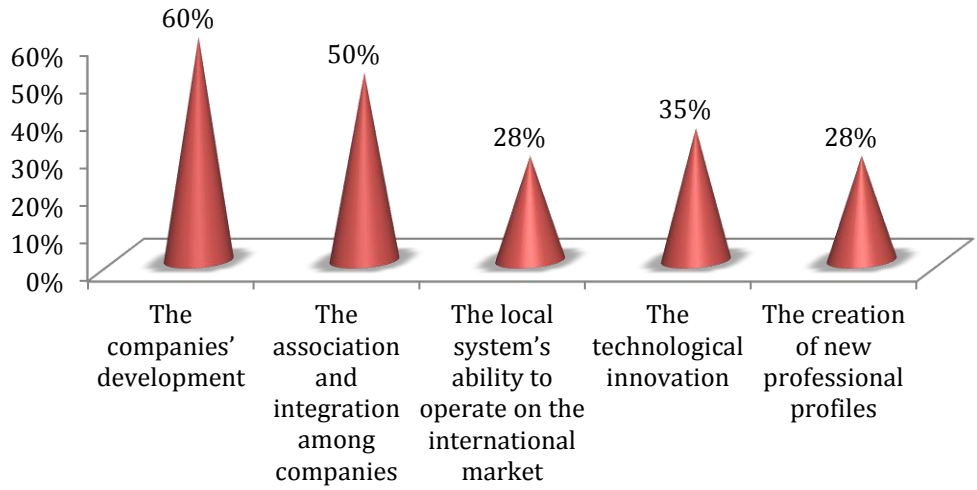


Question n.2: Which of the following items do you consider a priority for the tourism development of your area?

2) Which of the following items do you consider a priority for the tourism development of your area? (Select up to three answers)		**Total**
The companies' development	81	136
The association and integration among companies	68	136
The local system's ability to operate on the international market	38	136
The technological innovation	48	136
The creation of new professional profiles	38	136

In the opinion of the interviewees the companies' development (60%), the association and integration among companies (50%) and the tecnological innovation (35%) are seen as a priority for tourism development, followed by the ability of the local system to operate on the international market (28%)and the creation of new profiles (28%).

Graph 3.2.2: The priority for tourism development in the opinion of the Spanish interviewees



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Question n.3: Among the following actors, who is now playing an effective role in local tourism promotion?

3) Among the following actors, who is now playing an effective role in local tourism promotion?	Not present	Present	Total
Local authorities	11	125	136
Chambers of Commerce	16	120	136
Local touristic partnerships	7	129	136
Local tourist information officers	3	133	136
Professional congress and visitors organizers	7	129	136
Network of local businesses	4	132	136
The incoming services operator	5	131	136
The tour package & holiday experience integrator	10	126	136

Analyzing the table above are deduced some answers that indicate the presence and "non-presence" in the territory of local tourism promotion organizations. The actors who have collected the highest number of positive responses were in the order "Local tourist information officers" (98%) and "Network of local businesses" (97%) followed by "The incoming services operator" (96%) "Local touristic partnerships "and" Professional congress and visitors organizers " (both with 95%).

In cases of an affirmative answer the respondents were asked to provide an assessment on a scale of 1 to 5 (1 minimum - 5 maximum) on the role / importance played by each actor in promoting tourism in the territory. All organizations receive an average rating of between 2.77 and 3.44 points, therefore, a judgment below the sufficiency.

Graph 3.2.3: The Spanish actors playing a role in local tourism promotion

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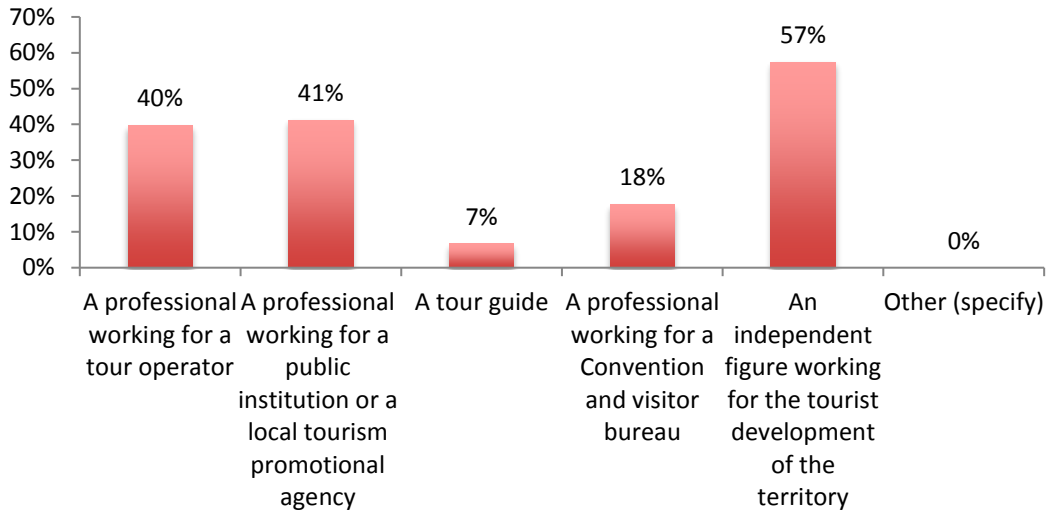
Part B - Destination manager profile

Question n. 4: In your opinion who is the Destination Manager?

4) In your opinion who is the Destination Manager (maximum 3 choices)?		Total
A professional working for a tour operator	54	136
A professional working for a public institution or a local tourism promotional agency	56	136
A tour guide	9	136
A professional working for a Convention and visitor bureau	24	136
An independent figure working for the tourist development of the territory	78	136
Other (specify)	0	136

In the opinion of the respondents the Destination Manager should be considered as an independent figure (57%), other as a professional working for a public institution or a local tourism promotional agency (41%). 7% believes that the DM is a tour guide, a 40% of interviewed believes that the DM is a professional working for a tour operator and 18% that is a professsional for a convention and visitors bureau.

Graph 3.2.4: The opinion of the interviewees about the Destination Manager profile



Question n.5: In your opinion, what should a Destination Manager know?

In the opinion of the interviewees the Destination Manager should know foreing languages, use of technology and social media, investigation techniques and statistical methods, the resources the territory, its history and culture, basics of marketing and web marketing and management of social dialogue techniques. But the most important knowledge that the DM should have are attributed to knowledge of the territory, its history and culture (4,6 points of 5), foreing languages,

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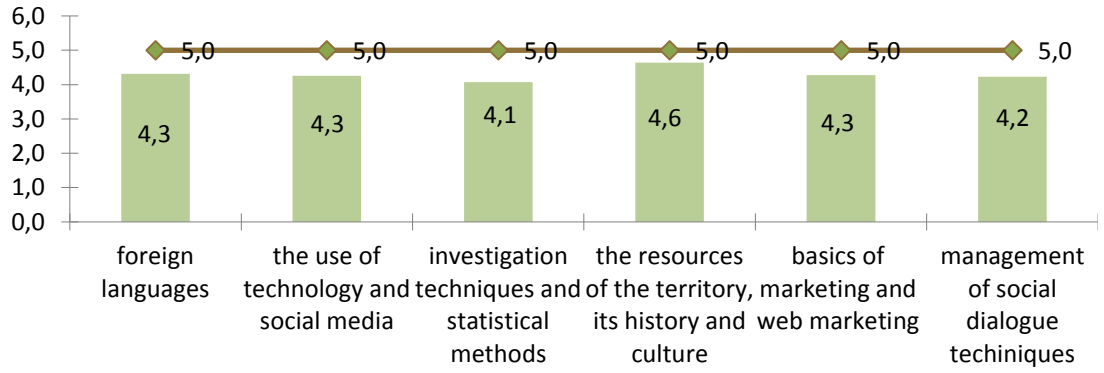
the use of technology and social media and basics of marketing and web marketing (4,3 points of 5), management of social dialogue (4,2 points of 5) and to investigation techniques and statistical methods (4,1 points of 5).

Graph 3.2.5: The opinion of the interviewees on the Destination Manager Knowledge



Question n.6: In your opinion, what should a Destination Manager do?

6) In your opinion, what should a Destination Manager do? (multiple choice is allowed)		
A) ANALYZYING		**Total**
the peculiarity of the area to develop coherent proposals	83	136
the characteristics of tourist flows	48	136
statistical, economic or financial reporting	38	136
b) COORDINATING		
the offer of tourist products or services	64	136
the actors and the institutions operating on the area	85	136
the creation of networks	28	136
C) PROMOTING		
new tourist itineraries and routes	54	136
integrated tourist offers	61	136
the emotional aspects of places	16	136
the area through social media	30	136
the area through fundraising for local development	33	136
Other (specify)	0	136

In the opinion of the interviewees the Destination Manager should analyze the peculiarity of the area to develop coherent proposals, should coordinate the actors and the institutions operating on the area, and should promote an integrated tourist offers and the new tourist itineraries and routes.

The following graphs show the percentage weight given by interviewees to each answer:

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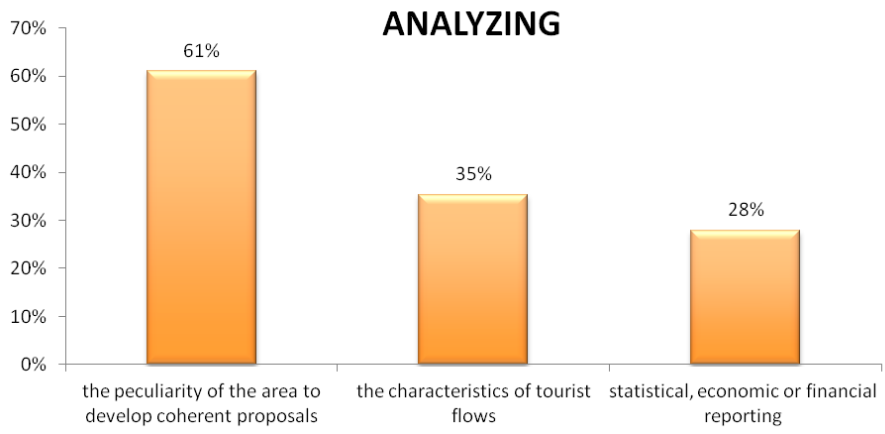
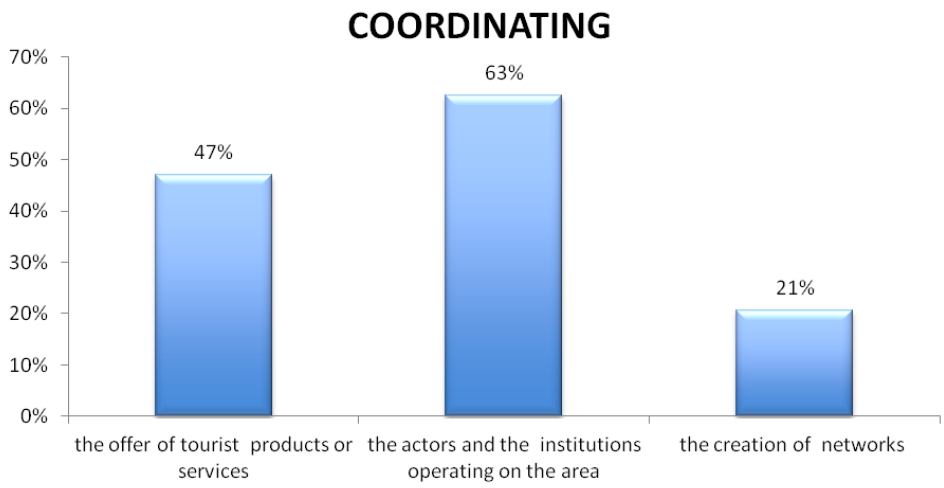
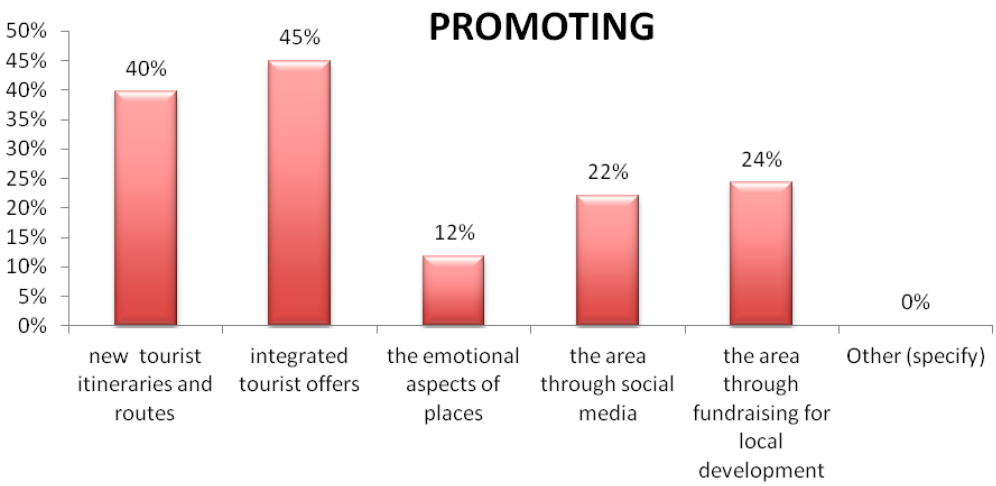
Graph 3.2.6: The opinion of the interviewees on the Destination Manager Competences







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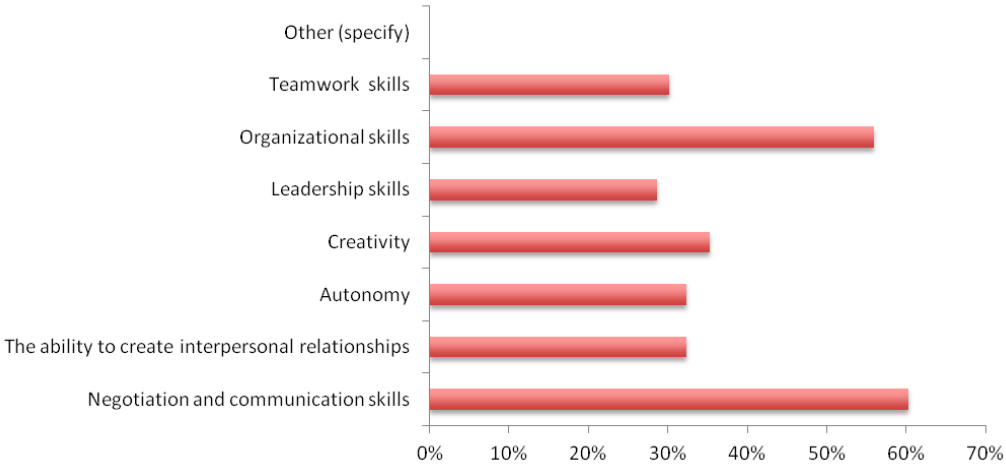
Question n.7: In your opinion, which skills should a Destination manager possess?

7) In your opinion, which skills should a Destination manager possess?		Total
Negotiation and communication skills	82	136
The ability to create interpersonal relationships	44	136
Autonomy	44	136
Creativity	48	136
Leadership skills	39	136
Organizational skills	76	136
Teamwork skills	41	136
Other (specify)	0	136

In the opinion of the interviewees the Destination Manager should have negotiation and communication skills (60%), organizational skills (56%), creativity (35%) and autonomy and the ability to create interpersonal relationships (32%).

Graph 3.2.7: The opinion of the interviewees on the Destination Manager skills



Question n.8: Which are the organizations where a Destination manager could operate or collaborate?

8) Which are the organizations where a Destination manager could operate or collaborate?		Total
Tour operators	72	136
local authorities	80	136
local firm networks	56	136
tourist consortiums / associations	68	136
with local SMEs	63	136
Other (specify)	0	136

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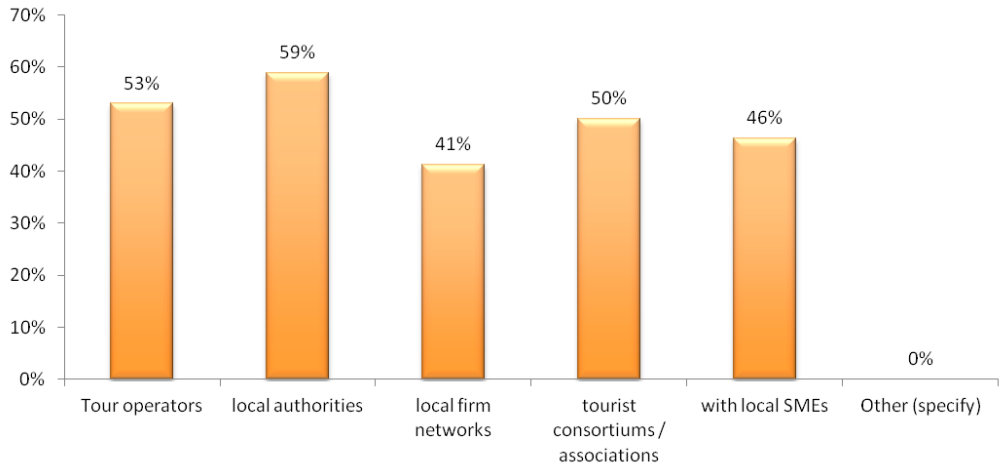
In the opinion of the interviewed the Destination Manager should operate or collaborate with local authorities, tour operators and tourist consortiums or tourist associations.

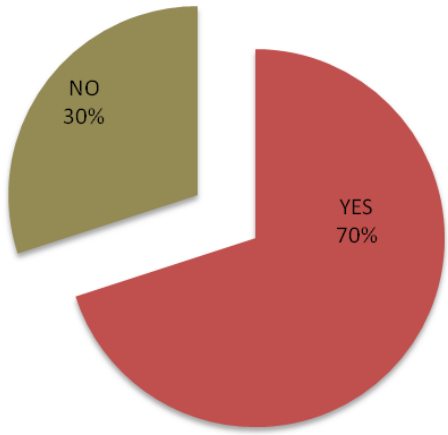
Graph 3.2.8: The main organization where a DM could operate or collaborate



Question n.9: In your opinion, is it useful to create a Destination Manager profile?

In the opinion of 70% of the interviewed the Destination Manager is very useful.

Graph 3.2.9: The opinion of the interviewed about the useful to create a DM



Following describes the motivations of the interviewees:

The main opinions of those who believe not useful to create a Destination Manager profile:

"... The Destination Manager role can be performed by existing profiles"

"…I did not know this professional profile and I do not consider it necessary"

" No, I think that what the sector needs is economic help to the companies that promote the tourism, not create new professional profiles".

"…I do not believe it useful because the problem of the sector is the lack of invest and that problem is not solved with this profile"

"…I do not see it useful because what is stimulating tourism sector is the tourism websites and these can be managed by the entrepreneur himself"

The main opinions of those who believe useful to create a Destination Manager profile:

"...is good to personal development"

"…the innovation in tourism sector is essential to the industry development. The DM profile can provide added value to the tourism management, especially in foreing promotion and internationalisation"

"…it's very important to have an independent profile who works for the general interest of the tourism industry in all possible ways"

"…it would be an essential profile for the right promotion of a destination"

"In the current situation, the DM profile would help us strengthen relations between the cities in our area and attract tourists, it would be very productive for small and medium-sized cities…"

"Any profile that serves to support and increase tourism is necessary"

"…it can generate new jobs and that is always positive"

"It is necessary because we have to adapt us to the needs of tourism industry to be able to grow at international level…"

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3.2.3 Online survey analysis in PORTUGAL

In Portugal the questionnaires collected were 96 equal to 21% of the total sample distributed according to the categories represented in Table 3.2.2.

Table 3.2.2 - Categories of those who filled out the questionnaire

Type of activity you are involved in:	
Accommodation	20%
Food and Beverage	1%
Trade and crafts	0%
Local Administration/Public Administration	20%
Training agency	18%
Tour Operator, Travel Agency, Tour Organizer	18%
Local information and promotion entity	7%
Congress and fairs organization	2%
Other	12%
Total	**100%**

In the following part of the chapter we describe the online survey results.

<u>Part A - Context analysis</u>

Question n.1: Which are the main strengths and weaknesses in the area where you operate?

1) Which are the main strengths and weaknesses in the area where you operate?	**strengths**	**weaknesses**	**tot**
the geographical location	84	11	95
the quality of human resources and professional skills	53	41	94
the capacity of companies to invest in innovation and research	24	68	92
the network between local actors (public and private)	41	49	90
the degree of internationalization of the local offer	51	42	93
the degree of integration of the local offer	52	41	93
the willingness of local companies to collaborate	36	56	92
the ability of local companies to do web marketing	44	48	92
the ability to do fundraising	25	67	92
a strong territorial identity	70	23	93

In the opinion of the interviewees the main territorial strengths are the geographical localization (88%), a strong territorial identity (75%) and the quality of human resources (56%), the degree of integration of the local offer (56%) and the degree of internationalization of the local offer (55%). While the main weakness are the capacity of companies to invest in innovation and research (26%) and the ability to do fundraising (27%).

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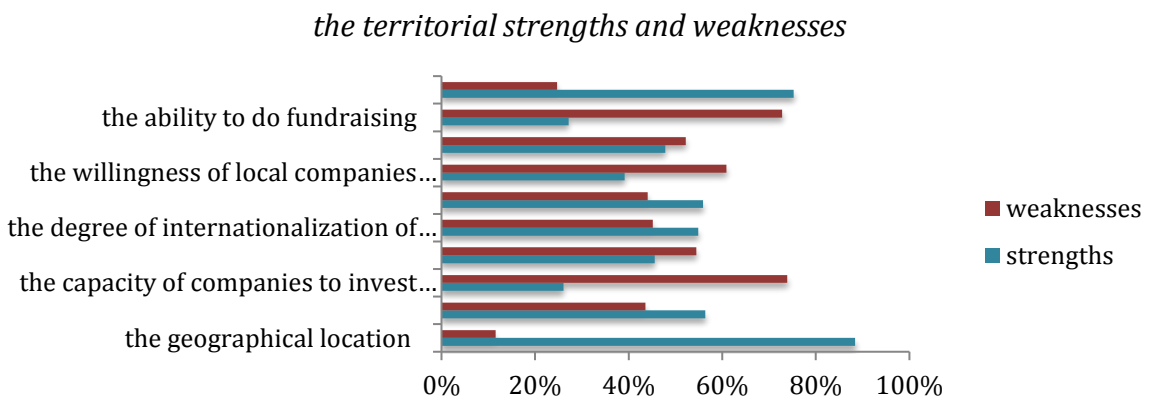
Graph 3.2.1: The territorial strengths and weaknesses

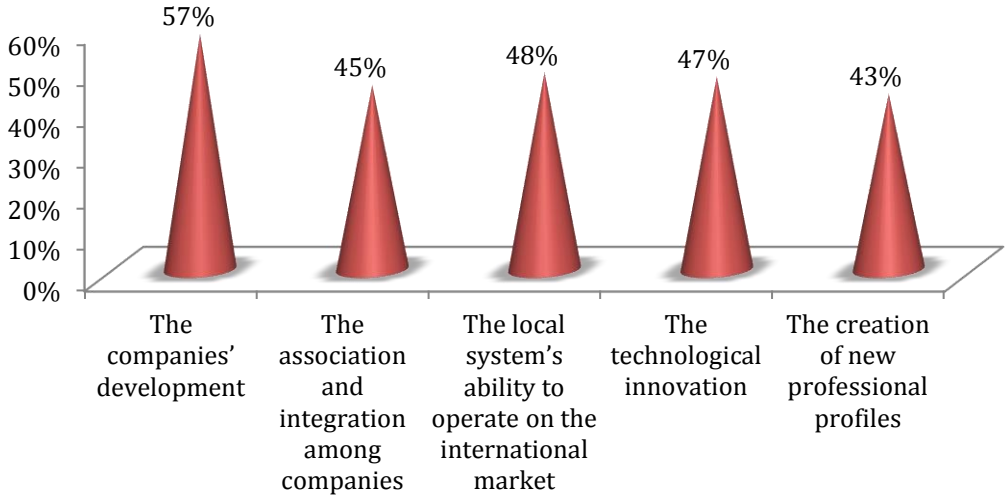


Question n.2: Which of the following items do you consider a priority for the tourism development of your area?

2) Which of the following items do you consider a priority for the tourism development of your area? (Select up to three answers)		**Total**
The companies' development	55	96
The association and integration among companies	43	96
The local system's ability to operate on the international market	46	96
The technological innovation	45	96
The creation of new professional profiles	41	96

In the opinion of the interviewees the companies' development (57%), the ability of the local system to operate on the international market (48%) and the tecnological innovation (47%) are seen as a priority for tourism development, followed by the association and integration among companies (45%) and the creation of new profesional profiles (43%).

Graph 3.2.2: The priority for tourism development in the opinion of the Spanish interviewees



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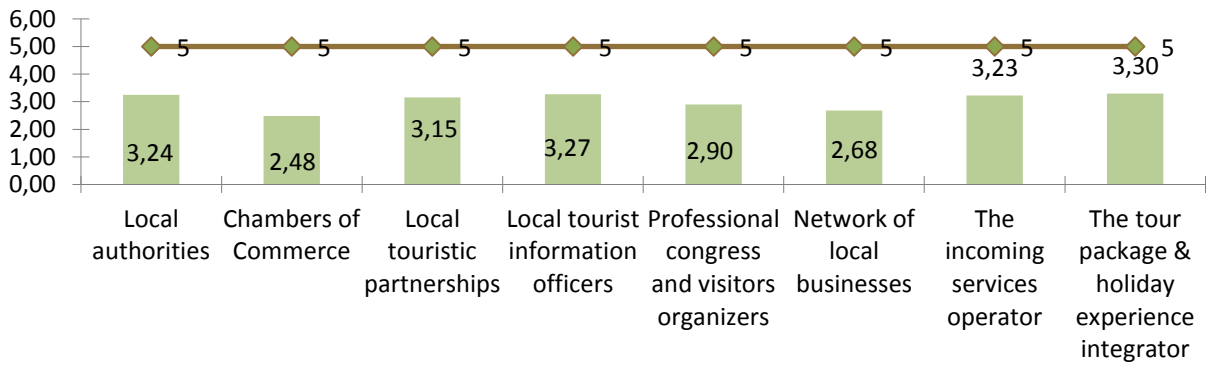
Question n.3: Among the following actors, who is now playing an effective role in local tourism promotion?

3) Among the following actors, who is now playing an effective role in local tourism promotion?	Not present	Present	Total
Local authorities	2	94	96
Chambers of Commerce	14	82	96
Local touristic partnerships	0	96	96
Local tourist information officers	1	95	96
Professional congress and visitors organizers	4	92	96
Network of local businesses	2	94	96
The incoming services operator	3	93	96
The tour package & holiday experience integrator	1	95	96

Analyzing the table above are deduced some answers that indicate the presence and "non-presence" in the territory of local tourism promotion organizations. The actors who have collected the highest number of positive responses were in the order "Local touristic partnerships" (100%), the "tour package & holiday experience integrator" and the "Local tourist information officers" (both with 99%), the "Network of local businesses" and the "Local authorities" (both with 98%) followed by "The incoming services operator" (97%), the "Professional congress and visitors organizers" (96%) and the "Chambers of Commerce" (85%).

In cases of an affirmative answer the respondents were asked to provide an assessment on a scale of 1 to 5 (1 minimum - 5 maximum) on the role / importance played by each actor in promoting tourism in the territory. All organizations receive an average rating of between 2.48 and 3.30 points, therefore, a judgment below the sufficiency.

Graph 3.2.3: The Portuguese actors playing a role in local tourism promotion



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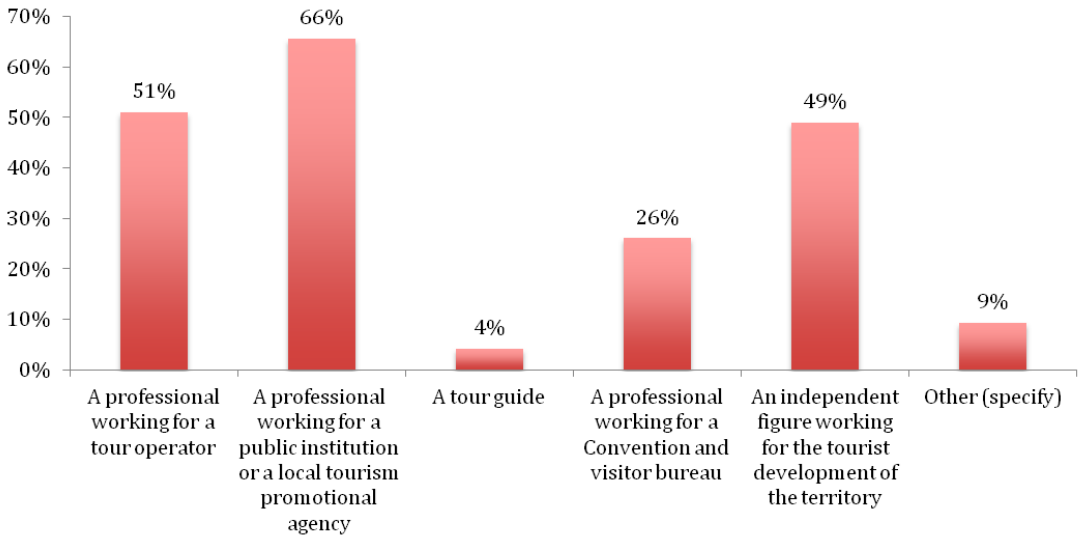
Part B - Destination manager profile

Question n. 4: In your opinion who is the Destination Manager?

4) In your opinion who is the Destination Manager		Total
A professional working for a tour operator	49	96
A professional working for a public institution or a local tourism promotional agency	63	96
A tour guide	4	96
A professional working for a Convention and visitor bureau	25	96
An independent figure working for the tourist development of the territory	47	96
Other (specify)	9	96

In the opinion of the respondents the Destination Manager should be considered as a professional working for a public institution or a local tourism promotional agency (66%). 51% believes that the DM is a professional working for a tour operator, a 49% of interviewed believes that the DM is an independent figure working for the tourist development of the territory and 26% that is a professsional for a convention and visitors bureau.

Graph 3.2.4: The opinion of the interviewees about the Destination Manager profile



Question n.5: In your opinion, what should a Destination Manager know?

In the opinion of the interviewees the Destination Manager should know foreing languages, use of technology and social media, investigation techniques and statistical methods, the resources the territory, its history and culture, basics of marketing and web marketing and management of social dialogue techniques. But the most important knowledge that the DM should have are attributed to knowledge of the territory, its history and culture (4,7 points of 5), foreing languages

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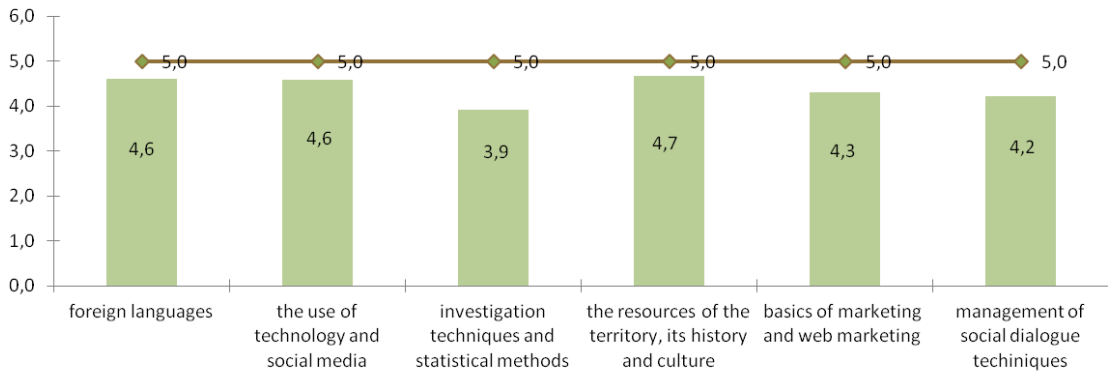
and the use of technology and social media (both with 4,6 points of 5), basics of marketing and web marketing (4,3 points of 5), management of social dialogue (4,2 points of 5) and to investigation techniques and statistical methods (3,9 points of 5).

Graph 3.2.5: The opinion of the interviewees on the Destination Manager Knowledge



Question n.6: In your opinion, what should a Destination Manager do ?

6) In your opinion , what should a Destination Manager do ? (multiple choice is allowed)		
A) ANALYZYING		**Total**
the peculiarity of the area to develop coherent proposals	82	96
the characteristics of tourist flows	59	96
statistical, economic or financial reporting	34	96
b) COORDINATING		
the offer of tourist products or services	78	96
the actors and the institutions operating on the area	41	96
the creation of networks	61	96
C) PROMOTING		
new tourist itineraries and routes	71	96
integrated tourist offers	77	96
the emotional aspects of places	45	96
the area through social media	39	96
the area through fundraising for local development	35	96
Other (specify)	3	96

In the opinion of the interviewees the Destination Manager should analyze the peculiarity of the area to develop coherent proposals, should coordinate the offer of tourist products or services, and should promote an integrated tourist offers.

The following graphs show the percentage weight given by interviewees to each answer:

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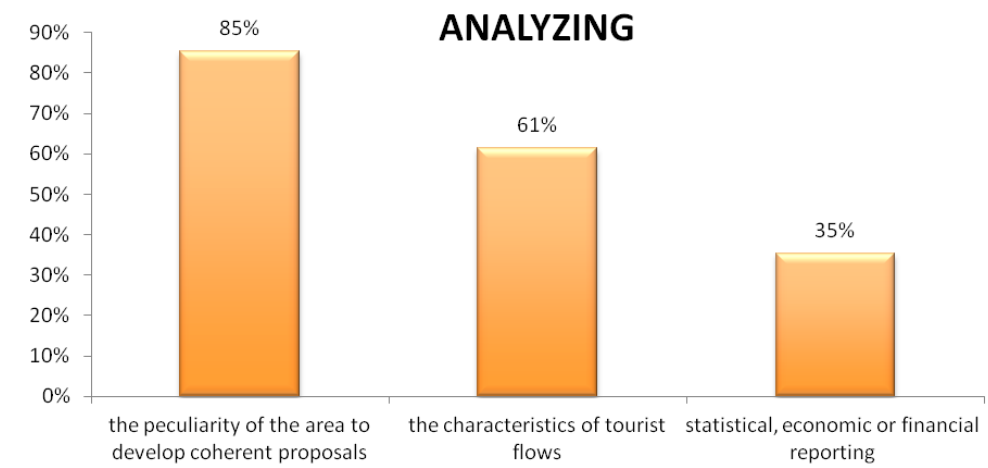
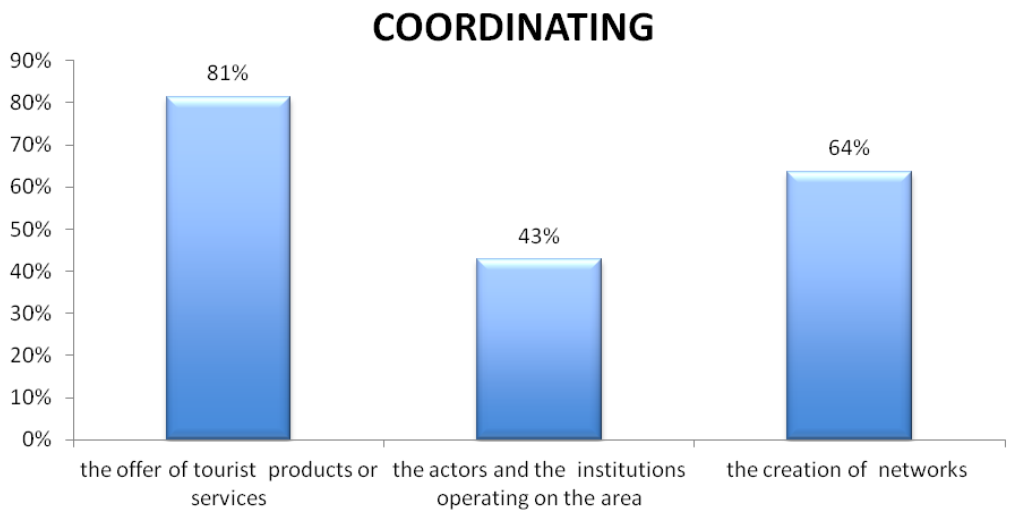
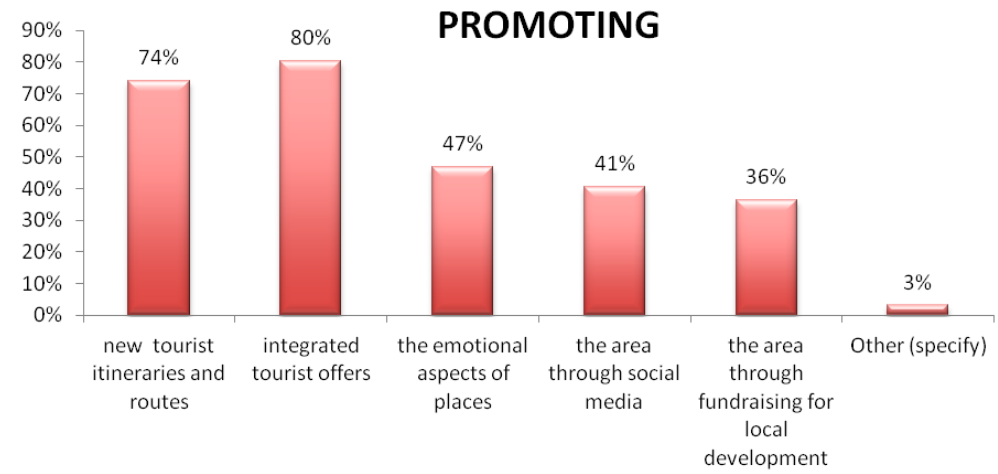
Graph 3.2.6: The opinion of the interviewees on the Destination Manager Competences







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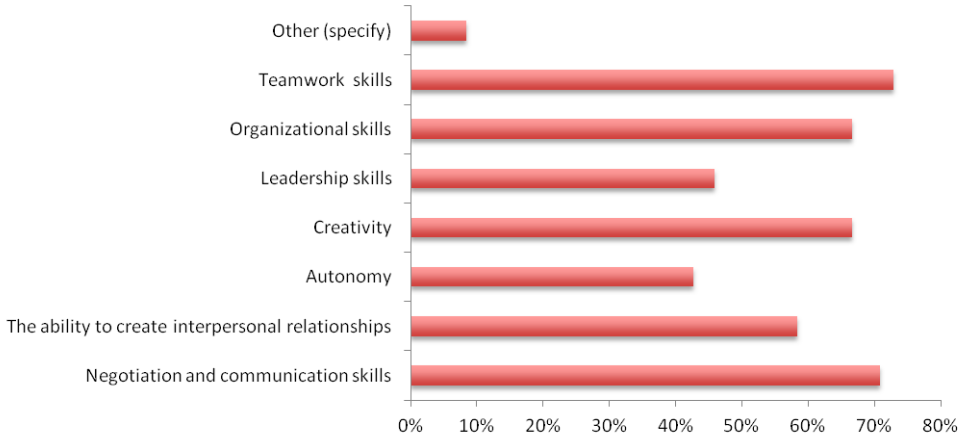
Question n.7: In your opinion, which skills should a Destination manager possess?

7) In your opinion, which skills should a Destination manager possess?		Total
Negotiation and communication skills	68	96
The ability to create interpersonal relationships	56	96
Autonomy	41	96
Creativity	64	96
Leadership skills	44	96
Organizational skills	64	96
Teamwork skills	70	96
Other (specify)	8	96

In the opinion of the interviewees the Destination Manager should have Teamwork skills (73%), Negotiation and communication skills (71%), creativity and organizational skills (both with 67%).

Graph 3.2.7: The opinion of the interviewees on the Destination Manager skills



Question n.8: Which are the organizations where a Destination manager could operate or collaborate?

8) Which are the organizations where a Destination manager could operate or collaborate?		Total
Tour operators	72	96
local authorities	69	96
local firm networks	55	96
tourist consortiums / associations	66	96
with local SMEs	36	96
Other (specify)	6	96

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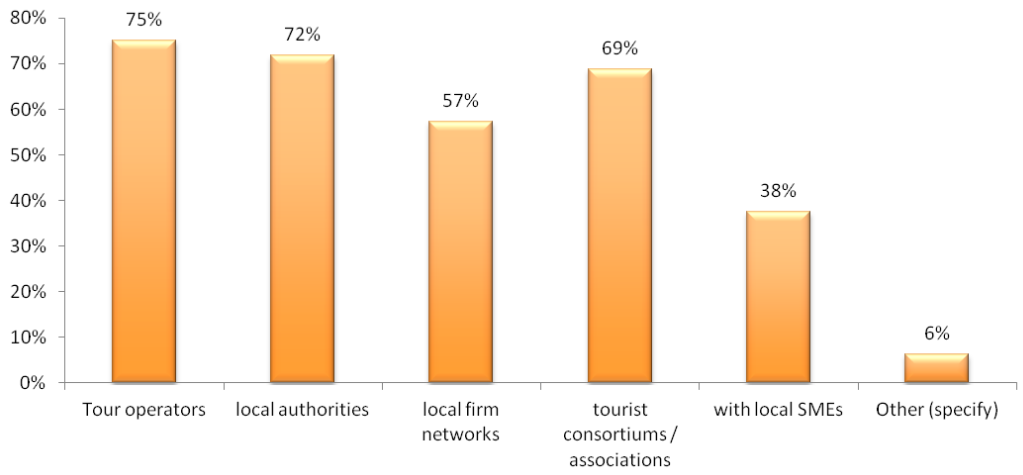
In the opinion of the interviewed the Destination Manager should operate or collaborate with tour operators, local authorities and tourist consortiums or tourist associations.

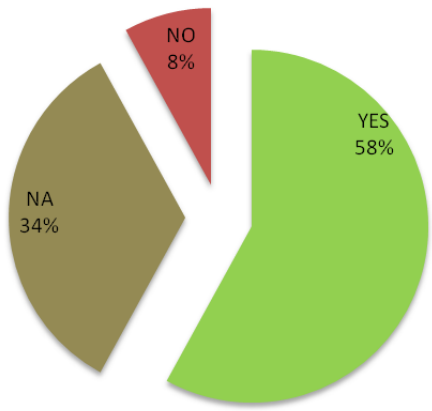
Graph 3.2.8: The main organization where a DM could operate or collaborate



Question n.9: In your opinion, is it useful to create a Destination Manager profile?

In the opinion of 58% of the interviewed the Destination Manager is very useful.

Graph 3.2.9: The opinion of the interviewed about the useful to create a DM



<u>Following describes the motivations of the interviewees:</u>

The main opinions of those who believe <u>not useful</u> to create a Destination Manager profile:

"... It's no needed. Regional authorities should be able to coordinate supply and promote together, and detect the supply of new possibilities"

"...I think that before creating a new profile there are other priorities to solve"

"...There are several institutions that can do this work".

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The main opinions of those who believe useful to create a Destination Manager profile:

"...Yes, it will be a conciliatory / facilitator of needs and wishes of the customers and companies."

"...Yes, to integrate tourism products and promotion of destination into public and private entities"

"...Yes, creating a DM profile can be useful as a guideline for hiring professionals. Also, It can be a critical element of tourism promotion and in the creation of integrated supply, combining the expectations of the various stakeholders to meet the tourist demand"

"...Yes, the destination manager should be someone to fill the gap between the public and private and can integrate the existing supply in the territory. The emotional aspects of the territory, which make it authentic and distinguish it from others, must also be resolved by the DM. It seems to me that this profile has not been created, it must be represented by a multidisciplinary team"

"The role of the DM is essential to keep a global vision of the goal and mobilizing the efforts of different actors for the same purpose, depending on the time of action."

3.2.4 Online survey analysis from OTHER COUNTRIES OF EUROPEAN UNION

In other countries of EU the questionnaires collected were 47 equal to 10% of the total sample distributed according to the categories represented in Table 3.2.4.

Table 3.2.4 - Categories of those who filled out the questionnaire

Type of activity you are involved in:	
Accommodation	9%
Food and Beverage	2%
Trade and crafts	4%
Cultural Organization	13%
Local Administration/Public Administration	32%
Training agency	2%
Tour Operator, Travel Agency, Tour Organizer	9%
Local information and promotion entity	23%
Congress and fairs organization	6%
Total	**100%**

In the following part of the chapter we describe the online survey results.

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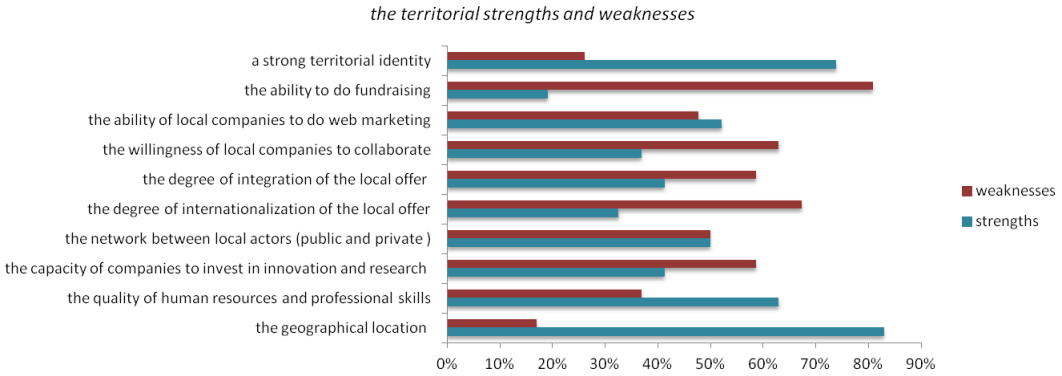
Part A - Context analysis

Question n.1: Which are the main strengths and weaknesses in the area where you operate?

1) Which are the main strengths and weaknesses in the area where you operate?	strengths	weaknesses	tot
the geographical location	39	8	47
the quality of human resources and professional skills	29	17	46
the capacity of companies to invest in innovation and research	19	27	46
the network between local actors (public and private)	23	23	46
the degree of internationalization of the local offer	15	31	46
the degree of integration of the local offer	19	27	46
the willingness of local companies to collaborate	17	29	46
the ability of local companies to do web marketing	24	22	46
the ability to do fundraising	9	38	47
a strong territorial identity	34	12	46

In the opinion of the interviewees the main territorial strengths are the geographical localization (83%), a strong territorial identity (74%), the quality of human resources (63%), the degree of integration of the local offer (59%) and the network between local actors (52%). While the main weakness are the ability to do fundraising (81%), the degree of internationalization of the local offer (67%), the willingness of local companies to collaborate (63%) and the capacity of companies to invest in innovation and research (59%).

Graph 3.2.1: The territorial strengths and weaknesses



Question n.2: Which of the following items do you consider a priority for the tourism development of your area?

2) Which of the following items do you consider a priority for the tourism development of your area? (Select up to three answers)		Total
The companies' development	26	47
The association and integration among companies	19	47
The local system's ability to operate on the international market	23	47
The technological innovation	17	47
The creation of new professional profiles	19	47

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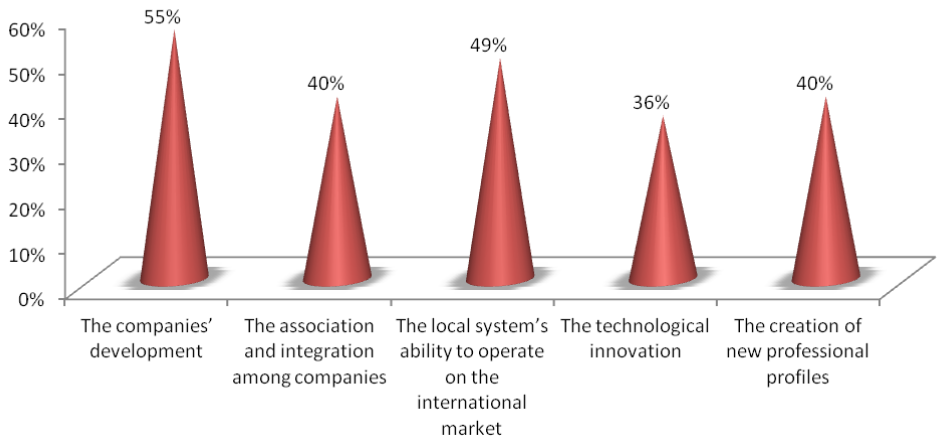
In the opinion of the interviewees the companies' development (55%), the ability of the local system to operate on the international market (49%), the association and integration among companies and the the creation of new profiles (both with 40%) are seen as a priority for tourism development, followed by the technological innovation (36%).

Graph 3.2.2: The priority for tourism development in the opinion of the Spanish interviewees



Question n.3: Among the following actors, who is now playing an effective role in local tourism promotion?

3) Among the following actors, who is now playing an effective role in local tourism promotion?	Not present	Present	Total
Local authorities	1	46	47
Chambers of Commerce	3	44	47
Local touristic partnerships	1	46	47
Local tourist information officers	0	47	47
Professional congress and visitors organizers	5	42	47
Network of local businesses	1	46	47
The incoming services operator	2	45	47
The tour package & holiday experience integrator	3	44	47

Analyzing the table above are deduced some answers that indicate the presence and "non-presence" in the territory of local tourism promotion organizations. The actors who have collected the highest number of positive responses were in the order "Local tourist information officers" (100%), the "Local authorities", the "Local touristic partnerships" and the "Network of local businesses" (the three with 98%), the "incoming services operator" (96%) , the "Chambers of Commerce" and the "tour package & holiday experience integrator" (both with 94%) and "professional congress and visitors organizers" (89%).

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In cases of an affirmative answer the respondents were asked to provide an assessment on a scale of 1 to 5 (1 minimum - 5 maximum) on the role / importance played by each actor in promoting tourism in the territory. All organizations receive an average rating of between 2.68 and 4.05 points, therefore, a judgment below the sufficiency.

Graph 3.2.3: The EU actors playing a role in local tourism promotion

Part B - Destination manager profile

Question n. 4: In your opinion who is the Destination Manager?

4) In your opinion who is the Destination Manager		Total
A professional working for a tour operator	20	47
A professional working for a public institution or a local tourism promotional agency	31	47
A tour guide	13	47
A professional working for a Convention and visitor bureau	13	47
An independent figure working for the tourist development of the territory	27	47
Other (specify)	0	47

In the opinion of the respondents the Destination Manager should be considered as a professional working for a public institution or a local tourism promotional agency (66%). 57% believes that the DM is an independent figure working for the tourist development of the territory, a 43% of interviewed believes that the DM is a professional working for a tour operator and 28% that is a professsional for a convention and visitors bureau and a tour guide.

Graph 3.2.4: The opinion of the interviewees about the Destination Manager profile

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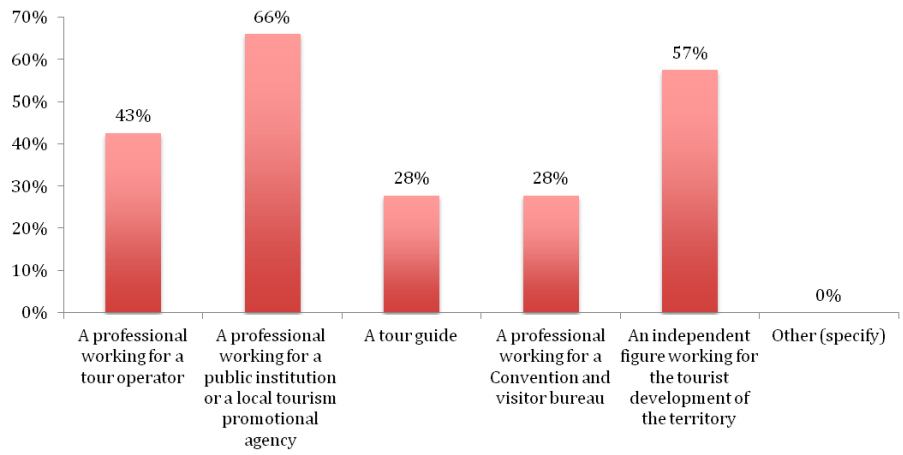
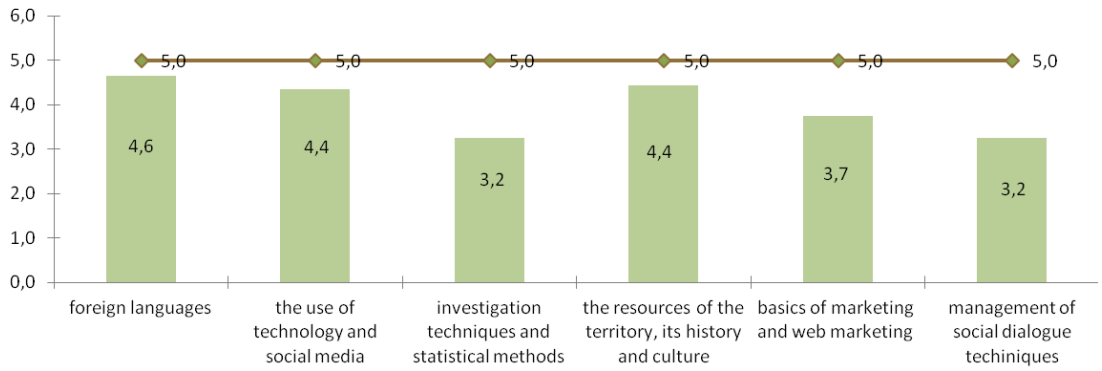


Question n.5: In your opinion, what should a Destination Manager know?

In the opinion of the interviewees the Destination Manager should know foreing languages, use of technology and social media, investigation techniques and statistical methods, the resources the territory, its history and culture, basics of marketing and web marketing and management of social dialogue techniques. But the most important knowledge that the DM should have are attributed to know foreing languages (4,6 points of 5), the resources of the territory, its history and culture and the use of technology and social media (both with 4,4), basics of marketing and web marketing (3,7 points of 5) and management of social dialogue and to investigation techniques and statistical methods (3,2 points of 5).

Graph 3.2.5: The opinion of the interviewees on the Destination Manager Knowledge



Question n.6: In your opinion, what should a Destination Manager do?

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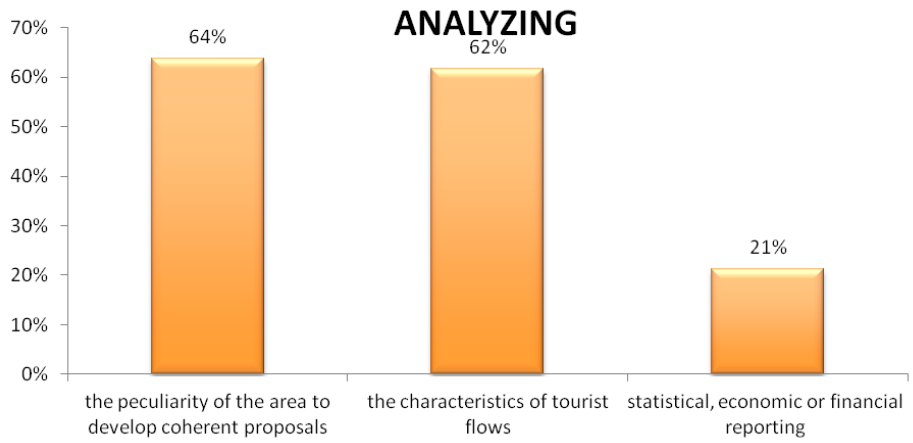
In the opinion of the interviewees the Destination Manager should analyze the peculiarity of the area to develop coherent proposals, should coordinate the offer of tourist products or services, and should promote an integrated tourist offers.

The following graphs show the percentage weight given by interviewees to each answer:

6) In your opinion , what should a Destination Manager do ? (multiple choice is allowed)		
A) ANALYZYING		**Total**
the peculiarity of the area to develop coherent proposals	30	47
the characteristics of tourist flows	29	47
statistical, economic or financial reporting	10	47
b) COORDINATING		
the offer of tourist products or services	30	47
the actors and the institutions operating on the area	24	47
the creation of networks	17	47
C) PROMOTING		
new tourist itineraries and routes	29	47
integrated tourist offers	30	47
the emotional aspects of places	21	47
the area through social media	29	47
the area through fundraising for local development	4	47
Other (specify)	0	47

Graph 3.2.6: The opinion of the interviewees on the Destination Manager Competences



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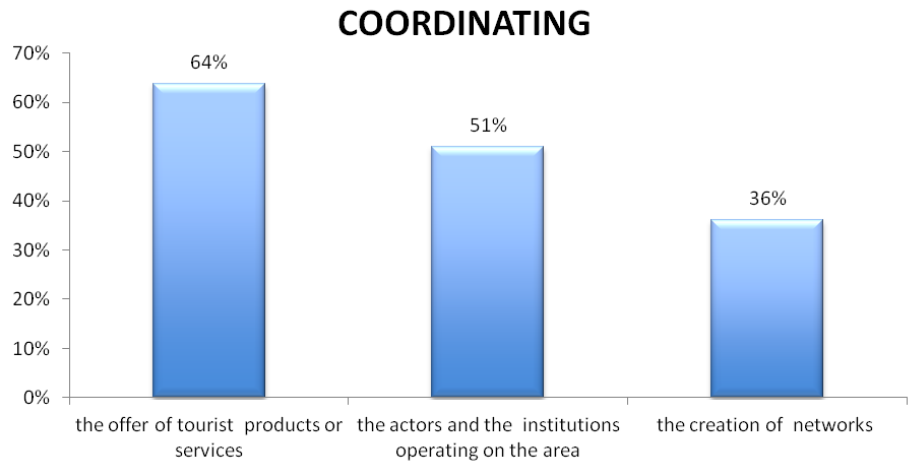

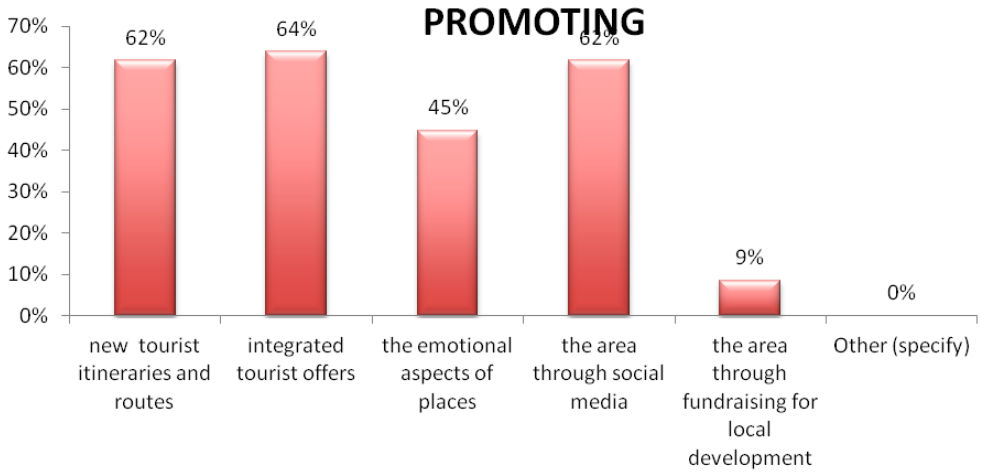

Question n.7: In your opinion, which skills should a Destination manager possess?

7) In your opinion, which skills should a Destination manager possess?		Total
Negotiation and communication skills	25	47
The ability to create interpersonal relationships	16	47
Autonomy	11	47
Creativity	26	47
Leadership skills	19	47
Organizational skills	20	47
Teamwork skills	28	47
Other (specify)	0	47

In the opinion of the interviewees the Destination Manager should have teamwork skills (60%), creativity (55%) and negotiation and communication skills (53%).

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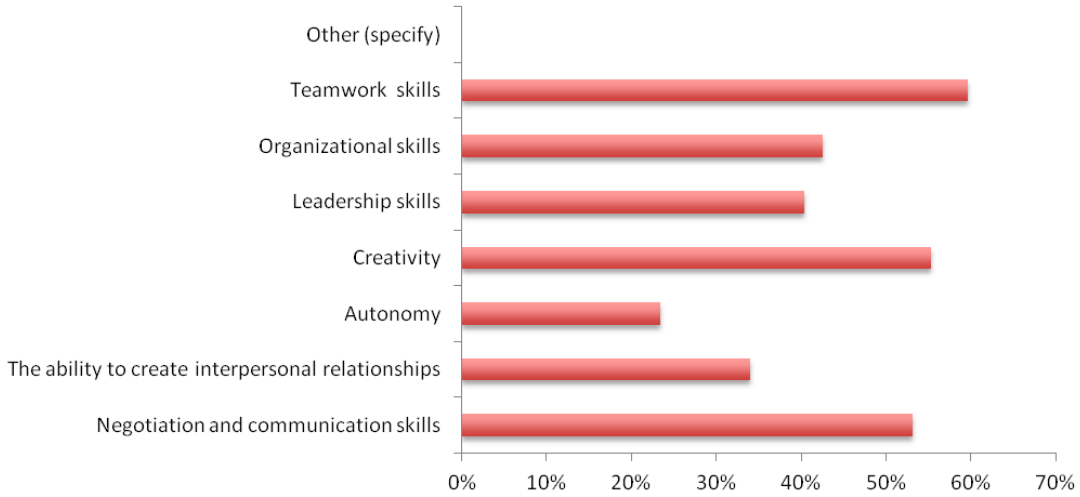
Graph 3.2.7: The opinion of the interviewees on the Destination Manager skills

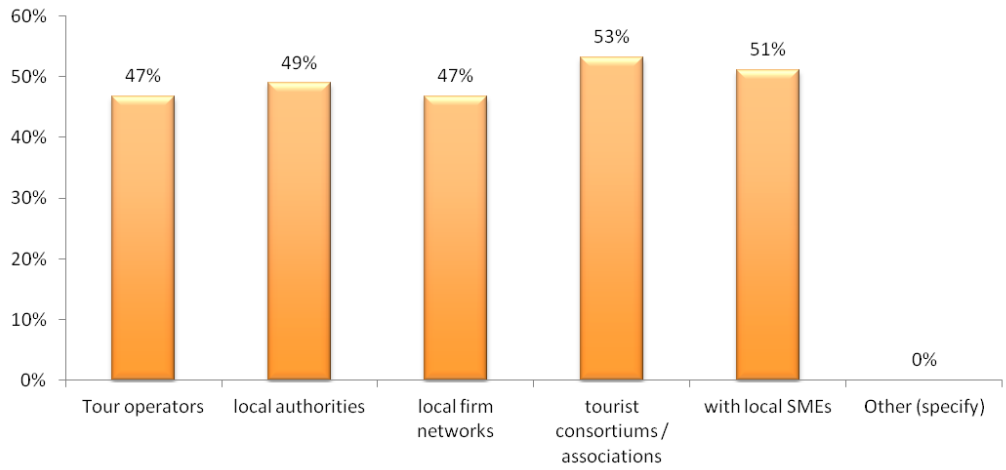


Question n.8: Which are the organizations where a Destination manager could operate or collaborate?

8) Which are the organizations where a Destination manager could operate or collaborate?		Total
Tour operators	22	47
local authorities	23	47
local firm networks	22	47
tourist consortiums / associations	25	47
with local SMEs	24	47
Other (specify)	0	47

In the opinion of the interviewed the Destination Manager should operate or collaborate with tourist consortiums or tourist associations, with local SMEs and local authorities.

Graph 3.2.8: The main organization where a DM could operate or collaborate



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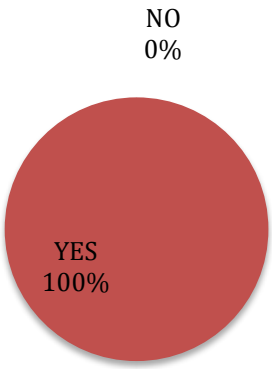
Question n.9: In your opinion, is it useful to create a Destination Manager profile?

In the opinion of 100% of the interviewed the Destination Manager is very useful.

Graph 3.2.9: The opinion of the interviewed about the useful to create a DM



Following describes the motivations of the interviewees:

The main opinions of those who believe useful to create a Destination Manager profile:

"Yes. Destination Managers should be independent profiles, not affiliated to any political party, whose aim to promote the destination professionally, regardless of the political party that rules. Tourism strategy for a destination can't change every 4 years, once there are elections. The best way to secure this is to put the strategy in the hands of a professional profile. Defining this professional profile would be very helpful."

"Yes, especially if it helps to adjust the current education und training offers to the actual needs in the work life."

"Yes, in particular if this profile will be able to promote the sustainable economic development of tourist destinations."

"Yes, he/she surely will help the development of local economies through the development of an integrated tourism offer among stakeholder."

"Yes, to coordinate all the efforts."

"Yes, I think it's necessary to coordinate all local efforts for a better result, looking for a profit for the whole destination."

"Yes, because it is help for growing of local tourism."

"Yes, he/she could helps the creation of Public-Private Partnerships."

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3.3 The in-depth interviews with relevant tourism stakeholders: summary of the results

The survey was conducted through direct interviews with a selected sample of actors considered qualified, for the role or for their knowledge, and therefore able to express critical assessments on the subject of the Destination Manager.

In methodological terms, therefore, it proceeded as follows:

1) Identification of the actors to be interviewed: The choice was made by identifying the qualified players in the tourism sector and training and members of local organizations that play an active role in promoting tourism and in the enhancement of professionalism.
2) Definition of a track interview: in order to facilitate the discussion and facilitate the analysis of the responses we proceeded to define a track interview made up of 13 open questions including three questions relating to the territorial context and 10 questions regarding the profile of the destination manager.
3) Procedure of the interview: the direct discussions were preceded by a request for appointment. After a brief description of the purposes of the survey, we proceeded with interviews lasted about 1hour. The answers were all transcribed.
4) Development of the results and preparation of the report: the material collected during the interviews was organized and processed in a descriptive report containing an aggregate summary of qualitative information obtained during interviews and single interviews.

We emphasize that the period determined to make direct interviews was following the survey by the questionnaire, in June 2016.

We contacted several professionals from tourism sector. Listed below are all the participants in each country:

ITALY:

- Museo Galileo – Cultural Organization
- Federalberghi Firenze – Accomodation Association
- Toscana Promozione Turistica – Regional Public Administration
- Associazione Centro Guide Turismo – Tourist Guide Association
- IRPET - Regional Institute for Economic Planning of Tuscany - Regional Public Administration
- Regione Toscana: Tourism Promotion, Tourism and Trade Legislation Sector of Tuscany Region - Regional Public Administration
- CESCOT – Training Institution
- CFO – Training Institution
- Trento Management School – Training Institution
- Florencetown – Tour Operator

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SPAIN:

- B The Travel Brand – Travel Agency
- Innovtur : Tourist Consulting and Tourism Training – Tourist SME
- University Miguel de Cervantes – Training Institution
- University of Valladolid - Training Institution
- Valladolid Provincial Council – Local Public Administration
- Valladolid City Council – Local Public Administration
- Valladolid Hotel Association - Accommodation Association
- Hotel Atrio: 4 stars hotel - Tourist SME (Accommodation)
- Tourism Office of Cigales: small city (population: 5.000), linked with wine tourism (DO Cigales) and cultural tourism - Tourist information office
- Tourism Office of Mucientes: small city (population: 700), linked with wine tourism (DO Cigales) and cultural tourism - Tourist information office

PORTUGAL:

- IPTran's trainers of the vocational course of tourism technician. – Training Institution
- Units of TIAT – Information and tourism animation.
- OTET (Galileo) – Technical Operations in Tourism Companies.
- TCAT – Communication Techniques in Tourism Hosting.
- Loures municipality technician in tourism

The interviews focused on three topics: context analysis, skills and competencies and teaching methodologies.

3.3.1 Direct survey with in depth interviews to stakeholders in ITALY

The results of direct interviews are discussed below in form aggregate and distinct in the two subject areas

<u>Part A – Context analysis</u>

The main strengths of territory, in the opinion of interviewed, are: 1) the destination Italy and brand recognized around the world, who is associated with icons of cultural heritage, wine and food, art and renaissance, variety of supply/products; 2) geographical location; 3) prospects of development of experiential offerings.

The main weaknesses of territory, in the opinion of interviewed, are: 1) fragmentation and atomization of the offer; 2) lack of infrastructure; 3) lack of a vision and a project that combines public and private development; 3) the low integration of products and construction of networks; 4) the lack of vision even in large cities; 5) the lacks of marketing strategies, of training and of ability to make changes to the traditional itineraries of tourists; 6) We need a central institute that functions and promotes Italy in a unified way, as a country destination; 7) lacks dialogue between

public and private sector; 8) the absence of a strategy of development of the destinations, absence in particular of strategies related to the integration of tourism products, lack of coordination between different actors in the local supply, lack of capacity in developing tourism products with a high experiential value.

The main priority for the tourism development of territory in the opinion of interviewed are: 1) Activation of a link between public and private actors; 2) Professionalization of public and private managers in tourism; 3) long term plans of financing and promotion; 4) the ability to aggregate local supply, the integration of the product in experiential form, the internationalization of the local system, technological innovation.

The actors that play effective role in local tourism promotion, in the opinion of interviewed are: 1) Only the private..., which, however, have a limited force; 2) we need a National tourism promotion body (ENIT) that is non-existent; 3) Convention and visitors bureau; 4) tour organizer specialized in selling experiences

Part B – Destination Manager Profile: Skills and competencies

The Destination Manager, in the opinion of interviewees is: 1) a profile that must close the gap between public and private; 2) a profile that is able to perform the following functions: Integration of the offer of products, building a network, 3) to know the regulatory and operational framework at the local and community level, to know how to anticipate the rules, Knowing how it works and how to analyze the market with rules and mechanisms that sometimes are borderline with respect to the regulatory framework; 4) a professional who works with a local government or an agency to promote tourism.

The Destination Manager should know: the territory, what it can offer and its potential; territorial marketing policies/strategies, English and social media; the legal framework; international markets; promotion strategies; foreign languages, new technologies, statistics.

The Destination Manager should do: create networks, use technology, manage the communication with local actors, knowing how to make an analysis of the domestic and international demand; promotion; analyse, design and coordinate the activities of the territory; promoting event and opportunities.

The Destination Manager should have the following skills: Interpersonal skills; Ability to work in team; organizational skills and coordination skills; tools and analytical skills to seize opportunities; networking skills with all the actors of the local offer: hotel companies, exhibition centers; must be able to figure out which is the economic driving force for the destination: is it mass tourism or elite tourism?

Following the skills list:

- Listening and mediation/negotiation skills
- Ability to perform analysis and synthesis
- Communication and organizational skills
- Leadership
- Knowledge of tourism marketing as well as of the tourism supply chain

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- Ability to evaluate tourist exigencies and define the most adequate strategies to set up tourism offers
- Ability to forecast tourism market trends so as to implement market orientated strategies
- Ability to set up networks with the institutions
- An extensive local knowledge and a lively interest in the sector
- A wide range of IT skills (web platforms, app services, social networks)

The organizations where a Destination manager could operate or collaborate, in the opinion of the interviewees are: Incoming Tourist businesses, Large tour operators, the Public sector at local level (networking with all the actors of the territory and also as a key to establish a public-private dialogue), the Public sector at national level in a public team with private or public investments, cultural institutions, trade associations and privates operating within the tourism supply-chain

In the opinion of interviewees, the Destination manager would be useful, provided that a change in the attitudes at public level takes place, by understanding what the needs of professionalization of tourist promotion are.

The role may involve many different types of work: key areas include marketing, visitor management, development of tourism services and facilities. The Destination Manager is a tourism expert, a professional able to attract visitors and to meet modern tourists' expectations.

The Destination Manager is a professional who develops, manages and optimizes destination management programs with a wide-range of knowledge and experience over the conditions and touristic resources of a region.

Besides the interception of emerging trip planning ideas, the main task of a Destination Manager consists in the promotion of personalized offers. The Destination Manager is a professional who knows how to make use of the opportunities as well as the range of services provided by the territory thus helping the community to create a sustainable tourism industry following the interests shown by tourists.

None of the interviewees know training programs or university programs or specific courses in the field of Destination Management. About the training methods that should be adopted, the interviewees suggest partly in presence and partly online and about the role of traineeships in the program, all believe that it is fundamental to understand how the market works.

<u>Part C Teaching methodologies</u>

Possible training methodology: traditional class room lessons, workshop, role play, case studies and on-field training: this last aspect has not to be disregarded in order to allow the acquisition of soft skills mandatory for this kind of job. Also "Learning by doing" could be very important in the learning process.

The ability to speak several languages is an important skill in the hospitality industry. Also, is important to provide students with the best possible foundation for their future career offering them the opportunity to gain real industry experience and to practice the expertise they learn day by day. Integrated approach to tourism management and destination marketing.

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3.3.2 Direct survey with in depth interviews to stakeholders in SPAIN

Part B – Destination Manager Profile: Skills and competencies

The Destination Manager provides tourist services (both leisure and business) to the customers from the arrival to the end of travel, advising in each case according to the needs of the visitor. This profile contributes to add value to the region, also improving the counseling service and giving specialization to the region.

He is a qualified professional in charge of planning the tourism development of the territory, a link and a coordinator among local stakeholders (agents working tourism of the area).

The Destination Manager should rather have a business profile instead of a political one. He should know the reality of the destination, since he is in permanent and direct contact with all the operators. He should also be able to coordinate and bring together different sectors in a common project.

The Destination Manager has to be a person with an active profile, with a good knowledge of languages and new technologies; he should be able to create and bring together a tour package as well as a series of actions and activities adapted to customer´s needs in order to get visibility for the city, region or territory.

Destination Manager Skills list:

- Empathy
- Eloquence
- Social skills
- Future vision
- Pro-activeness
- Leadership skills
- Organizational skills
- Communication skills
- Teamwork.
- Creativity
- Autonomy
- Business view
- Knowledge of the sector (legislation, structure, etc.)
- Foreign languages
- ICT skills
- Synthesis and analysis ability
- Organizational and planning ability
- Ability to manage information
- Troubleshooting
- Decision making
- Capacity to work in a multidisciplinary team
- Capacity to work in an international context
- Skills in interpersonal relationships

- Critical thinking
- Self-directed learning
- Adaptability to new situations
- Knowledge of other cultures and habits
- Concern for quality and Sensitivity to environment
- Commercial knowledge.

Part C Teaching methodologies

The suggested methodology could be classroom courses or semi-presential courses (at degree level) or *ad hoc* training sessions in formal education. Also should be mixed training (50% theoretical and 50% practice). It should be work-linked training, in which the theoretical training had the same weight that the practice part.

Should be continuous training for being in touch with the new trends and intense training in commercial skills to attract new customers. It should be a very specialized training, equivalent to Master Executive for business managers, only accessible for qualified people. It is a very particular education, only accessible to people with high formation and high competencies.

3.3.3 Direct survey with in depth interviews to stakeholders in PORTUGAL

Part B – Destination Manager Profile: Skills and competencies

The Destination Manager is a professional which proposes strategies for the management and the optimization of the touristic destinations, involving all the sector players.

Since a touristic destination is developed in a territory, the Destination Manager should manage it having in mind the caracteristics of the territory as well as the development of the touristic activity in that same territory, in order to promote and consolidate a space, facilitating stakeholders coordination and articulation for a commom purpose: the development of touristic activity. A Destination Manager, besides the need to know very well his territory of action, should know very well all the public and private organizations and the stakeholders with common interests and purposes within the touristic destination. Therefore, he must know how those stakeholders intend to act, which are their strategies for the development of the touristic destination.

A Destination Manager should have a deep knowledge on the touristic system and in its corporate component. He must know the touristic offer (touristic ressources and services) and also the demand (consumer profile – satisfaction levels). He should have knowledge of corporate and territorial strategies. Otherwise, he must possess knowledge about territorial planning and managing.

Destination Manager Skills list:

- Synthesis and analysis ability
- Organizational and planning ability
- Decision making ability
- Proactivity and assertivity

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- Ability to control, to guide, to coordinate and to plan
- Self confidence
- Communication skills
- Innovation skills
- Own initiative
- Creativity
- Foreign Languages
- Autonomy
- Work capacity
- Strategy skills
- Social skills

Part C Teaching methodologies

Teaching must give value to autonomy development. Therefore, it is advisable to promote individual and group work, oral presentations, and practical activities participation.

Besides the teaching-learning current method, which concludes with a final evaluation of the student, it can be use the participative method in which the student can acquire his knowledge participating in a touristic destination management, which provides a practical knowledge of the Destination Manager role. This practical knowledge could be acquired with studying national and international cases and with internship periods in public and private bodies.

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CHAPTER 4 - DISCUSSION ABOUT THE DESTINATION MANAGER PROFILE

In this chapter we gather the information collected through the focus group held in each country. The information collected by the survey and the in depth interviews was analyzed and validated by the experts of the sector to be taken as a starting point in the development of the next steps in our project.

3 Focus groups have been held, 2 in Italy (Tourism and Culture) and 1 in Spain.

These are the attendants in each country:

ITALY:

Focus Group on Tourism:

- ***Graziella Ciani*** *Grand Hotel Ambasciatori Wellness**** Hotel Patria**** (Chianciano – Siena)*
- ***Elisa Dabizzi*** Farmhouse *Borgo de' Ricci (Impruneta - FI), Farmhouse Le Masse (Greve – FI), Gustavino Restaurant (Firenze)*
- ***Simone Ferri Graziani*** *Palazzo Graziani B&B (Firenze), Farmhouse Villa Graziani (Vada – Livorno), Enoteca Graziani Restaurant (Vada – Livorno)*
- ***Gigliola Giannetti*** *La Vineria Restaurant (Montalcino – Siena)*
- ***Robert Piattelli*** *BuyTourismOnLine-Educational (no-profit association promoting digital culture)*
- ***Pasquale Stroia*** *Travel Appeal (marketing and communication agency)*
- ***Stella Targetti*** *Starhotels (a collection of 25 luxury hotels in Italy, New York, Paris and London)*

Focus group on Culture

- **Paolo Bellocci** – Fondazione Festival Pucciniano - Torre del Lago (Lucca) *(an institution devoted to music promotion among young people and production of operas)*
- **Marco Berni** - Galileo Galilei Museum – Florence
- **Marco Biffi** – Accademia della Crusca – Florence *(a leading institution in the field of research on the Italian language)*
- **Enrico Bocci** - Opera Medicea Laurenziana – Florence *(the Medici Laurentian Complex, which is composed by the basilica of San Lorenzo, the Medicea Laurenziana Library and the Museum of the Medici Chapels)*
- **Massimo Bressan** – Teatro Metastasio – Prato
- **Luca Ioseffini** - Maggio Musicale Fiorentino – Florence *(the oldest and most prestigious European arts festival)*
- **Stefania Ippoliti** – Italian Film Commission - Florence
- **Emanuela Sesti** - Fondazione Fratelli Alinari - Florence *(the oldest firm in the world working in the field of photography, image and communication)*
- **Chiara Zilioli** - Teatro della Pergola – Florence

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SPAIN:

- **Chelo Miñana** - Manager of the Hotels Association of Valladolid
- **Alicia González** - Coordinator of Tourism Degree of the Miguel de Cervantes University
- **Verónica García** - Sales Consulting and Client Management - BCD Travel Spain
- **Alicia Galván** - Technician in Tourism Board - Provincial Council of Valladolid
- **Alejandro Galán** - Coordinator of Tourism - Junta de Castilla y León
- **Tania Mejías** - Consulting partner of Innovtur - Tourism training and consultancy
- **Gabriel Ureta** - Coodinator of Tourism - Valladolid City Council

Down below we present the results for each country:

ITALY:

Focus Group on Tourism

The Key challenges raised during the focus group were:

- Comprehensive research to better understand the expectations of travelers
- More cohesive marketing and promotional campaigns
- Human resource strategies to attract and retain employees in the industry
- Investments in tourism infrastructure
- Efficient and integrated transportation systems
- Broadening and adopting sustainable tourism and best practices
- To foster an adequate supply of skills and labour to enhance visitor experiences through quality service and hospitality
- To improve the relationship between private and public sectors
- To determine the methods which would enable tourism operators to make the environment a source of economic activities

The participants highlighted and commented the need to ensure that training programs are focused on the business needs and provide:

- Excellent language knowledge
- Experiential learning programs and traineeships

The skills that the participants thought that should have the Destination Manager are:

- Ability to set up networks with the institutions providing a range of information on local resources and facilities
- Extensive local knowledge and in-depth understanding of rules affecting the tourism sector
- Wide range of IT skills
- Excellent communication and interpersonal skills
- Ability to forecast tourism trends and set up marketing strategies

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Focus group on Culture

The discussion was focused on training needs, competences and strategic professional requirements.

As far as higher training levels are concerned, there is a broad range of strategic professional requirements: commercial engineers, economic and financial analysts, fundraising experts, event managers. Adapting to changing times also means organizational changes, making use of new ICT technologies, ensuring continuous training of personnel.

The Destination Manager has a key role to play in this context. He should have the ability to understand that a strong link between tourism and culture can be fostered to help places become more attractive to tourists, increasing their competitiveness as locations to live, visit, work and invest in.

For being successful in cultural tourism, is needed training for cultural workers, tourism experts, business developers and representatives of public authorities. Identifying the actual training needs and developing detailed training programs according to these needs are the necessary steps for successful cultural tourism development.

SPAIN:

The discussion was focused on:

- Territorial scope of the profile: Local, regional, national or international.
- Educational background: Training and past experience.
- Professionalization of the sector (the management of entities in charge of tourism): the recent graduates do not have the professional maturity to occupy this position in a company, is needed a professional training to achieve this target.
- Need of creation new tourism products.
- Type of profile: Public or Private.
- Level of training: Vocational and Educational Training, Degree or Postgraduate.

Conclusions:

The abilities needed to deal with public administrations (that establishes the framework for tourism sector) and private companies (marketing of products) are:

- Organizational and coordination skills
- Management skills
- Negotiation skills
- Social skills

Also, Destination Manager needs teamwork skills, because is not possible for one person to know all the characteristics of an area, is needed a group of people. The Destination Manager is in charge of that group and needs to know how to delegate.

The Destination Manager needs capacity to analyze the market to know new trends, to analyze the information that is provided by the tourism observatories. Also needs creativity and innovation to develop new tourism products.

Needs ITCs Knowledge: how to use the technology for promotion, where you can find your customers (The social media give that information through analytics tools) and knowledge about Tourism Quality Certification System of the country of its own.

Knowledge about tourism regulation: Tourism Law and Strategic Plans in Tourism (elaborated by the Public Administration in each country) because these plans establish the rules of their activity.

And, of course, foreign languages, to be able to communicate with actors at international level.

The preferred educational background for this profile is the University *Degree in Tourism.*

Level of Training for Destination Manager Course: is recommended a Postgraduate course

Type of Profile: Mainly Public. To encourage the creation of new alliances with the private sector, the public administration promotes the tourism product and the private sector sells it.

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