HerTour4Youth

2020-1-UK01-KA227-YOU-094543

COMPARISON ANALYSIS

Document Title	Comparison analysis	
Project Activities	IO1/A1	
Authors	CIVIC	
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Organization	CIVIC	
Country	UK	
Approval Status	Draft	Final X
Number of Pages	116	
Keyword list		
Method of Distribution	Email □	Internet X
Dissemination Level	Confidential X	Public □
Language Version	English	

KA2 - Cooperation for innovation and the exchange of good practices
Partnerships for creativity

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1. Introduction

On the grounds of Heritage Tourism acting as a fundamental part of cultural heritage and sustainable tourism making up almost 40% of tourism revenues globally, a wide list of digital initiatives have been taken during the last few years. In particular, advanced technologies (such as 360o photo, Augmented Reality, 3D scanning, etc.) in conjunction with hybrid skills (i.e. technical and non-technical) of businesses' digital transformation have been providing endless possibilities in the field of cultural tourism towards enriching tourists experiences based on cultural heritage. Indeed, there are several examples revealing that heritage tourism is increasingly moving towards a new digital era. However, the COVID-19 crisis has a massive impact on the tourism-related cultural sector, having shone a light both on the challenges endured by people working in the sector and on how cultural life is weakened by the global lockdown (Compendium of Cultural Policies & Trends, 2020). In fact, the pandemic crisis jeopardizes the most crucial parts of cultural tourism (UNESCO, 2020). With almost 13% of museums being under the threat of never re-opening, more than 80% of UNESCO World Heritage properties being locked and most people working on tourism-related jobs being currently unemployed, the need to move towards digitization becomes even more urgent. To that end, new skills are being required among the professional profiles of culture and tourism. It is thus rational for young people seeking job opportunities in the heritage tourism sector to be more equipped with digital competences to form a more resilient tourism workforce (UNWTO, 2020).

1.1. Project objectives

The project aims at empowering young people in promoting Heritage Tourism resources through the development of their own skills in Digital Design for the digital transformation of heritage tourism. Moving towards a totally new era in cultural tourism that integrates the concept of digital heritage tourism into cultural life, young job seekers

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should be equipped with competences that allow them to differentiate themselves among a close and yet competitive industry. After the project completion, participants will be able to put their creativity into action being in position to map out digital content that promotes local culture and manage the tones of resources that cultural life offers (museum exhibits, local products, places to visit, local food, etc.) in an intuitive manner. Recent research has shown that the tourism sector has been turning into digitalised solutions towards the establishment of Smart Tourism. The objective is to lead creativity and innovation in tourism, while contributing to new destination configurations (Dredge, et. Al., 2018). In fact, the Digital Heritage Tourist definition has recently appeared under the scope of tourists visiting a place (museum, location, etc.) virtually instead of physically, having the entire tourist experience in a digital manner.

However, after COVID-19 outbreak, global tourism is brought to a standstill, with millions of people looking for cultural experiences from their homes and with professionals being rather unprepared for the lockdown and with their hands tied in the context of a travel-less world. On the other hand, youth play a significant role in all action plans to limit the impact of the crisis, while they are among the most vulnerable groups being the main victims of the aftereffect of the pandemic (Rojo, 2020). Therefore, with youth unemployment being increased by 0.8% within the first month of the crisis (March-April 2020) and with Heritage Tourism being at stake and turning to digital solutions to survive, there is an urgent to equip young people with digital competences in order to overcome unemployment and support heritage sustainable development.

1.2 Project Target group

The main target groups of this project are:

• Young adults that already have working experience in heritage tourism or are interested in promoting heritage tourism

· Young adults that are interested in improving their digital competences

· Youth workers

· Youth training organizations

· Tourism organizations

· Organisations related to the creative/cultural industry

· NGOs or other organizations/authorities taking initiatives towards sustainable development

· Digital designers/Digital design/e-Learning companies

· Policy makers

2. National Reports

National Reports are the official documents by which countries report information and research data useful to the development and delivery of a project. Used collectively, National Reports can draw the picture of the overall context of the project.

2.1 UK

2.1.1 The methodology

The methodology approach used for this desk research is mainly based on researching quantitative data using web-based sources and governmental documents. Since the objective of the research is mainly to draw the picture of the overall context of the project, in terms of tourism trends, needs and practices as well as data on youth unemployment and trends, websites such as VisitBritain, Gov.uk, and UNESCO will be the main sources of documentation.

2.1.2 The results (questions)

1.   What are the main areas that tourism-related training programmes/curricula your country focus on?

2.   Are there any training programs that promote digital upskilling in the Tourism sector in your country? If so, please describe (title, provider, objectives, focus areas).

3.   What are the main problems of the tourism sector in your country? (If any)

4.   Do young people in the tourism sector face any challenges or obstacles when looking for a job?

5.   What has been the response of the tourism sector in your country to the Covid-19 travel restrictions?

6.   What has been the response of the tourism sector in your country to the Covid-19 unemployment?

7.   What is the level of digital knowledge in your country among young people (18-29)? Which digital tools do they use the most and for what purposes?

8.   Please look for examples (practices, projects, tools, etc.) implemented in your country that promote digital solutions for the safeguarding of Heritage Tourism.

9.   What kinds of thematic tourism are present in your country?

10.   What kinds of thematic tourism could be developed in your country?

1.   What are the main areas that tourism-related training programmes/curricula your country focus on?

Tourism degrees will provide students with the fundamental knowledge of the tourism industry, preparing for exciting jobs in the field of tourism. With a Bachelor of Tourism, students will learn the business and management principals of tourism in all forms, such as ecotourism, luxury, as well as sustainable business practices[1]. The main findings are that the aims of the tourism-related courses in UK are substantially vocational and business orientated, that most courses include common areas of knowledge and that there is a range of opinion about the need for a common core body of knowledge. These findings contribute to the suggestion that there is a commonality around the tourism courses with a business focus but that there is less agreement about the courses that do not have this focus.

Undergraduate travel and tourism degrees can be studied as standalone qualifications or combined with other subjects. For example, travel and tourism programmes often overlap with hospitality courses or can be taken in conjunction with business-related subjects such as finance, accounting, management or human resources (HR). Travel and tourism degrees are also often combined with language courses such as French, Spanish or Italian[2].

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[1] https://www.bachelorstudies.com/Bachelor/Tourism/

[2] https://www.academia.edu/17501344/The_content_of_tourism_degree_courses_in_the_UK

Coventry University, Ulster University and the universities of Derby, Strathclyde, Sunderland and Westminster rank highly for travel and tourism programmes in university league tables. These institutions provide some of the following courses:

- Coventry University - BA Tourism and Hospitality Management.
- Ulster University - BSc International Travel and Tourism Management.
- University of Sunderland - BSc Tourism and Aviation Management, BSc Tourism Management.
- University of Westminster - BA Tourism with Business, BA Tourism and Events Management, BA Tourism Planning and Management.
- Bournemouth University, Liverpool John Moores University, the University of Birmingham and the University of Surrey also rank well for undergraduate travel and tourism degrees[3].

Generally, the subjects associated with a tourism-related degree are Economics of tourism, Marketing for tourism, Transport: challenges and issues, Management theory and practice for hospitality, travel and tourism industries, Sustainable tourism, Transport economics and policy[4].

2. **Are there any training programmes that promote digital upskilling in the Tourism sector in your country? If so, please describe (title, provider, objectives, focus areas).**

According to the World Travel and Tourism Council (WTTC), tourism accounted for 10.4% of global GDP and 313 million jobs or 9.9% of total employment in 2017 (WTTC, 2019). Clearly, these figures have changed in 2020 as Covid-19 severely impacts employment statistics within the tourism industry. However, during a post-Covid environment, as employment steadily returns and as digital connectivity of populations

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[3] https://www.prospects.ac.uk/jobs-and-work-experience/job-sectors/leisure-sport-and-tourism/travel-and-tourism-courses

[4] https://www.theuniguide.co.uk/subjects/tourism-and-travel

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has increased significantly. The need to virtualise work thanks to Covid-19 has accelerated digital transformation, and deepened differences of digital skills gaps across people and corporations. This indicates that a big number of employees require new digital skills within the workplace via in-house training and people got to improve their digital skills before entering the industry. Digitalisation of tourism services is changing the structure of the industry by altering barriers to entry, facilitating price comparison, revolutionising distribution channels through the web, optimising costs and improving production efficiency (Assaf and Tsionas, 2018).

According to Abou-Shouk et al. (2013), the tourism industry has become the most important category of products and services sold over the web. The most important future digital skills reported by respondents include online marketing and communication skills, social media skills, MS Office skills, operating systems use skills and skills to watch online reviews. The largest gaps between the present and therefore the future skill levels were identified in AI, robotics skills, AR and VR skills. However, these skills, alongside computer programming skills, were considered also as the least important digital skills for tourism and hospitality employees in the future.[5]

In terms of digital upskilling, there are many options available in UK, that support companies in their digital journey to learn how to better use technology and make their time more efficient. VisitScotland or VisitBritain for example, offer digital trainings like this, especially in response to Covid-19. Some of these training courses are: WorldHost customer service training, HIT customer service training, cyber security and others.[6][7]

3. What are the main problems of the tourism sector in your country? (If any)

UK's fastest growing sector that currently employs 3 million workers and contributes over £130bn to the country's economy is tourism, according to a UK Parliament report.

[5] Carlisle, S., Ivanov, S. and Dijkmans, C. (2021), "The digital skills divide: evidence from the European tourism industry", Journal of Tourism Futures, Vol. ahead-of-print No. ahead-of-print. https://doi.org/10.1108/JTF-07-2020-0114

[6] https://www.visitscotland.org/supporting-your-business/digital-skills

[7] https://www.visitbritain.org/business-advice/find-training

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This economic sector is greatly developed and represents the sixth largest tourism industry in the world based on value. London, Europe's most visited city, counted almost 20 million overseas visitors in 2017, with, (followed by Edinburgh with 2 million visitors).

A big share of overseas tourists visiting the UK come from the EU (67%), with a high percentage coming from France, Germany, Spain and The Netherlands.

The UK tourism and hospitality sectors are dependent on EU migrant workers, who represent 12%-23% of the industry's workforce. As the tourism sector continues to grow, it is estimated that there will be a need for an additional 62,000 workers per annum in order to meet growing demand. While the United Kingdom and European Union continue negotiations about the post-Brexit relationship, critical issues that will influence the future of British tourism are emerging. Since EU countries are fundamental to the industry, both in terms of workforce and overseas visitors, key questions arise as to how the post-Brexit environment will appear, specifically in relation to the freedom of movement, labour, and aviation agreements[8].

4. **Do young people in the tourism sector face any challenges or obstacles when looking for a job?**

The UK is the world's 7th most popular tourist destination; this is why it is not unexpected that this sector creates many job opportunities. These UK tourism employment statistics show the importance of tourism for employment. Since 2010, tourism has been the fastest-growing sector for UK employment, counting for 11.9% of all jobs and it is believed that by 2025, the industry will be worth over £257 billion. Travel and tourism surpassed financial services (8.9%) and banking (3.4%) as the fastest developing sector in the UK.[9]

Nonetheless, according to the All-Party Parliamentary Group (APPG) for Youth Employment, a great number of young people still face obstacles to employment; also, there too many young people are 'hidden' from the official statistics. (These are generally young people who are NEET (not in education, employment or training) and

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[8] https://www.touristengland.com/media-center/impact-of-brexit-on-tourism-industry/
[9] https://www.condorferries.co.uk/uk-tourism-statistics

not claiming any welfare support.)); New policy and funding models can create perverse implications for social mobility; young people far from the labour market face many barriers resulting in a struggle to complete programmes with pre-determined markers for achievements.

The government's greatest ambition is to have zero youth unemployment. However, according to Impetus PEF[10] young people who spend 12 months or more NEET are becoming more and more.

Evidence estimates that young people who are furthest from the labour market have generally one or more major barrier to employment. These comprise but are not limited to: disability, mental health issues, low education attainment, homelessness, care leavers, carers, a criminal record and low aspirations. Unfortunately, young people cannot be expected to make good and sustained progress into employment, education or training, if they don't first overcome these barriers.

What is needed is a personalised support for young people who are hidden or furthest away from the labour market. This could make them more likely to progress in their employment journey. The mentioned support may be represented by a key worker, non-formal training or a supported work experience.[11]

Statistics Canada shows that the share of youth employment in Travel & Tourism in UK is 27.8%, followed only by US (29.4%) and Canada (32.4%). The youth (15-24) economy unemployment rate in UK in 2017 instead was 12.1%.[12]

5. What has been the response of the tourism sector in your country to the Covid-19 travel restrictions?

To draw a general overview of Covid-19 impact on UK' tourism, here's some statistics:

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[10] https://www.impetus-pef.org.uk/policy

[11] https://www.youthemployment.org.uk/dev/wp-content/uploads/2018/01/Those-Furthest-From-The-Labour-Market-Youth-Employment-APPG-Report-L.pdf

[12] file:///Users/rosaamaro/Downloads/Social_Impact_Generating_Jobs_for_Youth_Jan_2019.pdf

- From 6,804,900 in February 2020 to 112,300 in April 2020, monthly air passenger arrivals to the UK saw a reduction of 98.3%.
- London saw the largest decrease in room occupancy of any English region from 2019 to 2020, with only 20% of rooms occupied in July 2020 compared with 90% in the same month in 2019.
- Accommodation and travel agency businesses saw the highest decline in turnover during the first UK lockdown, falling to 9.3% of their February levels in May 2020.
- In travel and tourism industries overall, the number of people aged 16 to 24 years experienced the greatest fall in employment than any age group between Quarter 3 (July to Sept) 2019 and Quarter 3 2020.[13]

As mentioned before the UK tourism industry became one of the country's fastest growing sectors, expected to reach £257bn by 2025. But that was before the global COVID-19 pandemic happened.

The industry is now set to lose £37bn this year alone, according to VisitBritain, with a drastic fall in visitor numbers both from overseas and the domestic market. Hospitality and leisure SMEs in the sector have been the worst affected by the pandemic, losing 54% of their monthly business income, according to research from Aldermore.

For many, the impact of quarantine measures for overseas visitors meant that 2020 had been all but written off. Since March, inbound tourism has generated very little revenue, if compared to last year, when it was worth £28bn to the UK economy. With the reduction of lockdown measures marking an important step in the reopening of hospitality, travel and leisure businesses, hotels, holiday parks, restaurants and attractions will have the

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[13]https://www.ons.gov.uk/businessindustryandtrade/tourismindustry/articles/coronavirusandtheimpactontheuktravelandtourismindustry/2021-02-15

opportunity to benefit from domestic tourism. However, they will still experience many challenges in complying with the strict COVID-19 health and safety regulations.[14]

VisitBritain, the national tourism agency, has as objective to drive immediate tourism recovery from the COVID-19 pandemic by building back visitor spend as quickly as possible and supporting the recovery of the industry. One of their most important goal is to ensure that tourism returns to be once again one of the most successful sectors in the UK economy. In order to do that, multiple policies and strategies have been put in place. As it's knows, COVID-19 created challenges but also opportunities as it became clear early on that "business as usual" will not be "business as before". That is why a new "people's strategy" has been created to help every member of the organisation to become more resilient and diverse, develop their skills and maximise their wellbeing at work. Expertise, passion and time was spent to develop this strategy with the support of the Diversity and Inclusion networks and the Vision Implementation Group. This people strategy faces towards the future, is ambitious, but also practical and deliverable.

The UK government is also developing a new plan to recover the tourism sector from the Covid-19 pandemic. Central in this plan are the creation of a new rail pass and vouchers for popular tourist attractions. This will aim to bring domestic tourism to its pre-pandemic levels by 2022 and international tourism by 2023.

The National Lottery in autumn 2021 will launch a £10 million voucher scheme where players will have the chance to redeem their vouchers at tourist attractions across the UK between September 2021 and March 2022; this will encourage domestic trips beyond the summer season.

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[14] Tourism in the UK - post covid. (2020). ICAEW. https://www.icaew.com/technical/business-and-management/business-and-management-faculty/business-and-management-magazine/bam-july-august-2020/tourism-in-the-uk-post-covid

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"Staycationers" also will get a great opportunity to travel: a Rail Pass indeed will be launched later this year, to make more sustainable for domestic tourists to travel across the country.

Another plan from the government includes a new focus on technology and data. Tourism data will be collected at the border to work how to support the sector and a tourism data hub to give the sector access to robust, accessible and timely data is also in the plans. This hub could help recording consumer trends in travel, and accordingly inform policy and marketing about new trends, create new policies and improve visitor experience.

Later this year, UK government is going to develop a Sustainable Tourism Plan. Its main aim is create further measures to reduce the impact of tourism on the environment whilst balancing the needs of local communities with the economic benefits generated by tourism.[15]

6. **What has been the response of the tourism sector in your country to the Covid-19 unemployment?**

Turnover in travel and tourism businesses fell to its lowest level in 2020 in May, at just 26.0% of February levels, compared with 73.6% in all other industries. Accommodation and travel agency companies saw the greatest decline in turnover during the first UK lockdown, dropping to 9.3% of their February levels in May.
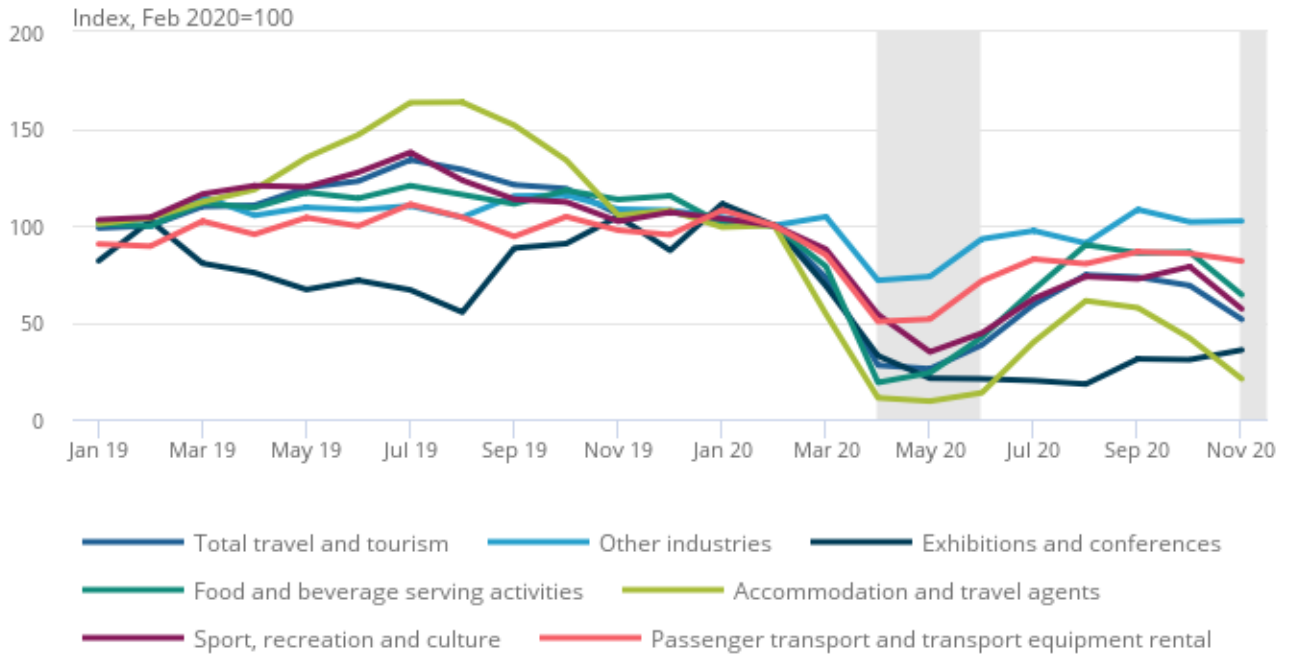
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[15] https://www.gov.uk/government/news/new-plan-to-drive-rapid-recovery-of-tourism-sector

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Figure 4: Turnover for travel and tourism businesses fell to 26.0% of
February levels in May 2020

Turnover by industry, indexed (February 2020 = 100), non-seasonally adjusted, UK
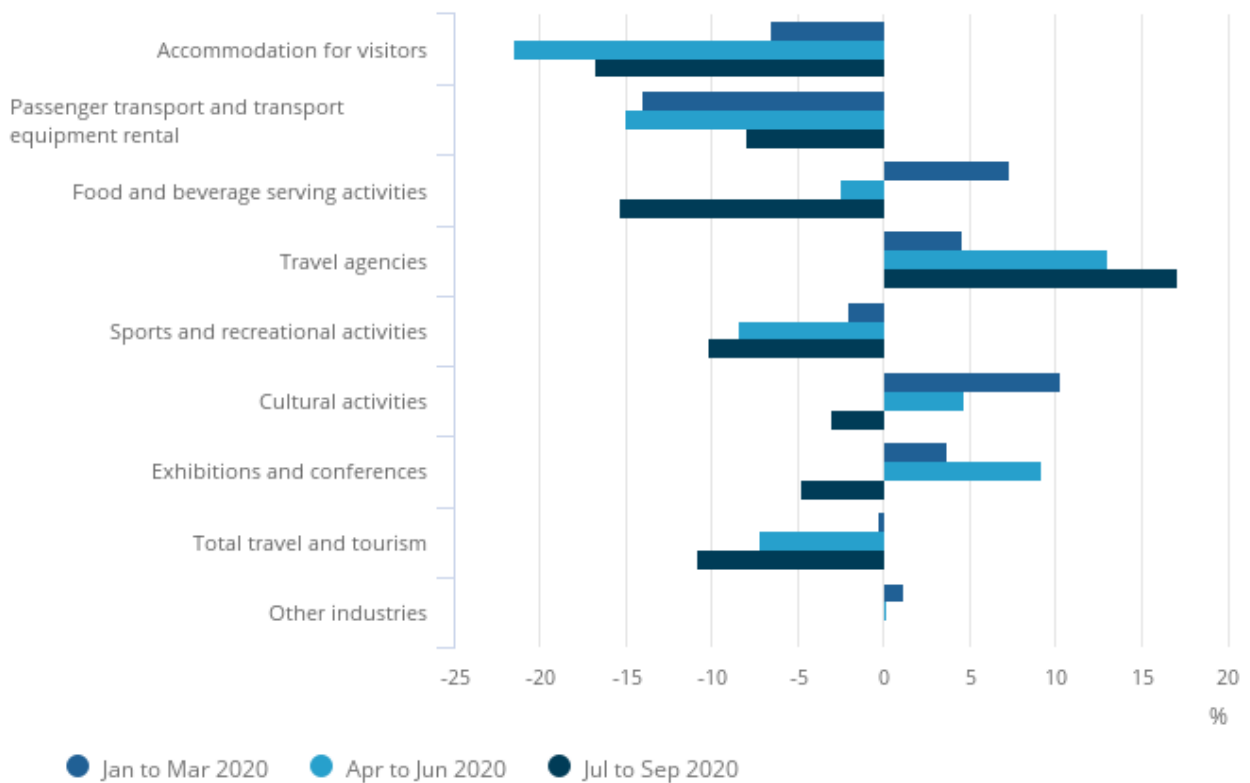

Source: Office for National Statistics - Monthly Business Survey

Quarter 2 (Apr to June) 2020, employment in accommodation for visitors fell by 21.5%
compared with the same three months of 2019 (see chart below)

Figure 6: Quarter 2 (Apr to June) 2020, employment in accommodation for visitors fell by 21.5% compared with the same three months of 2019

Percentage change in number of people employed by industry of main job, quarter on same quarter of previous year, non-seasonally adjusted, UK

● Jan to Mar 2020   ● Apr to Jun 2020   ● Jul to Sep 2020

Source: Office for National Statistics - Labour Force Survey

Also, statistics show that people aged 25 to 34 years working full-time in travel and tourism industries, saw the largest turnover, only followed by people aged 16 to 24 years working part-time.

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Figure 8: The largest fall in employment was in people aged 25 to 34 years
working full-time in travel and tourism industries

Contribution to percentage change in number of people employed by industry of main job, age and working
pattern, between Quarter 3 (July to Sept) 2019 and Quarter 3 2020, non-seasonally adjusted, UK

Percentage points

Legend:
● Total travel and tourism full-time   ● Total travel and tourism part-time
● Other industries full-time   ● Other industries part-time   — Total employment

Source: Office for National Statistics - Labour Force Survey

Along with the great declines in employment, travel and tourism industries have also resulted to have have higher rates of people on full or partial furlough leave. Even with the easing of restrictions in the summer of 2020, the percentage of the workforce on furlough leave in most travel and tourism industries was higher than in other industries, before increasing again in November in response to further lockdown measures.[16]

The main response from UK government to the tourism and travel industry's unemployment post Covid-19 pandemic has been a financial support scheme, called Universal Credit, a means-tested benefit for people of a working age on low income.

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[16]https://www.ons.gov.uk/businessindustryandtrade/tourismindustry/articles/coronavirusandtheimpactontheuktravelandtourismindustry/2021-02-15#impact-on-the-labour-market-in-travel-and-tourism-industries

Analysing official data from the Department for Work and Pensions (DWP), the BBC Shared Data Unit found that about 2.4 million fresh universal credit (UC) claims began last April and May during the first lockdown ; at least three in every five of those claims - about 1.4 million - remained open six months later; London, north and west Wales, north-east Yorkshire, Scotland and parts of Cumbria represent the main areas with the highest proportion of claims open six months later[17].

7. What is the level of digital knowledge in your country among young people (18-29)? Which digital tools do they use the most and for what purposes?

Digital technology has changed global society, both in the workplace and at home. The continuing advances in digital technology and the importance of digital skills are increasing. In 2017, Lloyds Bank stated that 11.5 million people in the UK were lacking basic digital skills, while the Office for National Statistics reported 9 percent of people had never used the internet. Research indicates that age, disability, social class, income and the age at which people leave education are important indicators of internet use.

In recent years, in order to improve digital skills in the UK, many measures have been introduced: for example, In 2014, a new computing programme of study for the national curricula was announced; while in 2017, the Government issued its UK Digital Strategy 2017, that affirmed that 90 percent of all jobs within the next 20 years "will require some component of digital skills". The UK Digital Strategy also included actions to reduce digital exclusion and improve digital skills; in 2015, Go ON UK produced the Basic Digital Skills Framework. This framework involved five main areas of digital capability and what these categories mean for both individuals and organisations. These five areas forming basic digital skills are:

- Managing information: Find, manage, and store digital information and its content.
- Communicating: Communicate, interact, collaborate, share and connect with others.

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[17] https://www.bbc.co.uk/news/uk-56127385

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- Transacting: Buy and sell goods and services; manage your finances; register and use digital government services.
- Problem Solving: Increase independence and confidence by solving problems and finding solutions using digital tools.
- Creating: Produce basic digital content to engage with digital communities and organisations.

As part of its Basic Digital Skills survey (based on 4,000 face-to-face interviews conducted in November 2016) Lloyds Bank found that 11.5 million people in the UK (21 percent) do not have basic digital skills. In terms of demographics, the report found that in 2017 age "continues to be a determining factor" in the possession of digital skills, noting that 29 percent of people aged 65 and over had no basic digital skills. In comparison, 97 percent of 15 to 24 year olds had basic digital skills.[18]

However, according to a recent study (March 2021) young people know digital skills will be important for their future careers, but at the same time many of them are unsure they have the more complex digital skills a workplace might require. The report indicated that 88% of young people think digital skills will be central for their future careers, and 62% said they have the basic digital skills employers might need, such as digital communication skills or use common software.

But when it comes to more complex digital skills, such as coding or using specialist softwares, only 18% of young people recognise to have these more advanced skills.[19]

This can be a cause for uncertainty among young people when looking for a job.

8. **Please look for examples (practices, projects, tools, etc.) implemented in your country that promote digital solutions for the safeguarding of Heritage Tourism.**

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[18]https://www.legco.gov.hk/general/english/library/stay_informed_overseas_policy_updates/digital_skills_in_the_uk.pdf

[19] https://www.computerweekly.com/news/252498241/Young-people-dont-feel-they-have-advanced-digital-skills-for-work

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Digitalisation is changing the way people live, work, and travel, and has opened up new opportunities for tourism businesses to compete in global markets. Digitalisation is bringing unprecedented opportunities for tourism SMEs to access new markets, develop new tourism products and services, adopt new business models and processes, upgrade their position in global tourism value chains and integrate into digital ecosystems. Destinations, businesses and the wider tourism sector will need to fully embrace these new technologies to remain competitive, and to take advantage of the innovation, productivity and value creation potential.[20]

Although the digitalisation of the tourism industry is quite official, recent events have brought up the necessity to digitalise this economic sector in order to keep it alive and profitable. That is why one of the most recent trends in tourism concern Technology solutions for visitor attractions and experiences in a post-COVID-19 world. As part of a project initiated by DLP (Destination Leaders Programme), a small group of experienced tourism professionals have spent the last month looking at how different technologies can help visitor attractions and experiences in Scotland adapt and diversify in a post-COVID-19 world.

The result of this research is an interactive toolkit, designed to give attractions and experiences inspiration and ideas, as well as recommendations and solutions. This toolkit has been rolled out throughout Scotland in June 2020, in a series of webinars and communications with key industry partners and associations.[21]

Another important and practical initiative called Reproduction of Works of Art and Cultural Heritage (ReACH) and led by the Victoria & Albert Museum of the United Kingdom, aims to detail a roadmap for how museums can engage with these technologies, particularly in relation to scientific challenges such as the restoration and reconstruction of cultural heritage, as well as preserving memory in the case of fragile heritage.[22]

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[20] https://www.oecd-ilibrary.org/sites/f528d444-en/index.html?itemId=/content/component/f528d444-en

[21] https://www.visitscotland.org/news/2020/technology-solutions-for-visitor-attractions

[22] https://en.unesco.org/news/cutting-edge-protecting-and-preserving-cultural-diversity-digital-era

The nature of the innovation in the cultural heritage sector varies. Some projects are using technologies such as 3D documentation and imaging in innovative ways or settings. In other cases, techniques which are well-established in other fields are being applied in new ways in a heritage context.

Other examples demonstrate models employing creative methods to share expertise, promote professional development and stimulate engagement. The survey identified several projects which use existing or emerging technology to improve the accessibility of heritage assets and safeguard heritage against loss. Some of the most important recent projects to mention are:

- Historic England, part of a large project, MEMORI, involving 12 organisations in 10 countries, which aimed to develop a combined sensor and reader to measure common internal and external air pollutants which affect heritage assets;

- The Scottish Ten project's use of new 3D scanning technology to analyse and monitor ten sites across the world contributed directly to 2 sites (India's Rani-ki-Vav and Japan's Meiji Industrial Heritage) becoming inscribed by UNESCO as World Heritage Sites. It is also serving as a diplomatic tool, enabling countries from across the globe to collaborate and offering Historic Environment Scotland the opportunity to showcase its innovation internationally.

- The National Archives' (TNA) Archangel project is exploring the use of distributed ledger technology for digital archiving. Led by Surrey University, this interdisciplinary feasibility study is seeking to design, develop and evaluate transformational technologies and business models to ensure the long-term sustainability of digital public archives.

9. What kinds of thematic tourism are present in your country?

VisitBritain.com lists 10 categories of thematic types of tourism in UK. These are:

- **Traditional/Historic Britain**: for tourists who want to follow traditional or historic British itineraries, for example by enjoying a cup of afternoon tea, participating to a quirky festival, or visiting one of many British castles.

- **Sports and Leisure**: for sports attractions fans, From the Olympic Park to Wembley Stadium, UK really got it all.
- **Shopping tourism**: Home to iconic shopping districts like London's Oxford Street as well as thousands of independent shops and vintage markets, Britain's the perfect place to indulge in a little retail therapy.
- **Royal Britain tourism** is one of the most popular types of tourism in UK. A common example can be visiting her Majesty the Queen's iconic residence, Buckingham Palace.
- **Outdoor tourism**: From the idyllic sanctuaries of the Lake District to the brooding, legend-steeped Scottish Lochs – and so many ways to explore them – there's no country like Britain for a taste of the great outdoors. Whether on bike or on foot, it's possible to ravish the sprawling Welsh coast and wild landscapes of Devon—straight out of a fairy tale.
- **Music & Festival tourism**: The Brits love a good party, and there's no party like a festival. Examples of these festivals are the iconic acts at Glastonbury, Festival No. 6, or the quirkiest of culture at Edinburgh Fringe.
- **Food & Drinks**: Whether it's a traditional afternoon tea, fish and chips by the seaside, regional specialities like the legendary Cornish pasty to the dark and peppery Haggis, everything has to be tried!
- **Film & TV**: Loads of films and TV shows were filmed in the UK: from Harry Potter's Diagon Alley to the endless plains of King Arthur's mighty kingdom. Whether it's magic, detective mystery or adventure, iconic film and TV locations scattered all over the UK are ready to be visited.
- **Arts & Cultures**: Not just Britain's best known cities, such as London or Edinburgh carry the culture torch. Thanks to a dazzlingly rich history, the UK is packed with more literature, arts and culture, with its museums, theatres, and other cultural attractions.
- **Activities**: There's something for everyone in this section, from family-friendly cycling routes to sailing through the Norfolk Broads. Featuring a never-ending

array of exciting tours, world-famous attractions, romantic itineraries, exotic experiences and so much more, there's no limit to what one can do in the UK.[23]

What's Hot | Traditional Britain | Sport & Leisure | Shopping | Royal Britain | Outdoors

Music & Festivals | Food & Drink | Film and TV | Arts & Culture | Activities

10. What kinds of thematic tourism could be developed in your country?

Traveling is one of the most effective ways of exploring a place, culture or a destination. As mentioned before, tourism can be divided in different categories, such as outdoors tourism, leisure tourism, historic/traditional tourism etc. However, in recent years some new types of tourism were born. Although mentioned already, the film and tv tourism is one of these, as well as the sustainable tourism or the food one[24].

Dark tourism also became popular in recent years, defined as tourism involving travel to places historically associated with death and tragedy. People find the main attraction to dark locations to be their historical value rather than their associations with death and suffering.[25] However, there are various cities in the United Kingdom that could develop a type of dark tourism, since tourists seem already very interested in participating in

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[23] https://www.visitbritain.com/gb/en/things-do
[24] https://hospitalityinsights.ehl.edu/new-types-tourism
[25] https://en.wikipedia.org/wiki/Dark_tourism

ghost tours and other types of mystery tours. This could represent another opportunity for the lovers of the macabre and the dark, while at the same time representing a chance to develop and enforce UK tourism industry even more.

2.1.3 Conclusion

As mentioned earlier, the main objective of the reporting phase of the project is to cumulate research data and useful information about the partners' countries, in order to draw the picture of the overall context of the project. The results chapter of this report contains all the data beneficial to achieve this objective. The main findings of this desk research about the context in UK are the following:

o The main aims of the tourism-related courses in UK are substantially vocational and business orientated. Indeed, undergraduate travel and tourism degrees, that can be studied as standalone qualifications, are generally combined with other subjects, such as business-related subjects (finance, accounting, management or human resources) or combined with language courses such as French, Spanish or Italian.

o The need to virtualise work due to Covid-19 has accelerated digital transformation. According to Abou-Shouk et al. (2013), the tourism industry has become the largest category of products and services sold over the Internet and the most important future digital skills reported by respondents include online marketing and communication skills, social media skills, MS Office skills, operating systems use skills and skills to monitor online reviews. In terms of digital upskilling courses, many options that support companies in their digital journey, are available in UK, offered by different platforms such as VisitScotland or VisitBritain.

o The UK tourism and hospitality sectors are reliant on EU migrant workers, who make up an estimated 12%-23% of the industry's workforce. The ongoing negotiations about Brexit, might represent a critical issue for British tourism in the future, in terms of to freedom of movement, labour, and aviation agreements.

o The youth (15-24) economy unemployment rate in UK was 12.1% in 2017. Evidence suggests that young people who are furthest from the labour market often have one or more significant barrier to employment. These include but are not limited to: disability, mental health issues, low education attainment, homelessness, care leavers, carers, a criminal record and low aspirations.

o The UK government has approached a new plan to recover the tourism sector from the Covid-19 pandemic. A new rail pass and vouchers for popular tourist attractions are at the heart of a plan to return domestic tourism to pre-pandemic levels by 2022 and international tourism by 2023. VisitBritain, instead, the national tourism agency, has as objective to drive immediate tourism recovery from the COVID-19 pandemic by ensuring that tourism rebounds to become once again one of the most successful sectors of the UK economy. In order to do that, multiple policies and strategies have been put already in place.

o Data show that in travel and tourism industries, the number of people aged 25 to 34 years working full-time saw the largest fall during the Covid-19 pandemic, followed by people aged 16 to 24 years working part-time. As well as seeing larger declines in employment relative to other industries, travel and tourism industries have also tended to have higher rates of people on full or partial furlough leave. The main response from UK government to the tourism and travel industry's unemployment post Covid-19 pandemic has been a financial support scheme, called Universal Credit, a means-tested benefit for people of a working age on low income.

o One of the most recent trends in tourism concern Technology solutions for visitor attractions and experiences in a post-COVID-19 world. This brought to the creation of multiple projects in UK. Some of these include Reproduction of Works of Art and Cultural Heritage (ReACH), led by the Victoria & Albert Museum of the United Kingdom, concerning the restoration and reconstruction of cultural heritage, as well as preserving memory in the case of fragile heritage using new

technologies; another example is The Scottish Ten project's use of new 3D scanning technology to analyse and monitor ten sites across the world.

o VisitBritain lists 10 types of thematic tourisms in UK. These are: Traditional/Historic Britain, sports & leisure, shopping, royal Britain, outdoors, Music & Festivals, Food and drink, film and TV, arts and culture and Activities.

o Dark tourism, which is becoming more and more popular in the world, could be developed and included in UK, as a new form of tourism.

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Co-funded by the
Erasmus+ Programme
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2020-1-UK01-KA227-YOU-094543

2. 2 ITALY

2.2.1 Methodology

In order to be able to compile this report, M.O.R.E. used previous research carried out in the digital field which were the starting point for further insights using the Google search. The Italian government has recently introduced new measures to facilitate both digital and tourism, which is why the news found does not yet give a broad description of the digital and tourist landscape of our country. However, the selected material, in our opinion, is valid enough to give a picture of the Italian situation.

2.2.2 The Results

1. **What are the main areas that tourism-related training programmes/curricula that your country focus on?**

Many young people choose to train in tourism from a very young age. In the 2016/17 school year, (according to data from the MIUR, Ministry of Education, University and Research), although the general enrollments of the Technical Institutes have dropped, the number of enrollments for the Tourism address is growing. Among the young people who enroll in a professional institute, it is the "Services" sector that collects the highest number of enrollments (10.5%).

In Italy, tourism training starts from high school with two different training offers:

- Technical Institute for tourism which issues the technical education diploma;

- Professional Institute for Food, Wine and Hotel Hospitality, which issues the professional education diploma.

All the Regions of Italy have a high school for food and wine. In the case of tourism, the "reformed" Professional Institute has three branches within it:

- Food and Wine;

- Hall and sales services;

- Tourist reception.

In addition to the five-year courses, professional guidance provides for the possibility of undertaking other courses, three-year (which issue the qualification of Professional Operator) and four-year (which issue the professional diploma of Technician). These offers can be activated by individual schools in agreement with the Regions.

After high school, the university offer in the tourism sector includes specific degree courses, such as tourism sciences, or other courses in different disciplinary fields (for example economics or languages) with tourism content. The training offer consists of a first level degree (called three-year) and a second level (called master or specialist). The three-year degree awards the academic title of Doctor. Subsequently, it is possible to access the second level degree courses, which last two years and issue the academic title of Dottore Magistrale.

At the end of the degree courses it is possible to attend university masters, first or second level, which can be accessed based on the qualification obtained. A three-year degree allows access to a first level master's degree, a master's degree allows access to both master levels. The masters have a duration of one year. The academic qualification awarded is that of a first or second level University Master.

Examples of post graduate courses:
Management of Tourism and Cultural Activities, Languages of Tourism and Intercultural Communication, Masters in Tourism and Territory.

Most active bodies:
- ACT - Creative Tourism Academy: the CTS Academy, thanks to the experience gained in activities related to tourism and the environment, offers Masters and Specialization Courses for the training of young people interested in entering the world of tourism as managers, tourism programmers , employees in the marketing or distribution of tourist services, tourist assistants and tour leaders, employees in congress tourism and the hotel sector, and again, journalists and reporters on tourism and environmental issues.

- UET - European University School for Tourism, based in Rome, Milan and Palermo, offers courses and masters in Food & Beverage Management, Management of Hotel and Accommodation Facilities, Management of Tourist Destinations, Tourism & Hotel Web Marketing.

- The Business School of Sole 24 ORE (Italian newspaper of major reference for economy, industry and markets) offers the Master in Management of the hotel industry, in Management of catering and Management of tourism companies.

- The Study Center of the Italian Touring Club offers conferences and in-depth courses on tourism and culture.

In general, the academic training offer in Italy remains wide with about 64 types of courses proposed in the 2013-2014 academic year, including three-year degree courses, master's and first and second level masters (Cliclavoro data).

Interest in Higher Technical Institutes is also growing (see below).

2. **Are there any training programmes that promote digital upskilling in the Tourism sector in your country? If so, please describe (title, provider, objectives, focus areas).**

The Higher Technical Institutes are the first Italian experience of professionalizing tertiary training offer for cultural goods and activities/tourism according to a system consolidated for some years also in other European countries.

Born in 2010 to train senior technicians in strategic areas for economic development and competitiveness in Italy, they are high technology schools closely linked to the production system that prepare specialized middle managers who can help Government and exploit the potential of Enterprise 4.0 in the companies.

There are nr. 110 ITS on the territory related to 6 technological areas considered "strategic" for the economic development and competitiveness of the country (D.P.C.M. 25 January 2008):

- Energy efficiency
- Sustainable mobility
- New technologies of life

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- New technologies for made in Italy (Business services, Agro-food system, Home system, Mechanical system, Fashion system)
- Information and communication technologies
- **Innovative technologies for cultural heritage and activities – Tourism**

The ITS allow to acquire a Higher Technical Diploma with the certification of the competences corresponding to the V level of the European Qualification Framework. To facilitate circulation at national and European level, the qualification is accompanied by the EUROPASS diploma supplement.

In addition, the Government has launched the PST - Strategic Plan of Tourism 2017-2022 (MIBACT - Ministry for Heritage, Cultural Activities and Tourism) with which it redesigns the planning in the field of tourism economics, putting it back at the center of national policies and making it operational at the strategic address aimed at creating a homogeneous vision in terms of tourism and culture. The Plan acts on fundamental levels such as technological and organizational innovation, the **enhancement of skills**, the quality of services.

These aspects are integrated with the need for a sustainable and lasting use of the environmental and cultural heritage. Among the various objectives of the PST:

• promote innovation, digitization, creativity;

• adapt infrastructures to improve accessibility and inter-modality;

• increase the quantity and quality of employment.

Objectives that the Government aims to achieve through the development of new skills and professionalism according to the new needs of demand. The dissemination of innovative training methodologies is envisaged both in the segment of professional institutes and in higher university and post-university training dedicated to operators.

Other Government Actions:

Strategy for Technological Innovation and Digitization of the Country (Ministry for Technological Innovation and Digitization). It lists 20 actions "to transform the country" by 2025 including:

Cross-Tech hub Italia Project

The project involves the creation, development and growth, through public-private partnerships, in coordination with the other competent Ministries, of cross-industry technological hubs in compliance with the excellence of the territories in which the centers are located and starting from the excellences that already exist in the our country.

The main technologies of reference will be artificial intelligence, cybersecurity, 5g while the sectors will be autonomous and sustainable mobility and robotics as well as the made in ITaly sectors (manufacturing sector, **tourism**, food, fashion, design, social, digital humanities).

Region Puglia – Province of Trani – Training course "Destination Management 4.0"

The project aims to train "Specialists" in tourism and in digital communication and promotion for cultural and experiential tourism. It aims to enhance skills in digitization and digital creativity applied to culture and cultural heritage, thus responding to the growing demand for new specializations of the cultural and creative industry. In fact, as it is still largely unanswered today, the gaps still existing in the current training and education systems will thus be filled and, at the same time, will affect the development of the economic and entrepreneurial potential of culture and cultural heritage in a network and destination logic.

3.   What are the main problems of the tourism sector in your country? (If any)

According to the AGI / Censis dossier (one of the most well-known Italian news agencies) dedicated to the sector in the framework of *Italy under stress. Diary of the transition 2020/2021, "tourism has experienced a new, unexpected, but above all devastating setback".*

But even before the pandemic, the major problems linked to tourism in Italy and never resolved are related to logistics, the port and airport system and rail links. Factors that contribute to placing Italy in seventh place in the world tourism competitiveness indicator.

After the Covid shock, we suffered 219 million fewer guests in accommodation establishments in the first eleven months of 2020, equal to -52.2% (Istat - National Institute of Statistics). According to data from Assoturismo (Italian Federation of Tourism), arrivals decrease by 61.8% and presences by 55%.

The effect on consumption are heavy, which lose 50 billion euros. The consequences on employment are very serious, despite the blocking of layoffs: -265 thousand employed in the second quarter of 2020 alone. At a European level, Italy risks being one of the most affected countries: it is in fact the one with the highest number of accommodation establishments (more than 30% of the total of the whole Union), the second country for foreign presences and among the first four for presences in hospitality establishments.

4. **Do young people in the tourism sector face any challenges or obstacles when looking for a job?**

Youth unemployment and, more generally, the working conditions of young people are one of the main collective concerns in Italy. The emergence of the problem is long standing and in recent years, even if the activity rate of young people has halved in half a century - due to the growth of upper secondary and tertiary education - the unemployment rate of 15-24 year olds has grown and is steadily around 35%.

Following the pandemic, the employed in the world of tourism have returned to the levels of 2011 having dropped in 2020 compared to 2019 by about 350 thousand units, from 1.3 million to 953 thousand. After all, the restrictions on travel as a measure to counter the pandemic contagion, have in fact made it impossible to do tourism or travel to participate in fairs and events. In essence, one in four tourism employees lost their jobs in 2020. The worst decline concerned those with fixed-term or seasonal contracts:

among these, one in three lost their job. The crisis has hit women (183,000 fewer employed than in 2019), young people and foreigners the most: in fact, the latter two categories have seen a reduction in employment by 30% and days worked by 40%. This was stated by the Labor Market Observatory on Tourism 2020 drawn up by Federalberghi (Federation of Italian hotel and Tourism associations) and Fipe (Italian Federation of Public Exercises) with the Ebnt (Bilateral National Tourism Organization).

The average age of workers in the tourism sector is 37. In particular, in hospitality it is equal to 41 years, in public establishments it is 36, in intermediation it is equal to 41 years, in thermal baths it is 46 and in amusement parks it is 35. Following the pandemic, young people were the most affected both as regards the loss in terms of employees and days worked (respectively minus 37.0% and 42.9% for under 20s and -28.1% and -39.2% for young people between 20 and 30 years)

Before the crisis, tourism was the leading sector of youth employment: young people represented 63 percent of the employed, 602,000 employees under 40 and 342,000 under 30.

5. What has been the response of the tourism sector in your country to the Covid-19 travel restrictions?

After the declaration of the "state of emergency", the Italian Government adopted a series of decree-laws containing extraordinary measures aimed at limiting the spread of COVID19 and mitigating its effects on the markets. These actions have introduced numerous temporary and extraordinary interventions to support families, workers and businesses belonging to all economic sectors, including tourism.

- Tourism fund aimed at supporting the tourism sector through market operations, with a budget of 50 million euros for 2020
- Fund for the promotion of tourism in Italy, with an endowment of 20 million euros for 2020, in order to favor the recovery of tourist flows and the promotion of the various sectors of Italian tourism

- Fund to support travel agencies, tour operators, tour guides and tour leaders, accommodation facilities and passenger transport companies with open buses in urban and suburban areas damaged by the containment measures of COVID-19, with an endowment € 675 million for 2020 and € 100 million for 2021

- Two funds for emergencies in the entertainment and cinema and audiovisual sectors. The Funds, established at the MIBAC, were endowed with a total of 325.4 million euros for the year 2020 and 90 million for 2021

- Fund for emergencies of businesses and cultural institutions, at MIBAC, intended to support bookstores, the entire publishing chain, as well as museums and other cultural institutes and places, with an endowment that was equal, in the year 2020, for a total of 631.5 million euros

- Fund intended to compensate for losses resulting from the cancellation, postponement and downsizing of trade fairs and conferences due to the COVID-19 pandemic. The Fund, established at the Ministry of Tourism, is endowed with 100 million for the year 2021.

Examples of "local" initiatives by tourism sector entities for the revitalization of tourism to combat travel restrictions:

- Federagit (Federation of Italian Tourist Guides) of Florence in collaboration with the Municipality and Confesercenti (trade association representing Italian businesses in the trade): "Unusual Florence? Better with the guide!" and proposes to replace the "classic" guided tours with thematic itineraries to discover curiosities and anecdotes, accompanied by professional guides. Obviously in small groups and in full compliance with anti-Covid regulations. The appointments, free of charge, are dedicated to esotericism, trekking, literature and much more.

- Mister White Travel Agency of Naples: Together with the Municipality it has developed a series of unpublished regional tours, aimed at promoting authentic and unique experiences closely linked to the Campania region. This is how the tours of Pompeii were born with excursions to Vesuvius, visits to the milking of cows in Paestum and the vein

linked to cinema. The "Naples and cinema, a century-long journey" itinerary in fact refers to the great films set in the area, such as "Neruda's Postman" in Procida and the films of Totò and Sofia Loren.

- "Smart Working Holiday", an initiative launched by Cortina Marketing to make teleworking enjoyable too. Not only thanks to the suggestive view of the snow-covered landscape of Cortina d'Ampezzo, but also to the possibility of carrying out activities in nature at the end of the working day or taking a lunch break in local mountain huts and farmhouses.

Furthermore, during the lockdown, some cultural organisations acted to create innovative content and communication opportunities in order to retain, approach, and not alienate their actual and potential audiences and this had a positive effect on their willingness/capability to use fundraising tools and channels, including digital ones.

Italian Organizations Analysed

- Science Museum, Trento
- Gallerie Estensi, Modena
- GAM, Turin
- MAMBO, Bologna
- Teatro Carlo Felice, Genoa
- Genus Bononiae, Bologna
- The Bagatti Valsecchi Museum, Milan
- MUDEC, Milan
- Donnaregina Contemporary Art Museum, Naples
- Museo Madre, Naples

The activities realized are:

- Increased use of social media, workshops promoted by GAM's Education Department, contests and columns;

- Creation of "The Director's Walks" format and "Do-it-yourself Egyptian" video tutorials for children and increasing the number of videos in the series "Snapshots from the collection": from one per month to four videos published in March;

- Continued promotion and communication of planned exhibitions (without attempted sale of tickets or products);

- Little Mart at home;

- Virtual gallery tours, quizzes and trivia in Instagram stories;

- Publication of videos with a famous YouTuber from Bologna;

- Campaigns on social media, "Il blog delle meraviglie" blog on the Gallerie Estensi website and a column in Gazetta di Modena newspaper, development of an app for the Ducal Palace.

6. **What has been the response of the tourism sector in your country to the Covid-19 unemployment?**

Although the current tourist context is very delicate, Italian tourism has always shown a great aptitude for resilience. The crises of recent years (11 September, SARS in the East, international terrorist attacks, the global financial crisis of 2008) are all examples of how dramatic situations have affected the behavior and habits of tourists, but have also highlighted how the market tourism has always managed to recover and continue to grow over time.

The Covid-19 crisis, therefore, has also led to the emergence of new needs and new trends by tourists. Consequently, the Italian tourism sector is moving in further directions.

- Safety in the use of the tourist experience

- Proximity market

- Experiential tourism

- Downsizing of tourism linked to events

- Downsizing of congress and exhibition tourism

Obviously these considerations affect the problem of unemployment in the sector itself. The assessment of new needs and tools is clearly also giving rise to the possibility for new professional figures and / or to strengthen existing ones.

Therefore, the sector is adapting to the new priorities and needs to be satisfied, such as the search for safety, hygiene, social distance, etc ... These concepts are influencing the brand development, the way in which the tourism product is built for the destination and the investment in human resources with new skills to heal unemployment.

First of all, the spaces, the use of the product and the ways of relating with the guest were reorganized. Museums, exhibitions, access to monuments have been rethought and organized in a functional way to meet new needs, especially thanks to the use of new technologies (think of the Virtual Tour offered by the most important Italian museums). It was also essential to rethink the ways in which people request information from the tourist office of the destination and in this context the digital experience was certainly privileged, with appropriate information on the destination website, development of dedicated apps, chatbots and all that that smart technologies can offer to shorten the distance between guest and destination while maintaining high standards in safety.

The process is still ongoing but the premises are comforting.

On the political side, moreover, the Government measures to support unemployment due to Covid-19 crisis:

- Compensation for seasonal workers in tourism and spas
- Indemnity for fixed-term workers in tourism and spas
- Entertainment workers' allowance
- Contribution relief

7. **What is the level of digital knowledge in your country among young people (18-29)? Which digital tools do they use the most and for what purposes?**

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The DESI index (Digital Economy and Society Index), which measures the progress of EU member states on their path towards a digital economy and society, highlighted Italy's backwardness in digitization. In addition to this study, an Eurostat survey also confirmed the Italian shortcomings.

The study quantified digital skills thanks to a composite indicator, based on selected activities carried out by individuals on the Internet in four specific areas: information, communication, problem solving, software.

First of all, the ability to identify, locate, retrieve, archive, organize and analyze digital information is assessed, underlining its relevance and purpose.

Secondly, the survey tries to quantify the skills of communicating in digital environments, sharing resources through online tools, connecting with others and collaborating through digital tools, interact and participate in communities and networks, develop intercultural awareness.

In addition, Eurostat has assessed the competence in identifying digital needs and resources, making informed decisions on which are the most appropriate digital tools based on the purpose or need. It is therefore a question of problem solving skills linked to the creative use of technology.

Finally, the survey measured software skills, generically defined as the ability to create and edit new digital content (from word processing to images and videos). This includes the skills to integrate and rework previous knowledge and content and to produce creative expressions, multimedia outputs and programming. The competence of individuals in dealing with and enforcing intellectual property rights and licenses is also assessed.

THE RESULTS

In the general frameworke, Italy is fourth from bottom with a percentage of 65%. In detail, according to the breakdown of the DESI index:

- Connectivity: Italy ranks 17th on average with EU values;

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- Human capital: Italy ranks 28th and last place. Only 42% of individuals between 16 and 74 have basic digital skills (vs 58% EU average);

- Use of the internet: Italy ranks 26th. 17% of individuals residing in Italy have never used the internet;

- Integration of digital technology: Italy ranks 22nd. Only 10% of SMEs sell online (well below the European average of 18%) and only 8% of turnover comes from digital sales;

- Digital public services: Italy ranks 19th, below the European average, despite the good performance in the offer of digital services and open data (Open Data) only 32% of Italian users online it uses e-government services (compared to the EU average of 67%).

Specifically, young people aged 16 to 29 would have a satisfactory level of computer skills, as well as those under 15. The problem is especially evident in the over 29s: a third of them would have no understanding of technological systems (OECD average: 17%).

Share of young people with basic or above basic digital skills, 2019
(% of individuals aged 16 to 24)
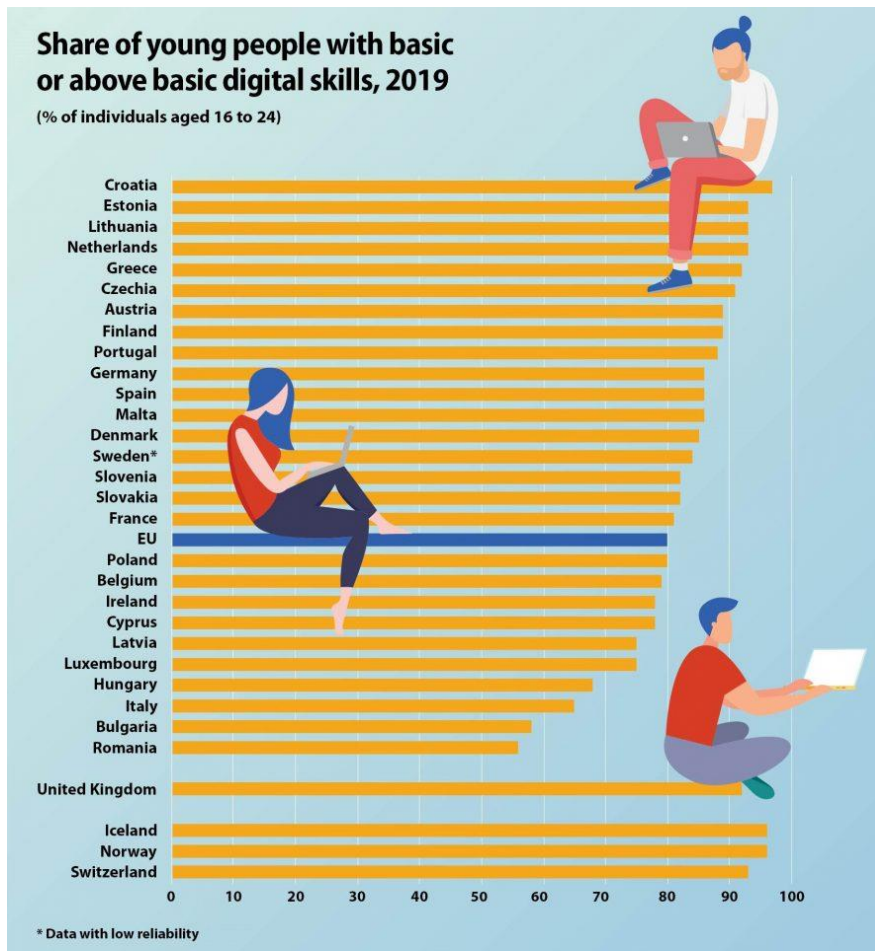
ec.europa.eu/**eurostat**

According to the latest interesting research by the Cultural Institute of Social Sciences Niccolò Rezzara of Vicenza (Italian study center) in 2015, digital tools are now within everyone's reach: 93% currently use the internet and 81.5% actively enter relationships offered by social networks. 92.4% own a smartphone and 91.9% a computer, while less than half also own a tablet.

In detail concerning young people, it is clear that many of them are in continuous connection. 88% claim to use the internet every day and more than 50% use social networks for over 2 or 3 hours.

Internet is mainly used for downloading messages, music and photos; social networks to meet people, share messages. The contents of the messages are 94.3% information.

The free judgments on people and sentimental relationships are placed behind them, with a few statistical points less. 29.5% use intimate texts or images online.

66% of their judgment on the social situation is limited to acquiring the new way of communicating differently than adults. Only one in five mentions the presence of a new way of relating and one in four of the new possibilities of play and pastime. 75% of young people condemn scams and stalking and, with a few percentage points less, the masking of identity and anonymity. Only about half grasp the inconsistencies of the ostentatious use of tools in public places.

8. **Please look for examples (practices, projects, tools, etc.) implemented in your country that promote digital solutions for the safeguarding of Heritage Tourism.**

There are many examples spread throughout the Italian territory.

- "Travels in ancient Rome", is now a fixed appointment of the Roman summer: visitors to the Forum of Augustus and the Forum of Caesar, armed with a special receiver with headphones, watch magnificent videos and videomapping reconstructions, projected directly on the surfaces of the sites, which show the places as they appeared at the time, witnessing a representation that - as reported by the same visitors in various online reviews - manages to combine emotion, wealth of information and great historical and scientific rigor.

- The "Ara as it was" project saw the combination of different technologies within the Ara Pacis exhibition space, offering a unique Augmented Reality and Virtual Reality experience. Through special viewers for Augmented Reality and the camera of the devices inserted in them, virtual elements and real elements blend directly into the visual field of visitors who find themselves immersed in a 360˚ environment, where they can admire the Ara Pacis in its original colors and witness scenes from the life of imperial Rome thanks to the combination of live film shooting, 3D reconstructions and computer graphics. The particular technology used carried out a real-time 3D tracking of the three-dimensional elements of the bas-reliefs and sculptures, allowing the anchoring of virtual

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objects to real objects, contributing to the effectiveness, immersion and sense of magic of the entire experience.

- "Circo Maximo Experience": also in this case, the combination of technologies for augmented (AR) and virtual (VR) reality allows to visit the site in all its historical phases thanks to a cutting-edge experience that uses interactive technologies to date never used in an outdoor area of such large dimensions. Again, visitors are able to explore the site from specific vantage points.

The initiatives were promoted by Roma Capitale, Department of Cultural Growth - Capitoline Superintendence for Cultural Heritage, organized by Zètema Progetto Cultura (instrumental company wholly owned by Roma Capitale which operates in the Culture sector) and entrusted through calls for tenders to several private companies that have taken care of the realization.

- The path of immersive experiences and virtual reality was followed by the Museum of Science and Technology in Milan with Toti Submarine VR Experience, a free app for virtual reality that since 2015 allows the user to explore firsthand "Enrico Toti S-506 ", the first submarine to be built in Italy after the Second World War. The project is part of the activities of the Italian Videogame Program which aims to promote the potential of the videogame medium for the enhancement of the territory and tourism.

The videogame, in the specific form of the applied game for the enhancement of the artistic and archaeological heritage, is, in fact, a growing sector and increasingly in sight by the institutions to the point of finding space in the "Operational guidelines for the preparation of the Cultural Strategic Development Plan "of the DG Museums of the MiBact.

- Along this line, the Archaeological Museum of Taranto presented the video game "Past for Future", created by the collective of artists TuoMuseo in collaboration with the Ministry of Cultural Heritage and Activities. "Past For Future" is a 2D horizontally scrolling narrative game that explores human feelings through a long investigative journey in the city of Taranto and in the treasures of the National Archaeological Museum of Taranto.

- The path of videogame experiences as a means of communication, promotion of the territory and involvement of the public follows the success of the National Archaeological Museum of Naples which, with the title "Father and Son" has, in fact, inaugurated a genre. The side-scrolling 2D narrative game alternates the exploration of human feelings such as love, dreams, fear, through a journey through the streets of Naples, different time periods and, of course, the spaces of the museum, which becomes a real location of the game. Some areas of the game, in fact, can only be unlocked by physically going to the Museum. After its success, a new chapter of the game is currently under development.

- Conservation and restoration: the 3ReaD project

The "3ReaD" project, born from the collaboration between two private companies and two Roman universities and financed by the Lazio Region, has the objective of using digital technology to assess the state of conservation of the cultural, architectural and historical-artistic heritage, applying - in an integrated and synergistic way - comparative, diagnostic and forecasting analyzes for the management of emergencies and for planned conservation activities. The project aims to create an innovative digital platform consisting of a set of modules and tools, complete, integrated with each other with AR / VR / MR technologies, for the survey, the generation of 3D objects, their editing and analysis, in order to assess the state of conservation of the architectural, archaeological and historical-artistic cultural heritage.

Many other examples/projects arise from a private sector:

- Bravo Innovation Hub.

Is an innovative incubator funded by the Pon Imprese e Competitività 2014-2020, which is part of the Action Plan for the dissemination of entrepreneurship and innovation promoted by the Ministry of Economic Development and housed in the historic Palazzo Guerrieri in Brindisi, which gathers start-ups and the micro-enterprises of the tourist and cultural supply chains of Basilicata, Calabria, Campania, Puglia and Sicily.

- Pomerium - SATELLITES, DRONES AND 5G TO PROTECT THE HISTORIC CENTRE OF ROME

Pomerium by e-GEOS - a company formed by Telespazio (80%) and the Italian Space Agency (20%),- is one of the winning projects in the European Space Agency's "5G for l'Art" call for tenders relating to the use of technology on behalf of the cultural heritage and the environment.

Pomerium envisages the creation of an advanced monitoring system using integrated methodologies and technologies, including a "Digital Twin" approach, to study and monitor certain areas of the historic centre of Rome within the area encircled by the Aurelian Walls. Areas identified in particular are the Palatine Hill and the Colosseum, the Pyramid of Cestius and Porta San Paolo, the urban course of the Tiber, the Aventine Hill, and the Porto Fluviale.

In view of the potential expressed so far, however, the digital transformation in the museum and cultural heritage sector is still proceeding at a slow pace, juggling the now historic "patchy" initiatives, pilot projects and best practices that barely manage to get out outside the logic of experimentation.

According to the latest Istat report "Italy of Museums", in 2019 only 10% of museum structures engaged in the digitization of their catalog and less than 45% use interactive technologies and digital tools.

9. What kinds of thematic tourism are present in your country?

We highlight some trends to understand how tourism is changing and which employment prospects can open up the new challenges of the future.

Environmental, sustainable and responsible tourism

The growing mobilization of large masses of people for tourism can have social and environmental consequences in the most delicate territories and habitats. One answer to the problem is called sustainable tourism, and it is based on elements such as the

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long-term tolerance of flows from an ecological point of view; economic and social equity; greater interaction between the tourism industry, local communities and travelers; the responsibility of travelers in contacting the local population and paying attention to the management of resources and waste. Sustainability thus becomes a great creative opportunity to regenerate and qualify the tourism offer and for the development of new professional figures. Highly specialized figures able to hold together communication skills, ability to read the territory and knowledge related to the carrying capacity of the environment and the communities concerned, for the adoption of new models outside the logic of exploitation and consumption models traditional.

On this topic we point out the Italian Association of Responsible Tourism.

Experiential tourism

It is a type of tourism that responds to emotional needs, linked to a narration of the territory based on the specific interests of the recipients (architecture, photography, music, food and wine, etc.). It was created as a response to counter the pricing policies of large groups and is based on the theming and personalization of tourist routes to offer the customer a unique experience to share with people sharing the same passion.

Cultural tourism

It is a great challenge that concerns us very closely. In fact, culture as well as tourism is one of the strategic assets for the economic growth of our country. This is why Civita (large entrepreneurial reality specialized in the enhancement of cultural heritage) presented the Report *The-art-of-producing-Art* which, if on the one hand underlines how Italy is losing competitive positions at an international level, on the other it detects a trend favored by the digital revolution, which has made for new groups of users (the "creative tourist") both the consumption of traditional cultural activities (from performing arts to museum visits) and those activities linked to the culture of a territory (from fashion to design, from crafts to the taste industry) or to the communication and audiovisual

industry (for example film tourism). This trend is potentially capable of supporting the economy of areas of the country that are not part of the current tourist attractions.

In this context, the works of the TDLAB (Laboratory for Digital Tourism), an initiative of the Ministry of Cultural Heritage and Activities and Tourism, which had the task of implementing a digital strategy for tourism, were inserted. The TDLAB, established with D.M. of 3 April 2014, concluded its work and delivered the Strategic Plan for the digitization of Italian tourism to the Minister. It envisages three areas of intervention - interoperability and big data, digital development and promotion and marketing - divided into 30 concrete actions intended to be implemented by the new ENIT.

With the Culture and Tourism Decree (Law Decree 31 May 2014, n.83), the MiBACT introduced important innovations for the relaunch of tourism. Among the measures adopted: tax credit for the digitization and restructuring of tourism businesses; the definition of "zero bureaucracy" tourist districts, simplifications for new businesses and tax concessions for start-ups created by under 40s. The adoption of an extraordinary plan for cultural tourism mobility, the creation of national circuits of excellence and a review of the classifications of hotel structures to adapt them to European and international ones.

10. What kinds of thematic tourism could be developed in your country?

Proximity tourism is one of those forms that is becoming more and more popular, it is the type of tourism that aims at the (re) discovery of the nearest places, those that are located a few kilometers from home, and that perhaps because of this is why we never thought of looking through the eyes of a visitor.

Those who practice Undertourism, on the other hand, choose little-frequented destinations, that is, they think about travel, choosing national, if not regional, little-known and uncrowded destinations, even this type of tourism enhances local realities.

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More and more people are choosing <u>sustainable tourism</u> that promotes knowledge and enhancement of local cultures and traditions, while respecting the environment and the life systems of the countries, territories and populations that inhabit them.

Another new trend in tourism is <u>Neverending tourism</u>, a service capable of extending the tourist experience before and after the trip, offering online content such as "virtual" visits to museums and cities, sports activities set in destinations but virtually practicable. o cooking courses linked to the territories visited.

But also work can also be seen as a tourist activity, <u>Business Travel</u> is a tourism in half that can be done in those places where, thanks to an excellent internet connection, customers can "cure" themselves of stress through moments of relaxation. , even during the working week. In 2020 alone, 39% of Italian hotels had remote workers as guests, who preferred to carry out their activities in places other than their home. An economic form to travel is "last second" travel, although there are not many tour operators offering this service, online you can still find agencies specialized in Last Second that sell travel packages for departures within two days at most with costs very content.
These trends are, in fact, at the center of some initiatives for the revival of tourism.

<u>Roots Tourism</u>
We are facing a form of tourism that more than others has to do almost exclusively with tourists. In fact, it allows him to know and discover something that belongs to him, that is part of his history and his culture which is the memory of his roots. This form of tourism is also called genealogical tourism, as it mainly refers to the descendants of emigrants who return to visit and experience the places of their ancestors during their holidays. a form of tourism in its own right but an integral part of cultural tourism. Root tourism for Italy is of interest potentially a basin estimated at between 60 and 80 million descendants of Italian emigrants in the world.

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Naturism

More and more people go on vacation every year, leaving costumes and clothes at home. In the last ten years there has been a slight but steady increase, essentially those who undress do so because they love being free and reject labels. The average age is not that high. The new young people practice independent naturism. The boys make a pragmatic choice without ideological involvement.

There are 123 thousand people who practice naturism in Italy, 368 thousand are those interested. Data in hand (source: Jfc 2017), we are talking about 70 million nudists in the world and 20 million in Europe alone.

5 thousand, on the other hand, are members of naturist associations in our country. 54 million euros is the turnover of naturist tourism in Italy. There are 50 places where naturism can be practiced in Italy. There are still few structures in Italy that allow men and women to be free, to practice nudism and this data suggests new ideas for an increase in naturist tourism in Italy with a consequent demand for workforce for the management of the structures. beaches and the digital circulation of information.

2.2.3 Conclusions

From what reported above and from the analysis of the data in the various studies mentioned, it is clear that in the Italian territory digital culture has not yet given great evidence, showing a marked gap between the so-called "millennials" and the mature generation. Although information and technological tools are easily accessible today, the older generations have matured a deeper aptitude for their use, certainly because they were protagonists of a pioneering era of technological innovations which, in a context where the media had a less aggressive impact, they were able to involve more and give emotion. Today technology is easy, fast, close at hand, almost obvious and in any case imagined just as a tool dedicated to cyber communication. This is the reason why young people generally use it for social media (Facebook, Instagram, TikTok, etc.), paying little attention to the other possibilities it allows. The situation changes for those young people who have followed a course of study where technology today becomes

an indispensable tool, especially if we are talking about Digital Design, Computer Science, Engineering.

As for the tourism sector, several structures were heavily affected by all the restrictions related to the covid, even if business trips remained constant as they were authorized by the government. The pre-covid experience of digitizing works of art and museums has ensured that these good practices incentivized other museums to create virtual tour itineraries available via the web. The lack of certainty of the end of the covid emergency continues to stimulate the production of such experiences with compelling proposals for web visitors.

Certainly the recent openings have given relief to both tourists and structures, as demonstrated by the fact that the entire hospitality sector reports significant increases in bookings. We have also mentioned naturism as Italy has given a significant tourist offer in recent years that continues to evolve thanks also to the spread of dedicated beaches that the various municipal administrations assign. Surely the strong restrictions inside the houses have generated a very strong attraction towards places surrounded by nature, both mountains and sea.

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2.3 Greece

2.3.1 The methodology

In order to complete the report, Club for UNESCO of Pireus and Islands used three sources of data and Information: The Greek Ministry of Tourism, officially published statistics from Eurostat and Its Greek counterpart, Elstat, and finally a small field research, by talking to tourism stakeholders, a VET provider who provides tourism curricula and staff at Harokopio University, a public Greek university with multiple courses on tourism. The Greek government is currently still Implementing changes to balance the COVID-19 pandemic and its effects on tourism, so some of the following data and practices may be subject to change.

2.3.2 The results

1. **What are the main areas that tourism-related training programmes/curricula that your country focus on?**

There are multiple public and private universities and VET providers that offer courses on Tourism. Most focus on business management and finances, preparing people who will either manage or work for tourism-related businesses, such as hotels, travel agencies, and guides. Effectively, most education providers focus on traditional forms tourism. More specifically, curricula focus on tourists that:

1. Visit Greece for either sightseeing or seaside leisure vacation.

2. Prefer to stay at hotels of varying price-ranges. Some education providers now offer management models for people looking to run AirBnB-related businesses.

3. Want to eat at local traditional restaurants

4. Often look to Island-hop.

Over the last few years, however, some universities have started offering postgraduate programs focusing on thematic tourism, sustainable tourism and technology-assisted tourism. These still require an existing degree in a related field.

2. **Are there any training programmes that promote digital upskilling in the Tourism sector in your country? If so, please describe (title, provider, objectives, focus areas).**

The University of Patras has incorporated a module in their general Tourism studies curriculum about technology and its application in modern tourism. The objective is to teach students how to use technology in order to reach more consumers/clients and promote their businesses ad products.

Ionian University: Postgraduate, Tourism and Technology. The objective is to provide an in-depth understanding of pre-trip, in-trip and post-trip technological applications to facilitate the consumer, create new experiences, and reach more people.

It covers a very broad spectrum of subjects, from communication, to gamification and digital payment methods.

Harokopio University, Postgraduate course on Sustainable Tourism Development: Heritage, Environment, Society. The course focuses on new technologies that facilitate sustainable tourism, such as green modes of local transportation, thematic digital trails, sustainable heritage sites.

3. **What are the main problems of the tourism sector in your country?**

After studying the announcements and guidelines of the Greek Ministry of Tourism, and speaking to a diverse group of educators and stakeholders from the field of tourism, we identified 5 main problems with tourism In Greece:

A. Tourism has traditionally been highly centralized around specific hubs (I.e. famous islands and monuments, while other areas of Greece that could have a touristic presence are left behind. This creates a feedback loop, in which the advanced touristic areas receive the majority of touristic income, allowing them to further improve their amenities, while the areas that are left fall further behind.

B. Domestic tourism, which was always a major means of wealth redistribution from urban to rural areas has been greatly affected by the financial crisis and the COVID-19 pandemic, and less Greek people are able to spend significant amounts of money to tourism. This has created the double problem of lacking wealth redistribution and a social issue in which people cannot go on holiday without some sort of financial support.

C. Sustainable Tourism. The sustainability of tourism in Greece is an emerging issue with troubling statistics. In the island of Crete alone, a recent study found that each foreign visitor accounts for 488.77kg annual CO_2 emissions by visiting the island (Vourdoubas 2019). Recently, UNESCO has shifted a lot of focus on the sustainable development of heritage sites, due to the increasing environmental damage caused by mass tourism. New modes of transport, sustainable energy usage and heritage site protection are necessary in order to ensure sustainability in tourism.

D. The COVID-19 pandemic. The pandemic did not only hurt tourism but has also created uncertainty for the future. Assisting the businesses involved in tourism to recover financially is only the first step, and arguably the easiest. The real challenge is predicting and reacting to the new status quo that will follow after the pandemic.

E. The seasonality of tourism. Greece is predominantly a summertime destination. While during the summer, tourism is one of the most profitable sectors for the country, it is significantly weakened during the rest of the year. This is especially applicable to islands, which suffer the greatest drop in arrivals.

4. Do young people in the tourism sector face any challenges or obstacles when looking for a job?

The tourism sector is relatively more accessible than other sectors, due to the fact that It Is one of the most profitable Industries In Greece. In general, young people can find entry-level jobs rather easily, although that only occurs during the summer season. During the rest of the year, access to the tourism sector is significantly reduced.

5. What has been the response of the tourism sector in your country to the Covid-19 travel restrictions?

The tourism sector was slow to adapt to the travel restrictions. Most hotels completely shut down, while few tried to utilise their conference centers and exhibition halls. However, by definition, only larger hotels could do that, meaning that smaller businesses were left behind. While hotels were closed, AirBnb, but with most heritage sites closed, and the weather not allowing for coastal vacation, that too was not widely used.

Restaurants, souvenir shops, traveling agencies, and yachting businesses also suffered losses.

Museums were much more adaptable, as many created digital exhibitions and online guided tours.

The COVID-19 pandemic was an example of how the tourism sector In Greece needs to evolve, as its low level of flexibility was a great detriment during the pandemic. Digital and Innovative solutions are necessary to adapt to the new status quo.

6. **What has been the response of the tourism sector in your country to the Covid-19 unemployment?**

During the pandemic, the tourism sector was unable to sustain new employees, and there were significant losses of work, although data is not yet available on the numbers. During the summer of 2020 and the summer of 2021 however, the tourism sector has seen a recovery faster than many other sectors, due to its seasonal nature.

Despite that, there were no significant steps taken to combat unemployment within the tourism sector. One significant problem that manifested Itself due to the pandemic was that many employees in the tourism sector have very temporary employment contracts with employers, which makes them very susceptible to unemployment during periods like the COVID-19 pandemic, with very few benefits and safeguards. Finally, another significant issue was that many employees were unregistered in the past, meaning many of them could not receive the relief payments and other benefits, which the government did not account for.

On the other hand, unemployment has greatly reduced visitors due to monetary restraints. This is something that many tourist businesses, especially hotels and other lodgings have adapted to, by lowering their prices or having special offers.

7. **What is the level of digital knowledge in your country among young people (18-29)? Which digital tools do they use the most and for what purposes?**

According to Eurostat, Greek young people have one of the highest digital competencies in Europe, with 92% having basic technological knowledge. (Eurostat, 2020)

Young people In Greece predominantly use social media as their main digital tool. Instagram TikTok and Facebook are the most widely used, with applications like iMessage, FaceTime, WhatsApp and Snapchat also being widely used for communication.

8. **Please look for examples (practices, projects, tools, etc.) implemented in your country that promote digital solutions for the safeguarding of Heritage Tourism.**

Many museums created digital exhibitions and tours. Two examples are the Acropolis Museum and the Averof Floating Naval Museum, which were among the first to digitize their exhibition and create a digital tour of the entire ship.

9. **What kinds of thematic tourism are present in your country?**

Wellness and Health tourism is present In Greece, especially in areas with hotsprings and mountaintops. Loutraki Is one prime example of health tourism, where people go to visit the hotsprings. Luxury hotels also host health and wellness packages for their guests.

Religious Tourism. Greece Is one of the few European countries with significant religious tourism. Mount Athos Is visited annually by thousands of people, and there are organized travel experiences In the Peloponnese where people visit monasteries and experience monastic life and food.

Camping tourism. Greece is a prime destination for campers, as many of Its islands are isolated and not urbanized.

Heritage tourism Is the main thematic tourism In Greece, as many tourists visit to see the ancient heritage sites and monuments around Greece. Of all thematic tourism models, this is the most widely present and the most advanced In Greece .

10. What kinds of thematic tourism could be developped in your country?

Gastronomic tourism can definitely be developed further. It Is currently done in certain areas and with certain hotels, but it could be very widespread due to the varying local cuisines and the various ethnic elements of Greece.

Technological Nomads. An emerging touristic field is the accommodation for people who are distance-working, especially for large companies. COVID-19 has accelerated the shift to distance-working and many people are seeking to migrate to warmer and more affordable countries, where they can work from home.

2.3.2 Conclusions

In terms of education and knowledge, there are options, albeit limited for young people who want to enter the tourism sectors. However, upskilling and gaining expertise are almost entirely reserved for higher education postgraduates, which are not easily accessible to all.

Additionally, while entering the tourism sector Is not difficult, the positions are temporary and entry-level, which makes a lot of young people, especially from lower socioeconomic backgrounds unable to advance.

The problems the Greek touristic sector faces largely have to do with the fact that there was an unbroken state of affairs In tourism, a steady profitable practice that had never significantly failed. As such, there were almost no safeguards to deal with the pandemic and Its effects. the Greek tourism sector will need to Invest resources In developing new

services (such as thematic tourism), and to find new ways to cater and attract potential visitors and clients, through digital means.

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2.4 Bulgaria

2.4.1 Methodology

The brief research was prepared using a theoretical and analytical approach, observation, and collection of information online and from secondary sources, statistical data processing and a brief survey conducted among representatives of education institutions, tourist companies and others active in the tourism sector in Bulgaria.

From the National sources were extracted and summarised data from: National Strategy for Sustainable Tourism Development in Bulgaria 2014-2030 (updated version), World Tourism Trends, (Ministry of Tourism, 2019), Strategy for the Development of Higher Education in the Republic of Bulgaria - 2014-2020, Centres for professional education register. National agency for vocational education and training, National agency for vocational education and training, National Statistical Institute, etc.

2.4.2 The results

1. **What are the main areas that tourism-related training programmes/curricula that your country focus on?**

The increase in the quality in opposition to quantity of the Higher Education and its synchronization with the European educational standards has been indicated as a challenge in the Strategy for the Development of the Higher Education 2014-2020[26] , where the condition of Higher Education has been defined as insufficiently modernized and not compliant with the needs of the labour market. Geographical and social barriers, including also the strong ethnical shaping of small settlements, are hampering the training of young people, which justifies the necessity of more flexible, effective, and cheap training methods. In comparison with the common European development, the digital and distant training forms remain complementary and lagging and the lifelong learning opportunities are insufficient, not diverse enough and unpopular.

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[26] Strategy for the Development of Higher Education in the Republic of Bulgaria - 2014-2020. Portal for public consultations. Electronic resource, available at: http://www.strategy.bg/StrategicDocuments/View.aspx?Id=962

Currently tourism in Bulgaria is being taught in 58 institutions at secondary school level and 25 at university level, with more than 540 centres for vocational education issuing diplomas for a profession or part of a profession in various tourism subjects.[27] Each year between 2000 and 2200 students receive university degree in the subject "Sports, tourism and hospitality".[28] For the past 9 years, since statistics are available, 11 610 persons have received a professional qualification and another 21 934 – are qualified for part of a profession in the Centres for vocational education in the fields of "Hotels, restaurant and catering" and "Travel, tourism and leisure."[29]

The main areas of the tourism-related training programmes are:

Area 1: Geography of tourism

Area 2: Tourism Economics/Management

Area 3: Management of a particular type of tourism (rural, cultural, etc.)

Area 4: Management of a separate activity typical for tourism (hotel management, hospitality management)

Area 5: Marketing of tourism

2. **Are there any training programmes that promote digital upskilling in the Tourism sector in your country? If so, please describe (title, provider, objectives, focus areas).**

According to the sectoral competency model developed by the Bulgarian Chamber of Commerce (Competence Assessment Information System, 2015), technical competencies (language and digital) are part of the three main subsectors in tourism -

[27] Centres for professional education register. National agency for vocational education and training. Online resource. Available at: https://www.navet.government.bg/bg/registar-na-tsentrovete-za-profesiona/

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hotels, restaurants, tour operators and agencies. In practice, however, as the content analysis of the curricula in Tourism in the higher schools in the country showed, a significant part of these digital competencies is not acquired through formal training and education. The modern requirements of the labor market in terms of digital competencies are related to such areas as digital marketing strategies, online reputation and use of social media, m-tourism (mobile) - related to the use of smart phones and user experiences. Specific digital competences are related to the skills to work and service the changing demand - in terms of how to plan, reflect, review (visibility) in multiple digital platforms (e.g., EU Directive 2015/2302). The main directions for increasing the digital competencies of key importance for the trainees in the professional field "Tourism" in the future will be related to:

- o Management of the processes of sharing, awareness and commitment, incl. in social networks;

- o Maintenance, creation, and management of a database for information, transparency, and awareness in the Internet space and on the spot in the tourist sites;

- o Personalization of the service, care and experience of the tourists, incl. use, development and application of mobile apps, the so-called SMART (or smart) travel and tourism; connecting users (network), sharing - location, social networks, experience, and experience. Creating and maintaining interactivity through augmented reality, including game elements (gamification) to attract interest, attention and generate added value to the experience;

- o Internet marketing in its two main areas: at the destination level and the activities of destination management organizations (linking to the destination, GIS and other positioning systems) and application of marketing tools in different communication environments (digital), change in distribution channels , sales and advertising;

- Business Intelligence Competencies, which include "the ability of an organization to make competitive strategic decisions based on the analytical processing of large amounts of information" (Chaudhuri S., Dayal U., Narasayya V. 2011).

Table 1: Programmes that promote digital upskilling in the Tourism sector[*]

[*]The list is non-exhaustive

Title	Provider	Objectives	Focus areas
Digital Management in Tourism	Sofia University Source: https://www.uni-sofia.bg	Goal of the program: To create highly qualified management staff and experts, mastering modern forms, methods, and tools for management in the field of tourism in a rapidly changing technological environment. The program aims to	Students acquire basic professional competencies for creating competitive, innovative products and digital experiences in the field of tourism and leisure management. Such are the competencies related to the management of tourism activities in a digital environment, the implementation of strategic and digital marketing strategies; use, improvement and adaptation of new information technologies, systems, and applications for management of various activities in tourism (such as CRM and GIS). Students form practical and applied skills in the field of: organization and management of tourism at different spatial and corporate levels; creation of innovative digital solutions in the field

		position itself as innovative, modern, and related to the requirements of the labor market, the rapid digitalization and transformation in the tourism sector. The focus of the program is on training specialists in digital management in tourism, who have the competencies, skills, and knowledge to work in a dynamically changing business and	of tourism management to various structures of the state administration, private business and non-governmental organizations; work with management information systems, development, and implementation of digital marketing strategies necessary for modern information support of the business, information provision for the dynamics of the environment, tracking the behavior of consumers and competitors. By applying a systematic approach, graduates will be able to create integrated services and complex products in the field of tourism.

		digital market environment.	
Tourism and Digital Transformations	International Business School, Sofia Source: https://ibsedu.bg	Goal of the program: To create highly qualified management staff and experts, mastering modern forms, methods, and tools for management in the field of tourism in a rapidly changing technological environment.	In this academic program the necessary combination of economic and social sciences in the perspective of tourism services and tourism development will be found. It has a strong practical focus on acquiring knowledge and skills for innovative approaches to starting, managing, and developing a business in the field of tourism. The educational content is in line with modern trends for the introduction of innovative business models under the influence of digitalization and digital transformation. During the training the necessary entrepreneurial skills, general management and analytical competencies, skills for time management and organization will be acquired. The program focuses on foreign language training, digital skills, generation and evaluation of innovative business ideas, effective business communication. The program also includes the opportunity to choose and profile in three specializations - management of tour operator and

			travel agency activities, hotel management and restaurant management.
			This program gives the opportunity to enter professions in which the key is to understand global business processes - tourism advisors on local or national level, managers of cultural and natural heritage centers, international airlines, airports, hotels, owners of successful businesses.
			All types of digital technologies are studied - chatbots, robots, virtual / augmented / mixed reality, kiosks, hotel software, etc.
			In 2021 the discipline won the Smartourism.bg award - https://www.smartourism.bg/awards-general/awards21/

Vocational digital trainings, such as those approved in the list of the National Agency for Vocational Education and Training and created by it, cannot be found. There are several training centers that offer ICT training, ranging from programming to software engineering, coding, etc., but they are specifically designed as short-term training and usually serve the needs of a particular company or enterprise (in most cases foreign IT companies operating on the territory of Bulgaria and urgently in need of IT specialists). The positive side of these trainings is that they are very practically oriented, and the

negative side is that most of them are not officially recognized as professional trainings and are not on the VET list. The Center for Digital Innovations was founded several years ago (as part of the Bulgarian Chamber of Industry) with the main purpose to serve as a remote center, providing training, consulting, and support to companies in the process of digitalization. However, there is no information on whether this center is still operational.

3. What are the main problems of the tourism sector in your country? (If any)

Some of the main problems that the tourism in Bulgaria is facing, are:

- The desire of the owners to control the processes, their unwillingness to delegate the management to the managers and to cooperate to improve the conditions in the destination, as well as the new market environment and the adaptation to it.
- Lack of qualifications and entrepreneurial experience among owners, business people, and locals is also a problem for alternative tourism.

The way out of overcoming the shortage of employees in the tourism sector is the automation and digitalization of it. This is possible and it can be seen in several hotels in Bulgaria. Three of them have already introduced robots as part of their work, and two of these hotels are in the Golden Sands resort (the third is in Sofia). A good example is one of the Varna hostels, which has been working contactless with its clients for several years.

According to the Concept for digital transformation of the Bulgarian industry, Bulgaria is expected to be recognized as a regional centre of the digital economy through the implementation of products, technologies, business models and processes from Industry 4.0. by 2030. The aim is to reach the average European level of the DESI index. In general, Bulgarian companies lag the average performance of the rest of the EU in terms of digital progress, mainly due to human resource skills and lack of financial resources. Very few companies have already implemented or are in the process of implementing or planning to implement digital technologies. There is no unequivocal

opinion as to which industry will be the pioneers in the Fourth Industrial Revolution. In addition to experts, the automated industry will play a leading role in digitalization. This will reduce production costs, connect with the management of inventory through modern transfer of information about the need for production. Compared to the Bulgarian Chamber of Commerce, the sectors that will continue to be most affected by digitalization are mechanical engineering, electrical industry, transport, energy industry. According to a survey conducted by the German-Bulgarian Chamber of Industry and Commerce in 2016 among 59 Bulgarian, German, and other foreign companies, more than 80% of respondents rate the role of digitalization in their company as "decisive" or "very significant". Regarding the current level of digitalization, more than half of the respondents answered that it is above average. Nearly 90% of companies within three years will have already taken steps to digitize the processes, and 64% say they have a department or employee responsible for this. Over 70% of respondents in the next five years will invest up to 3% of their turnover.

4. Do young people in the tourism sector face any challenges or obstacles when looking for a job?

According to a research conducted by the Bulgarian Chamber of Commerce30, the employment by main sectors in tourism is, as follows:

- Restaurants - 39%
- Drinking establishments - 26%
- Hospitality - 22%
- TO and TA - 6%
- Other sectors (including tourist attractions) - 7%

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30 Project of the Bulgarian Chamber of Commerce, № BG051PO001-2.1.06, 2015

There is one main obstacle defined by the tourism industry: lack of necessary practical skills and knowledge of graduating students in tourism. But the real definition of the problem is that there is a lack of competence-oriented educational programmes for Tourism "in higher educational institutions".

One way to deal with this problem is a legal regulation of the partnership between the main subjects (university, tourism business, government), through appropriate mechanisms. There should be a monitoring system and indicators for measuring changes in demand, new technologies, innovations, trends, new professions, respectively knowledge and skills.

The young people also find it hard to work for low salaries and redirect themselves in other sectors of the economy.

The Covid-19 situation reduced the supply of labour in tourism.

5. What has been the response of the tourism sector in your country to the Covid-19 travel restrictions?

Although Bulgaria has introduced one of the most liberal regimes for entering the country, opening "green corridors" without tests for foreigners with vaccination certificates, including, for example, the Russian Sputnik vaccine, as well as people who have had the coronavirus in the last six months, no effect. There are several factors for this: Bulgaria is still not in the safest areas for tourism based on morbidity or vaccination level, and 2021 has already emerged as the year of island tourism, in which the country has nothing to offer.

At the same time, there are still large restrictions on Bulgaria's main tourist exporting markets, as most of them have not yet lifted their restrictions at home. Germany is going through one of the most serious lockdowns. The second most important market for

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Bulgaria in recent years - the Polish, opened its restaurants only on May 14, and hotels a little earlier. In many places, vaccination is running slower than expected and tourists will not have vaccination certificates, so they will play a significant role for the 2022 season.

Charter flights to Bulgaria from Germany, the country's largest market, were canceled by June 30. Bulgaria has been identified as a high-risk country, along with many others by the German Robert Koch Institute, due to the high number of infected, with 50 infected per 100,000 people being considered a critical number.

The other indicator is the number of vaccinated, which is also lagging, and the third is whether there are new strains of the virus registered in the country.

The situation with the key eastern market - Russia - is completely unclear. At this stage, there have been no canceled flights to Bulgaria since June, but Russia itself has not given any signs under what conditions its citizens will travel abroad.

According to tour operators, Bulgaria could separate the morbidity statistics for its tourist areas from the general statistics for the country and thus be more attractive from the point of view of security.

The industry has managed to arrange for tourism staff to be vaccinated as a matter of priority and vaccinations are currently underway. However, little is also known about these processes, as the country fails to advertise itself as a safe destination. That is why the main tourism organizations have called for serious efforts in the field of diplomacy.

6. **What has been the response of the tourism sector in your country to the Covid-19 unemployment?**

The Government and the Ministry of Tourism offer programs that try to help the most affected sectors of the economy, regarding the employment:

- New employment package "Employment x 3" - Under the Operational Program "Human Resources Development" a new procedure "Employment for you" has been launched, aimed at the economic operators in the sectors - "Hotel and restaurant business" and "Tour operator activity". The main objective of the measure is to provide support for the reintegration of the unemployed who have lost their jobs because of the pandemic and the spread of the COVID-19 coronavirus. The procedure allows for the direct provision of grants until the end of 2020, in the total amount of up to BGN 160 million, for which a specific beneficiary is the Employment Agency.

- PROJECT BG05M9OP001-1.104-001 "SHORT-TERM SUPPORT FOR EMPLOYMENT IN RESPONSE TO THE COVID-19 PANDEMIC" - The aim of the project is to provide support to enterprises and self-insured persons whose economic activity is directly affected by the adverse impact of the state of emergency imposed in the country, declared by a decision of the National Assembly on March 13, 2020 caused by the coronavirus pandemic. COVID-19. In order to maintain the employment of employees in enterprises engaged in economic activities in the relevant sectors - hotels and restaurants, transport and tourism, specifically specified in the Annex to RMS № 429/2020 (amended and supplemented by RMS 982/2020 d.), The project will support employers, self-insured persons and municipal enterprises established under Art. 52 of the APA by providing compensation for part of the salary and due tax and social security contributions at the expense of the insurer and the insured person in the amount of BGN 290. The employment of the supported workers and employees, as well as the activities of self-insured persons should be reserved for the entire period of payment of the compensation, as well as for an additional period equal to half of the period for which the compensations have been paid. Applications for payment of compensations will be accepted until 31.05.2021 or until the available financial resources are spent.

Project BG16RFOP002-2.010-0002 "Increasing the capacity of SMEs in the tourism sector by supporting the establishment and operation of Tourism Management Organizations" - The total value of the public procurement is BGN 3 million with VAT, and its purpose is to help tour guides and mountain guides in the country to deal with the consequences of the COVID-19 pandemic and promote domestic tourism. In addition, the inclusion of guides and their work in the online space will accelerate the process of digitalization and expansion of the range of services provided by them, which is fully consistent with the planned measures to accelerate digitalization in the tourism sector.

One of the problems is because large number of employees in the sector worked in the informal sector or the grey economy before the pandemic, i.e. either they had no contracts or received a minimum wage (their basic income came from bonuses or tips). In this way, they were not actually able to take advantage from any benefits of the upper programs (neither the companies themselves nor the employees). Workers are struggling to survive or simply try to change their field of employment. Of course, the on-going situation with the virus is a major problem because it does not give any guarantees to the owners or to the employees that there will not be any new waves or lockdowns.

19,2% of the people who started working in May, 2021 are in the manufacturing sector, 15,1% in the hospitality industry, 14,5% in trading, 5,7% in construction, etc. The biggest number of free positions in the economy is in manufacturing (24,3%), hospitality industry (22%), trading (11,4%), etc.

The positive forecast is that when the Covid situation becomes stable, the negative level of unemployment will normalize and the contractual force will already be on the side of the workers, because the supply of jobs is more than the demand for them, at least for

now. Many people reoriented themselves and left tourism, so to bring them back, there should be way better conditions.

7. What is the level of digital knowledge in your country among young people (18-29)? Which digital tools do they use the most and for what purposes?

A study conducted by ESTAT on behalf of UNICEF Bulgaria shows that children and young people do not think they are addicted to digital media. 3/4 of the young people in Bulgaria surf social networks and communicate through online applications on a daily basis, but most find what is happening in the real world more important and exciting. This is shown by the results of a national survey, which focuses on media habits and practices, popular personalities on the Web, as well as the extent to which digital technologies help them to express themselves and achieve individual and community goals.

89% of young people own some kind of a smartphone. They use them mainly for fun, chatting, communicating with friends. This is not the case with laptops and desktops - ie devices that allow educational process, especially in distance learning, only 34% have such technology. 14% have their own iPad or other form of such a device. The connection to the Internet is great, the presence in social networks is significant, but when we talk about quality feedback when it comes to the educational process, the situation is worrying. Most of the Bulgarian youth do not have the necessary technological tools through which to be included in such a quality process. "

Traditional forms of media awareness, such as newspapers and magazines, have virtually no space in young people's lives.

69% prefer Facebook, although the trends around the world are towards Instagram, Tik Tok and so on. 22% use Instagram, and only 7% - Tik Tok. Diverse trends depend on the

age group and interests. The most preferred format for young people is short videos. On Instagram, photo content is more popular, while Tik Tok stands out with the generation of trends - popular trends. As adulthood matures and the pursuit of emancipation progresses, a search begins for channels in which young people, not adults, reside. "

One in four respondents actively follows "influencers", while every second participant said that they follow "vloggers" on the Web. The study concludes that children and young people would make sense of the opinions shared by "influencers" and other celebrities, but would not aim to look, think or act completely like them. There is a belief that they can pursue and achieve their own goals without following role models.

As conclusion, there is low level of digital literacy in the original sense of the word, mainly surfing, use of digital resources for information. Ignorance to create your own content (maybe because of the young age).

8. **Please look for examples (practices, projects, tools, etc.) implemented in your country that promote digital solutions for the safeguarding of Heritage Tourism.**

Virtual and augmented reality are such a solution. Instead of showing visitors brochures and computer screens, travel agents can provide their customers with a virtual experience. This approach can also be used for greater effect at trade fairs and events. In this way, interest from the general public is quickly gained. For example, the most attractive and advanced innovation in the Madara National Historical and Archaeological Reserve is the place for virtual reality, located in the field. Up to 20 people at the same time have the opportunity to go to a virtual tour of the village and to find interesting information about each object.

There are some good examples for projects, applications, and websites that promote digital solutions:

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- URBO is working towards the digitalization of tourism services. It is a web portal and mobile application for entertainment and leisure for the traveller or active resident in an urban environment.

- Plovdiv City Concierge is the first city chatbot in Bulgaria, which offers automated process in the communication with customers, automatically answers the most frequently asked questions, automates reservations, surveys, etc. „Since 2018, Umni helped businesses save thousands of staff hours by digitizing communication with clients, and automating frequently asked questions and routine tasks."31

- Plovdiv Municipality's website - extremely interactive site, which has absolutely all the necessary information to visit the city of Plovdiv, with the practical links, information and details about attractions, accommodation, places to eat, events, maps, video gallery, etc.

- EDIBO project: European Digital Training Laboratories, funded by the Youth Employment Fund of the EEA Financial Mechanism and the Norwegian Financial Mechanism 2014-2021. The project will organize a total of six training courses on "Digital Skills" free of charge - The first course attracted 25 unemployed young people between the ages of 21-29, most of whom live in the small towns around the town of Dobrich. Students entered the course with quite different levels of education (45.5% - completed secondary education, 40.9% - completed higher education), digital skills, language skills (only 20% with a basic level of English) and social standard. All participants have passed the curriculum, and the main topics of the program are computers and business; basic programs for the daily life of the entrepreneur; organization of the entrepreneur's work with the help of a computer; electronic interaction with institutions; digital entrepreneurship, etc.

- TRANS-EDU-NET Project which was implemented by National Tourism Cluster "Bulgarian Guide", funded under the INTERREG V-B Balkan - Mediterranean 2014-2020 Programme. It offered transnational curricula in the field of tourism,

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31 https://umni.bg/en/about-umni-chatbot/

applicable for 4 partner countries and several master classes, incl. education in digital skills in tourism. A specialized virtual platform for joint transnational online preparation of a business plan for start-up companies in the field of tourism and a business simulation game (Hotel Empire) in tourism, dedicated to the hospitality management techniques and risk management, were also developed.

9. What kinds of thematic tourism are present in your country?

According to the Strategy for Sustainable Development of Tourism in Bulgaria 2014-2030, these are: rural, ecological, mountain, adventure (cycling, horseback riding, skiing, and snowshoeing, boating, diving, penetration into unlit caves, crossing alpine routes with a guide) and thematic (related to cultural and historical heritage, with the esoteric, religion, wine, traditional cuisine, ethnography and traditional music and crafts). Bulgaria is also developing the so-called niche tourist products - sports, urban entertainment, cruise, and business tourism. The products of alternative tourism are divided into priority and those with potential for development. Also, cultural, and cognitive tourism, religious tourism, wine tourism, culinary tourism, festival and event tourism, health tourism (medical, spa, wellness).

Creative tourism, especially in rural areas, has become an important strategy for cultural tourism to remain competitive in today's mass tourism market without having to lose the local authenticity on which it depends. That is why it is important to look at this trend in greater detail. As an emerging trend, the creative journey is rooted in the rise and mass democratization of cultural travel. The Tourism and Recreation Training Association (ATLAS) shows that the experiences that cultural travelers enjoy the most are those that offer a true understanding of local culture. The more experienced travelers are, the more likely they are to set specific educational goals for their trip before rest and relaxation. In the past, cultural travel was largely based on cultural heritage, such as visits to museums or monuments. With the rise of the creative class, the socio-economic class,

whose main driving force is economic development through education and entertainment, this focus is gradually shifting.

Another trend: Religious / Pilgrimage tourism in the new media era religious tourism is tourism based on people traveling individually or in groups with motives related to worship, missionary purposes, or entertainment.

According to the United Nations World Tourism Organization, about 300 million pilgrims visit the world's most famous religious sites each year. There are many aspects associated with these types of visits: visits to the sanctuary, pilgrimages on the way to St. James, visits to monasteries, vacations, or visits to religious tourist attractions. Religious tourism has existed since ancient times. Devotees, for example, are believed to travel for several reasons:
• To understand and appreciate their religion through a tangible cultural heritage.
• To feel secure about their religious beliefs, • To connect personally with a holy city or place.

There is no doubt that religion played an important role in encouraging early travelers and pilgrims to cross the European continent to visit holy places. Today, many of them fill up the map of the world as important heritage sites in a certain country or region.

Other types of tourism that are present in the country:
- Cultural Tourism
- Eco Tourism
- Sea Tourism, incl. camping tourism
- Mountain tourism
- Balneo, SPA and wellness
- Sport and adventure tourism
- Rural Tourism

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- Event Tourism – congresses, business, festivals, etc.
- Wine-culinary

10. What kinds of thematic tourism could be developed in your country?

When planning the development of tourist activities in an area except its specific features - nature, cultural attractions, accessibility, economy, capacity of the local population, etc., the general principles, trends, and policies applicable to the development of tourism, especially within the EU, but also globally must be considered. The redistribution of tourist resources and changes in services are imposed on one hand in a more natural way - through the already mentioned factors such as easy accessibility of destinations, cheap transport, more free time, and on the other hand are the result of purposeful European regulations - need for environmental protection, striving for reducing the number of tourists at the same time and place, strategic planning of activities for a fairer distribution of the economic benefits in the regions concerned (for example, not only for hoteliers but also for hoteliers) for local agricultural producers or vulnerable groups), planning a balance between tourism services and other socio-economic and public activities in an area.

Further thematic tourism that could be developed:
- Adventure Tourism: Diving, rowing, Skydiving
- Geotourism
- City tourism
- Sport tourism (golf, cycling, etc.)
- Hunting tourism
- Photo tourism
- Scientific tourism
- Entertaining tourism

2.4.3 Conclusion

Tourism is one of the main economic pillars and among the national priorities of the Bulgarian economy. In 2019, it formed ar. 12% of the GDP and around 11% of the employment in the country[32]. However, the COVID-19 pandemic had a devastating effect on the tourism and revealed the significance of the tourism sector for the economy and social wealth. It can be clearly seen from the decrease on the number of tourist visits of foreigners in Bulgaria for the period January-April 2021 in comparison to the same period in 2020. The decrease is 58.1%. More than 70% is the decrease in the visits for holiday and recreation.[33]

The pandemic further emphasized the importance of digital skills and boosted the development of the digitalisation in the tourism. Some tour operators started to offer virtual tours, museums adapted to virtual exhibitions, etc.

Even though young people in Bulgaria are below the EU average level of basic or above basic digital skills, digitalisation is rapidly developing and entering many fields of the tourism education.[34] Upskilling and gaining further expertise in the field are mostly offered in the higher education and are not easily accessible to all. As far as the employment in the tourism sector is concerned, the best-case scenario is that the negative level of unemployment will get back to normal. Many workers, however, left the tourism sector and received other qualifications in other sectors. Especially in times of pandemic and during the post-pandemic period, the tourism sector in Bulgaria will need to adapt and attract potential visitors, customers, and workers by digital means.

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2.5   Netherlands

2.5.1 Methodology

The methodology for this desk research is based on quantitative data. To collect the information needed for the research we have use the data available on the internet. In order to present the situation in the Netherlands and the context of the tourism sector in the country due to the corona crisis. We have research on governmental websites. Rijksoverheid.nl, holland.com, CBS.nl, nbtc.nl and den.nl are our main sources.

2.5.2   The results

1.   What are the main areas that tourism-related training programmes/curricula that your   country   focus   on?

Tourism and recreation are promising sectors of the Dutch economy. The hospitality sector is already economically larger than the agricultural sector and in a few years it will overtake the construction sector.

These are bizarrely strange times because in the pre-corona year 2019 the Dutch economy received 91.2 billion euros in tourist recreational expenditure (4.4 percent of GDP). This has fallen sharply due to the corona measures and travel restrictions.

Studying   tourism   right   now: "We need young sky stormers - the sleeve-rollers, the doers and the creatives!" reports Frank Oostdam, director of the travel industry organization ANVR (290 affiliated travel organizations). ANVR would like to retain the talents at all levels in the travel world. The images of stationary planes and empty beaches and centers at well-known holiday destinations at home and abroad mean that parents now ask their teenagers: "Are you sure you want to study tourism or leisure?" "Especially now", reports spokesperson Marieke van Meurs of seven colleges of higher education that have tourism in their training package, united in the consultation body Landelijk Overleg Tourism Management (LOTM). "Now we need a generation that will help to further develop the

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path we have taken towards sustainable tourism within the Netherlands and beyond. Help this growing sector with enthusiasm and innovation". The graphic below shows how the enrollment of students in tourism has been decreasing in the past years.
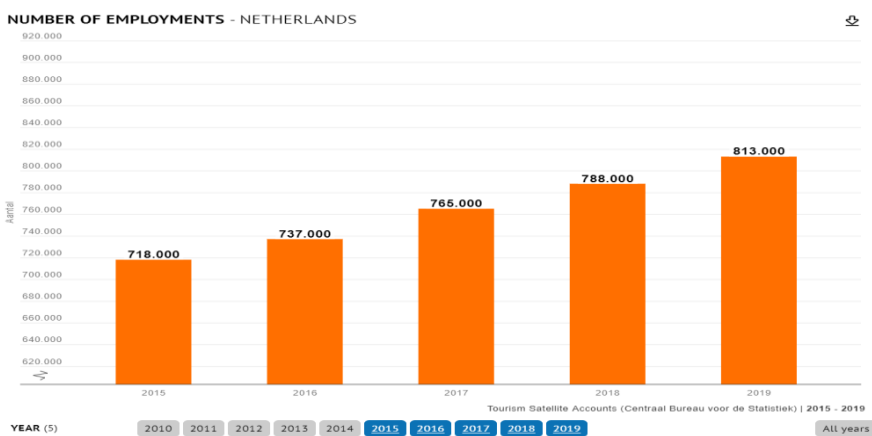
Studenten
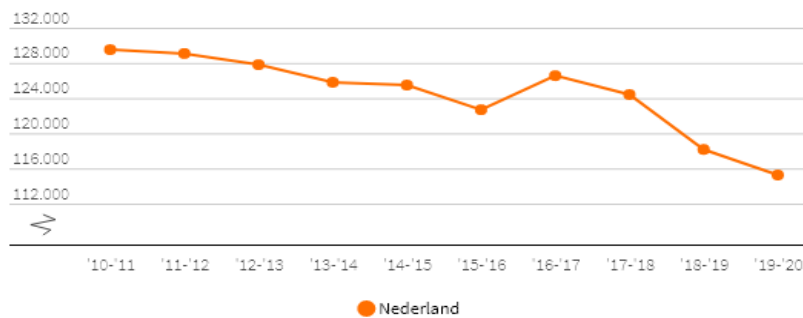
DUO (CBS) | '10-'11 - '19-'20

However, the hospitality sector is a warm sector that, according to the report 'Social value of tourism and recreation' (April 2021), contributes a lot to the Dutch social happiness. This sector already provides 800,000 jobs and of the companies surveyed in the report, 96% report that it generates money for other companies, residents and government.

The graphic below shows how the employments in tourism has been increasing in the Netherlands in the past years.

NUMBER OF EMPLOYMENTS - NETHERLANDS

Tourism Satellite Accounts (Centraal Bureau voor de Statistiek) | 2015 - 2019

YEAR (5)   2010 2011 2012 2013 2014 **2015 2016 2017 2018 2019**   All years

In the Netherlands the tourism studies are offered in three different levels:

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> MBO (middle-level applied education), which is the equivalent of junior college education. Designed to prepare students for either skilled trades and technical occupations and workers in support roles in professions such as engineering, accountancy, business administration, nursing, medicine, architecture, and criminology or for additional education at another college with more advanced academic material. This studies, are from 1 to 4 years.

> HBO (higher professional education), which is the equivalent of college education and has a professional orientation. The HBO is taught in vocational universities (hogescholen), of which there are over 40 in the Netherlands. Note that the hogescholen are not allowed to name themselves university in Dutch. This also stretches to English and therefore HBO institutions are known as universities of applied sciences. This studies go from 2 to 4 years.

> WO (Scientific education), which is the equivalent of university level education and has an academic orientation. This studies are 3 years average.

> Master. In tourism sector, the masters are 2 years long average.

Examples of different educations in the Netherlands:

MBO Hospitality Management
The program prepares the students for further study or a job in the world of hospitality and events. In addition to a good portion of tourism, the students receive lessons in hotel subjects, event management, recreation and entertainment. They can take courses such as management and marketing, public relations, host-hostessship, tour guidance, travel information and tourist information.

HBO Tourism Management (Tourism & Recreation Management)
In the first year of education, the students are introduced to their future field of work. In the 1 year the courses are grouped around themes. This includes areas such as tourism and recreation, leisure management, management and organisation, marketing and

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marketing management, law, computer science, languages, geography, psychology and sociology, presentation techniques, mathematics and statistics. The second year has a similar structure as the first year. In the third year of this education there is a internship in a company. The fourth year is mainly devoted to graduation.

WO University: The Bachelor Tourism is an English-taught academic programme offered jointly by Breda University of Applied Sciences and Wageningen University & Research. As the first of its kind in the Netherlands, this scientific programme deals with developments in tourism and the interrelationships between tourism, the economy, society and the environment. After graduation of the Bachelor in tourism, the students can apply their knowledge to the sustainable development of tourism, or continue their education with a master's programme.

Master: Tourism, Society and Environment

The MSc Tourism, Society and Environment is a two year programme, starting every year in September. In total the programme comprises 120 credits (ECTS = European Credits Transfer System), 60 credits per year. The programme consists of course work, an internship and a thesis research. Generally the first year is entirely dedicated to course work and the second year is split between internship and thesis.

The main areas that tourism related programs/curricula the Netherlands focus on are:

- Hospitality management; mainly focus on hotel management, events management, and service management.
- There are programs focusing in art and cultural heritage.
- Programs related to tourism destination management. Focus in the field of travel agencies.

2.   **Are there any training programmes that promote digital upskilling in the Tourism sector in your country? If so, please describe (title, provider, objectives, focus areas).**

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The Netherlands' innovative top sectors are among the world's best. The government wants to further strengthen their international position. The Netherlands has nine top sectors:

- Horticulture and propagation materials
- Agri-food
- Water
- Life sciences and health
- Chemicals
- High tech
- Energy
- Logistics
- Creative industries.

In the Netherlands there are in total 694 technological studies, more specifically in the areas of: Building and construction, Architecture, Civil engineering, Creative media and game technology, Electrical engineering, Logistics, Mechatronics, Aviation, Mechanical engineering, biomedical engineering, Food technology and food innovation, chemical technology, and agrotechnology.

Tourism and recreation studies are 130 in the Netherlands and 37 educational institutions who deliver this studies. Some of these programs include new technologies and innovation.

- **International Tourism Management. TIO university of applied sciences**.

  Focuses extensively on e-commerce. Learn to promote a trip online and how to optimize a website to allow visitors to book their holidays quickly and easily.

- **Tourism Management. Breda university**: In the E-Lab, first-year students of the Tourism Management programme set out to work on online applications. They develop a mock-up for a tourism app, create content such as a 360˚ film, an infographic, and an animation video. They conduct online research and make social media analyses. Students experience to work with online tools. They also experience how important online tools are to share information and get in touch with customers.

- **Tourism Management; HZ university of applied sciences.** They have some modules focus on: Digital intelligence, Technological trends and e-tourism.

- **Tourism Management (Bachelor); Saxion university of applied sciences.** They have one part of the program for using the technology: Launch a virtual reality app that gives tourists a preview of the destination they are planning to travel to, or design an app that assists them on their holiday. Learn to cater to the target group's needs and use smart digital tools to create unforgettable experiences. Discover what technology can do for the tourism sector in terms of enhancing client experiences. You come up with a plan and an end product, others will design it.

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Government strategy:

Perspective 2030 is about the changing role of tourism and the sustainable development of the Netherlands as a destination. This requires a new approach, that prioritizes the common interests of visitors, businesses and local residents. Ensuring that tourism contributes to the prosperity and well-being of all Dutch people.

Five priorities play a key role in achieving this ambition:

- Benefits and burdens are in balance, more benefits from tourism than burdens
- All the Netherlands is attractive: put more cities and regions on the map as attractive destinations
- Accessible and achievable: easily accessible cities and regions
- Sustainability is a must: a living environment with less waste and pollution
- A hospitable industry: the Netherlands as a welcoming destination.

This vision was compiled based on input from more than one hundred experts working in tourism, mobility, education and culture. The local populations and various levels of government were also involved. Perspective 2030 can only be achieved through broad cooperation with the tourism industry and government authorities. An agenda for action was established for this purpose. But there is also a great need for improved data and insights on visitor behavior, among others.

3. **What are the main problems of the tourism sector in your country? (If any)**

Tourism is an integral part of Netherlands. Tourism has contributed a lot to the economy of Netherlands. North Holland and South Holland are the famous provinces in Netherlands for Tourism. NTBC which is the "Netherlands Bureau for tourism and conventions" has taken some initiative to increase the marketing and the promotional strategies to maximize the tourism.

Amsterdam is where is mainly concentrated all the tourism of the Netherlands. It's a tension that Amsterdam has been trying to navigate for years: how to embrace its status as a vibrant, international hub without making the city unlivable for its residents — and without letting go of its famous, free-spirited roots, says a report of New York Times about the tourism in Amsterdam. A tourism "monoculture" has taken root, and residents are being pushed out. Businesses and services that used to cater to locals — high-quality bakeries, butcher shops, and the like — have been replaced by trinket shops, ice-cream parlors and "Nutella shops," which serve takeaway waffles and other treats smeared in the hazelnut spread, mainly to tourists. Meanwhile, rising housing prices — due, in part, to the rise of Airbnb and other vacation rental platforms — have made the city centre unaffordable for many locals. In addition, streets and parks are often full, and there are long queues outside tourist attractions. As a result, local people feel their city has been taken over.

In 2019, a record-breaking 21.7 million people visited Amsterdam, a city with a population of about 870,000. Geerte Udo, the director of Amsterdam & partners, a nonprofit, government-supported organization that manages tourism in the city said "We need to change everything we have on offer in the city center if we want to bring the balance back to living, working and recreating,".

Tourism and coronavirus: 15 million fewer tourists in the Netherlands

Unsurprisingly, the coronavirus pandemic has had considerable repercussions for the Dutch tourism industry. 2020 saw only seven million tourists visit the country - significantly less than the 21 million that was expected.

Tourism during the coronavirus crisis

According to figures released by the Netherlands Bureau for Tourism & Conventions (NBTC), the Netherlands can expect over 70 percent fewer international visitors this year than in 2019. Fewer than seven million tourists are expected for the whole of 2020, but at the start of the NBTC predicted the country would receive almost 22 million, which would have been a new record.

The predictions for 2020 were so high due to a number of major events that were set to take place this year, including the revival of the Formula 1 race in Zandvoort, the Eurovision Song Contest in Rotterdam, and the European Football Championship. However, the outbreak of the coronavirus at the start of the year meant all these events had to be cancelled.

The future of tourism in the Netherlands

According to Jos Vranken, director of the NBTC, the tourism figures for the year 2020 are comparable to figures from the 1980s. Looking ahead to 2021, many have also said they are planning fewer holidays next year. Vranken says he predicts it will take a number of years for the Dutch tourism industry to recover, saying he expects it will only improve in 2024. Before the coronavirus the government have made plans to spread tourism more throughout the country and attract more business tourists.

Tourism creates jobs and income

In 2017, foreign tourists spent over €20 billion. In 2016, holidaymakers and day trippers spent €75.7 billion. Around 641,000 people work in the tourism sector, making it a major employer.

Spreading tourism more

The government wants to persuade tourists to come to the Netherlands during the off-peak season and to go to less-visited regions. This should help solve the problem. As well as allow other parts of the Netherlands to profit from the increasing numbers of visitors.

4.   **Do young people in the tourism sector face any challenges or obstacles when looking for a job?**

They are more flexible, but young people who make a bad start in the labor market can suffer the consequences for a long time, says Wilthagen. 'In economics, we call that scar effects. Young people run the risk of building up less income than they normally could. Without stable work you often stay at home longer, at Hotel Mama. As a result, relationships and family formation are also postponed. And there are more and more young people in the Netherlands with debts. Gielen knows from previous studies that young people who graduate in a recession still experience the consequences in the first years of their career in the form of a lower initial wage. 'It can take 5 to 10 years before that gap is made up. It is also much more difficult these days for young people to move on to a permanent job.

Apart from the crisis, young people are already more frequently affected by these kinds of issues. As a young person you often haven't built up a professional network yet, so you fall back on your parents and friends.

5.   **What has been the response of the tourism sector in your country to the Covid-19 travel restrictions?**

The coronavirus (COVID-19) pandemic turned the tourism industry upside down. The Dutch government put different restrictions during the whole pandemic. The Dutch government implemented travel restrictions, intelligent lockdown in the beginning of the pandemic, use of the face masks in public transport, indoor spaces, stations and places where is not possible to keep the 1.5m distance. In December 2020 the

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government announced a hard lockdown which affected to catering, culture and creative industry. The consequences of the coronavirus have major consequences for tourists and the cultural or creative sector. The cultural sector includes artists, theater and music makers and others who work in the cultural and creative field. The tourism industry includes hotels, bed and breakfast and others that offer overnight stays.

Financial arrangements cultural and creative sector

The outbreak of the coronavirus has major consequences for the artists, makers and others who work in the cultural and creative field. The cabinet responded to the cultural and creative sector with various measures for the damage suffered. From 2020 the Dutch Government has brought different support package to the cultural and creative sector. The government had substantially expanded the support package for jobs and the economy. The reality is that the corona crisis has became a long-term economic crisis, in which many entrepreneurs and workers have been hit hard. The economical support packages involves a total amount of 7.6 billion euros. The easing applies for the first and second quarter of 2021. The government gave more tan 900 million euros in 4 support packages to the culture, creative and tourism industry. In addition, more support packages were intended for the self-employed, and SMEs, and extra financial support packages for different regions In the Netherlands.

During the corona crisis, the tourism, art, culture and creative sectors developed different initiatives.
LKCA (National Knowledge Institute for Cultural Education and Amateur Art), DEN the institute for digitization in the cultural sector, MCN advancing digital transformation in museums, holland.com (the official tourism page for the Netherlands), and municipalities they have created a list of tourism options such as digital tours, art & culture digital events, etc.

Some of the examples are:
➢ Online concerts metropole orchestra

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➢ Van Gogh museum created quiz and question games, 4k virtual tour, etc.

➢ Rijksmuseum: Online drawing and painting tutorials from RijksCreative

➢ Nemo: Trials and experiments, teaching materials, etc

➢ villa zebra 'Villasoferen' about a work of art & fun home art assignments

➢ Digital tours of different cities in the Netherlands.

➢ IDFA: Free Movies Collection

6. What has been the response of the tourism sector in your country to the Covid-19 unemployment?

The number of jobs in the trade, transport and hospitality industry fell sharply, down by 48 thousand. Also, in business services, excluding employment agencies (-18 thousand), culture, recreation and other services (-12 thousand) and financial services (-4 thousand) jobs were lost. Compared to the first quarter of 2020, the number of jobs decreased most in trade, transport and hospitality (-135 thousand).

The Dutch government created as well specific and special economic measurements. The economic and social consequences of the coronavirus can be felt by everyone in the Netherlands. That is why there is a support and recovery package with temporary financial arrangements, a social package and investment measures. With this, the central government helps large and small (independent) entrepreneurs and offers support when employees move from unemployment to new work.

As we mentioned before, the Dutch Government created the *perspective 2030* is about the changing role of tourism and the sustainable development of the Netherlands as a destination.

The Dutch government is taking a total of 1 billion euros in measures aimed at growth companies, innovation, job retention and retraining in SMEs. In order to maintain and increase prosperity over the next 20 to 30 years, the economy must grow faster and differently. The government will allocate a total of 20 billion euros over the next five years for investments that contribute to maintaining and increasing prosperity. This

money is placed in the National Growth Fund and goes to knowledge development, physical infrastructure and research, development & innovation.

A total of 9.25 million euros has been set aside in the budget of the Ministry of Economic Affairs and Climate to support the Netherlands Bureau for Tourism and Congresses (NBTC) in 2021.

Transport in the Netherlands gets a necessary boost

In the coming years, Minister Cora van Nieuwenhuizen and State Secretary Stientje van Veldhoven will allocate 1.9 billion euros at an accelerated pace for the maintenance and replacement of roads, railways, waterways and dikes. For the tourism sector, the plans contain starting points at Schiphol airport, cycling infrastructure and circularity.

7. What is the level of digital knowledge in your country among young people (18-29)? Which digital tools do they use the most and for what purposes?

The Netherlands ranks among the EU top in digital skills

The Netherlands is one of the countries in Europe with the largest share of inhabitants who are proficient in using the internet, computers and software (digital skills). In 2019, half of the Dutch population aged 16 to 74 years had 'above basic' overall digital skills, versus an average 33 percent in the European Union. This is the outcome of research conducted recently by Statistics Netherlands (CBS) and other EU member states.

IN addition, according to the DESI index the Netherlands is ranked in the 4th position. The Digital Economy and Society Index (DESI) is a composite index that summarizes relevant indicators on Europe's digital performance and tracks the evolution of EU Member States, across five main dimensions: Connectivity, Human Capital, Use of Internet, Integration of Digital Technology, Digital Public Services.

THE RESULTS OF DESI INDEX

1. Connectivity: The Netherlands ranks 6th on average.
2. Human Capital: The Netherlands ranks 4th on average.
3. Use of Internet services: The Netherlands ranks 3rd on average.
4. Integration of digital technology: The Netherlands ranks 4th on average.
5. Digital public services: The Netherlands ranks 7th on average.

More young people digitally skilled

Dutch young people aged 12 to 25 have become more skilled in the use of the internet, computers and software compared to 2015. In the area of communication, the proportion of young people with more than basic skills in 2019 was greater than in other areas. Boys and girls do not differ in digital skills, young people (12 to 25 years) and young adults (25 years or older) do. Statistics Netherlands reports this in the context of the Youth Monitor.

In 2019, 96 percent of Dutch young people aged 12 to 25 used the internet (almost) every day. In 2015 this was still 93 percent. During the same period, young people have also become more proficient in using the Internet, computers and software. 72 percent of young people had more than basic skills in 2019, compared to 63 percent in 2015. In 2019, 41 percent of the over-25s in the Netherlands had more than basic digital skills, compared to 34 percent in 2015.

Most communication skills

The digital skills of young people are determined based on results in four sub-areas: communication, information, computers/online services and software. In the area of communication, the proportion of young people with more than basic skills in 2019 was greater (94 percent) than in other areas. This includes e-mailing, calling via the Internet, using social networks and uploading self-made photos, music, videos, text or software. Young people who have more than one of these skills fall into the category more than basic skills.

In both areas, information (such as looking up information over the Internet, moving files, and storing photos in the cloud) and computers/online services (e.g. shopping online, installing apps, and taking a course over the Internet), 86 percent of young people had basic-level skills. rise above.

In the area of software, 83 percent of the young people had more than basic skills. This sub-area includes the use of word processing programs and spreadsheets. Writing computer programs in a programming language also belongs to this sub-area.

Explanation: Digital skills indicators

The ICT use of households and individuals survey was conducted in 2019 among 5,610 Dutch people aged 12 and above, of which 963 were aged 12 to 25. Among other things, the survey asked about activities in the field of internet, computer and software use. Based on these activities and the extent to which they are implemented, indicators for digital skills have been developed such as no or few skills, basic or more than basic skills. All EU countries apply the same method, making the results of the Netherlands comparable in Europe.

8.   **Please look for examples (practices, projects, tools, etc.) implemented in your country that promote digital solutions for the safeguarding of Heritage Tourism.**

Digitization offers opportunities to display work, still reach and involve a (new) audience and to earn money – to a small extent. Not only DEN offers an overview of these kinds of initiatives, but also the Boekman Foundation and the National Knowledge Center for Cultural Participation and Amateur Art (LKCA).

In recent years, the Netherlands has invested heavily in the digitization of heritage collections and in making them accessible on the basis of the principles of the national strategy for digital heritage. As a result, many heritage institutions were able to immediately start working online with high-quality digitized collection material at the start of the crisis.

Various museums and archives offer virtual tours, in which the director, curator or a guest takes the public through the building and tells stories about the works that are important or most inspiring to that person. For example, Jan Rudolph de Lorm, director of museum Singer Laren, told every day on the Singer's YouTube channel about an artwork from the current exhibition and curators of the Rijksmuseum did this from home in the video series #Rijksmuseumfromhome using the existing digital collection.

In the first weeks of the lockdown, cultural institutions energetically set to work on ad hoc experiments such as organizing virtual tours and streaming performances. Digital initiatives can play an important role in complementing and even enhancing the slow start-up of the live experience, which is only becoming available to small numbers of audiences at first.

Digital heritage tourism: innovations in museums

A number of museums have been implementing digital applications to develop new products and services such as online exhibitions, new processes to research, display and manage collections, new organizational structures to accommodate an increasingly digital environment, reaching new markets, and tapping into existing resources to generate new capital.

In addition, the official tourism website of the Netherlands offers an online tourism of different cities of the country.

Some examples of digital activities are:

Photos and footage

- [Photo collection of the National Archives](#)
- [Image bank Rijksdienst Cultural Heritage](#)
- [Rotterdam City Archives - Image and sound](#)
- [Beelbank Amsterdam City Archives](#)
- [Image bank Groningen](#)
- [Image bank Utrecht Archives](#)
- [Nijmegen remains in the picture](#)

Archives

- [Archives.nl](#)
- [MaSS](#) : a maritime history database
- [warlife.nl](#)
- [Nijmegen Regional Archives](#)
- [Utrecht Archives](#)

Film and television equipment

- [IDFA Online](#)
- [Netherlands Institute for Sound and Vision](#)
- [EYE](#)
- [Open Images](#)
- [Groningen Film Bank](#)

Music, audio and sound

- Re:vive
- STEIM web archive

Literature, newspapers, texts

- Royal Library
- DBNL
- Delpher

Works of art

- Collectionnederland.nl
- Rijksstudio
- mediakunst.net
- Van Gogh Museum
- Museum Boijmans Van Beuningen
- Art Museum The Hague
- Kröller-Müller Museum
- Mauritshuis
- West Frisian Museum

Fashion, architecture and (industrial) design

- fashion muse
- JewelryMuseum
- Contemporary Jewelry
- The New Institute
- Cube exhibition archive
- Design Museum Den Bosch

Performing arts

- musical treasures
- music web
- NDT on Google Arts & Culture
- Performance Technology Lab
- Theater texts

Digital Tours

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- [Flower fields](#)
- [Wadden islands](#)
- [Typical dutch villages and towns](#)
- [Popular cities; Leeuwarden, Rotterdam, Maastricht, Amsterdam, etc.](#)
- [Liberation route](#)
- [Hollands castles and country houses](#)
- [The Dutch Golden Age](#)
- [Royal Holland](#)
- [Dutch food and cuisine](#)

9.   What kinds of thematic tourism are present in your country?

1. Events: Holland offers many, many events. Festivals, markets, parades, expositions and events are organized throughout the country in every season. Spring mainly offers flower parades and cheese markets. In summer, there's a wealth of dance, music and theatre festivals; autumn is the time for art and culture, and Sinterklaas and the Christmas markets bring warmth to cold winter months. The largest national event is celebrated every year on 27 April: King's Day.

2. Arts & Culture: Museums, street art, opera, dance and theater

3. Cycling: They are plenty of cycling routes through the country. Opportunity to discover the Wadden Sea, coastline of the IJsselmeer, Wadden Islands of Texel and Terschelling, Friesland and Noord-Holland, tour the islands and peninsulas of Zeeland, coastal views and rich history of The Hague, to the port city of Rotterdam, all the way to the iconic cheese-making city of Gouda, etc.

4. Water sports: The Netherlands is the perfect place for water sports. Nearly one third of the land is below sea level. In addition to the risk of flooding, this also means unique water sports opportunities. You can go boating through the canals in big cities or enjoy the peace and quiet on large bodies of water.

5. Tourism with Kids: The Netherlands has numerous attractions. From zoos, such as Blijdorp, GaiaPark, Dolfinarium Safaripark Beekse Bergen and the Apenheul, to

fun-parks like Walibi, Madurodam, Neeltje Jans, Duinrell and the world-famous Efteling.

10 What kinds of thematic tourism could be developed in your country?

In the Netherlands it is possible to find all kind of tourism thematic. The challenge in The Netherlands, is to promote other places, rather than Amsterdam attracting different visitors to different places, preferably at different times, outside of peak season.

From destination promotion to destination management

The most important themes are:

· Enhance the Dutch identity

· Improve the livability

· Realize sustainability objectives

· Create employment opportunities.

In addition, "The Netherlands is fully committed to making the next leap forward Dutch Prime Minister Mark Rutte said at the UN Sustainable Development Summit in September 2015. He affirmed the Netherlands' intention to make the SDGs its leading policy framework for the next 15 years. In 2018, tourism was responsible for about 8% of the carbon footprint. Air traffic plays a huge part in this, as do cruises. The amount of greenhouse gas emissions in the Dutch tourism sector increased by 11% from 2010 to 2015 (CBS, 2017). If holiday emissions of Dutch people continue to increase, they will be higher than was agreed for the Netherlands in the proposed climate legislation by 2030 (CSTT, 2018).

The Netherlands is fighting over-tourism in Amsterdam and the bulb region by showing tourists that the distances here are small and by inspiring them to consider other areas. For this the government has decided to:

– Create awareness of tourism behaviour.

– Reward sustainable initiatives and tax polluting activities.

– Make investments in soft mobility: developing the range of electric mobility and making bikes and electric bikes more easily accessible to visitors.

– Encourage the use of public transport and improve the booking-paying-traveling experience for tourist.

Nature tourism is tourism based on the natural attractions of an area. It consists of responsible travel to experience natural areas and their landscape, flora and fauna, protecting the environment and improving the quality of life of locals. In addition, EcoHotels was founded in 2020 as a responsible and sustainable alternative to the large and dominant online travel agencies (OTAs), whose business model and high commissions severely decimate individual hotels´ identity, concept and bottom line. EcoHotels´ mission is to be a community for hotels, sharing knowledge and best practices, and standing side by side to promote sustainability in the travel industry.

In the Netherlands the government and the provinces are focusing in a tourism more focused in cycling tourism, ecotourism, sustainable tourism and slowly more places are available for wild-camping.

2.5.3 Conclusions

Tourism is an integral part of Netherlands. Tourism has contributed a lot to the economy of Netherlands. North Holland and South Holland are the famous provinces in Netherlands for Tourism. Amsterdam is where is mainly concentrated all the tourism of the Netherlands.

In 2019, a record-breaking 21.7 million people visited Amsterdam, a city with a population of about 870,000. Unsurprisingly, the coronavirus pandemic has had considerable repercussions for the Dutch tourism industry. 2020 saw only seven million tourists visit the country - significantly less than the 21 million that was expected. The number of jobs in the trade, transport and hospitality industry fell sharply, down by 48 thousand.

The Netherlands is one of the countries in Europe with the largest share of inhabitants who are proficient in using the internet, computers and software (digital skills). In 2019, half of the Dutch population aged 16 to 74 years had 'above basic' overall digital skills, versus an average 33 percent in the European Union. This is the outcome of research conducted recently by Statistics Netherlands (CBS) and other EU member states.

In recent years, the Netherlands has invested heavily in the digitization of heritage collections and in making them accessible based on the principles of the national strategy for digital heritage. As a result, many heritage institutions were able to immediately start working online with high-quality digitized collection material at the start of the crisis.

In the first weeks of the lockdown, cultural institutions energetically set to work on ad-hoc experiments such as organizing virtual tours and streaming performances. Digital initiatives can play an important role in complementing and even enhancing the slow start-up of the live experience, which is only becoming available to small numbers of audiences at first.

The Netherlands is fighting over-tourism in Amsterdam and the bulb region by showing tourists that the distances here are small and by inspiring them to consider other areas.

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- Study in the Netherlands https://www.studyinholland.nl/
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- Studentum is a web site to compare the programs of all MBO schools, colleges and universities in the Netherlands. https://www.studentum.nl/

- DEN Kennisinstituut cultuur & digitale transformatie (national knowledge institute for culture & digitization and supports the cultural sector (heritage and arts) in utilizing the possibilities of digital transformation) https://www.den.nl/

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3. Conclusion

These national reports have been created with the objective of drawing the picture of the overall context of the project, which is to empower young people in promoting Heritage Tourism resources through the development of their own skills in Digital Design for the digital transformation of heritage tourism.

Every country involved in the project has produced their own national report, using their own methodology to draw the needed results. The report involved questions about the country's curricula/ training programs in the Tourism sector; training programs that promote digital upskilling in the Tourism sector; any challenges the country in general and specifically young people face when looking for a job in this sector; what has been the response of the country's tourism sector to the Covid-19 travel restrictions and the relative unemployment; what is the level of digital knowledge in the country among young people; what practices, projects, tools, etc. the country implements to promote digital solutions for the safeguarding of Heritage Tourism; what kinds of thematic tourism are present in the country and which ones could be developed more.

1. **What are the main areas that tourism-related training programmes/curricula your country focus on?**

The research showed that the aims of the tourism-related courses in UK are substantially vocational and business orientated. Undergraduate travel and tourism degrees can be studied as standalone qualifications or, as it generally happens, combined with other subjects. For example, travel and tourism programs often overlap with hospitality courses or can be taken in conjunction with business-related subjects such as finance, accounting, management, human resources (HR), or also language courses such as French, Spanish or Italian.

The curricula offered in Italy is slightly different since people can start studying tourism since the age of 16. Indeed In Italy, tourism training starts from high school with two different training offers:

- Technical Institute for tourism which issues the technical education diploma;

- Professional Institute for Food, Wine and Hotel Hospitality, which also issues the professional education diploma.

After high school, the university offer in the tourism sector includes specific undergraduate, master's degree, and finally second level degree courses, such as tourism sciences, or other courses in different disciplinary fields (for example economics or languages) with tourism content.

The situation in Greece is quite similar to UK, with the national curricula offering courses on tourism, but generally combined with business related subjects. Only in the last few years some universities have started offering postgraduate programs focusing on thematic tourism, sustainable tourism and technology-assisted tourism, which still require an existing degree in a related field.

In Bulgaria tourism is being taught in 58 institutions at secondary school level and 25 at university level, with almost 2200 students receiving a university degree in the subject "Sports, tourism and hospitality", each year. However, according to the Strategy for the Development of the Higher Education 2014-2020, the condition of Higher Education in Bulgaria has been defined insufficiently modernized, not diverse enough and not compliant with the needs of the labour market.

Finally, in the Netherlands, research shows that young people have been mainly discouraged to study tourism and travel subjects, in these hard times.

Indeed, the research for the Netherlands showed that the enrollment of students in tourism has been decreasing in the past years, although the employments in the same sector sector has been increasing. In terms of curricula, the Netherlands offer various levels of education on tourism related subjects, mainly on Tourism or Hospitality Management.

2. Are there any training programmes that promote digital upskilling in the Tourism sector in your country? If so, please describe (title, provider, objectives, focus areas).

Covid-19 has severely impacted the whole economic context, the employment statistics within the tourism industry, highlighted the need to virtualise work and accelerated digital transformation. This has significantly deepened differences of digital skills gaps across people and corporations, which now require specific digital skills to remain active and efficient in the sector.

In terms of digital upskilling, many options are available in UK, that support companies in their digital journey on how to learn to better use technology and make their time more efficient. VisitScotland or VisitBritain for example, offer digital trainings like this, especially in response to Covid-19, such as WorldHost customer service training, HIT customer service training, cyber security and others.

In Italy, The Higher Technical Institutes propose an experience of professionalizing tertiary training offer for cultural goods and activities/tourism. The ITS allow to acquire a Higher Technical Diploma with the certification of the competences corresponding to the V level of the European Qualification Framework. In addition, the Government has launched the PST - Strategic Plan of Tourism 2017-2022 (MIBACT - Ministry for Heritage, Cultural Activities and Tourism) with which it redesigns the planning in the field of tourism economics, putting it back at the centre of national policies. The Plan acts on fundamental levels such as technological and organizational innovation, the enhancement of skills, the quality of services.

The main digital upskilling programs in Greece are offered by universities, and they mainly propose to teach students how to use technology in order to reach more consumers/clients and promote their businesses and products; upskilling and deeper understanding of communication, gamification and digital payment methods; and finally new technologies that facilitate sustainable tourism, such as green modes of local transportation, thematic digital trails and sustainable heritage sites.

In Bulgaria as well digital upskilling programs are mainly offered by universities and the main business schools in the country, mainly in the capital, and they're generally related to areas such as digital marketing strategies, online reputation and use of social media, m-tourism (mobile) - related to the use of smart phones and user experiences.

Finally, for the Netherlands, various universities offer digital upskilling programs, mainly in Tourism Management related studies. The most popular subjects of these programs focus on e-commerce, tourism app and creation of e-content, social media analyses, digital intelligence, technological trends and e-tourism, and finally Virtual Reality apps that give tourists a preview of the destination they are planning to travel to.

3. What are the main problems of the tourism sector in your country? (If any)

The main problems countries face in the tourism sector are varied. For example, in UK the main current problem concerns the actual political situation, involving the Brexit. Indeed, the UK tourism and hospitality sectors are dependent on EU migrant workers, who represent 12%-23% of the industry's workforce. Since EU countries are fundamental to the industry, both in terms of workforce and overseas visitors, key questions arise as to how the post-Brexit environment will appear, specifically in relation to the freedom of movement, labour, and aviation agreements.

The major problems linked to tourism in Italy and never resolved are related to logistics, the port and airport system and rail links: factors that contribute to placing Italy in seventh place in the world tourism competitiveness indicator.

Research has shown that Greece instead faces 5 main problems in the tourism sector: tourism is mainly centralised around specific places, leaving other areas that could represent tourism attractions, left behind; the domestic tourism which represented a major means of wealth redistribution, was affected significantly by the pandemic; tourism in Greece is not very sustainable according to troubling statistics, and it's caused mainly by mass tourism; the Covid pandemic created uncertainty for the future and

finally the seasonality of tourism: Greece is indeed a summertime destination and a weakened one during the rest of the year.

Moving forward, Bulgarian tourism has to deal with the lack of qualifications and entrepreneurial experience among owners, business people, and locals within the tourism context and the desire of the owners to control the processes and their unwillingness to cooperate to improve the conditions in the destination, as well as the new market environment.

The Netherlands instead faces a total different problem which involves a *monocultural* tourism, meaning that the pole of the dutch tourism, Amsterdam, for years has attracted a signifcant number of tourists from all over the world, that, although positive for the economic sector, has been making the residents' lives unlivable.

Local people feel their city has been taken over, creating a lack of balance among living, working and recreating.

4. **Do young people in the tourism sector face any challenges or obstacles when looking for a job?**

The UK is the world's 7th most popular tourist destination, and as such creates many job opportunities. Nonetheless, according to the All-Party Parliamentary Group (APPG) for Youth Employment, a great number of young people still face obstacles to employment; also, too many young people are 'hidden' from the official statistics (these are generally young people who are NEET (not in education, employment or training) and not claiming any welfare support.)); The main barriers to employment, and also progress in education in UK, comprise but are not limited to: disability, mental health issues, low education attainment, homelessness, care leavers, carers, a criminal record and low aspirations.

Youth unemployment and, more generally, the working conditions of young people are one of the main collective concerns in Italy. Indeed, the unemployment rate of 15-24 year olds has grown and is steadily around 35%. The pandemic unfortunately has only highlighted this crisis more. Indeed, before the crisis, tourism was the leading sector of youth

employment: young people represented 63% of the employed, while now there's been a reduction in employment by 30%.

Unlike Italy, greek young people do not face any important challenge when looking for a job. Since tourism represents one of the most profitable sectors in Greece, young people can find entry-level jobs rather easily, although that only occurs during the summer season. The situation in Bulgaria is different. Indeed, there is one main obstacle defined by the tourism industry which is lack of necessary practical skills and knowledge of graduating students in tourism. But the real definition of the problem is that there's a lack of competence-oriented educational programmes for Tourism "in higher educational institutions". The young people also find it hard to work for low salaries and redirect themselves in other sectors of the economy.

To conclude, for the Netherlands, the main challenge young people face is that they generally make a bad start in the labour market. Indeed, according to research, young people who graduate in a recession still experience the consequences in the first years of their career in the form of a lower initial wage. It can take 5 to 10 years before that gap is made up. Also, it's much more difficult these days for young people to move on to a permanent job.

5. What has been the response of the tourism sector in your country to the Covid-19 travel restrictions?

As expected, the general context of the tourism industry, during the Covid-19 pandemic has drastically changed, by generally reducing the number of arrivals, room occupancy, and creating a very sharp turnover and unemployment in all tourism related sectors.

UK's response to support tourism recovery after the pandemic has been to put in place multiple policies and strategies, such as a new government plan to recover the tourism sector. Central in this plan are the creation of a new rail pass and vouchers for popular tourist attractions to bring domestic tourism to its pre-pandemic levels by 2022 and

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international tourism by 2023. Another plan from the government includes a new focus on technology and data. Indeed, all tourism data will be collected in order to record consumer trends in travel and accordingly creating new helpful policies. Finally, another plan will focus on sustainability, by creating measures to reduce the impact of tourism on the environment whilst balancing the needs of local communities.

Italy has reacted to the Covid state of emergency with a series of decree-laws containing extraordinary measures aimed at limiting the spread of COVID19 and mitigating its effects on the markets. Some of these new policies adopted in response to the pandemic included mostly funds to support the tourism sector and travel agencies, through market operations and tourism sector promotion, funds for emergencies in the entertainment, cinema and audio-visual sectors, businesses and cultural institutions, and finally funds meant to compensate for losses resulting from the cancellation, postponement and downsizing of trade fairs and conferences.

Italy's tourism sector responded to the pandemic by readapting to the new priorities and needs to be satisfied, such as the search for safety, hygiene, social distance, etc . First of all, the spaces, the use of the product and the ways of relating with the guest were reorganized. Museums, exhibitions, access to monuments have been rethought and organized in a functional way to meet new needs, especially thanks to the use of new technologies (Virtual Tour offered by the most important Italian museums, everything smart technologies can offer to shorten the distance between guest and destination while maintaining high standards in safety, such as providing appropriate information on the website, chatbox, apps etc.).

Greek's tourism sector was slow to adapt to the travel restrictions, with most hotels, Air BNBs, small businesses and most heritage sites shutting down. Museums however were much more adaptable, as many created digital exhibitions and online guided tours.

Bulgaria has been identified as a high-risk country, and unfortunately not many adequate responses have been taken after the pandemic. Indeed, Germany, Bulgaria's largest tourism market, had constantly cancelled flights until June 2021. According to tour operators, Bulgaria could separate the morbidity statistics for its tourist areas from

the general statistics for the country and thus be more attractive from the point of view of security. Vaccinations which were also proceeding slowly, were made a matter of priority for tourism staff. Still, the situation remains unclear and the main tourism organisations have called for serious efforts in the field of diplomacy.

The Netherlands, as the other countries, has implemented hard restrictions, such as a lockdown, to face the Covid-19 pandemic. The government responded to the outbreak with a number of strategies to support the country's economic sector, such as financial arrangements for the cultural and creative sector, including tourism. Also, a list of tourism options such as digital tours, art & culture digital events, has been proposed by different organisations to help digitalise the industry and limit the impact of the pandemic on this sector.

6. What has been the response of the tourism sector in your country to the Covid-19 unemployment?

All countries have faced a hard turnover within the tourism industry due to the Covid 19 pandemic.

UK's government response to the tourism and travel industry's unemployment post Covid-19 pandemic has been a financial support scheme, called Universal Credit, a means-tested benefit for people of a working age on low income. According to data, about 2.4 million fresh universal credit (UC) claims began during the first lockdown ; at least three in every five of those claims - about 1.4 million - remained open six months later.

Italy's government measures to support unemployment due to Covid-19 crisis were: Compensation for seasonal workers in tourism and spas; Indemnity for fixed-term workers in tourism and spas; Entertainment workers' allowance and contribution relief.

During the pandemic, the Greek tourism sector was unable to sustain new employees, and there were significant losses of work. Unfortunately, there were no significant steps taken to combat unemployment within the tourism sector, also because many employees in the tourism sector had very temporary employment contracts with

employers, which made them very susceptible to unemployment during periods like the COVID-19 pandemic, with very few benefits and safeguards; furthermore, many employees were unregistered in the past, meaning many of them could not receive the relief payments and other benefits.

Bulgaria's government instead provided with the new employment package "Employment x 3" grants until the end of 2020, in the total amount of up to BGN 160 million. Also, various short-term projects were proposed in order to support enterprises and self-insured persons whose economic activity was directly affected by the adverse impact of the state of emergency imposed in the country. Other projects focused on SMEs and on the promotion and recovery of the domestic tourism.

In the Netherlands, a support and recovery package with temporary financial arrangements, a social package and investment measures were taken by the Government. The Dutch Government also created the *perspective 2030,* which is about the changing role of tourism and the sustainable development of the Netherlands as a destination. For the tourism sector, some plans of maintenance and replacement included starting points at Schiphol airport, cycling infrastructure and circularity. Finally, a total of 9.25 million euros has been set aside in the budget of the Ministry of Economic Affairs and Climate to support the Netherlands Bureau for Tourism and Congresses (NBTC) in 2021.

7. **What is the level of digital knowledge in your country among young people (18-29)? Which digital tools do they use the most and for what purposes?**

Digital technology has changed global society, both in the workplace and at home and the importance of digital skills is increasing. However, according to Lloyds Bank (2017), 11.5 million people in the UK were still lacking basic digital skills.

Nevertheless, in recent years, in order to improve digital skills in the UK, many measures have been introduced: for example, in 2014, a new computing programme of study for the national curricula was announced; and in 2017, the Government issued its UK Digital Strategy 2017, which included actions to reduce digital exclusion. According to a recent

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study (March 2021) young people know digital skills will be important for their future careers, but at the same time many of them are unsure they have the more complex digital skills a workplace might require. More specifically, 62% said they have the basic digital skills employers might need, such as digital communication skills or use common software, but only 18% of young people recognise to have more advanced skills, such as coding or using specialist softwares.

The DESI index (Digital Economy and Society Index), which measures the progress of EU member states on their path towards a digital economy and society, highlighted Italy's backwardness in digitization. More specifically: only 42% of individuals between 16 and 74 have basic digital skills; 17% of individuals residing in Italy have never used the internet; young people aged 16 to 29 would have a satisfactory level of computer skills, as well as those under 15. The problem is especially evident in the over 29s: a third of them would have no understanding of technological systems (OECD average: 17%).

Contrariwise, according to Eurostat (2020), Greek young people have one of the highest digital competencies in Europe, with 92% having basic technological knowledge. Young people In Greece predominantly use social media as their main digital tool. Instagram, TikTok and Facebook are the most widely used, with applications like iMessage, FaceTime, WhatsApp and Snapchat also being widely used for communication.

In Bulgaria, there is low level of digital literacy in the original sense of the word. Young people mainly use digital devices for surfing, use of digital resources for information, but no creation of content. A study conducted by ESTAT on behalf of UNICEF Bulgaria shows that children and young people do not think they are addicted to digital media. However, 3/4 of the young people in Bulgaria surf social networks and communicate through online applications on a daily basis, but most find what is happening in the real world more important and exciting. This is shown by the results of a national survey, which focuses on media habits and practices, popular personalities on the Web, as well as the extent to which digital technologies help them to express themselves and achieve individual and community goals.

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Finally, according to the DESI index, the Netherlands is ranked in the 4th position. Indeed, the Netherlands is one of the countries in Europe with the largest share of inhabitants who are proficient in using the internet, computers and software (digital skills). In 2019, half of the Dutch population aged 16 to 74 years had 'above basic' overall digital skills, versus an average 33 percent in the European Union. Dutch young people aged 12 to 25 have become more skilled in the use of the internet, computers and software compared to 2015 (72 percent of young people had more than basic skills in 2019, compared to 63 percent in 2015).

8. **Please look for examples (practices, projects, tools, etc.) implemented in your country that promote digital solutions for the safeguarding of Heritage Tourism.**

One of the most recent trends in tourism concern technology solutions for visitor attractions and experiences in a post-COVID-19 world. In UK many practices and tools have been designed in order to safeguard Tourism Heritage. An example can be the *Reproduction of Works of Art and Cultural Heritage* (ReACH), led by the Victoria & Albert Museum, which aims to detail a roadmap for how museums can engage with these technologies, particularly in relation to scientific challenges such as the restoration and reconstruction of cultural heritage, as well as preserving memory in the case of fragile heritage. Other projects involve the use of technologies such as 3D for documentation, imaging and monitoring sites, or the use of distributed ledger technology for digital archiving.

Same type of projects can be found in Italy. Most of them use 3D technology, as well as AR and VR to promote virtual tours of heritage sites (for example, *Travels in ancient Rome. Ara as it was*, *Circo Maximo Experience* etc.). At the same time digital technology is also used to assess the state of conservation of the cultural, architectural and historical-artistic heritage, applying - in an integrated and synergistic way - comparative, diagnostic and forecasting analyses for the management of emergencies and for planned conservation activities.

Digital solutions have also been provided in Greece with many museums creating digital exhibitions and tours. Two examples are the Acropolis Museum and the Averof Floating

Naval Museum, which were among the first to digitise their exhibition and create a digital tour of the entire ship.

In Bulgaria as well, digital solutions have been promoted by many sites in order to digitalise tourism services. Some examples are URBO, a web portal and mobile application for entertainment and leisure for the traveller or active resident in an urban environment; or TRANS-EDU-NET Project, which was implemented by National Tourism Cluster "Bulgarian Guide" and offered transnational curricula in the field of tourism and digital skills.

In the Netherlands a number of museums have been implementing digital applications to develop new products and services such as online exhibitions, new processes to research, display and manage collections, new organisational structures to accommodate an increasingly digital environment, reaching new markets, and tapping into existing resources to generate new capital.

In addition, the official tourism website of the Netherlands offers an online tourism of different cities of the country.

9. What kinds of thematic tourism are present in your country?

Thematic tourisms are types of tourism undertaken to satisfy a particular interest or need. Every country can have different types of tourism tailored to its tourists' needs. For example, in UK there are 10 categories of thematic tourism. These are: Traditional/Historic Britain, sports & leisure, shopping, royal Britain, outdoors, Music & Festivals, Food and drink, film and TV, arts and culture and Activities.

In Italy we can find mainly the experiential tourism and the cultural tourism among the most important ones.

Greece offers among the most important ones, wellness and health tourism, religious tourism, camping tourism and heritage tourism which is the most popular.

Bulgaria is developing the so-called niche tourist products - sports, urban entertainment, cruise, and business tourism. Along with those, we can find creative tourism, religious /

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pilgrimage tourism , cultural tourism, Eco-tourism, sea tourism, camping tourism, mountain tourism, balneo, SPA and wellness, sport and adventure tourism, rural tourism, event tourism (congresses, business, festivals, etc.) and finally wine-culinary.

The Netherlands instead offers the events tourism, arts & culture tourism,cycling, water sports and tourism with kids or family tourism.

10. What kinds of thematic tourism could be developed in your country?

Some types of tourism are becoming popular in recent years and they could represent opportunities of development for many countries. An example could be developing dark tourism more in UK, defined as tourism involving travel to places historically associated with death and tragedy, since ghost tours and other types of mystery tours are already quite popular in UK.

In Italy instead, proximity tourism is one of those forms that is becoming more and more popular, and it's the type of tourism that aims at the (re) discovery of the nearest places. Another new trend in tourism is the *Neverending* tourism, a service capable of extending the tourist experience before and after the trip, offering online content such as "virtual" visits to museums and cities, sports activities set in destinations but virtually practicable. Also, business tourism, roots tourism (discover something that is part of the tourist's history and culture) and naturism are becoming more popular in Italy.

Greece instead focuses its new thematic tourisms on gastronomy, that could be very widespread due to the varying local cuisines and the various ethnic elements of Greece; and the technological Nomads: an emerging touristic field for people who are distance-working, especially for large companies.

Further thematic tourism that could be developed in Bulgaria are: adventure tourism: diving, rowing, skydiving; geotourism; city tourism; sport tourism (golf, cycling, etc.); hunting tourism; photo tourism; scientific tourism and entertaining tourism.

In the Netherlands it's already possible to find all kind of tourism thematic. The challenge in The Netherlands, is to promote other places, rather than Amsterdam attracting different visitors to different places, preferably at different times, outside of peak season.