**WELLNESS AND SPA TOURISM SECTORAL SKILLS DEVELOPMENT - WESKILL**

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**REPORT ON FINDINGS OF SKILLS GAPS RESEARCH IN WELLNESS AND SPA TOURISM SECTOR**

**(WP 3)**

**Programme ERASMUS+**

**Project Nr. 621401-EPP-1-2020-1-BG-EPPKA2-SSA**

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**2021**

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INTRODUCTION

The Erasmus + project “Wellness and Spa Tourism Sectoral Skills’ Development” (WeSkill), Ref. No. 621401-EPP-1-2020-1-BG-EPPKA2-SSA aims to develop and implement a curriculum for VET (vocational education and training) institutions in line with labour market needs, based on addressing skills and competency gaps in the spa and wellness sector.

The cooperation partners involved in the project are vocational education and training institutions (VET), state institutions, companies in the spa and wellness sector and non-governmental organizations from Latvia, Slovenia, France, Italy, Serbia, the Netherlands, Greece and Bulgaria.

The aim of the first phase / activity of the "WeSkill working package 3" is to summarize the research carried out in the project partner countries, the analysed data carried out at the national and regional level on the existing skills and competences gaps in the spa and wellness sector, which will be followed by surveys of employers and VET providers on the skills, competencies and qualifications required at the workplace by companies in the spa and wellness sector. An important activity in "Working package 3" will be the organization of focus groups, in-depth interviews with opinion leaders and experts in the "WeSkill" partner countries. At the end of the 3rd stage of the working package, a final report “Wellness and Spa sector skills’ gaps summary report” will be prepared, 4 skills gaps, competency gaps will be identified, for which study programmes will be developed according to the needs of the labour market in the spa and wellness sector.

PART I: FINDINGS OF SKILLS GAPS RESEARCH IN EXISTING DATA SOURCES

INTRODUCTION

This is the first report of the Erasmus + project “Wellness and Spa Tourism Sectoral Skills’ Development” (WeSkill), Ref. No. 621401-EPP-1-2020-1-BG-EPPKA2-SSA.

The aim of the first report was to summarize the research carried out in the project partner countries, the analysed data carried out at the national and regional level on the existing skills and competences gaps in the spa and wellness sector.

Report on findings of skills gaps research collected from existing data sources (desk research) in 7 participating countries and, in addition, in 4 EU countries beyond the partnership.

The report summarizes in detail presently existing data (from national databases, projects’ results, NRP, etc.) on skills gaps, occupational profiles, education programmes, curriculums and industry’s needs in the wellness and spa sector in project participating countries.

The report collected the same data from 4 other EU countries – Germany, Malta, Spain, Portugal – in collaboration with the project’s partner organization, the World Federation of Hydrotherapy and Climatotherapy (FEMTEC).

Terminology used in the WeSkill project

*Spa resources* – physical therapy, e.g. massages, packs with fango and peloids, physiotherapy, inhalations, Kneipp treatments, balneo-physical treatments with special consideration of local therapeutic remedies (natural resources like mud, mineral, thermal waters, etc.) (European Spas Association).

*Medical tourism* – the process of traveling outside the country of residence for receiving medical care.

*Health tourism* is an important part of social tourism as it focuses on types of care that enhances the well-being of a person but cannot be considered as necessary per se.

*Wellness Tourism* – healthy people travelling to other cities to maintain their physical and psychological health through receiving certain services in specialized institutions.

*Spa* – 1. A resort providing therapeutic baths. 2. A resort area having mineral springs. 3. A fashionable hotel or resort. 4. A health spa. 5. A tub for relaxation or invigoration, usually including a device for raising whirlpools in the water (<https://medical-dictionary.thefreedictionary.com/spa>).

*Wellness* – definition of wellness: the quality or state of being in good health, especially as an actively sought goal of a lifestyle that promotes wellness. Wellness is an active process of becoming aware of and making choices toward a healthy and fulfilling life. Wellness is more than being free from illness, it is a dynamic process of change and growth.

Definitions from EUROPEAN COUNCIL RECOMMENDATION of 22 May 2017 on the European Qualifications Framework for lifelong learning and repealing the recommendation of the European Parliament and of the Council of 23 April 2008 on the establishment of the European Qualifications Framework for lifelong learning:

*Skills* means the ability to apply knowledge and use know-how to complete tasks and solve problems. In the context of the EQF, skills are described as cognitive (involving the use of logical, intuitive and creative thinking) or practical (involving manual dexterity and the use of methods, materials, tools and instruments).

*Competence* means the proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations and in professional and personal development.

*Responsibility* and *autonomy* means the ability of the learner to apply knowledge and skills autonomously.

*Learning outcomes* means statements regarding what a learner knows, understands and is able to do on completion of a learning process, which are defined in terms of knowledge, skills and responsibility and autonomy.

*Knowledge* means the outcome of the assimilation of information through learning. Knowledge is the body of facts, principles, theories and practices that is related to a field of work or study. In the context of the EQF, knowledge is described as theoretical and/or factual.

*Professional skills* are specific because they are related to the sector / profession and a specific profession. Acquisition of professional skills requires training (formal or informal), in addition to them can be easily assessed and measured (examples – ability to use specific spa terminology, ability to create descriptions of spa treatments, ability to sell Spa and Wellness products, etc.).

European Skills, Competences, Qualifications and Occupations (ESCO handbook)

Distinguishes four levels of skills reusability:

*Transversal knowledge, skills and competences* are relevant to a broad range of occupations and sectors,

*Cross-sector knowledge, skills and competences* are relevant to occupations across several economic sectors,

*Sector-specific knowledge, skills and competences* are specific to one sector, but are relevant for more than one occupation within that sector,

*Occupation-specific knowledge, skills and competences* are usually applied within one occupation or specialisation.

*‘Skills gap’* is used to describe the qualitative mismatch between the supply or availability of human resources and the requirements of the labour market. Skills gaps exist where employers feel that their existing workforce has inadequate skill types/levels to meet their business objectives; or where new entrants to the labour market are apparently trained and qualified for occupations but still lack a variety of the skills required (NSTF 1998).

Data collection methodology

Partner organisations from all the projects partner states of Latvia, Slovenia, France, Italy, Serbia, Greece and Bulgaria were assigned the task of collating information about relevant national databases, projects, studies, situation assessments in their country and the opinions of experts about the required skills, which there are a lack of and which are need to be improved among employees working in the Spa and Wellness sector.

Parallel to this, the equivalent data was collated by member states of the project cooperation partner organisation Femtec 4: Germany, Malta, Spain and Portugal.

In order for the collated data to show as comprehensive a picture as possible in relation to which skills and knowledge are required to improve the Spa and wellness sector in the European Union, international projects implemented in the European Union were collated and analysed, which focus on the overall development of the Spa and wellness sector and tourism, and studies conducted by international organisations such as CEDEFOP and OECD.

To collate and analyse the data received according to a unified methodology, the Latvian project partner, the NGO “Latvian Association of Resort Towns” in collaboration with the Bulgarian project partner, the Institute for Training of Personnel in International Organizations (Itipio) developed a unified form for data collection. (Table 1)

Table 1

**Unified form for data collection**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| WeSkill WP3 | **Desk research template** | | |  |  |  |  |
| Duration: | December, 2020 - January, 2021 | | |  |  |  |  |
| Country: |  | | |  |  |  |  |
| Projectpartner: |  | | |  |  |  |  |
| Name of the source where are identified needs on skills gaps, occupational profiles, education programmes, curriculums and industry’s needs | Short description of the content | In which level: national legislation, educational programmes, industry, etc | What type of document, information (National data base, project, research, surveys? Private or state information etc.) | Link to the source of European, national databases, project results, existing surveys etc. of spa and wellness industry (quantity or quality data information) source | Source author, provider or interviewed organisation: (Representative organizations, VET providers, regulators, state institution, companies, others.). | Suggestions for solutions of existing needs | Skills gaps identified in the source |
| (if any) |
| No | *Up to 300 characters (with spaces)* |  |  | *Link + description of projects, or data bases* | *Contact institution (name, website), contact person (name, surname, position, email, phone)* | *Short description if there are already further steps for solving some skill gaps, or other needs, what kind of solutions and timeframe for it etc.* | *There could be good information which could help to recognize needs and develop report.* |

Data was collated including national, regional, local and international studies, laws and regulations, planning documents and interviews. This also included contact information of data providers, which could be useful during the future development of the project, organising Spa and wellness sector focus groups and in interviewing industry experts in-depth. Among the other data collated was information about existing proposals and next steps towards the eradication of these shortcomings if such have been devised.

Data collation took place over a two-month period from December 2020 to January 2021. From January-February 2021 the Latvian project partner “Latvian Association of Resort Towns” analysed the data received. Information required about project cooperation partners was revised. In February 2021 the first WP 3 report was compiled, which presents the collated results, as well as conclusions about the lack of skills and knowledge among employees working in the Spa and wellness sector.

SKILLS GAPS RESEARCH IN EXISTING DATA SOURCES

## Bulgaria

In recent years, various studies have been carried out in Bulgaria, both on skills needs and knowledge in the labour market, especially in the tourism sector, Spa and Wellness industry.

Bulgarian Industrial Association Union of the Bulgarian Business published public report “Sector analysis of the tourism sector”. (2013) Analysis of the report is based on current trends, needs and problems in the tourism sector in Bulgaria.

According to research, the skills and knowledge that should be improved are computer skills, more flexible staffing needs, adaptability, teamwork, talent management, communication skills, e-learning, risky investment strategies based on overly ambitious forecasts.

To address these gaps, practical trainings have been implemented: Maintenance of good material and technical base. Higher qualification and education of the staff.

More information: <https://mycompetence.bg/bg/static/5> and <https://mycompetence.bg/bg/>

Ministry of Economy of the Republic of Bulgaria published a “Strategy for sustainable development of tourism in the Republic of Bulgaria 2014-2030” (2014). The Strategy covers the period 2014-2030. It systematizes the vision, the strategic goals, the priorities, the activities, the realization of which will lead to the establishment of sustainable schemes for development and management of tourist activities.

The strategy points to a number of skills and knowledge gaps such as digital skills, foreign language skills for the medical and spa personnel.

To address these skills gaps, provision of better training content and filling in the missing skills are planned. But these are not sufficient steps for solving some skills gaps.

More information:  
<https://www.tourism.government.bg/bg/kategorii/strategicheski-dokumenti/nacionalna-strategiya-za-ustoychivo-razvitie-na-turizma-v>

Research made by the USAID Labour Market project by Carana Corporation and USAID “Study of the needs of qualified labour and special skills in the Bulgarian tourist industry”. (2005)

Interviews were conducted with managers from over 200 different companies and organizations working in the field of tourism. All interviewed organizations noted that the need for additional customer service training is most urgent.

The research identified the following skills and knowledge gaps – customer service, marketing, financial management, human resources management, foreign languages.

To address these skills gaps, provision of better training content and filling in the missing skills are planned.

Chart

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Fig. 1 **Skills and knowledges which should be improved in Spa and Wellness sector of Bulgaria**

## France

The regional research “Skills knowledge of the tourist environment” was prepared in the Normandy region (2018). The research indicated the need to focus more on the needs of the client-tourist. Developing a “welcoming spirit" is undoubtedly one of the keys to the success of a tourism development policy. Indeed, welcoming the customer with a smile, knowing how to greet the customer by phone, knowing how to be available, responding to punctual expectations, finding solutions to the problems encountered, putting the customer at the heart of the system, is the very foundation of tourist activity.

The research indicated which knowledge and skills of employees in the spa and wellness industry should be improved: telephone reception techniques, knowing how to make yourself available, meeting punctual expectations, finding solutions to problems, knowing how to communicate, knowing how to sell, being able to express yourself in a foreign language (especially in English), having a customer-oriented approach, knowing how to welcome foreign tourists, how to find out the tastes and behaviour of foreign customers, anticipating customer needs, knowing how to offer services/products, encouraging discovery, putting ourselves at the service of the customer, being loyal to the customer, meeting the customer’s expectations.

More information:   
<http://normandie.direccte.gouv.fr/sites/normandie.direccte.gouv.fr/IMG/pdf/tourisme-ok-18-12-18.cl.pdf>

The survey “The skills and qualities expected in the health and social” was prepared by Pôle emploi.

According to the survey, skills which should be improved are relational skills, presentation skills, versatility skills, adaptation.

More information:   
<https://www.pole-emploi.org/files/live/sites/peorg/files/documents/Statistiques-et-analyses/E%26S/eets_22_competences_attendues_par_les_employeurs_et_pratiques_de_recrutement10343.pdf>

According to France Tourism Development Agency, quality of reception is both a key issue and a challenge, as it is often difficult to reconcile it with the constraints of the sector (stress situations linked to overcrowding, lack of staff, etc.). If welcoming is an attitude that can be "learned", and that must be cultivated, it should in no way be weaned or felt! Quality of reception, customer relations, commercial relations.

One can deplore hearing the reactions of consumers, a certain lack of hospitality culture among   
many French tourist service providers. The individualisation of sensitivities and behaviour: tourist impacts.

Direction du tourisme, 2005, http://www.tourisme.gouv.fr

More information:   
<http://www.tourisme.gouv.fr/fr/navd/mediatheque/publication/evolution/att00010306/individualisation.pdf>

The analysis “The skills and qualities expected in the accommodation and restaurant sector” was written by Pôle emploi (2016).

The analysis showed which skills should be improved: motivation, availability, relational skills, presentation skills, versatility, and adaptation.

More information:  
<https://www.pole-emploi.org/files/live/sites/peorg/files/documents/Statistiques-et-analyses/E%26S/eets_22_competences_attendues_par_les_employeurs_et_pratiques_de_recrutement10343.pdf>

The survey “Skills expected by employers: What do employers expect today? What place is there for diplomas in recruitment? What are the most sought-after skills?” was prepared by Pôle emploi (2018).

The survey points out: behavioural skills, ability to adapt, organizational skills, autonomy, sense of responsibility, teamwork, knowledge of and respect for rules, ability to update knowledge, initiative, stress management.

More information:   
<https://www.pole-emploi.org/accueil/actualites/infographies/les-competences-attendues-par-le.html?type=article>

The survey “Qualifications required according to human service trades” was prepared by Pôle emploi (2018).

The survey showed the following skills which should be improved: autonomy, reliability, ability to update your skills, sense of customer relations.

More information:   
<https://www.pole-emploi.org/accueil/actualites/infographies/les-competences-attendues-par-le.html?type=article>

The survey “Qualifications required by the hotel and restaurant trades” was prepared by Pôle emploi (2018).

The survey showed the following skills which should be improved: customer relations skills, ability to work under pressure, stress management.

More information:   
<https://www.pole-emploi.org/accueil/actualites/infographies/les-competences-attendues-par-le.html?type=article>

Report on diplomas and training for tourism professions. Paris, Assemblée nationale (2003).

New information and communication technologies, especially with the interactive information and online distribution made possible by the internet, are completely overturning the tourism economy. One objective is essential: to enable everyone, employees and employers, through initial and continued training, to better master these new technologies.

As an economic activity with significant effects on the environment, heritage, culture and social relations, tourism must naturally mobilise resources in favouring an awareness of its social and environmental responsibility. This responsibility must be expressed in the content of initial and/or continued training, because, like any economic activity, tourism is concerned with sustainable development, specific knowledge related to local agritourism, knowledge of all criteria for sustainable development, in particular the European Charter for Sustainable Tourism.

More information:   
<http://www.ladocumentationfrancaise.fr/brp/notices/034000418.shtml>

The GFE 17 "Hotels, Restaurants, Tourism, Leisure, Animation, Sport" provided updated data and the first statistical surveys on the evolution of training, employment and the labour market by the ARF - Poitou-Charentes Regional Agency for Lifelong Learning (2018).

The professionalization of catering and hotel industries, as well as those of sport, entertainment and tourism, is linked to an increase in the degree of customer requirements in terms of care and safety. Mastery of foreign languages and IT has become necessary for better service quality to customers.

More information:   
[http://www.veilleinfotourisme.fr/servlet/com.univ.collabouratif.utils.LectureFichiergw?CODE\_FICHIER=1218032638145&ID\_FICHE=17995](http://www.veilleinfotourisme.fr/servlet/com.univ.collaboratif.utils.LectureFichiergw?CODE_FICHIER=1218032638145&ID_FICHE=17995)

"Graduates must have a sense of being welcome, management and leadership," from the interview with Philippe Gilles from the Odalys Group, partner of the Rochelle Business School of Tourism (Sup de Co La Rochelle group) (2008).

Social management, mechanics of different corporate cultures, management methods, etc. should be improved.

More information:  
<http://www.studyrama.com/article.php3?id_article=10304>

“Tourism professions: a regional approach”. Marseille, Céreq, 2006, p. 131

In this industry, reception seems to refer above everything to relational and communicative skills (including languages), and to providing the right information at the right time. Be polite, smile, present yourself well.

<http://www.cereq.fr/cereq/Net-Doc-24.pdf>

The public annual report “Research on the demand for skills in the sector 2020-2021” was prepared by the Court of Auditors (2019).

The analysis of the demand for skills in the thermalism sector is based on the work of the Court of Auditors concerning a fragile system of thermalism and territorial communities.

The analysis showed that the following skills should be improved: computer skills, more flexible staffing needs, adaptability, teamwork, talent management, communication skills, e-learning, risky investment strategies based on overly ambitious forecasts.

The follow-up conclusions of the report are that practical training must be improved, good general condition of a SPA must be maintained, legionella risks in SPAs and bubbling ponds must be prevented.

More information:   
<https://www.ccomptes.fr/system/files/2019-02/11-thermalisme-collectivites-territoriales-systeme-fragile-Tome-1.pdf>

According to the opinions by French Spa professionals, by practitioners published on the media: a spa manager is needed who is multi-skilled in finance, marketing, communications and location management.

Each division corresponds to skills that will allow the manager to build a communication plan throughout their professional activity and to manage their operating accounts, but also to set up a training plan for their team, to organize recruitment and to ensure the management of the place in accordance with regulations.

The staff’s flexibility – the professional must adapt to the demands of the client such as their schedule, care for the client, and have training other than giving a massage and in aesthetics, for example, also in nutrition, aromatherapy, etc.

<https://trouver-un-metier.fr/spa-praticien/>

<https://wellnessbygalyaortega.com/2019/05/21/la-professionnalisation-des-spa-praticiens/>

Chart, bar chart

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Fig. 2 **Skills and knowledges which should be improved in Spa and Wellness sector of France**

## Germany

In recent years, many studies and a lot of research have been carried out in Germany about the Health, Spa and Wellness Industry in relation to the labour market in the tourism sector.

The most recent are:

Country Report “On Health and Wellness in Germany” edited by

The Euromonitor International limited (GB) <https://www.euromonitor.com/health-and-wellness-in-germany/report> published in FEBRUARY 2021 a “Country Report Health and Wellness in Germany.

The Report summary concern specially COVID-19 impact on health and wellness

Despite the COVID-19 pandemic, health and wellness products performed well during 2020, with a growing number of consumers looking to boost their immune systems with added vitamins or to look after their health by reducing sugar intake. Sugar-free and low sugar tea and juices that are low in calories are increasingly consumed as health boosters in the morning, accelerating the trend seen in soft drinks in recent years.

COVID-19 country impact

Restrictions on large gatherings started from 13 March in Germany. Schools were closed, travel was restricted, and many of the country’s borders were closed on 16 March, with travellers returning to Germany having to self-isolate for 14 days.

The response from businesses

In response to COVID-19, major brands have shifted towards larger packaging and formats such as 1L to 1.5L bottles and multipacks.

Retailing shift

After the stockpiling effect at the end of March 2020, which lasted for approximately 3-4 weeks, retailers quickly adjusted their available stocks both in-stores and online to match and address increased consumer demand. Store closures have led to uncertainty, with many consumers shifting towards “one stop” shopping and buying everything in one go so as to limit time spent in crowded places.

Food service vs. retail split

The closure of consumer food service outlets has had a positive impact on consumption of health and wellness beverages in Germany, with the market seeing a clear channel shift from on-trade to off-trade sales. Health and wellness hot drinks beverages have also benefitted from the shift of consumption from offices due to the implementation of remote work, with the majority of office workers working from home throughout the year, thus boosting organic coffee and fortified/functional tea sales.

What next for health and wellness?

Overall, the trend towards health and wellness beverages will continue to grow over the coming years as already strong consumer health awareness is further boosted by the desire to boost the immune system in response to the COVID-19 pandemic. Furthermore, the introduction of a growing array of new innovative products will also help to boost sales and attract new consumers, with reduced sugar beverages set to perform particularly well.

Discover the latest market trends and uncover sources of future market growth for the Health and Wellness industry in Germany with research from Euromonitor's team of in-country analysts.

Find hidden opportunities in the most current research data available, understand competitive threats with our detailed market analysis, and plan your corporate strategy with our expert qualitative analysis and growth projections.

The Health and Wellness in Germany market research report includes:

• Analysis of key supply-side and demand trends

• Detailed segmentation of international and local products

• Historic volumes and values, company and brand market shares

• Five-year forecasts of market trends and market growth

• Robust and transparent market research methodology, conducted in-country

Market research reports answer questions such as:

• What is the market size of Health and Wellness in Germany?

• What are the major brands in Germany?

• Were the sales of health and wellness affected by the global recession?

• What functional ingredients in food and drinks are in fashion in Germany?

• Is the organic movement still growing?

• Are weight management food and drinks driven by product reformulation?

According to the Report, the skills and knowledge that should be improved are computer skills, more flexible staffing needs, communication skills, e-learning and risk investment.

It is necessary to implement the learning plan with practical training (also international).

Other recent studies proposed by International Medical Wellness Association and German Medical Wellness Association (2021) about “The Leading Medical Wellness Hotels &Resorts/Clinics & Spa”.

[www.dmwv.de](http://www.dmwv.de)

The report points to a number of skills and knowledge gaps as digital skills, outdated marketing and management and inadequate foreign languages skills among medical and spa personnel.

Studies of balneology (also connected to the Health Tourism).

From the scientific point of view, the most important institution is the Institute of Balneology and Medical Climatology of the Clinical for Physical Medicine and Rehabilitation in Hannover (https://www.mhh.de/en/).

The researchers are mainly oriented to the efficacy of balneological therapeutic treatments.

In addition, many scientific works are available on the website of the International Society of Medical Hydrology.

<http://www.ismh-direct.net/info.aspx?sp=1>

In regard to the research, there is no general planned strategy about the development of balneology as medical treatment and financing studies. In the Schools of Medicine, students do not have enough information about the possibilities of receiving treatments with mineral waters.

In addition, the thermal centres are primarily oriented to Wellness and Complementary Treatments without scientific evidence.

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Fig.3 **Skills and knowledges which should be improved in Spa and Wellness sector of Germany**.

## Greece

Presentation on the description of tourism industry dynamics in Greece, their relationship with employment and challenges to the improvement of human resources in tourism industries was prepared by Patras Public Vocational Training Institute (2019).

Basic skills that need to be improved in tourism professions: specialised digital skills, creativity, problem-solving, teamwork skills.

Professional skills that need to be improved in tourism professions: tourism marketing and e-tourism marketing competencies, planning, development and implementation of e-planning and eMarketing campaigns, skills to collect, edit, analyse and present statistics from the internet pertaining to campaigns’ results.

Other emerging skills gaps are in: customer service orientation, awareness of and preoccupation with things on the internet, digital e-leadership skills.

It is generally suggested that besides individual professional training in specific skills in tourism industry, work conditions and collective actions/negotiations are considered to be significant for the development of the tourism industry.

More information:  
<http://iek-patras.ach.sch.gr/newsite/?p=7397>

The study “Wellness tourism in Greece: Case study of wellness resorts” was carried out at the Hellenic Open University (2019).

Research of wellness resorts in Greece included the special characteristics of their visitors and prospects for development of wellness tourism in Greece. The conclusions refer to both existing and potential tourist audience as well as to clients who are not interested in visiting a wellness resort. Although a general direction towards the reinforcement of the promotion of wellness & spa tourism in Greece is suggested.

The case study showed that customer-oriented quality service should be developed and that there is lack of wellness service design skills.

More information:   
<https://apothesis.eap.gr/bitstream/repo/43495/1/105874_%ce%a3%ce%9a%ce%9f%ce%a5%ce%9c%ce%a0%ce%97_%ce%9c%ce%91%ce%a1%ce%99%ce%9b%ce%95%ce%9d%ce%91.pdf>

The main aim of the thesis “Tourist development and special forms of tourism – wellness tourism in Greece” published at University of the Aegean is to investigate and delimitate, to determine the positioning of wellness tourism in the Greek tourism market in terms of demand, characteristics and supply structure (2008-2014).

The research combines 4 different surveys in the form of questionnaires presented to key informants, wellness tourists, spa tourists and hotel managers in Greece.

No specific skills gaps were identified. However, the research concluded that one of the main weaknesses in wellness tourism in Greece is the lack of skilled workforce.

More information:   
<https://thesis.ekt.gr/thesisBookReader/id/34749#page/372/mode/2up>

The diploma work “Desk research on the curriculums of tourism educational programmes in Greece” was published at Technological Educational Institute of Piraeus by Artemis Spintzos (2014). It refers to the evolution of tourism education in the Greek educational system, presenting relevant curriculums of Greek tourism educational programmes and drawing conclusions on tourism education in Greece.

The research does not mention specific skills gaps but rather showcases the importance of the connection between tourism education and tourism labour market. The research highlights the importance of upgrading tourism workforce through establishing tourism departments at the undergraduate level, collaboration between several educational organisations for interdisciplinary approach to tourism curriculums, continuous education and training of workforce in IT, communication and their application in tourism industry, e-learning and closer cooperation between the education and tourism markets in Greece.

More information:  
<http://okeanis.lib.puas.gr/xmlui/bitstream/handle/123456789/2219/tef_201400058.pdf?sequence=1>

The diploma work “Tourism and local development” was published at School of Economics, Aristotle University of Thessaloniki by the author Margaritis Fasoulas (2021). The diploma work contains a questionnaire survey on a national scale concerning innovation in the spa and wellness industries.

The research does not mention specific skills gaps but provides information on which skills are considered necessary for spa & wellness businesses in Greece, namely: good knowledge of the subject, communication skills and familiarity with technology.

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Fig.4 **Skills and knowledges which should be improved in Spa and Wellness sector of Greece**.

## Italy

The Institute for the Development of Vocational Training for Workers (ISFOL) is a public body that carries out study, research, consulting and technical assistance in the field of training, labour and social policies. The group "Professional needs and labour market intelligence" at the Institute regularly carries out research and studies to monitor the labour market and to define the professional, technological and organizational needs of each profession.

According to the Group’s research titled "Professional needs and labour market intelligence", tourism is one of the main sectors providing greater demand for personnel with appropriate knowledge and skills. For the specific professions of masseurs and spa operators the following skills are considered relevant: being able to speak using effective communication methods, active listening, time management, and adaptability.

More information:   
<https://fabbisogni.isfol.it/scheda.php?id_menu=1&id=5.4.3.3.0&limite=1>

The thesis on “Tourism and human resources: the importance of an appropriate training” was written by Christian Borgo at University of Padova. The diploma work contained research at the national level about the importance of training in the tourism industry and related talent gaps.

One of the skills gaps identified by the study concerns the improvement of the quality of services provided, especially the personal skills needed to approach customers. The need emerges to improve skills not only at the managerial level, but above everything at the operational and executive level.

Skills gaps can be bridged by increasing educational offerings of specialized pathways, in terms of content and variety.

More information:   
<http://tesi.cab.unipd.it/62295/>

National report “From crisis to opportunities for the future of tourism in Italy” was prepared by Alfonso Morvillo and Emilio Becheri in cooperation with CNR (National Research Council) and Research Institute on Innovation and Development Services, about the changes the COVID-19 brought about tourism industry. A specific section of the study concerns the new skills and training needs on tourism industry necessary for tackling the challenges presented by the pandemic.

New skills needed after the pandemic are divided into two parts – technical skills and soft skills.

Technical skills: basic knowledge of hygiene and epidemiology, ability to apply protocols, using medical and health devices, ICT competence, foreign languages.

Soft skills: emotional intelligence (personal emotional competencies and social, interpersonal emotional competencies), cultural intelligence (knowledge of different cultures, ability to deal with different cultures) intelligence from experience (customer focus, creativity and innovation in interpreting customer needs, professional behaviour).

Interventions at the governmental level aimed at bridging existing gaps in the tourism sector, including upgrading staff skills based on new skills considered necessary as a result of the pandemic.

More information: <https://www.cnr.it/sites/default/files/public/media/Supplemento_XXIII_Rapporto_Turismo.pdf>

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Fig.5. **Skills and knowledges which should be improved in Spa and Wellness sector of Italy**.

## Latvia

The research “Latvian tourism industry analysis” was prepared by University of Latvia (2019).

The research consists all tourism sectors, health tourism, too. It shows skills gaps in tourism, also in health tourism where skills should be improved. Insufficient human resource capacity was also highlighted as a topical problem area in both quantitative and qualitative terms (knowledge of foreign languages, marketing, IT skills and competencies) for the development and promotion of new products and services.

More information:  
<https://www.em.gov.lv/sites/em/files/latvijas_turisma_nozares_analize_20brandtour_20final1.pdf>

The PhD thesis “Determinants attracting foreign patients and their relationship with patient experience and overall satisfaction with the health care services received in Latvia” written by Daiga Behmane at the University of Latvia (2020).

The aim of the doctoral thesis is to develop a conceptual model for the acquisition of foreign patients to health care services based on scientific knowledge and international approaches to health care provision, and to evaluate the performance of acquisition factors as well as the experience and satisfaction of foreign patients in Latvia.

There is a tendency for foreign patients to be more likely served in institutions where managers are more critical of staffing aspects, such as insufficiency of staff motivation, poor psycho-emotional readiness, high workload so far, insufficient knowledge of foreign languages and unsatisfactory service culture. Consequently, institutions that are unable to provide high service culture or problems with foreign language skills in the future may face difficulties in attracting foreign patients. Also, need to develop staff competencies in communication and IT skills in attracting foreign patients.

More information:   
<https://dspace.lu.lv/dspace/bitstream/handle/7/52392/298-77081-Behmane_Daiga_db09190.pdf?sequence=1&isAllowed=y>

Spa and Wellness business interviews were carried out by Riga Style and Fashion Technical School (RSMT), Latvia (2020).

Main conclusions from spa specialists have to enhance their skills in beauty care services to be capable to serve clients in complex procedures.

Transversal skills which should be improved are: communication in foreign languages using professional terminology about procedures and cosmetics, description and the influence on body and physical well-being, multilingual skills, communication skills, financial skills and finance planning, accountancy of business.

The interviews showed that experienced professionals working in the spa and wellness sector have a strong need for practical training.

Several research studies were carried out as part of the project by the Ministry of Economics of the Republic of Latvia and University of Latvia. “The impact of population ageing on future skills supply in Latvia”, “Strategically most demanded skills in future Latvia”, “On the professional mobility of the labour force” (2013). Researchers at the Faculty of Economics and Management (EVF) of the University of Latvia (LU) have carried out research that will make few people think about what the future holds for us. Wanting to experience rapid growth, the country may have to face decisions that are so unpopular in politics in the near future – raising the retirement age, introducing a migration policy.

The research commissioned by the Ministry of Economics of the Republic of Latvia (MoE) was performed by a team of four researchers from LU EVF: Sandra Jēkabsone, DEc., Associate Professor, Edgars Brēķis, DEc., Associate Professor, Edgars Kasalis, DEc. Kārlis Purmalis, DEc.

Researchers have concluded that one of the most important factors will be the ability to communicate in 2-3 foreign languages, including knowledge of Asian languages. Jēkabsone points out that young people in the Scandinavian countries are already learning Chinese and this is a direction that needs to be developed in Latvia, because "China will immediately overtake the United States and take a dominant position in the world economy".

Other important skills required are those related to the 'green economy' sectors. The professor explains that public thinking around the world is changing and more and more people are paying attention to how they can live in an environmentally friendly way. "Soft" skills, i.e., the ability to communicate, will also be in demand. Foreign experts point out that there is a lack of high-level specialists who know foreign languages and are able to work in different environments and cultures. There will also remain a need for people who will be able to work with the latest technologies. Researchers estimate that a significant increase is expected for medical and healthcare workers, engineers and other technical professionals.

In the future, new skill development will be connected to the development and application of technologies, the “green economy” sector, labour flexibility and mobility, management and organization, communication, public relations, ability to operate in international markets, in a multinational and multicultural environment, acquisition of new (incl. Asian) languages.

More information:  
<https://www.em.gov.lv/lv/media/691/download>

More information:   
<https://www.em.gov.lv/lv/media/685/download>

The research “A study of current labour market requirements in Latvia and Estonia” was prepared in the 'Youth BIZ Skillset' project, co-funded by the European Union's Erasmus + program, implemented by the Jobs & Society of the JUC (2019). As part of the project, an extensive study on current skills needs in the labour market was carried out, in addition to which a practical guide for young people was prepared to encourage them to consider entrepreneurship.

Since September 2017, the project, in cooperation with the Estonian Business School and the Spanish Communication and Innovation Centre, has implemented various interactive activities that have objectively and in-depth explored the skills and career opportunities of young people in Latvia and Estonia in the 21st century, focusing on smart and forward-looking entrepreneurship.

In the implementation of the study “Skills required in the labour market: possibilities to use job advertisement information to identify skills required in the labour market”, more than 4,000 CV.lv job advertisements in Latvia and Estonia were collected and processed in the context of professions and specific skills in sections.

Skills which mostly were requested in Latvia and Estonia: personal skills (responsibility, accuracy, ability to work independently, courtesy, desire to learn and develop, orientation on results, stress persistence), language skills, communication skills, teamwork skills and organization skills.

The digital handbook “Design Thinking for the Development of Business Ideas” created during the project is a set of practical tips and easy-to-implement methods for successful business promotion and development of specific business models using design thinking methods. The handbook includes comprehensive information on identifying and researching the market situation, solving various problematic situations and generating ideas, creating visible and easy-to-test prototypes, as well as an objective assessment of one's potential without investing unnecessary resources and energy.

The design thinking method used in the book is based on a creative and innovative approach to solutions to problem situations, which focuses on the person or the end user of the product / service. Thus, the content of the handbook also consists of informative content blocks and individual question-and-answer sections, as well as practical tasks in the form of interviews, collages, drawings and prototypes of visible business models.

More information: <https://juc.lv/wp-content/uploads/2019/01/design_toolikt_final.pdf>

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Fig.6 **Skills and competencies which should be improved in Spa and Wellness sector of Latvia**.

## Malta

In Malta there is no special organization involved in the studies on balneology and health tourism.

Throughout history, Malta has often been referred to as “The Hospital of the Mediterranean”, due to the prominent role the island played over the centuries as a prime location for medical treatment and the care of the sick. Today, Malta is building on this reputation and is an excellent destination where one can receive medical and surgical treatment. Combining a high level of medical expertise and an ideal climate, the Maltese Islands, and the Island of Gozo in particular, are also the perfect places to improve recuperation. With a growing list of services and treatments, ranging from the simplest to the most complex and a variety of private clinics and hospitals to choose from, Malta offers everything you’re looking for and more. The YUE Health & Wellness Centre is already planning to jointly service this niche market with its sister destination management company YUE DMC specifically to service and focus on medical and health tourism for the Maltese Islands.

Studies on Wellness Tourism and Training proposals - the training of specialists operating in the SPA and Wellness Centres is very well organized in Malta.

In particular, the University of Malta (<https://www.um.edu.mt/services/health-wellness>) is active with different training Courses.

The Health and Wellness Centre at the Msida Campus offers services aimed at enhancing the wellness of UM staff and students.

Professional support to help UM staff and students take on the challenges and grasp the opportunities that may arise as a result of everyday life situations is readily available at our Centre.

“Promoting Resilience in Education” was a university-led project coordinated by the Centre for Resilience and Socio-Emotional Health seeking to increase access to post-secondary and tertiary education from particular regions in Malta. It took a systemic, multi-intervention approach, making use of peer and youth mentoring programmes, school-based support and family support to promote social and emotional education and increase access to post-secondary and tertiary education for young people coming from a particular region with a relatively low number of students continuing their post-secondary and tertiary education. The project adopted a child-centred, resilience-based, longitudinal and action-research perspective, making use of both case studies and universal interventions at various school levels. The findings of the initial project were published in an international journal in 2015. In January 2013, the project led to the establishment of the Cottonera Resource Centre at the University of Malta, which has continued the project and introduced various other initiatives to increase access to higher education as well as lifelong learning in the community.

Project website: [www.um.edu.mt/crc](http://www.um.edu.mt/crc) and consists of:

- The Centre for Resilience and Socio-Emotional Health that is participating in an international study on primary, middle and secondary school students during the Covid-19 lock-down. This study took place between June and September 2020. It investigates the mental health, well-being and resilience of students in primary, middle schools during the lock-down. The aim is to identify what helped children and young people to cope and be resilient during the Covid-19 with recommendations on how schools and families may support children and young people in similar circumstances in the future. More than twenty countries are taking part in the study. For further information, please contact Ms Natalie Galea.

- International Survey of Children’s Well-Being, SCWEB is a worldwide research survey on children’s subjective well-being with participants from 40 countries. The study aims to collect solid and representative data on children’s lives and daily activities, their use of time and in particular on their own perceptions and evaluations of their well-being. The purpose is to improve children's well-being by creating awareness among children, their parents and their communities, but also among opinion leaders, decision makers, professionals and the general public. Seventeen countries are taking part in the study, including Malta. The Centre for Resilience and Socio-Emotional Health has participated in the second and third waves of the study, collecting the data with a representative sample of 8, 10 and 12 year old children. The finding report of the second wave study was published in 2016 as the third Centre monograph while the third wave report has been published in 2020 (see Centre Publications for the two reports), website: www.isciweb.org.

- Social Capital and Well-Being Study (Socawe) was an international study on university students' social capital and well-being led by the Czech Positive Psychology Centre at Masiryk University, Czech Republic. The Centre for Resilience and Socio-Emotional Health was the Maltese partner in this project and data with Maltese University students was collected in 2013-2014; the findings were published in a peer reviewed journal paper in 2018.

- A Passage to Malta: The Health and Well-Being of Foreign Children in Malta is the result of a research study conducted by the Centre for Resilience and Socio-Emotional Health at the University of Malta in collaboration with the Commissioner for Children. The report looks at children aged 0 to 16 who were born outside Malta, or were born in Malta to non-Maltese parent(s) (Country Coordinator Maltaewsi@pfcmalta.org)

In Malta there is strong support by the Government for the programmes oriented towards wellness and spa treatments.

In addition, the Femtc' Partner Euroteam https://www.eteam-ltd.comisdevelopping a new activity for the promotion of Health Tourism in Malta in collaboration with Malta Direct (https://www.maltadirect.com/spa-holidays-in-malta) and the Web-TV H24 <https://www.h24tv.org/MALTA> and web site [www.mmprofs.org](http://www.mmprofs.org)

Malta Direct is the largest specialist tour operator to Malta, Gozo and Comino. With over 40 years of successful travel experience we are one of the oldest established niche tour-operators in providing package holidays, tailor- made services and flight/accommodation-only trips to the Maltese Islands. We offer year-round holidays to over 80 accommodations, from budget to 5\* deluxe resorts, seaside apartments to rustic villas and farmhouses. https://www.maltadirect.com/spa-holidays-in-malta

No serious gaps. However, there is a need to improve human resource management, and scientific syllabus concerning medical treatments.

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Fig. 7 **Skills and knowledges gaps of Malta Spa and Wellness sector**.

## Portugal

In recent years, many studies and a lot of research has been carried out in Portugal about Health, Spa and Wellness Industry in relation to the labour market in the tourism sector.

The most recent are the Country Report “On Health and Wellness in Portugal” edited by

#### The Euromonitor International limited (GB) <https://www.euromonitor.com/health-and-wellness-in-portugal/report>

The Health and Wellness in Portugal market research report includes:

* Analysis of key supply-side and demand trends
* Detailed segmentation of international and local products
* Historic volumes and values, company and brand market shares
* Five year forecasts of market trends and market growth
* Robust and transparent market research methodology, conducted in-country

Market research reports answer questions such as:

* What is the market size of Health and Wellness in Portugal?
* What are the major brands in Portugal?
* Were the sales of health and wellness affected by the global recession?
* What functional ingredients in food and drinks are in fashion in Portugal?
* Is the organic movement still growing?
* Are weight management food and drinks driven by product reformulation?

#### Transversal skills which should be improved: communication in foreign language; financial skills and finance planning and business accounting.

Researches on Balneology (connected with Health Tourism)

The activity in the Spa and Wellness sector is oriented towards research, training and organization.

Research: evaluation of the effectiveness and scientific evidence of different treatments.  
  
These topics are the subject of Congresses and activities by individual thermal centres and Universities, in particular by the Portuguese Society of Medical Hydrology. <https://www.sphidrologia.pt/>  
Regarding the training of operators, there are general training courses organized by private facilities (<https://www.ipnaturologia.com/>).

Individual structures are also organized in relation to specific problems and treatments. Although they are not officially accredited by the Ministry, they have been generally accredited by Regional Medical Orders.

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Fig. 7 **Skills and knowledges which should be improved in Spa and Wellness sector of Portugal**.

## Serbia

According to the Law on Tourism of the Republic of Serbia created by the Ministry of Trade, Tourism and Telecommunications and approved by the Government of the Republic of Serbia, the need to improve the skills of those working in the tourism sector has already been identified.

5. Incentive measures: Article 27. In order to direct and encourage the development of tourism in the budget of the Republic of Serbia funds are provided for: 1) participation in financing the development of strategic master plans, tourism product development programmes, tourism development programmes, feasibility studies of tourist projects, urban plans of tourist places and resting places.

5. Incentive measures: Article 2. Participation in the financing of promotional activities of tourist destinations and tourist places, tourist-cultural and tourist events in the country and abroad, as well as educational programmes and improvement of skills of employees in tourism;

More information: <https://mtt.gov.rs/download/1(2)/ZAKON%20O%20TURIZMU.pdf>

The national level strategy “The Tourism Development Strategy of the Republic of Serbia for the Period from 2016 to 2025” was prepared by the Ministry of Trade, Tourism and Telecommunications. (2016)

The basic study of the strategy contains: analysis of the current state and current level of tourism development, comparative analysis of tourism of competing countries, analysis of the advantages and disadvantages of tourism, business mission, vision and goals of tourism development, selection of priority tourism products, proposal of priority tourist destinations heritage and natural resources and a proposal for the tourism development policy.

12) professional education, improvement of skills in catering and tourism; 13) training of workers to help companies that have to restructure or have a shortage of skilled workers; 14) training of people from marginalized groups in order to acquire better skills and jobs in tourism; 16) vocational training and skill acquisition (courses, workshops, e.g. how to develop rural tourism).

Following the approval of the strategy, human resources and the labour market were improved: (1) adaptation of the education system for tourism and catering and related activities according to international standards, (2) evenly covering the entire Republic of Serbia with a system of secondary vocational schools for catering and hospitality, (3) developing new curricula and programmes of formal and informal acquisition of new knowledge and skills and new occupational profiles in tourism and catering and related activities, (4) connecting and including available human resources from interested organizations.

More information:

<https://mtt.gov.rs/download/3/STRATEGIJA%20RAZVOJA%20TURIZMA%20RS%20%202016-2025.pdf>

The national strategy “Employment Strategy in Relation to the European Framework 2010-2020” were prepared by the Ministry of Labour, Employment, Veterans and Social Affairs. (2010)

The “Agenda for New Skills and Jobs” refers specifically to employment and aims to enable the achievement of established employment levels and the sustainability of the social model. On national level it is requested to enable the acquisition of competencies necessary for further learning and engagement in the labour market, through general education and training, either through formal or non-formal learning.

Educational challenge in this sense, the key challenges in education policy are primarily the lack of harmonization of employment, education and scientific and technological development strategies, lack of legislation in the field of adult education, linking formal and non-formal education, the problem of non-existence of institutions in accordance with the requirements of quality standards for adult education.

Educational challenge Inconsistency of supply and demand, i.e. lack of qualified labour force that would meet the requirements of employers, i.e. deficit of competencies and work skills, is a characteristic of the workforce not only in the Republic of Serbia but also in most EU member states. The educational challenge is closely linked to the demographic challenge.

More information: <https://www.minrzs.gov.rs/sr/dokumenti/predlozi-i-nacrti/sektor-za-rad-i-zaposljavanje/nacionalna-strategija-zaposljavanja>

The regional strategy “Sustainable Development Strategy” was prepared by the municipality of Cajetina, Serbia. (2009)

The regional strategy points out the tourism problem regarding the education of tourism workers. SWOT analyses highlighted poor qualification structure (small number of highly educated in tourism, cooks, managers, etc.) and the low level of education among tourism workers.

More information: <https://www.cajetina.org.rs/sites/default/files/strategijaodrzivograzvoja.pdf>

Regional strategy “Sustainable Development Strategy” was prepared by the municipality of Vrnjačka Banja, Serbia. (2013)

The SWOT analysis of this regional strategy showed the imbalance between available human resource competencies and modern market requirements (inadequate level of expertise to meet European standards) for educated and experienced staff in the fields of tourism, health and other related activities (experienced specialists and young unemployed persons).

More information: <https://vrnjcispa.biz/baze-i-registri/biblioteka/strateski-dokumenti>

The regional development plan “Development Plan of the Municipality of Kursumlija for the Period 2020-2027” was prepared by the municipality of Kursumlija. (2019)

Compared to the educational structure at national level, the municipality of Kursumlija has significantly more inhabitants without schooling, with incomplete primary school or primary school education compared to the educational structure of the population at the national level and significantly fewer inhabitants with secondary school and higher and higher education compared to the educational structure of Serbia. Regional development plan 5.7.4 measure 1: Support for the adjustment of educational profiles in the School of Economics and Technology to the needs of the labour market municipalities and investments in neighbouring municipalities require adjustment of educational profiles.

More information: <https://kursumlija.org/plan-razvoja-opstine-kursumlija/>

The dissertation “Trends in Wellness Tourism, Master Thesis” was written by author Marijana Bogdanović, at Singidunum University, Serbia. (2011)

In regard to the economic impacts to employment, the author points out that any form of health and wellness tourism needs to employ trained staff. And while, on the one hand, this is a beneficial impact, on the other hand it is often difficult to find qualified and experienced staff in the place where the facility is located. If the differences and distances between capitals and regions, where wellness tourism is developing, are large, employers often have to offer more favourable conditions and income in order to attract staff from other regions.

In the opinion of Hores regarding training of staff from the public, private, civil and academic sectors, as well as training of unemployed persons, it is extremely important to consider the needs of the tourism sector in terms of a lack of necessary knowledge and skills and on the basis of such identification to start creating education programmes. The creation of such programmes are important in order to raise the competence of actors in the field of tourism in Serbia and competitiveness. Investing in human resources is an obligation for all tourism companies that aim to generate a satisfied tourist (consumer) and quality.

More information: <https://hores.rs/docs/obuka_ns_2019.pdf>

The regional development plan “Development Plan 2018-2022” was prepared by the City of Novi Sad. Regarding the analysis of key actors in tourism, educational tourism does not depend on weather conditions, and infrastructure already exists. It is necessary to invest in market research and design and adaptation of appropriate education programmes, in branding and communication of programmes to target markets and target segments, because it is a completely unused product in the context of tourism development.

An educational centre for training in professional and working skills. An academy focused on vocational education and training of unemployed and employed persons, assistance in acquiring new knowledge and skills for easier employment and support for entrepreneurship development, creating preconditions for starting a business and quality investment in training and education of interested faces.

More information:

<http://www.novisadinvest.rs/sites/default/files/attachment/3.2_program_razvoja_turizma_gns_2018-2022.pdf>

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Fig. 8 **Skills, knowledges and competencies which should be improved in Spa and Wellness sector of Serbia**

## Slovenia

In accordance with the WellTo project, the research was prepared. The objective of this research was to identify the main work activities and tasks of an Administrator of Wellness Centre (AWC) and the necessity for their successful implementation of knowledge, skills and competences (2018–2019).

Given that the AWC is a new qualification in our countries, it was necessary to collect reliable information to identify the occupational profile. Thus, field research was conducted in the form of questionnaires. Questionnaires were intended for: specialists acting as AWC and specialists providing different wellness tourism services.

Identifying the most important tasks, knowledge and skills that AWC performs and identifying the most important tasks, knowledge and skills that AWC should have and perform in its work.

The most important task is as follows: payment service, ensuring adequate conditions for the quality of wellness services, creating harmonious and relaxing environment in the centre, client scheduling, registration and work with a client database, advising guests and customers on wellness topics and putting together individual programmes for them and organization, coordination and monitoring of the wellness services provided in centres.

The most important knowledge is as following: knowledge about the wellness services and products, knowledge of foreign languages, work organization and leadership and motivation of employees.

The most important skills are as follows: communication and presentation skills, client-oriented approach, wellness services design skills, sales and marketing techniques and using information technologies.

Identifying the most important tasks, knowledge and skills that AWC performs and identifying the most important tasks, knowledge and skills that AWC should have and perform in its work.

These duties and their respective skills, knowledge and competences identified in the National AWC Occupational Profile served as the basis for the development of the Qualification Profile.

More information:

<https://e3e6a955-eb28-4fb6-92e4-1a1a72819d97.filesusr.com/ugd/a0df74_2049db6e3c2a456892c6828528989b6a.pdf>

The diploma work “The Quality of the Service in Wellness Tourism” was written by the author Romana Bizilj (2009)*.*

The diploma work and research try to determine the quality of the service provided in wellness and fitness centres through contact staff (receptionists). The research was focused on three important valuation segments: kindness, attention, helpfulness off staff; counselling and adequate communication; professionalism and expert knowledge of products and services.

The kindness, attention and helpfulness of the contact staff (receptors) were quite high as they are aware of the importance of first contact and a smile. Staff professionalism and knowledge of products and services were the segment that achieved the highest rating. The lowest score was achieved by the segment, which includes counselling and appropriate communication. The research showed that employees are sufficiently educated in their professional field, but they lack other skills, such as sales techniques and customer relations, etc. These are the so-called “soft skills”.

More information: <http://dk.fdv.uni-lj.si/diplomska/pdfs/bizilj-romana.pdf>

“Revision of Occupational Standards and Catalogues for NVQ in the Field of Tourism” was prepared in 2018.

The document summarizes the revision of professional standards in the field of tourism and covers: description of the field of tourism, qualification structure, personnel in tourism and labour market needs assessment, analysis of awarded certificates for NVQ, legal basis, substantive changes to occupational standards and catalogues for NVQ, impact of revised occupational standards on educational programmes, and a sectoral committee for occupational standards.

According the document’s conclusions, skills which should be improved include foreign languages, ICT skills, organizational skills, sustainable competences. Practical training is vital to enhancing utilization of skills.

The diploma work – survey “Motivation of Employees for Providing Spa and Wellness Services in Terme Čatež” by author Kolman, L. (2017)

Wellness and health are greatly connected. Wellness tourism offers a big choice of services that keep, strengthen health and welfare of guests. The quality of services is very much dependent on motivated service providers, therefore the present diploma work's theoretical part studies wellness as a healthy lifestyle. As a matter of fact, wellness tourism is an important kind of tourism that is growing extremely fast and has developed tremendously in the past few years. Then motivation and motivating the employees in achievement activities is studied. Employees are mostly motivated by harmonious relationships in the working environment, and a lot but less by money. In its empirical part, this diploma work contains research on motivating the employees working at the Čatež Spa Wellness Centre. After analysing the results and checking the hypotheses, the conclusion offers suggestions for better motivation of employees working at the Čatež Spa Wellness Centre. Key motivators for work in spa and wellness industry are: healthy lifestyle, payment, colleagues.

More information: [*https://dk.um.si/Dokument.php?id=119197*](https://dk.um.si/Dokument.php?id=119197)

The diploma work – survey “The importance of environmental aspects and education in spa and wellness tourism” by author Zavrl, Š. (2019)

The thesis deals with the environmental aspects and environmental protection in the field of wellness and spa tourism. The thesis focuses on the conditions in the company Thermana Laško d. d. and represents factors, which influence the education of employees and the consequences thereof. It shows the many different impacts of education on the future work process as well as on the personal characteristics of employees. The author decided to use a poll to represent the impact and consequences of the educational process. The poll was composed of questions about desires and opinions for the future educational programmes and types thereof. Some of them were about obstacles within education and giving personal opinions about the meaning of the coaching for the company. Participants were also asked to tell which rules from the programmes were considered on the daily basics as part of the work process. At the end, we analysed all the answers and came to the conclusions about the impact of education on the work process and environmental awareness of the employees in the company Thermana Laško d. d.

Educational content in the wellness and spa industry indicates the need to develop communication skills, workshops, fire safety skills, socially responsible and ecological behaviour.

More information: [*https://dk.um.si/Dokument.php?id=137767*](https://dk.um.si/Dokument.php?id=137767)

The study “Identification of Employee Competencies Necessary for the Long-Term Competitiveness of Slovenian Tourism and Formulation of Proposals for the Modernization of Educational Programmes” was prepared by the University of Maribor’s Faculty of Tourism. (2020)

The study showed that the following skills should be improved: entrepreneurial competences, ICT skills and sustainable competences.

Follow-up tasks for improvement of these skills: integration of key competences (professionalism, responsibility, communication in different languages, social competences) and development of special training for teachers of tourism content.



Fig. 9 **Skills, knowledges and competencies which should be improved in Spa and Wellness sector of Slovenia**.

## Spain

In recent years, many studies and a lot of research have been carried out in Portugal about Health, Spa and Wellness Industry in relation to the labour market in the tourism sector.

The most recent is Country Report “On Health and Wellness in Spain” edited by The Euromonitor International limited (GB).

<https://www.euromonitor.com/health-and-wellness-in-portugal/report>

<https://www.euromonitor.com/health-and-wellness-in-spain/report>

The Health and Wellness in Spain market research report includes:

• Analysis of key supply-side and demand trends

• Detailed segmentation of international and local products

• Historic volumes and values, company and brand market shares

• Five year forecasts of market trends and market growth

• Robust and transparent market research methodology, conducted in-country

Our market research reports answer questions such as:

• What is the market size of Health and Wellness in Spain?

• What are the major brands in Spain?

• Were the sales of health and wellness affected by the global recession?

• What functional ingredients in food and drinks are in fashion in Spain?

• Is the organic movement still growing?

• Are weight management food and drinks driven by product reformulation?

Why buy this report?

• Acquire competitive intelligence about market leaders

• Track key industry trends, opportunities and threats

• Inform your marketing, brand, strategy and market development, sales and supply functions

The main conclusion from the report is that skills must be increased and expanded in beauty care services in order to be capable of serving clients in complex procedures; communication in foreign language should be improved and more practical training is required.

In Spain are very well developed the researches about the efficacy of balneotherapy for different pathologies. Good support by the Government in this direction and social point of view

The Case of Spain and the Costa del Sol (Malaga) published in Sustainability (20 Oct.2020)

In this report, the Authors give a detailed analysis of the problem.

The interest and relevance of medical tourism has increased significantly over the last few decades, and it has become a very lucrative source of income and profit for many firms. This paper analyses the sustainability of the medical tourism model in Spain in general, and in The Costa del Sol (Spain) in particular, in order to investigate the potential challenges that the domestic industry will face in the future. For this purpose, we first analysed the process of the globalization of health services and the main characteristics of the Spanish medical tourism industry (in terms of tourism and health services). Second, we examined the data availability on medical tourism for the cases of Spain, Andalusia and the Costa del Sol, and identified who travels, why, and for what reasons. The results show that Spain and the Costa del Sol offer high-quality medical and tourism facilities and services with very competitive prices, and with the high commitment and support of public local authorities, tourism and health providers, and universities. However, the lack of a real leadership, well-defined strategy, financial support, and specific training programmes are considered to be crucial challenges for the near future. In addition to this, the novel coronavirus, the economic crisis, Brexit and the situation of British expats living in Spain and The Costa del sol are also discussed.

The survey showed the following skills which should be improved: customer relations skills, managing stress, practical training and foreign languages.

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Fig. 10 **Skills, knowledges and competencies which should be improved in Spa and Wellness sector of Spain**.

## CEDEFOP

Cedefop published the study “Research on the Demand for Skills in Tourism 2018-2019” (2018). The analysis of skills demand in the tourism sector is based on Cedefop’s work on mapping online job advertisements.

The research showed that transversal skills such as teamwork, adaptability, being able to prioritise, communication or problem solving dominate employers’ demand in online job ads.

And gaps in skills and knowledge like teamwork, adaptability, customer service, English/ Multilingual skills/, ability to prioritise, communication, cooking and food preparation, using a computer, problem solving, creative thinking and quality standards.

Future proposals for solving these problems are: increasing qualifications, improving cooperation between companies and VET providers, and increasing practical training.

More information: <https://skillspanorama.cedefop.europa.eu/en/analytical_highlights/skills-developments-and-trends-tourism-sector#_job_and_skills_demand_in_tourism>

“Research: Trends and Skill Needs in Tourism” was prepared by CEDEFOP (2005). There are identified skills needs in wellness tourism. Courses under two projects “MedicWell®Trainer” and “Health Management University (HMU”). Present qualifications to fill skills’ gaps in wellness management, communication and health, massage, psychology, relaxation, wellness-based fitness, wellness through eating and drinking, wellness design, body care and aesthetics.

More information: <https://www.cedefop.europa.eu/files/5161_en.pdf>

The panorama series published by CEDEFOP regarding Greece’s tourism sector. (2005) Publication with social trends and economic aspects, which determine the future demand for skills and competencies in the hotel, catering and tourism sector. In addition it looks at occupational fields and new types of skills demanded by these trends, resulting in the transfer of research results into policy and practice.

The research doesn’t mention skills’ gaps in the spa & wellness industry, but mentions the following skill gaps in the general tourism industry in Greece: knowledge of foreign languages, skills linked to technological innovation and IT. The article also states that ‘systems of initial vocational education are not prepared to meet the skill requirements of the sector’, implying that there should be a development of such education in this direction.

Proposals to solve the problems were ongoing training combined with practical work experience and training on-the-job that supports skill development more effectively.

Finally, the research concludes mostly towards to how to attract and retain skilled workforce, that is through working conditions and wage policies rather on how to fill the skills’ gaps of employees. In-depth interviews with owners, HR managers and employees of small tourism businesses in the island of Crete. The Greek partner in the project was the Laboratory of Sociology and Education, University of Patras, represented by Prof. Nikitas Patiniotis.

More information: <https://www.cedefop.europa.eu/files/5161_en.pdf>

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Fig. 11 **Skills, knowledges and competencies which should be improved in Spa and Wellness sector by CEDEFOP**.

## OECD

The report “2020 Tourism Trends and Policies” prepared by the OECD Tourism Committee in cooperation with the European Union. (2020)

The report includes the analysis of tourism performance and policy trends across 51 OECD (Organisation for Economic Co-operation and Development) countries and partner economies.

A mismatch between current and anticipated sector skills requirements (e.g. digital/IT, data analytics and administration/finance), while tourism businesses may not have the financial or management capacity to employ tech experts or invest in workforce training.

Encouraging uptake and investment in new technologies, skills and innovation and support existing tourism SMEs to take advantage of the benefits of the digital transformation. An upgrade of digital skills through new training offers will be needed.

More information:

<https://www.oecd.org/cfe/tourism/OECD-Tourism-Trends-Policies%202020-Highlights-ENG.pdf>

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Fig. 12 **Skills, knowledges and competencies which should be improved in Spa and Wellness sector by OECD**.

## International projects

WellTo

WellTo Project – National occupational profile report. Desk research was prepared by ZPG, NAVET, ITPIO (2019). Desk research was made on a national level in Bulgaria.

The research identified the following skills and knowledge gaps – wellness services design, written and spoken communication, physiotherapy and other subjects related to health, communication skills, foreign language skills, advising guests and clients, organizing, coordinating and monitoring the wellness service.

The research showed that experienced professionals working in the wellness sector have a strong need for training.

More information:

<https://e3e6a955-eb28-4fb6-92e4-1a1a72819d97.filesusr.com/ugd/a0df74_de2fce8fe5b141bbb812b4e5b2f10f2e.pdf>

Culttour

A study under the Cultour project shows the need to develop intercultural skills of those working in tourism at the Business Foundation for Education, Bulgaria.

Cultour brings together partner organizations from France, Spain, Italy, Portugal, Turkey and Bulgaria. Intercultural skills are of great importance in these six European countries, where one in ten people is employed in tourism. In the first months of the project, they conducted a survey among trainers, managers and workers in the tourism industry, in order to identify the main problems and needs related to competencies in the field of intercultural communication.

Research showed which skills need to be improved – intercultural skills, foreign language skills, non-verbal communication, awareness of the importance of cultural specificities.

Some steps to solving the problems identified are: methodological and qualification framework, manuals and tools for trainers through which they can develop intercultural skills of those working in tourism.

<https://fbo.bg/cultour_%D0%BF%D1%80%D0%BE%D1%83%D1%87%D0%B2%D0%B0%D0%BD%D0%B5/>

BOOSTED – Boosting Tourism Business Growth through Higher Professional Education

The project study report “Skills Needed in International Tourism Business Development Satakunnan ammattikorkeakoulu” was prepared by Satakunta University of Applied Sciences, Finland. (2017)

This study provides an example of skills development within the context of the international tourism business. It is a part of the EU-funded project BOOSTED – Boosting Tourism Business Growth through Higher Professional Education.

The study report specified which skills should be improved: product and experience design and development; digital marketing communication and sales; collaboration and networks; internationalisation; managing business operations.

More information:

<https://www.theseus.fi/bitstream/handle/10024/125698/2017_B_4_SAMK_SkillsInternationalTourism_CountryReportFinland.pdf?sequence=1&isAllowed=y>

The Next Tourism Generation Alliance

The Next Tourism Generation Alliance main project scope was to establish a Blueprint Strategy for Sectoral Skills Development in Tourism to respond to the fast changing and increasing skills gaps in digital, green and social skills sets.

In total, 14 partners represent the whole tourism sector including specialists in hospitality, food and beverage, travel agencies, attractions and recreation. Drawn from 8 EU countries (Italy, UK, Spain, Bulgaria, Hungary, The Netherlands, Germany and Ireland).

Sector Skills Alliances project “Next Tourism Generation Alliance” was approved for improving a collaborative and productive relationship between education and the industry. The project provides benchmarks, tools and good practices for green and social skills to support sustainable development and digital and technological innovation within 5 tourism and hospitality sub-sectors (visitor attractions, food & beverage operations, accommodation, destination management and tour operators & travel agencies).

In the framework of the project’s desk research, surveys were prepared in 8 European countries.

The output of the skills gap and future skills need research is a pack of insights created by the Next Tourism Generation Alliance which follows the NTG Tourism Skills Assessment Methodology, a research method built around three key skill sets that form the basis for the next step in skills development for the European Tourism Sector.

The skills gap detected in the report is related to 5 tourism sub-sectors. For each of them, the report highlights the needed future skills grouped in 5 skill categories: environmental skills, personal skills, communication skills, diversity skills, and digital skills.

Elaboration of a toolkit built around three skills sets, examples and tools on how to improve digital, green and social skills focusing on the 5 tourism subsectors. The toolkit can be used by industry and education to form the basis for the next step in skills development for the European Tourism Sector.

Next Generation Tourism Skills toolkit, built around three skills sets, gives ideas, examples and tools on how to improve digital, green and social skills with the help of best practices, assessment methodologies and supporting tools.

The project research specified which skills should be improved: skills gaps in digital, green and social skills sets.

The summary of skills gap is included here:

https://nexttourismgeneration.eu/wp-content/uploads/2020/07/Survey-report-Italy-NTG.pdf https://nexttourismgeneration.eu/research-insights-italy/

More information: <https://nexttourismgeneration.eu/>

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Fig. 13 **Skills, knowledges and competencies which should be improved in Spa and Wellness sector by international projects WellTo, Cultour, Boosted, The Next Tourism Generation on Alliance**.

CONCLUSIONS

The report collates and analyses data and studies that were conducted as part of the “WeSkill” project partner countries: Latvia, Slovenia, France, Italy, Serbia, Greece and Bulgaria and five European Union member states not involved in the project: Malta, Germany, Spain and Portugal.

Overall, national and regional studies were collated, along with student’s study research theses, interviews with opinion leaders in the Spa and Wellness sector. The collated data was processed and analysed, specifying the most significant weaknesses and shortcomings in terms of employees’ skills, competences and qualifications in the spa and wellness sector.

Overall, in all the partner countries the most important shortages identified were in four groups of skills:

1. Computer skills/digital skills/ICT skills,
2. Communication skills/written and spoken communication/ telephone reception techniques/intercultural communication skills/multicultural communication skills,
3. Foreign languages skills for the medical and spa personnel/English/multilingual skills/ knowledge of foreign languages/foreign language using professional terminology/Spa and Wellness terminology,
4. Customer service/ customer-oriented service/ approach.

As we can see, the era of the digital economy dictates its own rules, and high quality and complicated digital knowledge and skills will be increasingly in demand. It should also be noted that the use of various digital IT solutions and tools is varying fields is ever increasing including marketing, sales, communication with customers, meeting hosting, teamwork and many others.

In the Spa and wellness sector on the most important skills is the skill of communication. In this regard, one can draw parallels with the connection of various skills including digital communication skills, verbal communication and presentation skills. Multicultural communication skills are inevitably becoming more relevant, especially in light of the growth in the flow of foreign tourists into the European Union from Asian countries, Arab states with their religious and cultural characteristics.

Foreign language skills are vital and especially so in the Spa and wellness sector. Improved foreign language skills are required in the use of Spa and wellness terminology, medical terms, as well as overall improvement of foreign language skills including English and other languages, including the languages of Asian countries with a view to the future.

In the Wellness and Spa sector customer-oriented service is extremely important. Accordingly, these skills need to be improved. Related issues include customer-oriented service, devising complex products, correct communication, how to sell, how to serve customers, how hospitable we are, and whether the customer will return and become a regular client? These are extremely important issues. Skills enabling employees to serve customers with the requisite level of quality and hospitality are an important precondition for businesses in the Spa and Wellness sector to operate successfully. Therefore, the shortage of these skills needs to be rectified.

However, there were notable shortcomings in regard to Adaptability in several of the project partner countries such as Bulgaria, France, Italy and Latvia.

Furthermore, Teamwork was a major skill in need of improvement according to Bulgaria, Greece, France and Latvia.

In Bulgaria, Slovenia, Latvia and Portugal the same applies to: Financial management/financial planning/payment services/data analytics/business operational skills

In Bulgaria, Greece and Slovenia, Spa and wellness services design needs to be improved.

In order to collate a more comprehensive volume of information to analyse within the territory of the European Union and in order for it to provide quality data about the skills and knowledge that employees in the Spa and Wellness need to improve, as well as analyse future trends and which knowledge and skills will be most sought after, various studies were analysed, which were conducted by international organisations like the OECD and CEDEFOP, in addition to which information was collated about the following international projects: WellTo, Cultour, Boosted and The Next Tourism Generation Alliance, which were supported by the European Union and focus on the requirements, developmental trends of the Spa and Wellness sector and the expectation of employers within the sector.

Studies of international projects revealed a similar shortage of skills and know how as in individual partner states. Areas where one can highlight further significant skill and know how shortages are Wellness service design and development, as well as digital marketing and sales skills.

It is noteworthy that OECD and CEDEFOP studies and reports also indicate a need for improvement in skills including,

1. Computer skills/digital skills/ICT skills,
2. Adaptability,
3. Teamwork,
4. Communication skills/written and spoken communication/ telephone reception techniques/intercultural communication skills/multicultural communication skills,
5. Foreign languages skills for the medical and spa personnel/English/multilingual skills/ knowledge of foreign languages/foreign language using professional terminology/Spa and Wellness terminology,
6. Customer service/ customer-oriented service/ approach,
7. Financial management/financial planning/payment services/data analytics/business operational skills,
8. The need for improved Spa and wellness services design.

Studies conducted by international organisations like CEDEFOP and OECD also accent shortcomings in teamwork, financial management, planning and data analysis skills.

The next project activity within Working package 3 will be surveys of spa and wellness sector employers’ and PIA providers regarding skills, competences and qualifications, which are necessary in the workplaces of spa and wellness sector businesses from the perspective of employers and PIA providers. The survey results will provide more specific and detailed results of the skills, competences and qualifications currently required in the spa and wellness sector and will augment the results of the first report.

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Fig. 14 **Skills, knowledge, competencies gaps by data of all project partner countries**.

PART II: SPA AND WELLNESS EMPLOYER SURVEY AND VET PROVIDER SURVEY RESULT ANALYSES

INTRODUCTION

Main aim of the project is to design and implement development of VET curriculum for corresponding needs of labour market based on the eliminations of the skills and competencies gaps. Project partners representing VET providers, public institutions, Spa and Wellness sector entrepreneurs and non-governmental organizations from Bulgaria, France, Greece, Italy, Latvia, Serbia, Slovenia, Belgium and the Netherlands.

The survey was carried out within Erasmus+ Sector Skills Alliances project “WeSkill”, which aims to design and implement development of VET curriculum for corresponding needs of labour market based on the elimination of the skill and competency gaps.

Within the project, two surveys were conducted in each of the countries involved in the project - one for industry employers and the other for VET providers.

The aim of the employer’s survey – identifying skills, competences and qualifications needed at the workplace for Spa and Wellness sector, from the perspective of industry. Its main focus is on working tasks performed at the workplace, their change in importance and the preparedness of the workforce to cope with tasks that are becoming more important. This survey will help Spa and Wellness managers to highlight gaps in staff skills and competencies in order to promote professional and high-quality staff development by designing and implementing development of VET curriculum for corresponding needs of labour market.

The main aim of the VET providers survey – to identify skills, competences and qualifications that are needed at the workplace for the Spa and Wellness sector from the perspective of VET providers. VET institutions need continuously to adapt to increasingly rapid changes in the Spa and Wellness industry and adjust to demand for new skills and competencies in labour markets. This survey will help VET institutions to highlight gaps in the Spa and Wellness industry staff skills and competencies, in order to promote professional and high-quality staff development by designing and implementing development of VET curriculum for corresponding needs of labour market.

1. SPA AND WELLNESS EMPLOYER SURVEY AND VET PROVIDER SURVEY RESULT ANALYSIS – COUNTRIES

The main aim of the survey is to identify skills, competences and qualifications that are needed at the workplace for the Spa and Wellness sector from the perspective of industry itself and from VET providers. Two questionnaires with similar questions were developed for this purpose. Most of the questions are closed-ended questions with a rating scale, the results of which can be compared with quantitative methods.

This section summarizes and analyses the results of surveys conducted by seven project countries, comparing the results of surveys of industry and VET providers in each country and FEMTEC separately.

* 1. BULGARIA



## Bulgaria employer survey result analysis

Bulgaria employer survey respondent structure analysis

Of the 31 surveyed companies in Bulgaria, the majority – 25 companies or 81% - are private SPA and Wellness centers.

Fig. 1.1.1. **Organisation types represented by the respondents** (n=31)

Majority of respondents from Bulgaria were from SMEs, every forth (25%) company was employing 1 to 4 employees, almost every fifth (19%) employed 5 to 9 employees, the largest proportion, half of respondents, were small enterprises employing 10 to 49 people, and 6% of medium size companies employing 50 to 249 employees.

Fig. 1.1.2. **Number of employees in the companies represented by the respondents** (n=31)

Bulgarian Spa and wellness sector respondent structure consists of:

Manager of establishment (45%), Owner of establishment (3%), Chairman (3%), Department Manager (10%), Employee (16%), Marketing manager (26%), Consultant (3%)

Fig. 1.1.3. **Respondent’s occupation** (n=31)

Bulgaria employer survey result analysis

Almost every surveyed company of Bulgaria (97% of companies), when looking for suitable employees with relevant knowledge and skills, faces most difficulties related to honesty, integrity and loyalty of future employees. The second most common difficulty was reliability and precision indicated by 90% of surveyed companies. The third most common difficulty was problem-solving skills outlined by 80% of surveyed companies. The next difficulties, when looking for suitable employees with relevant knowledge and skills, were teamwork (71%), foreign languages (65%), business and entrepreneurial skills (58%), computer and IT skills, as well as learning skills (each indicated by 45% of companies), then interpersonal/communication skills (39%), time management (35%), basic technical skills (26%). Only 19% of surveyed companies, when looking for suitable employees with relevant knowledge and skills, face difficulties related to creativity/initiative, manual dexterity and versatility capacity to fill in for absent workers, even less (16%) indicated management and master skills.

Fig. 1.1.4. **Difficulties companies face when looking for suitable employees with relevant knowledge and skills** (n=31)

The skills that experienced the largest increase of requirements are foreign language skills – 8.94 points (in 10-point scale from 1=no increase to 10=largest increase), complying with related legislation; occupational safety and health, fire protection and hygiene regulations – 8.87, basic skills (for offering Spa treatments) – 8.61, motivation or personality – 8.61, customer-oriented communication skills – 8.61. (Fig. 1.1.5.)

Fig. 1.1.5. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills are: complying with related legislation; occupational safety and health, fire protection and hygiene regulations – 9.27 points (in 10-point scale from 1-not requested to 10-most requested), teamwork skills – 9.25, scheduling work – 9.05, reliability/precision – 9.00, computer/IT skills – 8.97 points. (Fig. 1.1.6.)

Fig. 1.1.6. **The most in-demand skills in professions where there is a serious shortage of staff in the establishment** (on a scale from1-not requested to 10-most requested)

The most important knowledge for work: knowledge about the Spa and Wellness services and products – 4.76 points (in 5-point scale from 1=the least important to 5=most important), work organization – 4.5, knowledge about the tourism services and products – 4.43, knowledge of Spa and Wellness services design – 4.43, General Data Protection Regulation (GDPR) – 4.32.

Fig. 1.1.7. **The importance of knowledge in different areas of the establishment** (on a scale from 1-the least important to 5-the most important)

The skills, when lacking, that have the greatest negative impact on the establishment: literacy skills – 3.9 points (in 4-point scale from 1-very low impact to 4-very significant impact), customer handling skills – 3.88, foreign language skills – 3.74, problem solving skills – 3.65, technical, practical or job-specific skills – 3.56 points.

Fig. 1.1.8. **The impact level of lacking skills on the establishment** (on a scale from 1-very low impact to 4-very significant impact)

The importance in their job of reading, becoming familiar with and comprehending the instructions, guidelines, manuals or reports of Spa establishment is indicated as very important by 90% of surveyed companies; only 10% marked it as rather important. (Fig. 1.1.9)

In the survey, it did not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports.

Fig. 1.1.9. **Importance of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishment in respondent’s job** (n=31; %)

The importance level in the job of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages was indicated as very important by 93% of companies. (Fig. 1.1.10)

Fig. 1.1.10. **Importance of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages in respondent’s job** (n=30; %)

Referring to personnel respondent jobs, on a scale where 4-very important/ 3-rather important/ 2-rather unimportant/ 1-completely unimportant, as the most important skill respondents marked instructing, training or teaching people, individually or in groups with 3,81 out of 4, followed by communicating in a foreign language with 3,76 and making speeches or presentations to internal or external audiences with 3,71. The implementation of practices to reduce the use of raw materials, energy or water, eco-friendly company development was evaluated with 3,63, adapting to new Spa and Wellness equipment or materials with 3,39, working as a member of a group or team with 3,35 and learning new ideas, methods or techniques only with 3,3.

Fig. 1.1.11. **Importance of different skills in the establishment** (on a scale from 1-completely unimportant to 4-very important)

When evaluating the importance of the Spa and Wellness professional tasks in the establishment, most respondents of Bulgaria (81%) emphasize the following 5 skills with the increasing importance of creating and placing SPA packages on a website, or other platforms such as FB, Instagram, Video blogs etc. Work on e-shops with Spa; manage client files, client scheduling, registration and work with a client register/database; communication and customer service skills; critically assessing Spa and Wellness trends and translating these into suitable offers as well as acknowledging and responding to relevant customer queries, needs and expectations. Also a big part of respondents (77%) outline that the importance of experience in sales, Spa services and products, and maintaining equipment and sample inventory of products is increasing, followed by keeping inventory and ordering products necessary for Spa and Wellness services (74%). 68% of companies highlight an increase also in good time-management skills, and interpersonal and communication skills. Slightly more than half of respondents mention ensuring adequate conditions for the quality of Spa and Wellness services, creating harmonious and relaxing environment in the centre (59%), and scheduling and coordination of the work of specialists providing Spa and Wellness services (59%), as well as positive attitude and patience (52%).

Fig. 1.1.12. **Increase or decrease in importance of certain tasks** **(n=31; %)**

When evaluating the level of difficulty to find skilled labour to fill vacancies, the highest level – 3,9 out of 4 was indicated for highly qualified specialists like medical staff, followed by skilled workers as Spa specialists, sales & marketing specialists (3,83 out of 4). As the third group of skilled labour to fill vacancies was mentioned employees responsible for preparation of information, registration of documents, other registration and services (3,49 out of 4).

Fig. 1.1.13. **Difficulties to find skilled labour to fill vacancies at respondent’s establishment in different job categories** (on a scale from 1-completely simple to 4-very difficult)

The main subject that respondents mentioned as the most important for training or education programmes was physiotherapy and other subjects related to health, wellbeing, etc. (4,81 out of 5), second most important subject was Spa and Wellness services design (4, 52 out of 5) and as the third - Written and spoken communication (4,42 out of 5).

Fig. 1.1.14. **Importance of training topics** **if a training or even an education programme would be offered** (on a scale from 1 – the least important to 5 – the most important)

## 1.1.2. Bulgaria VET provider survey result analyses

Bulgaria VET providers survey respondent structure analysis

Respondent structure indicates that the dominating majority of VET providers of Bulgaria, who filled the survey, represented public institutions (32 institutions out of 33) and VET institutions (31 institutions out of 33). Only one respondent was from a private VET institution.

Fig. 1.1.15. **Type of organization represented by the respondents** (n=33)

Most of the VET institutions, who filled survey, are medium size organisations with 50 to 249 employees, and only two institutions are large with more than 250 employees.

Fig. 1.1.16. **Size of organization represented by the respondents** (n=33)

More than half of institutions started to offer training programmes in the Spa and Wellness only during the last few years (1-5 years, 20 institutions or 60%), one out of three institutions offers training programmes already for 6-10 years (11 institutions) and just two institutions offer training programmes for a long period of time– 11 till 20 years.

Fig. 1.1.17. **The period of time during which the organization offers Spa and Wellness training programmes** (n=33)

Majority of respondents who filled the survey were teachers and trainers of VET institutions (94% or 31 respondent out of 33).

Fig. 1.1.18. **Respondent’s current position** (n=33)

Bulgaria VET providers survey result analysis

As the TOP3 most important skills and key competencies at Spa and Wellness establishments VET providers mentioned social skills (14 institutions or 42%), one third emphasized teamwork (11 institutions) and IT skills (8 institutions).

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| **The most important skills and key competencies at Spa and Wellness establishments from respondent’s point of view** (n=33) |
| Social skills |
| IT skills |
| Teamwork |

When marking the TOP5 weakest skills and lack of knowledge in students, all respondents agreed that teamwork skills are the weakest, two out of three VET providers mentioned knowledge of a foreign language followed by problem-solving skills and honesty, integrity, loyalty (14 institutions) and information management (11 institutions).

Fig. 1.1.19. **The** **skills and knowledge that respondents see as the weakest in students** (n=33)

When marking the largest increase in the skill requirements using a 10 point scale (1=no increase, 10=largest increase), respondents outlined complex problem-solving skills (8,82) and social skills (8,67). VET providers also highlighted basic ICT skills, customer oriented communication skills, collaboration skills and Spa and Wellness services design skills as a quite high increase (8,27). System skills, resource management skills, work experience, attitude, motivation or personality, critical thinking skills, sustainability management skills, eco-friendly skills were indicated as having increase in requirements (8.15).

Fig. 1.1.20. **Skills areas with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills for occupations in serious lack of personnel, VET providers using a 10 point scale (1–not requested, 10–most requested) mentioned scheduling work (8,36), foreign languages skills in Spa terminology, Total Quality Management skills, information management, time management skills, Spa and Wellness design skills (8,27 each).

Fig. 1.1.21. **The most in-demand skills in the case of occupations in which respondents experienced a serious lack of personnel** (on a scale from 1–not requested to 10–most requested)

When evaluating the importance of Spa and Wellness industry knowledge assessed in 5 point scale, all VET providers gave the same level of importance to knowledge about the Spa and Wellness services and products, knowledge about the tourism services and products, knowledge of foreign languages, psychology of sales and marketing, leadership and motivation of employees, time management, information technology and database work, economic operations, financial planning, reporting, accountancy, consumer rights, General Data Protection Regulation (GDPR), related legislation; occupational safety and health, fire protection and hygiene regulations, knowledge of Spa and Wellness services design as well as work organization.

Fig. 1.1.22. **The importance of the knowledge listed below for the Spa and Wellness industry from respondent’s point of view** (on a scale from 1 – the least important to 5 – the most important)

When speaking about the lack of skills that have the greatest negative impact on the Spa and Wellness establishments using a 4 point scale (4–very significant impact to 1–very low impact), all VET providers outlined that the following skills have a very significant impact: oral communication skills, customer handling skills, team working skills, foreign language skills, problem solving skills, management skills, technical, practical or job-specific skills, literacy skills and also office administration skills.

Fig. 1.1.23. **The lacking skills who have the greatest negative impact on the Spa and Wellness establishments?** (on a scale from 4- very significant impact to 1-very low impact)

Based on their experience, VET providers specified the level of difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments using a 4 point scale (4=very difficult, 1=completely simple) and identified that the most difficult task is to find highly qualified specialists including medical staff (3,88), followed by average qualification specialists like technicians, masters, accountants, salespersons, cashiers, etc., employees responsible for preparation of information, registration of documents, other registration and services, skilled workers like Spa specialists, sales & marketing specialists, support staff such as drivers, security staff, etc.; and also unskilled workers including unskilled support staff like office cleaners, yard-keepers (3,61).

Fig. 1.1.24. **The difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments in different job categories** (on a scale from 1-completely simple to 4-very difficult)

All VET providers had equal opinion about the reasons for increase in skill requirements in Spa and Wellness establishments (4–very significant impact to 1–very low impact) marking all the reasons – development of new technology, change in workplace organization for example, having more emphasis on personal skills, etc., higher quality standards for the Spa and Wellness services, more competitive business environment in Spa and Wellness industry - as having very significant impact.

Fig. 1.1.25. **The** **reason(s) for increase of skill requirements in Spa and Wellness establishments** (on a scale from 4-very significant impact to 1-very low impact)

When thinking about possible changes that are going to shape the future of the Spa and Wellness sector, 91% of VET providers (33 institutions) highlighted changes in technologies including Spa technologies, working methods, new therapies, new techniques, IT etc.. As the second most frequently indicated change, respondents mentioned changes in the market like client’s expectations, legal regulations etc. (55% or 18 institutions).frequently indicated change respondents mentioned changes in the market like client’s expectations, legal regulations etc. (55% or 18 institutions).

Fig. 1.1.26. **Changes going to shape the future of the sector** (n=33)

## 1.1.3. Conclusions from Bulgaria SPA and Wellness employer survey and VET provider survey result analysis

Comparing survey results of Spa and Wellness employer opinion with VET providers in Bulgaria, the most in-demand skills from the point of view of Spa and Wellness employers are more profession related skills complying with related legislation: occupational safety and health, fire protection and hygiene regulations, teamwork skills. However, VET providers highlighted more communication and management skills - scheduling work, foreign languages skills in Spa terminology, Total Quality Management skills, information management, time management skills, Spa and Wellness design skills.

Comparing survey results of Spa and Wellness employer opinion with VET providers, as the largest increase in the skill requirements Spa and Wellness employers outlined foreign language skills, complying with related legislation; occupational safety and health, fire protection and hygiene regulations; but VET providers outlined complex problem-solving skills and social skills.

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|  | Skill outlined by both Spa and Wellness employers and VET providers | Skill outlined only by Spa and Wellness employers | Skill outlined only by VET providers |
| the most in-demand skills |  | * teamwork skills * legislation; * occupational safety and health, * fire protection and hygiene regulations | * scheduling work * foreign languages skills in Spa terminology * Total Quality Management skills * information management * time management skills * Spa and Wellness design skills |
| largest increase in the skill requirements |  | * foreign language skills, * complying with related legislation; * occupational safety and health, * fire protection and hygiene regulations | * complex problem-solving skills * social skills |

* 1. FRANCE

Map

Description automatically generated

## France employer survey result analysis

France employer survey respondent structure analysis

Of the 15 surveyed companies in France, the majority – 13 companies or 87% - are private Spa and Wellness centres, and only 2 companies were public Spa and Wellness centres

Fig. 1.2.1. **Organisation types represented by the respondents** (n=15)

Majority of respondents from France were from SMEs, 53% represented micro enterprises with 5 to 9 employees, and 40% small enterprises employing 10 to 49 employees.

Fig. 1.2.2. **Number of employees in the companies represented by the respondents** (n=15)

French Spa and wellness sector respondent structure consists of:

Manager of establishment (40%), Owner of establishment (40%) and only 13% were Operators of establishment.

Fig. 1.2.3. **Respondent’s occupation** (n=15)

France employer survey result analysis

More than half of surveyed companies of France (67% of companies), when looking for suitable employees with relevant knowledge and skills, faces most difficulties related to knowledge of basic technical skills. Next most mentioned difficulties were versatility and capacity to fill in for absent workers as well as reliability and precision, each mentioned by 53% of surveyed companies.

Fig. 1.2.4. **Difficulties companies face when looking for suitable employees with relevant knowledge and skills** (n=15)

The skills that experienced the largest increase of requirements are basic skills for offering Spa treatments skills – 8.73 points (in 10-point scale from 1=no increase to 10=largest increase), curiosity – 8,07, collaboration skills – 8,00, process skills like Spa process skills as well as motivation or personality – 7,93 each (Fig. 1.2.5).

Fig. 1.2.5. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills are: honesty, integrity and loyalty – 9,87 points (in 10-point scale from 1-not requested to 10-most requested), capacity to work autonomously – 9,8, sustainability management skills and complying with related legislation; occupational safety and health, fire protection and hygiene regulations – 9,53 points each (Fig. 1.2.6)

Fig. 1.2.6. **The most in-demand skills in professions, where there is a serious shortage of staff in the establishment** (on a scale from 1-not requested to 10-most requested)

The most important knowledge for work: knowledge about work organization – 4,4 points (in 5-point scale from 1=the least important to 5=most important), knowledge about the Spa and Wellness services and products – 4,27 points, information technology and database work – 3,87, followed by knowledge about the Related legislation; occupational safety and health, fire protection and hygiene regulations – 3,73.

Fig. 1.2.7. **The importance of knowledge in different areas of the establishment** (on a scale from 1-the least important to 5-the most important)

The skills, when lacking, that have the greatest negative impact on the establishment, all employers of France mentioned management skills and office administration skills (4,00 out of 4 points). Also skills like written communication skills – 3,43, problem solving skills – 3,29 and literacy skills - 3,4 were outlined as having negative impact.

Fig. 1.2.8. **The impact level of lacking skills on the establishment** (on a scale from 1-very low impact to 4-very significant impact)

The importance in their job of reading, becoming familiar with and comprehending the instructions, guidelines, manuals or reports of Spa establishment is indicated as very important only by 27% of surveyed companies; majority or 73% marked it as rather important. (Fig. 1.2.9)

In the survey, it did not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports.

Fig. 1.2.9. **Importance of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishment in respondent’s job** (n=15; %)

The importance level in the job of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages was indicated as very important only by13% of companies and rather important by majority or 60% companies. 13% indicated such instructions as rather unimportant (Fig. 1.2.10)

Fig. 1.2.10. **Importance of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages in respondent’s job** (n=15; %)

Referring to personnel jobs, on a scale where 4-very important/ 3-rather important/ 2-rather unimportant/ 1-completely unimportant, as the most important skill respondents marked learning new ideas, methods or techniques with 3,36, working as a member of a group or team – 3,33, adapting to new Spa and Wellness equipment or materials with 3,31. Making speeches or presentations to internal or external audiences was evaluated with 2,83.

Fig 1.2.11. **Importance of different skills in the establishment** (on a scale from 1-completely unimportant to 4-very important)

When evaluating the importance of the Spa and Wellness professional tasks in the establishment, most respondents of France (over 70%) emphasize the following 5 skills with the increasing importance - delivering a variety of spa services like body treatments, massages, facials, waxing and manicure, pedicure in a safe and comfortable manner (79%), also interpersonal and communication skills (75%), apply best practices and be up to date with market trends and uphold hygiene standards and follow health and safety regulations (73% each) and suggest treatments to customers based on their needs (71%).

Fig. 1.2.12. **Increase or decrease in importance of certain tasks** (n=15; %)

When evaluating the level of difficulty to find skilled labour to fill vacancies, the highest level – 3,37 out of 4 was indicated for heads and representatives of authority and all levels of authority and managers (3,17 out of 4), followed by skilled workers as Spa specialists, sales & marketing specialists, followed by highly qualified specialists like medical staff (3,00 out of 4). As the third group of skilled labour to fill vacancies were mentioned highly qualified specialists like medical staff and average qualification specialists like technicians, masters, average accountants, sale persons, cashiers, etc. (2,67 each).

Fig. 1.2.13. **Difficulties to find skilled labour to fill vacancies at respondent’s establishment in different job categories** (on a scale from 1-completely simple to 4-very difficult)

The main subject that respondents mentioned as the most important for training or education programmes was physiotherapy and other subjects related to health, wellbeing, etc. (3,73 out of 5), second most important subject was written and spoken communication (3, 67 out of 5) and ensuring Epidemiological and hygiene requirements (3, 47 out of 5).

Fig. 1.2.14. **Importance of training topics** **if a training, or even an education programme would be offered** (on a scale from 1 – the least important to 5 – the most important)

## France VET provider survey result analysis

France VET providers survey respondent structure analysis

Respondent structure indicates that the majority of VET providers of France, who filled the survey, represented private institutions (11 institutions out of 20), also 5 public intitutions and 4 PPPs (Private Public Partnership). Majority of respondents were from VET institutions (12 institutions or 60%). Seven respondents were from a VET companies.

Fig. 1.2.15. **Type of organization represented by the respondents** (n=20)

All of the VET institutions, who filled survey, are SMEs. 10% of institutions employ1 to 4 employees, half employ 5 to 9 employees, 30% are small institutions with 10 to 49 employees and two medium size organisations with 50 to 249 employees (10%).

Fig. 1.2.16. **Size of organization represented by the respondents** (n=20)

VET institutions of France who filled the survey have a wide range of time since offering Spa and Wellness training programs. Majority of institutions started to offer training programmes in the Spa and Wellness already during the last 6 to 10 years (9 institutions or 45%), 4 institutions offer training programmes already during the last 11 to 20 years, two institution more than 20 years. Five institution are offering such training programs just recently in last 1 to 5 years.

Fig. 1.2.17. **The period of time during which the organization offers Spa and Wellness training programmes** (n=20)

Majority of respondents who filled the survey were teachers and trainers of VET institutions (55% or 11 respondents out of 21) also 5 managers of VET institutions (25%) and 3 quality managers (15%).

Fig. 1.2.18. **Respondent 's current position** (n=20)

France VET providers survey result analysis

As the most important skills and key competencies at Spa and Wellness establishments VET providers mentioned knowledge of the fundamentals, anatomy, and holistic care of the client, personalized consideration of customer needs, reception, quality of services provided, reception, hygiene and diversification offer, reception, English, care, knowledge of hygiene, quality and safety, knowledge of anatomy and physiology, in-depth knowledge of massage techniques as well as language, smile, techniques.

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| --- |
| **The most important skills and key competencies at Spa and Wellness establishments** |
| Knowledge of the fundamentals, anatomy, and holistic care of the client. |
| Personalized consideration of customer needs, reception, quality of services provided |
| Reception, hygiene and diversification offer |
| Reception, English, care |
| Knowledge of hygiene, quality and safety, knowledge of anatomy and physiology, in-depth knowledge of massage techniques |
| language, smile, techniques |

When marking the weakest skills and lack of knowledge in students, respondents mentioned basic technical skills as well as computer/IT skills (13 institutions each), followed by foreign languages and versatility, capacity to fill in for absent workers (12 institutions each).

Fig. 1.2.19. **The** **skills and knowledge that respondents see as the weakest in students** (n=20)

When marking the largest increase in the skill requirements using a 10 point scale (1=no increase, 10=largest increase), respondents outlined largest increase for customer oriented communication skills (8,16), foreign language skills and digital marketing skills like video blogs, social media network (7,68 each). Motivation or personality (7,32) and work experience attitude (7,21) also were marked as having increase by dominating majority of respondents.

Fig. 1.2.20. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills for occupations in serious lack of personnel, VET providers using a 10 point scale (1=not requested, 10=most requested) mentioned basic professional skills (6,63), basic technical skills (6,47), honesty, integrity and loyalty (6,37), followed by inter-personal and communication skills, foreign languages skills for Spa terminology as well as capacity to work under stress (6,16).

Fig. 1.2.21. **The most in-demand skills in the case of occupation, in which respondents experienced a serious lack of personnel** (on a scale from 1-not requested to 10-most requested)

When evaluating the importance of Spa and Wellness industry knowledge assessed in 5 point scale, all VET providers gave the same level of importance to knowledge about the consumer rights, General Data Protection Regulation (GDPR) as well as related legislation; occupational safety and health, fire protection and hygiene regulations (3 points out of 5 for each knowledge).

Fig. 1.2.22. **The importance of the knowledge listed below for the Spa and Wellness industry** (on a scale from 1 – the least important to 5 – the most important)

When speaking about the lack of skills that have the greatest negative impact on the Spa and Wellness establishments using a 4 point scale (4=very significant impact to 1=very low impact), VET providers highlighted technical, practical or job-specific skills (2,28). Also majority of VET providers outlined that the following skills have a very significant impact: office administration skills (2,11) and general IT user skills (1,72).

Fig. 1.2.23. **Absence of skills with the greatest negative impact on the Spa and Wellness establishments?** (on a scale from 4- very significant impact to 1-very low impact)

Based on their experience, VET providers specified the level of difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments using a 4 point scale (4=very difficult, 1=completely simple) and respondents identified that the most difficult task is to find unskilled workers including unskilled support staff like office cleaners, yard-keepers (2,17), employees responsible for preparation of information, registration of documents, other registration and services as well as support staff like drivers, security staff, etc. (2,00 each job category).

Fig. 1.2.24. **The difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments in different job categories** (on a scale from 1-completely simple to 4-very difficult)

VET providers marked opinion about the reasons for increase in skill requirements in Spa and Wellness establishments (4=very significant impact to 1=very low impact) and indicated change in workplace organization, for example, more emphasis on personal skills, as well as more competitive business environment in Spa and Wellness industry - as having very significant impact. (1,83 out of 4 points).

Fig. 1.2.25. **The** **reason(s) for increase of skill requirements in Spa and Wellness establishments** (on a scale from 4-very significant impact to 1-very low impact)

When thinking about possible changes that are going to shape the future of the Spa and Wellness sector, VET providers highlighted changes in the market, for example client’s expectations, legal regulations (85% of respondents), followed by changes in technologies like Spa technologies, working methods, new therapies, new techniques, IT (70%).

Fig. 1.2.26. **Changes going to shape the future of the sector** (n=20)

## Conclusions from France SPA and Wellness employer survey and VET provider survey result analysis

Comparing survey results of Spa and Wellness employer opinion with VET providers in France, the most in-demand skills from the point of view of both Spa and Wellness employers as well as VET providers are honesty, integrity and loyalty. Spa and Wellness employer also mentioned capacity to work autonomously, sustainability management skills, complying with related legislation; occupational safety and health, fire protection and hygiene regulations. However, VET providers highlighted basic professional skills, basic technical skills as well as honesty, integrity and loyalty.

Spa and Wellness employers and VET providers did not have common opinion about the largest increase in the skill requirements. Large increase mentioned by Spa and Wellness employers was for basic skills for offering Spa treatments skills, curiosity and collaboration skills; but VET providers outlined with the same high importance customer oriented communication skills, foreign language skills and digital marketing skills like video blogs, social media network.

Spa and Wellness employers and VET providers also did not have common opinion about the importance of knowledge. Spa and Wellness employers highlighted importance of knowledge about work organization, knowledge about the Spa and Wellness services and products, as well as about information technology and database work. However, VET providers mentioned importance for knowledge about the consumer rights, General Data Protection Regulation (GDPR) as well as related legislation; occupational safety and health, fire protection and hygiene regulations.

When speaking about lack of skills that have the highest negative impact, both Spa and Wellness employers and VET providers had the same opinion that office administration skills would have the most negative impact. Spa and Wellness employers also mentioned management skills and written communication skills. However, VET providers outlined also technical, practical or job-specific skills and general IT user skills.

When evaluating the difficulty to find skilled labour to fill vacancies Spa and Wellness employers and VET providers again did not have common opinion about job categories with highest difficulty. Spa and Wellness employers mentioned highly qualified staff as heads and representatives of authority and all levels of authority and managers, skilled workers as Spa specialists, sales & marketing specialists and highly qualified specialists like medical staff. On contrary VET providers outlined less skilled workers to fill the vacancies, like unskilled workers including unskilled support staff like office cleaners, yard-keepers, employees responsible for preparation of information, registration of documents, other registration and services as well as support staff like drivers, security staff, etc.

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| --- | --- | --- | --- |
|  | Skill outlined by both Spa and Wellness employers and VET providers | Skill outlined only by Spa and Wellness employers | Skill outlined only by VET providers |
| The most in-demand skills | * honesty, integrity and loyalty | * capacity to work autonomously * sustainability management skills * complying with related legislation; occupational safety and health, fire protection and hygiene regulations | * basic professional skills * basic technical skills |
| The largest increase in the skill requirements |  | * basic skills for offering Spa treatments skills * curiosity * collaboration skills | * customer oriented communication skills * foreign language skills * digital marketing skills like video blogs, social media network |
| The importance of knowledge |  | * knowledge about work organization * knowledge about the Spa and Wellness services and products * information technology and database work | * knowledge about the consumer rights * General Data Protection Regulation (GDPR) * related legislation; occupational safety and health, fire protection and hygiene regulations |
| Lacking skills that have the highest negative impact | * office administration skills | * management skills * written communication skills | * technical, practical or job-specific skills * general IT user skills |
| The difficulty to find skilled labour to fill vacancies |  | * heads and representatives of authority and all levels of authority and managers * skilled workers as Spa specialists, sales & marketing specialists * highly qualified specialists like medical staff | * unskilled workers including unskilled support staff like office cleaners, yard-keepers, * employees responsible for preparation of information, registration of documents, other registration and services * support staff like drivers, security staff, etc. |

* 1. GREECE

Map

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## Greece employer survey result analysis

Greece employer survey respondent structure analysis

Of the 20 surveyed companies in Greece, the majority – 7 companies or 35% - are public SPA and Wellness centers.

Fig. 1.3.1. **Organisation types represented by the respondents** (n=20)

Majority of respondents from Greece were from MSMEs, 45% represented small enterprises with 10 to 49 employees, 30% micro enterprises employing 5 to 9 employees, and 25% enterprises with 51 to 4 employees.

Fig. 1.3.2. **Number of employees in the companies represented by the respondents** (n=20)

Greece Spa and wellness sector respondent structure consists of:

Supervisor of establishment (35%), Manager of establishment (10%), Operators of establishment (10%) and Owner of establishment (30%).

Fig. 1.3.3. **Respondent’s occupation** (n=20)

Greece employer survey result analyses

More than half of surveyed companies of France (55% of companies), when looking for suitable employees with relevant knowledge and skills, faces most difficulties related to knowledge of problem solving skills. Next most mentioned difficulties were related to basic technical skills, foreign languages and willingness to work overtime, flexitime,, each mentioned by 40% of surveyed companies.

Fig. 1.3.4. **Difficulties companies face when looking for suitable employees with relevant knowledge and skills** (n=20)

The skills that experienced the largest increase of requirements are complying with related legislation; occupational safety and health, fire protection and hygiene regulations – 8.00 points (in 10-point scale from 1=no increase to 10=largest increase), followed by Spa and Wellness services design skills (7,45) and digital marketing skills like video blogs, social media network. (Fig. 1.3.5).

Fig. 1.3.5. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills are: honesty, integrity and loyalty– 7,84 points (in 10-point scale from 1-not requested to 10-most requested), client relations skills and problem solving skills (7,65 each), Total quality management skills (7,60), decision making (7,58) as well as foreign languages skills for Spa terminology – 7,25 points (Fig. 1.3.6)

Fig. 1.3.6. **The most in-demand skills in professions, where there is a serious shortage of staff in the establishment** (on a scale from1-not requested to 10-most requested)

The most important knowledge for work: knowledge about the Spa and Wellness services and products – 4,05 points (in 5-point scale from 1=the least important to 5=most important), knowledge about the tourism services and products - 3,95, and knowledge of foreign languages – 3,80.

Fig. 1.3.7. **The importance of knowledge in different areas of the establishment** (on a scale from 1-the least important to 5-the most important)

The skills, when lacking, that have the greatest negative impact on the establishment, employers of Greece mentioned oral communication skills (3,5 out of 4 points). Also skills like customer handling skills– 3,47, team working skills- 3,27 were outlined as having negative impact.

Fig. 1.3.8. **The impact level of lacking skills on the establishment** (on a scale from 1-very low impact to 4-very significant impact)

The importance level in the job of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishment was indicated as very important by70% of companies and 30% of companies indicated such instructions as rather important (Fig. 1.3.9.)

Fig. 1.3.9. **Importance of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishment in respondent’s job** (n=20; %)

The importance level in the job of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages was indicated as very important by70% of companies and 30% of companies indicated such instructions as rather important (Fig. 1.3.10)

Fig. 1.3.10. **Importance of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages in respondent’s job** (n=20; %)

Referring to personnel jobs, on a scale where 4-very important/ 3-rather important/ 2-rather unimportant/ 1-completely unimportant, as the most important skill respondents marked communicating in a foreign language with 3,65, working as a member of a group or team – 3,63. Learning new ideas, methods or techniques was evaluated with 3,62.

Fig. 1.3.11. **Importance of different skills in the establishment** (on a scale from 1-completely unimportant to 4-very important)

When evaluating the importance of the Spa and Wellness professional tasks in the establishment, most respondents of Greece (80% and more) emphasize the following 4 skills with the increasing importance – uphold hygiene standards and follow health and safety regulations (95%), communication and customer service skills, positive attitude and patience, organization, coordination and monitoring of the Spa and Wellness services provided in the centre (80% each).

Fig. 1.3.12. **Increase or decrease in importance of certain tasks** (n=20; %)

When evaluating the level of difficulty to find skilled labour to fill vacancies, the highest level – 3,37 out of 4 was indicated for heads and representatives of authority and all levels of authority and managers, as well as for highly qualified specialists like medical staff (3,37 out of 4 points each). As the third group was mentioned skilled workers as Spa specialists, sales & marketing specialists. (3,3 points).

Fig. 1.3.13. **Difficulties to find skilled labour to fill vacancies at respondent’s establishment in different job categories** (on a scale from 1-completely simple to 4-very difficult)

The main subject that respondents mentioned as the most important for training or education programmes was Spa and Wellness services design . (3,82 out of 5), ensuring Epidemiological and hygiene requirements (3, 76), followed by organisation and supervision of apprenticeships and other work-based learning forms (3,71).

Fig. 1.3.14. **Importance of training topics** **if a training, or even an education programme would be offered** (on a scale from 1 – the least important to 5 – the most important)

## Greece VET provider survey result analyses

Greece VET providers survey respondent structure analyses

Respondent structure indicates that all respondents of VET providers of Greece, who filled the survey, represented private institutions (20 institutions out of 20) and all were from a VET companies.

Fig. 1.3.15. **Type of organization represented by the respondents** (n=20)

All of the VET institutions, who filled survey, are SMEs. 75% of institutions ae small size organisations and employ10 to 49 employees, one fourth are middle size organisations and employ 50 to 2499 employees.

Fig. 1.3.16. **Size of organization represented by the respondents** (n=20)

Majority of VET institutions of Greece who filled the survey started to offer training programmes in the Spa and Wellness only during the last 1 to 5 years (15 institutions or 75%), 5 institutions offer training programmes already during the last 6 to 10 years.

Fig. 1.3.17. **The period of time during which the organization offers Spa and Wellness training programmes** (n=20)

Majority of respondents who filled the survey were teachers and trainers of VET institutions (65% or 13 respondents out of 21) also 7 managers of VET institutions (35%).

Fig. 1.3.18. **Respondent 's current position** (n=20)

Greece VET providers survey result analyses

As the most important skills and key competencies at Spa and Wellness establishments VET providers mentioned services, expertise, efficiency, knowledge of the sector, professional communication and courtesy, specialization, organisation, communication, teamwork

|  |
| --- |
| **The most important skills and key competencies at Spa and Wellness establishments** |
| Sevices, expertise, efficiency |
| Knowledge of the sector, professional communication and courtesy, specialization |
| Organisation, Communication, Teamwork |

When marking the weakest skills and lack of knowledge in students, respondents mentioned management and master skills (15 institutions), followed by inter-personal/communication skills (13 institutions), foreign languages as well as computer/IT skills (10 institutions each).

Fig. 1.3.19. **The** **skills and knowledge that respondents see as the weakest in students** (n=20)

When marking the largest increase in the skill requirements using a 10 point scale (1=no increase, 10=largest increase), respondents outlined largest increase for technical skills like use of new technologies of Spa (8,8) and digital marketing skills like video blogs, social media network (8,45). Work experience attitude and complex problem-solving skills (8,05 each) also were marked as having increase by dominating majority of respondents.

Fig. 1.3.20. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills for occupations in serious lack of personnel, VET providers using a 10 point scale (1=not requested, 10=most requested) mentioned problem solving skills (8,25), capacity to work autonomously and time management skills (8,20 each).

Fig. 1.3.21. **The most in-demand skills in the case of occupation, in which respondents experienced a serious lack of personnel** (on a scale from 1-not requested to 10-most requested)

When evaluating the importance of Spa and Wellness industry knowledge assessed in 5 point scale, majority of VET providers gave the highest level of importance to knowledge of foreign languages (3,2). Also consumer rights (2,35), psychology of sales and marketing, information technology and database work (2.25 each) were mentioned as quite important.

Fig. 1.3.22. **The importance of the knowledge listed below for the Spa and Wellness industry** (on a scale from 1 – the least important to 5 – the most important)

When speaking about the lack of skills that have the greatest negative impact on the Spa and Wellness establishments using a 4 point scale (4=very significant impact to 1=very low impact), VET providers highlighted office administration skills (3,3). Also majority of VET providers outlined that the following skills have a very significant impact: customer handling skills, team working skills, management skills (3,25).

Fig. 1.3.23. **Absence of skills with the greatest negative impact on the Spa and Wellness establishments?** (on a scale from 4- very significant impact to 1-very low impact)

Based on their experience, VET providers specified the level of difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments using a 4 point scale (4=very difficult, 1=completely simple) and respondents identified that the most difficult task is to find heads and representatives of authority and all levels of authority and managers (3,2), highly qualified specialists like medical staff (2,75) as well as skilled workers like Spa specialists, sales and marketing specialists (2,7).

Fig. 1.3.24. **The difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments in different job categories** (on a scale from 1-completely simple to 4-very difficult)

VET providers marked opinion about the reasons for increase in skill requirements in Spa and Wellness establishments (4=very significant impact to 1=very low impact) and indicated change in higher quality standards for the Spa and Wellness services (3,25), as well as more competitive business environment in Spa and Wellness industry - as having very significant impact. (3,15 out of 4 points).

Fig. 1.3.25. **The** **reason(s) for increase of skill requirements in Spa and Wellness establishments** (on a scale from 4-very significant impact to 1-very low impact)

When thinking about possible changes that are going to shape the future of the Spa and Wellness sector, VET providers highlighted changes in technologies like Spa technologies, working methods, new therapies, new techniques, IT (65%), followed by changes in the market, for example client’s expectations, legal regulations (50% of respondents).

Fig. 1.3.26. **Changes going to shape the future of the sector** (n=20)

## Conclusions from Greece SPA and Wellness employer survey and VET provider survey result analysis

Comparing survey results of Spa and Wellness employer opinion with VET providers in Greece, the most in-demand skills from the point of view of both Spa and Wellness employers as well as VET providers are problem-solving skills. Spa and Wellness employer also mentioned honesty, integrity and loyalty as well as client relations skills. However, VET providers highlighted capacity to work autonomously and time management skills.

Comparing survey results of Spa and Wellness employer opinion with VET providers, as the largest increase in the skill requirements both outlined digital marketing skills like video blogs, social media network. Large increase mentioned by Spa and Wellness employers also was for complying with related legislation; occupational safety and health, fire protection and hygiene regulations, as well as for Spa and Wellness services design skills. VET providers outlined additionally technical skills like use of new technologies of Spa, work experience attitude and complex problem-solving skills.

Spa and Wellness employers and VET providers did not have common opinion about the importance of knowledge. Spa and Wellness employers highlighted importance of knowledge about knowledge about the Spa and Wellness services and products, about the tourism services and products and knowledge of foreign languages. However, VET providers mentioned importance for knowledge of foreign languages, consumer rights, psychology of sales, marketing, information technology and database work.

When speaking about lack of skills that have the highest negative impact, both Spa and Wellness employers and VET providers had the same opinion that customer handling skills and team working skills would have the most negative impact. Spa and Wellness employers also mentioned oral communication skills. However, VET providers outlined also office administration skills and management skills.

When evaluating the difficulty to find skilled labour to fill vacancies both Spa and Wellness employers and VET providers had the same opinion about the TOP job categories with highest difficulty - heads and representatives of authority and all levels of authority and managers, highly qualified specialists like medical staff, as well as skilled workers as Spa specialists, sales and marketing specialists.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Skill outlined by both Spa and Wellness employers and VET providers | Skill outlined only by Spa and Wellness employers | Skill outlined only by VET providers |
| The most in-demand skills | * problem solving skills | * honesty, integrity and loyalty * client relations skills | * capacity to work autonomously * time management skills |
| The largest increase in the skill requirements | * digital marketing skills like video blogs, social media network | * complying with related legislation; occupational safety and health, fire protection and hygiene regulations * Spa and Wellness services design skills | * technical skills like use of new technologies of Spa * work experience attitude * complex problem-solving skills |
| The importance of knowledge |  | * knowledge about the Spa and Wellness services and products – * knowledge about the tourism services and products * knowledge of foreign languages | * knowledge of foreign languages * consumer rights * psychology of sales * marketing, information technology and database work |
| Lacking skills that have the highest negative impact | * customer handling skills * team working skills | * oral communication skills | * office administration skills * management skills |
| The difficulty to find skilled labour to fill vacancies | * heads and representatives of authority and all levels of authority and managers * highly qualified specialists like medical staff   skilled workers as Spa specialists, sales and marketing specialists |  |  |

* 1. ITALY

Map

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## 1.4.1. Italy employer survey result analysis

Italy employer survey respondent structure analysis

Of the 20 surveyed companies in Italy, the majority – 15 companies or 75% - are private SPA and Wellness centers.

Fig. 1.4.1. **Organisation types represented by the respondents** (n=20)

Majority of respondents from Italy were from SMEs, every fifth (20%) company employed 5 to 9 employees, the largest proportion, more than half of companies (55%), were employing 10 to 49 employees, and 25% of medium size companies were employing 50 to 249 employees.

Fig. 1.4.2. **Number of employees in the companies represented by the respondents** (n=20)

Italian Spa and wellness sector respondent structure consists of:

Manager of establishment (45%), Operator of establishment (30%), Owner of establishment (15%).

Fig. 1.4.3. **Respondent’s occupation** (n=20)

Italy employer survey result analysis

Six out of ten surveyed companies of Italy (60% of companies), when looking for suitable employees with relevant knowledge and skills, faces most difficulties related to problem-solving skills. The second most common difficulty was related to business and entrepreneurial skills indicated by 55% of surveyed companies. The third most common difficulty was inter-personal and communication skills outlined by 40% of surveyed companies. The next difficulties, when looking for suitable employees with relevant knowledge and skills, were management and master skills, as well as foreign language (35%), then creativity and indicative (30%) and computer and IT skills (25%)

Fig. 1.4.4. **Difficulties companies face when looking for suitable employees with relevant knowledge and skills** (n=20)

The skills that experienced the largest increase of requirements are customer oriented communication skills - 7,75 points (in 10-point scale from 1=no increase to 10=largest increase), complex problem-solving skills – 7,3 , technical skills 6,95, motivation of personality – 6,94, work experience attitude, digital marketing skills – 6,85, foreign language skills – 6,8. (Fig. 1.4.5).

Fig. 1.4.5. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills are: client relation skills – 7.65 points (in 10-point scale from 1-not requested to 10-most requested), inter-personal communication skills – 7,5, honesty, integrity and loyalty – 7,15, basic professional skills – 7,1, foreign language skills in Spa terminology – 7,05, teamwork skills – 6,9 (Fig. 1.4.6)

Fig. 1.4.6. **The most in-demand skills in professions where there is a serious shortage of staff in the establishment** (on a scale from1-not requested to 10-most requested)

The most important knowledge for work: knowledge of foreign language – 4 points (in 5-point scale from 1=the least important to 5=most important), knowledge about the tourism services and products – 3.95, knowledge about the Spa and Wellness services and products and psychology of sales marketing as well as time management – 3.65 points

Fig. 1.4.7. **The importance of knowledge in different areas of the establishment** (on a scale from 1-the least important to 5-the most important)

The skills, when lacking, that have the greatest negative impact on the establishment: problem solving skills – 3.45 points (in 4-point scale from 1-very low impact to 4-very significant impact), customer handling skills – 3.35, technical, practical or job-specific skills – 3,30, managerial skills – 3,25, oral communications skills - 3,2 points.

Fig. 1.4.8. **The impact level of lacking skills on the establishment** (on a scale from 1-very low impact to 4-very significant impact)

The importance in their job of reading, becoming familiar with and comprehending the instructions, guidelines, manuals or reports of Spa establishment is indicated as very important by 45% of surveyed companies; also, 45% marked it as rather important. (Fig. 1.4.9). Also 30% of companies outlined that the importance of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishments is increasing; still majority (65%) indicated that the importance level would stay the same.

In the survey, it did not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports.

Fig. 1.4.9. **Importance of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishment in respondent’s job** (n=20; %)

The importance level in the job of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages was indicated as very important by 55% of companies. (Fig. 1.4.10). 35% of companies in Italy outlined that this importance of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages in respondent’s job will increase and 60% indicated that the importance level will stay the same.

Fig. 1.4.10. **Importance of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages in respondent’s job** (n=20; %)

Referring to personnel jobs on a scale where 4-very important/ 3-rather important/ 2-rather unimportant/ 1-completely unimportant, as the most important skill respondents marked instructing, training or teaching people, individually or in groups with 3,65 out of 4, followed by working as a member of a group or team and adapting to new Spa and Wellness equipment or materials with 3,55. The learning new ideas, methods or techniques was evaluated with 3,45.

Fig. 1.4.11. **Importance of different skills in personnel job of respondents** (on a scale from 1-completely unimportant to 4-very important)

When evaluating importance of the Spa and Wellness professionals tasks in the establishment, most respondents of Italy (95%) emphasize upholding hygiene standards and following health and safety regulations, 85% indicate suggesting treatment to customer based on their needs, 75% communication and customer service skills, 70% highlight delivering a variety of spa services like body treatments, massages, facials, waxing and manicure and pedicure in a safe and comfortable manner, also applying best practices and be up to date with market trends as well as customer-oriented, friendly but professional approach.

Fig. 1.4.12. **Increase or decrease in importance of certain tasks** (n=20; %)

When evaluating level of difficulty to find skilled labour to fill vacancies, the highest level – 3,44 out of 4 was indicated for heads and representatives of authority and all levels of authority, managers, followed by highly qualified specialists like medical staff (3,44 out of 4).As the third group of skilled labour to fill vacancies was mentioned skilled workers like Spa specialists, sales and marketing specialists (2,94 out of 4).

Fig. 1.4.13. **Difficulties to find skilled labour to fill vacancies at respondent’s establishment in different job categories** (on a scale from 1-completely simple to 4-very difficult)

The main subject that respondents mentioned as the most important for training or education programmes was physiotherapy and other subjects related to health, wellbeing, etc. (4,35 out of 5), written and spoken communication (4,2 out of 5) and as third economy and operations like calculations, marketing, budgeting, sales strategies (4,1 out of 5).

Fig. 1.4.14. **Importance of training topics** **if a training**

## 1.4.2. Italy VET provider survey result analyses

Italy VET providers survey respondent structure analyses

Respondent structure indicates that dominating majority of VET providers of Italy who filled the survey represented private institutions (21 institutions out of 22), majority being VET companies (13 institutions out of 22) and VET institutions (8 out of 22). Only one respondent was from PPP (Public Private Partnership).

Fig. 1.4.15. **Type of organization represented by the respondents** (n=22)

Most of the VET institutions, who filled survey, are micro size organisations 27% with 1 to 4 employees and 55% with 5 to 9 employees, and only four institutions are small employing 10 to 49 employees.

Fig. 1.4.16. **Size of organization represented by the respondents** (n=22)

VET institutions of Italy who filled the survey have a wide range of time since offering Spa and Wellness training programs. 18% of institutions offer such education only during the last few years (1-5 years), majority or 41% of institutions offers training programmes already for 6-10 years (9 institutions), 27% of institutions offer training programmes for 11-20 years, and three institutions (14%) are operating in this field already for a long period of time– 11 till 20 years.

Fig. 1.4.17. **The period of time during which the organization offers Spa and Wellness training programmes** (n=22)

Majority of respondents who filled the survey were managers of VET institutions (41%). 18% of respondents were teachers and trainers of VET institutions, 9% quality managers of VET institutions, 4,5% project manager, 23% training course managers and 4,5% sales manager.

Fig. 1.4.18. **Respondent 's current position** (n=22)

Italy VET providers survey result analysis

As the TOP7 most important skills and key competencies at Spa and Wellness establishments VET providers mentioned communication skills, problem solving, to be able to use manual and instrumental massage techniques, technical skills, management skills, digital marketing and human resources.

|  |
| --- |
| **The most important skills and key competencies at Spa and Wellness establishments from respondent’s point of view** |
| communication skills |
| problem solving |
| to be able to use manual and instrumental massage techniques |
| technical skills |
| management skills |
| digital marketing |
| human resources |

When marking the TOP5 weakest skills and lack of knowledge in students, majority of respondents agreed that inter-personal communication skills (64%), computer IT skills as well as management and master skills (55%), also business and entrepreneurial skills (50%), problem-solving skills (41%) are the weakest.

Fig. 1.4.19. **The** **skills and knowledge that respondents see as the weakest in students** (n=22)

When marking the largest increase in the skill requirements using a 10 point scale (1=no increase, 10=largest increase), respondents outlined customer oriented communication skills (9,0), digital marketing skills like video blogs, social media networks (8,41), technical skills and use of new technologies of Spa (8,23). VET providers also highlighted high level or specific ICT skills (8,05), motivation or personality (7,27) as having increase in requirements.

Fig. 1.4.20. **Skills areas with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills for occupations in serious lack of personnel, VET providers using a 10 point scale (1=not requested, 10=most requested) mentioned inter-personal/communication skills and client relations skills (both 9,32), product and services sales skills and e-commerce skills (both 8,95) (Fig. 1.4.21).

Fig. 1.4.21. **The most in-demand skills in the case of occupations in which respondents experienced a serious lack of personnel** (on a scale from 1-not requested to 10-most requested)

When evaluating the importance of Spa and Wellness industry knowledge assessed in 5 point scale, all VET providers mentioned knowledge about the Spa and Wellness services and products (4,55), psychology of sales and marketing (4,45), also knowledge about the tourism services and products, knowledge of foreign languages, , knowledge of Spa and Wellness services design as well as work organization (4,05) as well as time management (3,68)

Fig. 1.4.22. **The importance of the knowledge listed below for the Spa and Wellness industry from respondent’s point of view** (on a scale from 1 – the least important to 5 – the most important)

When speaking about the lack of skills that have the greatest negative impact on the Spa and Wellness establishments using a 4 point scale (4=very significant impact to 1=very low impact), VET providers outlined that the following skills have a very significant impact have oral communication skills, technical, practical or job-specific skills (both 3,91), customer handling skills (3,86).

Fig. 1.4.23. **The lacking skills who have the greatest negative impact on the Spa and Wellness establishments?** (on a scale from 4- very significant impact to 1-very low impact)

Based on their experience, VET providers specified the level of difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments using a 4 point scale (4=very difficult, 1=completely simple) and identified that the most difficult task is to find heads, representatives of authority and all levels of authority, managers (3,36), also highly qualified specialists including medical staff (3,24), followed by skilled workers, like Spa specialists, sales & marketing specialists (3,61).

Fig. 1.4.24. **The difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments in different job categories** (on a scale from 1-completely simple to 4-very difficult)

When speaking about the reasons for increase in skill requirements in Spa and Wellness establishments (4=very significant impact to 1=very low impact), as the most important VET providers as having significant impact marked development of new technology (3,45), more competitive business environment in Spa and Wellness industry (3,32) and higher quality standards for the Spa and Wellness services (3,19).

Fig. 1.4.25. **The** **reason(s) for increase of skill requirements in Spa and Wellness establishments** (on a scale from 4-very significant impact to 1-very low impact)

When thinking about possible changes that are going to shape the future of the Spa and Wellness sector, 68% of VET providers (33 institutions) highlighted changes in technologies including Spa technologies, working methods, new therapies, new techniques, IT etc. As the second most frequently indicated change, respondents mentioned changes in the market like client’s expectations, legal regulations etc. (55%).

Fig. 1.4.26. **Changes going to shape the future of the sector** (n=22)

## 1.4.3. Conclusions from Italy SPA and Wellness employer survey and VET provider survey result analysis

Comparing survey results of Spa and Wellness employer opinion with VET providers in Italy, the most in-demand skills from the point of view of Spa and Wellness employers are client relations skills, inter-personal and communication skills and honesty, integrity, loyalty. However, VET providers highlighted customer oriented communication skills, technical skills and use of new technologies of Spa and digital marketing skills like video blogs, social media networks.

Comparing survey results of Spa and Wellness employer opinion with VET providers, as the largest increase in the skill requirements both outlined technical skills and use of new technologies of Spa and customer oriented communication skills. Large increase mentioned by Spa and Wellness employers also for complex problem-solving skills; but VET providers outlined also digital marketing skills like video blogs, social media networks.

In the importance of knowledge, Spa and Wellness employers and VET providers did not have a common opinion. Spa and Wellness employers highlighted importance of knowledge of foreign language and knowledge about the tourism services and products. However, VET providers mentioned importance of knowledge about the Spa and Wellness services and products, psychology of sales and marketing

When speaking about lack of skills that have the highest negative impact, both Spa and Wellness employers and VET providers had the same opinion that customer, handling skills and technical, practical or job-specific skills would have the most negative impact.

When evaluating the difficulty to find skilled labour to fill vacancies again both Spa and Wellness employers and VET providers had the same opinion about job categories with highest difficulty - the heads, representatives of authority and all levels of authority, managers, highly qualified specialists including medical staff, skilled workers, like Spa specialists, sales and marketing specialists.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Skill outlined by both Spa and Wellness employers and VET providers | Skill outlined only by Spa and Wellness employers | Skill outlined only by VET providers |
| The most in-demand skills |  | * client relations skills * inter-personal and communication skills, * honesty, integrity, loyalty | * customer oriented communication skills * technical skills and use of new technologies of Spa, * digital marketing skills like video blogs, social media networks |
| The largest increase in the skill requirements | * technical skills and use of new technologies of Spa,   Diagram  Description automatically generated   * customer oriented communication skills   Icon  Description automatically generated | * complex problem-solving skills | * digital marketing skills like video blogs, social media networks |
| The importance of knowledge |  | * knowledge of foreign language, * knowledge about the tourism services and products | * knowledge about the Spa and Wellness services and products, * psychology of sales and marketing |
| Lacking skills that have the highest negative impact | * customer handling skills,   Icon  Description automatically generated   * technical, practical or job-specific skills   Icon  Description automatically generated | * problem solving skills | * oral communications skills |
| The difficulty to find skilled labour to fill vacancies | * heads, representatives of authority and all levels of authority, managers   Icon  Description automatically generated   * highly qualified specialists including medical staff   Icon  Description automatically generated   * skilled workers, like Spa specialists, sales and marketing specialists |  |  |

* 1. LATVIA

Map

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## Latvia employer survey result analysis

Latvia employer survey respondent structure analysis

Of the 20 surveyed companies in Latvia, one was private SPA and Wellness center, six private Spa, Spa and Wellness hotels, the rest of respondents were from other type of companies like rehabilitation centers and Spa clinics.

Fig. 1.5.1. **Organisation types represented by the respondents** (n=20)

Respondents from Latvia were from different size companies both from MSMEs and large companies, 7% represented micro enterprises with 5 to 9 employees, and 36% small enterprises employing 10 to 49 employees. 29% medium size enterprises employing 50 to 249 employees, as well as 25% large enterprises with small enterprises employing over 250 employees.

Fig. 1.5.2. **Number of employees in the companies represented by the respondents** (n=20)

Latvia Spa and wellness sector respondent structure consists of:

Supervisor of establishment (10%), manager of establishment (30%), owner of establishment (10%) and other respondents like department manager, sales manager, etc.

Fig. 1.5.3. **Respondent’s occupation** (n=20)

Latvia employer survey result analyses

Majority of surveyed companies of Latvia (79% of companies), when looking for suitable employees with relevant knowledge and skills, faces most difficulties related to inter-personal and communication skills. Next most mentioned difficulties were problem-solving skills (57%) and knowledge of foreign languages mentioned by 50% of surveyed companies.

Fig. 1.5.4. **Difficulties companies face when looking for suitable employees with relevant knowledge and skills** (n=20)

The skills that experienced the largest increase of requirements are stress management skills – 8.08 points (in 10-point scale from 1=no increase to 10=largest increase), customer oriented communication skills – 7,93, collaboration skills – 7,71, social skills and complex problem-solving skills – 7,57 each (Fig. 1.5.5).

Fig. 1.5.5. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills are: client relations skills – 9,0 points (in 10-point scale from 1-not requested to 10-most requested), inter-personal and communication skills – 8,93, product and services sales skills– 8,85, reliability and precision – 7,62 points (Fig. 1.5.6)

Fig. 1.5.6. **The most in-demand skills in professions, where there is a serious shortage of staff in the establishment** (on a scale from1-not requested to 10-most requested)

The most important knowledge for work: knowledge about the Spa and Wellness services and products – 4,79 points (in 5-point scale from 1=the least important to 5=most important), knowledge about work organisation – 4,31 points, psychology of sales and marketing – 4,29, followed by knowledge of Spa and Wellness services design– 4,23 points.

Fig. 1.5.7. **The importance of knowledge in different areas of the establishment** (on a scale from 1-the least important to 5-the most important)

The skills, when lacking, that have the greatest negative impact on the establishment, all employers of Latvia mentioned customer handling skills (4,00 out of 4 points). Also skills like technical, practical or job-specific skills– 3,69, team working skills – 3,57 and oral communication skills- 3,5 were outlined as having negative impact.

Fig. 1.5.8. **The impact level of lacking skills on the establishment** (on a scale from 1-very low impact to 4-very significant impact)

The importance in their job of reading, becoming familiar with and comprehending the instructions, guidelines, manuals or reports of Spa establishment is indicated as very important only by 36% of surveyed companies; majority or 57% marked it as rather important. Only one respondent mentioned it as completely unimportant. (Fig. 1.5.9)

In the survey, it did not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports.

Fig. 1.5.9. **Importance of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishment in respondent’s job** (n=20; %)

The importance level in the job of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages was indicated as very important by 45% of companies and rather important also by 45% companies. One respondent indicated such instructions as rather unimportant and one as completely unimportant (Fig. 1.5.10)

Fig. 1.5.10. **Importance of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages in respondent’s job** (n=20; %)

Referring to personnel jobs, on a scale where 4-very important/ 3-rather important/ 2-rather unimportant/ 1-completely unimportant, as the most important skill respondents marked adapting to new Spa and Wellness equipment or materials with 3,71, working as a member of a group or team as well as instructing, training or teaching people, individually or in groups – 3,54 each. Learning new ideas, methods or techniques was evaluated with 3,5 points.

Fig. 1.5.11. **Importance of different skills in the establishment** (on a scale from 1-completely unimportant to 4-very important)

When evaluating the importance of the Spa and Wellness professional tasks in the establishment, most respondents of Latvia (79% and above) emphasize the following 6 skills with the increasing importance – uphold hygiene standards and follow health and safety regulations (86%), acknowledging and responding to relevant customer queries, needs and expectations, Spa and Wellness design , apply best practices and be up to date with market trends, positive attitude and patience, organization, coordination and monitoring of the Spa and Wellness services provided in the centre (79% each).

Fig. 1.5.12. **Increase or decrease in importance of certain tasks** (n=20; %)

When evaluating the level of difficulty to find skilled labour to fill vacancies, the highest level – 3,67 out of 4 was indicated for highly qualified specialists like medical staff, followed by skilled workers as Spa specialists, sales and marketing specialists (3,14 out of 4). As the third group of skilled labour to fill vacancies were mentioned heads and representatives of authority and all levels of authority, managers. (3,08).

Fig. 1.5.13. **Difficulties to find skilled labour to fill vacancies at respondent’s establishment in different job categories** (on a scale from 1-completely simple to 4-very difficult)

The main subject that respondents mentioned as the most important for training or education programmes was physiotherapy and other subjects related to health, wellbeing, etc. (4,0 out of 5), second most important subject was Spa and Wellness services design (3,86), ensuring Epidemiological and hygiene requirements (3, 85 out of 5).

Fig. 1.5.14. **Importance of training topics** **if a training, or even an education programme would be offered** (on a scale from 1 – the least important to 5 – the most important)

## Latvia VET provider survey result analyses

Latvia VET providers survey respondent structure analyses

Respondent structure indicates that the majority of VET providers of Latvia, who filled the survey, represented public institutions (60% or 12 institutions out of 20), the rest eight were private institutions. Majority of respondents were from VET institutions (10 institutions or 50%). Eight respondents were from a VET companies.

Fig. 1.5.15. **Type of organization represented by the respondents** (n=20)

Most of the VET institutions, who filled survey, are MSMEs. 10% of institutions employ 5 to 9 employees, 25% are small institutions who employ 10 to 49 employees, 65% are medium size institutions with 50 to 249 employees and one large size organisations with more than 250 employees (5%).

Fig. 1.5.16. **Size of organization represented by the respondents** (n=20)

VET institutions of Latvia who filled the survey have a wide range of time since offering Spa and Wellness training programs. 15% of institutions are offering such training programs just recently in last 1 to 5 years. Majority of institutions started to offer training programmes in the Spa and Wellness already during the last 6 to 10 years (10 institutions or 50%), 7 institutions offer training programmes already during the last 11 to 20 years (35%).

Fig. 1.5.17. **The period of time during which the organization offers Spa and Wellness training programmes** (n=20)

Majority of respondents who filled the survey were teachers and trainers of VET institutions (50% or 10 respondents out of 21) also four managers of VET institutions (20%) and one quality manager (15%).

Fig. 1.5.18. **Respondent 's current position** (n=20)

Latvia VET providers survey result analyses

As the most important skills and key competencies at Spa and Wellness establishments VET providers mentioned communication skills.

|  |
| --- |
| **The most important skills and key competencies at Spa and Wellness establishments** |
| Communication skills |
| The ability to tell the client in detail, comprehensibly and interestedly about the procedures, their advantages and disadvantages, effects, possible side effects, the desired amount, etc. important issues. Diversity of Spa procedures. Practical professional skills. Basic knowledge of anatomy. Hand dexterity and technique. Positive communication with the client. Knowledge of epidemiological safety issues. Working with the client. Professional skills. Customer service. Professional skills and techniques providing services |
| Professionalism in offering and implementing procedures recommended to the client. Ability to communicate with the client. Good hygiene and beauty etiquette / service culture skills. Environmental design. Psychology. Knowledge of materials. Perform Spa massages. Innovation. Finding out the customer's wishes. Hand dexterity. Provision of quality service. Hospitality. |
| Outstanding ethical behaviour and impeccable moral attitude, the ability to build trust. Teamwork. Comprehension and application skills of material learning. Quality of service. Communication skills. Maintain customer well-being. Professionalism. Responsible attitude towards the procedures to be performed. Theoretical basis. Digital marketing skills. Responsibility. Management skills |

When marking the weakest skills and lack of knowledge in students, respondents mentioned inter-personal and communication skills (12 institutions), followed by problem-solving skills (10 institutions), learning skills (7 institutions).

Fig. 1.5.19. **The** **skills and knowledge that respondents see as the weakest in students** (n=20)

When marking the largest increase in the skill requirements using a 10 point scale (1=no increase, 10=largest increase), respondents outlined largest increase for foreign language skills (8,0), process skills like Spa process skills (7,86), customer oriented communication skills (7,71). Social skills and complying with related legislation; occupational safety and health, fire protection and hygiene regulations (7,64) also were marked as having increase by dominating majority of respondents.

Fig. 1.5.20. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills for occupations in serious lack of personnel, VET providers using a 10 point scale (1=not requested, 10=most requested) mentioned client relations skills (9,21), followed by manual dexterity (9,14), inter-personal and communication skills (9,0), capacity to work under stress (8,86).

Fig. 1.5.21. **The most in-demand skills in the case of occupation, in which respondents experienced a serious lack of personnel** (on a scale from 1-not requested to 10-most requested)

When evaluating the importance of Spa and Wellness industry knowledge assessed in 5 point scale, VET providers mentioned knowledge about the Spa and Wellness services and products as well as knowledge of foreign languages (4,14 each), followed by time management (4,07).

Fig. 1.5.22. **The importance of the knowledge listed below for the Spa and Wellness industry** (on a scale from 1 – the least important to 5 – the most important)

When speaking about the lack of skills that have the greatest negative impact on the Spa and Wellness establishments using a 4 point scale (4=very significant impact to 1=very low impact), VET providers outlined that the following skills have a very significant impact - customer handling skills (3,93), oral communication skills (3,86), technical, practical or job-specific skills (3,57 out of 4 points).

Fig. 1.5.23. **Absence of skills with the greatest negative impact on the Spa and Wellness establishments?** (on a scale from 4- very significant impact to 1-very low impact)

Based on their experience, VET providers specified the level of difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments using a 4 point scale (4=very difficult, 1=completely simple) and identified that the most difficult task is to find skilled workers, like Spa specialists, sales & marketing specialists (2,5 points).

Fig. 1.5.24. **The difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments in different job categories** (on a scale from 1-completely simple to 4-very difficult)

When speaking about the reasons for increase in skill requirements in Spa and Wellness establishments (4=very significant impact to 1=very low impact), as the most important VET providers as having significant impact marked new technology and higher quality standards for the Spa and Wellness services (3,43).

Fig. 1.5.25. **The** **reason(s) for increase of skill requirements in Spa and Wellness establishments** (on a scale from 4-very significant impact to 1-very low impact)

When thinking about possible changes that are going to shape the future of the Spa and Wellness sector, VET providers highlighted variety of market, technology, production and employee related aspects.

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| --- | --- |
| **Changes going to shape the future of the sector** | |
| The market (e.g. client’s expectations, legal regulations etc.) | Saturation of companies in the sector, economic activity in the country, tourism development, solvency  Customer satisfaction with service  Allow SPA and beauty companies to work ONLY with appropriate education in the industry  Possibility to receive the service as close as possible to the place of residence  Availability of services  Competition.  Customer's expected result  Customers are becoming more demanding  Diversity of offers  Quality service  Constraints, competition and customer demand for services  Service aggravation  Competition and legal regulation, social media |
| Employees (supply, productivity etc.) | Employee education and flexibility  Employee productivity  To improve and continue the initiated regulations of the SPA Association on recertification every 5 years, improvement of the qualification of beauty care specialists;  Certainly qualified staff  Employee loyalty to the company  Quality of work.  Productivity  Employees need to be highly stress resistant and have excellent communication skills  Employee responsibility and qualifications.  Loyal employees and management  Employees' abilities and skills to adapt, learn new skills  the ability of employees to adapt to rapid changes in the work schedule, working with the client  Competent staff |
| Technologies (Spa technologies, working methods, new therapies, new techniques, IT etc.) | New therapies set, personalization, non-standard technologies, individual approach  New SPA procedures  Greater development of knowledge (courses, seminars, championships, etc.); to teach and allow more creative expression, to help introduce and approve (with the involvement of the SPA Association Commission) new technologies in the profession  New hardware technologies  Diversity of technologies  New SPA technologies  Spa technologies  Without IT knowledge, it will be difficult to realize yourself in the labour market  New approaches and methods in performing procedures.  Existing SPA working methods and introduction of new methods have been improved  New technologies, software in customer service and marketing  SPA customer registration program  Introduction and acquisition of new technologies |
| Production (materials, quality, eco recycling etc.) | Reasonable use of resources, non-traditional materials, materials of natural origin  Product quality, ecological processing  Pay more attention to natural, locally sourced products (supply is still the same in all major centers)  Materials change over time  Eco products  An ecological approach to everything.  Quality of materials  Eco-products are becoming increasingly important  Ecological approach.  Quality materials  Ecological and nature-friendly materials, products  Availability of eco products  Quality |

## Conclusions from Latvia SPA and Wellness employer survey and VET provider survey result analysis

Comparing survey results of Spa and Wellness employer opinion with VET providers in Latvia, both groups indicated inter-personal and communication skills. Also as the most in-demand skills from the point of view of Spa and Wellness employers is product and services sales skills as well as reliability and precision. However, VET providers also highlighted client relations skills and manual dexterity.

Comparing survey results of Spa and Wellness employer opinion with VET providers, as the largest increase in the skill requirements both outlined customer oriented communication skills. Large increase for stress management skills and collaboration skills was also mentioned by Spa and Wellness employers; but VET providers outlined also foreign language skills and process skills like Spa process skills.

In the importance of knowledge, Spa and Wellness employers and VET providers as the most important knowledge both mentioned knowledge about the Spa and Wellness services and products. Spa and Wellness employers also highlighted importance of knowledge about work organisation as well as psychology of sales and marketing. However, VET providers mentioned importance of knowledge of foreign languages and time management.

When speaking about lack of skills that have the highest negative impact, both Spa and Wellness employers and VET providers had the same opinion that customer, handling skills and technical, practical or job-specific skills would have the most negative impact. Spa and Wellness employers also highlighted team working skills. However, VET providers mentioned oral communication skills as have the highest negative impact.

When evaluating the difficulty to find skilled labour to fill vacancies both Spa and Wellness employers and VET providers had the same opinion about job categories with highest difficulty - skilled workers as Spa specialists, sales and marketing specialists. Spa and Wellness employers also mentioned highly qualified specialists like medical staff as well as heads and representatives of authority and all levels of authority and managers.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Skill outlined by both Spa and Wellness employers and VET providers | Skill outlined only by Spa and Wellness employers | Skill outlined only by VET providers |
| The most in-demand skills | * inter-personal and communication skills | * product and services sales skills * reliability and precision | * client relations skills * manual dexterity |
| The largest increase in the skill requirements | * customer oriented communication skills | * stress management skills * collaboration skills | * foreign language skills * process skills like Spa process skills |
| The importance of knowledge | * knowledge about the Spa and Wellness services and products | * knowledge about work organisation * psychology of sales and marketing | * knowledge of foreign languages * time management |
| Lacking skills that have the highest negative impact | * customer handling skills * technical, practical or job-specific skills | * team working skills | * oral communication skills |
| The difficulty to find skilled labour to fill vacancies | * skilled workers as Spa specialists, sales and marketing specialists | * highly qualified specialists like medical staff * heads and representatives of authority and all levels of authority, managers |  |

* 1. SERBIA

Map

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## Serbia employer survey result analyses

Serbia employer survey respondent structure analyses

Of the 20 surveyed companies in Serbia, the majority – 9 companies or 45% - are private SPA and Wellness hotels, the second biggest responded group was Public-Spa, Spa and Wellness hotels (8 companies or 40%)

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Fig. 1.6.1. **Organisation types represented by the respondents** (n=20)

Majority of respondents from Serbia were from large companies with 250 or more employees (11 companies or 55%), SMEs were represented by 7 medium size companies (35%) employing 50 to 249 employees, and one company with 5 to 9 employees.

Fig. 1.6.2. **Number of employees in the companies represented by the respondents** (n=20)

Serbian Spa and wellness sector respondent structure consists of:

Supervisors of establishment (25%), Manager of establishment (30%), Owner of establishment (10%) and 35% of other position respondents.

Fig. 1.6.3. **Respondent’s occupation** (n=20)

Serbia employer survey result analyses

More than half of surveyed companies of Serbia (55% of companies), when looking for suitable employees with relevant knowledge and skills, faces most difficulties related to foreign languages and problem-solving skills. Next most mentioned difficulties were computer and IT skills, creativity and initiative as well as information management, each mentioned by 45% of surveyed companies.

Fig. 1.6.4. **Difficulties companies face when looking for suitable employees with relevant knowledge and skills** (n=20)

The skills that experienced the largest increase of requirements are foreign language skills – 8.68 points (in 10-point scale from 1=no increase to 10=largest increase), customer oriented communication skills – 8.37, technical skills like use of new technologies of Spa – 7,79, motivation or personality – 7,78 (Fig. 1.6.5).

Fig. 1.6.5. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills are: foreign language skills and Spa terminology – 8.63 points (in 10-point scale from 1-not requested to 10-most requested), product and services sales skills – 7,67, capacity to work under stress – 7,56, stress management skills – 7,22, creativity / and initiative taking skills – 7,17 (Fig. 1.6.6).

Fig. 1.6.6. **The most in-demand skills in professions, where there is a serious shortage of staff in the establishment** (on a scale from1-not requested to 10-most requested)

The most important knowledge for work: knowledge about the Spa and Wellness services and products – 3,9 points (in 5-point scale from 1=the least important to 5=most important), work organization – 3.89, psychology of sales and marketing, leadership and motivation of employees – each 3,76, followed by knowledge about the tourism services and products – 3.67, knowledge of foreign languages – 3,62.

Fig. 1.6.7. **The importance of knowledge in different areas of the establishment** (on a scale from 1-the least important to 5-the most important)

The skills, when lacking, that have the greatest negative impact on the establishment: foreign language skills – 3.55, oral communication skills – 3,5, customer handling skills – 3.47, followed by team working skills – 3,45, problem solving skills and technical, practical or job-specific skills - 3,4 each.

Fig. 1.6.8. **The impact level of lacking skills on the establishment** (on a scale from 1-very low impact to 4-very significant impact)

The importance in their job of reading, becoming familiar with and comprehending the instructions, guidelines, manuals or reports of Spa establishment is indicated as very important by 80% of surveyed companies; only 10% marked it as rather important and 10% as completely unimportant. (Fig. 1.6.9)

In the survey, it did not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports.

Fig. 1.6.9. **Importance of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishment in respondent’s job** (n=19; %)

The importance level in the job of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages was indicated as very important by 90% of companies and rather important by 10% companies. (Fig. 1.6.10)

Fig. 1.6.10. **Importance of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages in respondent’s job** (n=20; %)

Referring to personnel jobs, on a scale where 4-very important/ 3-rather important/ 2-rather unimportant/ 1-completely unimportant, as the most important skill respondents marked learning new ideas, methods or techniques with 3,75, communicating in a foreign language with 3,55, adapting to new Spa and Wellness equipment or materials with 3,5. Working as a member of a group or team and instructing, training or teaching people, individually or in groups was evaluated with 3,47 each.

Fig. 6.11. **Importance of different skills in the establishment** (on a scale from 1-completely unimportant to 4-very important)

When evaluating the importance of the Spa and Wellness professional tasks in the establishment, most respondents of Serbia (over 80%) emphasize the following 3 skills with the increasing importance of uphold hygiene standards and follow health and safety regulations (85%), interpersonal and communication skills (85%), creating and placing SPA packages on a website, or other platforms such as FB, Instagram, Video blogs, work on e-shops with Spa offers (84%). Also a big part of respondents outline that the importance of positive attitude and patience (75%) and good time-management skills (74%) will increase.

Fig. 1.6.12. **Increase or decrease in importance of certain tasks** (n=20; %)

When evaluating the level of difficulty to find skilled labour to fill vacancies, the highest level – 3,37 out of 4 was indicated for skilled workers as Spa specialists, sales & marketing specialists, followed by highly qualified specialists like medical staff (3,26 out of 4). As the third group of skilled labour to fill vacancies was mentioned heads and representatives of authority and all levels of authority, managers (3,06 out of 4).

Fig. 1.6.13. **Difficulties to find skilled labour to fill vacancies at respondent’s establishment in different job categories** (on a scale from 1-completely simple to 4-very difficult)

The main subject that respondents mentioned as the most important for training or education programmes was physiotherapy and other subjects related to health, wellbeing, etc. (4,1 out of 5), second most important subject was economy and operation – calculations, marketing, budgeting, sales strategies (3, 65 out of 5) and HR – human resources management and training (3, 63 out of 5).

Fig. 1.6.14. **Importance of training topics** **if a training or even an education programme would be offered** (on a scale from 1 – the least important to 5 – the most important)

## Serbia VET provider survey result analyses

Serbia VET providers survey respondent structure analyses

Respondent structure indicates that the dominating majority of VET providers of Bulgaria, who filled the survey, represented public institutions (19 institutions out of 21) and all were VET institutions (21 institutions). Only two respondent were from a private VET institution.

Fig. 1.6.15. **Type of organization represented by the respondents** (n=21)

Most of the VET institutions, who filled survey, are medium size organisations with 50 to 249 employees (95%), and only one institution was a small company with 5 to 9 employees.

Fig. 1.6.16. **Size of organization represented by the respondents** (n=21)

Majority of institutions started to offer training programmes in the Spa and Wellness already during the last 11 to 20 years few years (19 institutions or 90%), one institution more than 20 years, and just one institution only 1 to 5 years.

Fig. 1.6.17. **The period of time during which the organization offers Spa and Wellness training programmes** (n=21)

Majority of respondents who filled the survey were teachers and trainers of VET institutions (90% or 19 respondents out of 21) and 2 managers of Vet institutions (10%).

Fig.1. 6.18. **Respondent’s current position** (n=21)

Serbia VET providers survey result analyses

As the most important skills and key competencies at Spa and Wellness establishments VET providers mentioned organisation skills, communication skills, teamwork skills, manual dexterity, foreign languages, customer service skills, management skills.

|  |
| --- |
| **The most important skills and key competencies at Spa and Wellness establishments** |
| organisation skills |
| communication skills |
| teamworks skills |
| manual dexterity |
| foreign languages |
| customer service skills |
| management skills |

When marking the weakest skills and lack of knowledge in students, respondents mentioned creativity and initiative (12 institutions), computer and IT skills as well as foreign languages (9 institutions each).

Fig. 1.6.19. **The** **skills and knowledge that respondents see as the weakest in students** (n=21)

When marking the largest increase in the skill requirements using a 10 point scale (1=no increase, 10=largest increase), all respondents agreed that largest increase is for technical skills and use of new technologies of Spa, complying with related legislation; occupational safety and health, fire protection and hygiene regulations, stress management skills as well as Spa and Wellness services design skills (10,0). Process skills for example Spa process skills and collaboration skills also were marked as having increase by dominating majority of respondents (9,95).

Fig. 1.6.20. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills for occupations in serious lack of personnel, VET providers using a 10 point scale (1=not requested, 10=most requested) all VET providers mentioned basic technical skills, basic professional skills, foreign languages skills for Spa terminology, learning skills, manual dexterity, time management skills, critical thinking skills, stress management skills, Spa and Wellness design skills, complying with related legislation; occupational safety and health, fire protection and hygiene regulations, versatility and capacity to fill in for absent workers as well as reliability and precision as most requested (10 point for each skill).

Fig. 1.6.21. **The most in-demand skills in the case of occupation, in which respondents experienced a serious lack of personnel** (on a scale from 1-not requested to 10-most requested)

When evaluating the importance of Spa and Wellness industry knowledge assessed in 5 point scale, all VET providers gave the same highest level of importance to knowledge about the Spa and Wellness services and products, knowledge of foreign languages, time management, General Data Protection Regulation (GDPR), related legislation; occupational safety and health, fire protection and hygiene regulations, knowledge of Spa and Wellness services design as well as work organization (5 points out of 5 for each skill).

Fig. 1.6.22. **The importance of the knowledge listed below for the Spa and Wellness industry** (on a scale from 1 – the least important to 5 – the most important)

When speaking about the lack of skills that have the greatest negative impact on the Spa and Wellness establishments using a 4 point scale (4=very significant impact to 1=very low impact), all VET providers highlighted technical, practical or job-specific skills (4,0). Also majority of VET providers outlined that the following skills have a very significant impact: foreign language skills (3,95), team working skills (3,86), management skills (3,76) and customer handling skills (3,62).

Fig. 1.6.23. **Absence of skills with the greatest negative impact on the Spa and Wellness establishments?** (on a scale from 4- very significant impact to 1-very low impact)

Based on their experience, VET providers specified the level of difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments using a 4 point scale (4=very difficult, 1=completely simple) and all respondents identified that the most difficult task is to find heads and representatives of authority and all levels of authority and managers (4,0). Also big part of respondents identified that the most difficult task is to skilled workers like Spa specialists, sales and marketing specialists (3,9), followed by highly qualified specialists including medical staff (3,81).

Fig. 1.6.24. **The difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments in different job categories** (on a scale from 1-completely simple to 4-very difficult)

All VET providers had equal opinion about the reasons for increase in skill requirements in Spa and Wellness establishments (4=very significant impact to 1=very low impact) marking higher quality standards for the Spa and Wellness services (4,0), and majority also more competitive business environment in Spa and Wellness industry (3,95) - as having very significant impact.

Fig. 1.6.25. **The** **reason(s) for increase of skill requirements in Spa and Wellness establishments** (on a scale from 4-very significant impact to 1-very low impact)

When thinking about possible changes that are going to shape the future of the Spa and Wellness sector, all VET providers highlighted changes in technologies including Spa technologies, working methods, new therapies, new techniques, IT as well as production like materials, quality, and eco recycling.

Fig. 1.6.26. **Changes going to shape the future of the sector** (n=21)

## Conclusions from Serbia SPA and Wellness employer survey and VET provider survey result analysis

Comparing survey results of Spa and Wellness employer opinion with VET providers in Serbia, the most in-demand skills from the point of view of both Spa and Wellness employers as well as VET providers are foreign languages skills including for Spa terminology. Spa and Wellness employer also mentioned product and services sales skills and capacity to work under stress. However, VET providers highlighted basic technical skills and basic professional skills.

Comparing survey results of Spa and Wellness employer opinion with VET providers, as the largest increase in the skill requirements both outlined technical skills and use of new technologies of Spa. Large increase mentioned by Spa and Wellness employers was also for foreign language skills and customer oriented communication skills; but VET providers outlined with the same high importance also complying with related legislation; occupational safety and health, fire protection and hygiene regulations, stress management skills and Spa and Wellness services design skills.

Both Spa and Wellness employers as well as VET providers outlined in the importance of knowledge, knowledge about the Spa and Wellness services and products. Spa and Wellness employers also highlighted importance of knowledge of psychology of sales and marketing as well as leadership and motivation of employees. However, VET providers mentioned importance also with the same high importance knowledge of foreign languages, time management, General Data Protection Regulation (GDPR), related legislation; occupational safety and health, fire protection and hygiene regulations, knowledge of Spa and Wellness services design, work organization, technical, practical or job-specific skills, team-working skills

When speaking about lack of skills that have the highest negative impact, both Spa and Wellness employers and VET providers had the same opinion that foreign language skills would have the most negative impact. Spa and Wellness employers also mentioned oral communication skills and customer handling skills. However, VET providers outlined also technical, practical or job-specific skills as well as team working skills.

When evaluating the difficulty to find skilled labour to fill vacancies both Spa and Wellness employers and VET providers had the same opinion about job categories with highest difficulty: skilled workers as Spa specialists, sales & marketing specialists, highly qualified specialists like medical staff, heads, representatives of authority and all levels of authority and managers.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Skill outlined by both Spa and Wellness employers and VET providers | Skill outlined only by Spa and Wellness employers | Skill outlined only by VET providers |
| The most in-demand skills | * foreign languages skills for Spa terminology   A picture containing text, clipart, vector graphics  Description automatically generated | * product and services sales skills * capacity to work under stress | * basic technical skills, * basic professional skills |
| The largest increase in the skill requirements | * technical skills and use of new technologies of Spa,   Diagram  Description automatically generated | * foreign language skills * customer oriented communication skills | * complying with related legislation; occupational safety and health, fire protection and hygiene regulations * stress management skills * Spa and Wellness services design skills |
| The importance of knowledge | * knowledge about the Spa and Wellness services and products, | * psychology of sales and marketing, * leadership and motivation of employees | * knowledge of foreign languages, * time management, * General Data Protection Regulation (GDPR), * related legislation; occupational safety and health, fire protection and hygiene regulations, * knowledge of Spa and Wellness services design * work organization |
| Lacking skills that have the highest negative impact | * foreign language skills | * oral communication skills * customer handling skills | * technical, practical or job-specific skills, * team working skills |
| The difficulty to find skilled labour to fill vacancies | * skilled workers as Spa specialists, sales & marketing specialists, * highly qualified specialists like medical staff Icon    Description automatically generated * heads, representatives of authority and all levels of authority and managers   Icon  Description automatically generated |  |  |

* 1. SLOVENIA

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## Slovenia employer survey result analysis

Slovenia employer survey respondent structure analysis

Of the 22 surveyed companies in Slovenia, the majority – 11 companies or 50% - are private SPA and Wellness centres and 7 private SPA and Wellness hotels.

Fig. 1.7.1. **Organisation types represented by the respondents** (n=22)

Respondents from Slovenia represented all different size of companies. Majority of respondents were from SMEs, 14% of companies employed 1 to 4 employees, 14% of companies 5 to 9 employees and again 14% were small size companies employing 10 to 49 employees. The largest proportion (32%) were medium size companies employing 50 to 249 employees. 27% of respondents represented large size companies.

Fig. 1.7.2. **Number of employees in the companies represented by the respondents** (n=22)

Slovenia Spa and wellness sector respondent structure consists of:

manager of establishment (55%), supervisor of establishment (14%), Owner of establishment (14%), and other.

Fig. 1.7.3. **Respondent’s occupation** (n=22)

Slovenia employer survey result analyses

Seven out of ten surveyed companies of Slovenia (64% of companies), when looking for suitable employees with relevant knowledge and skills, faces most difficulties related to willingness to work overtime and flexitime. The second most common difficulty was related to inter-personal/communication skills indicated by 59% of surveyed companies. The third group of the most common difficulties was creativity and initiative as well as versatility and capacity to fill in for absent workers (50% each). The next difficulties, when looking for suitable employees with relevant knowledge and skills, were honesty and integrity, loyalty as well as reliability and precision (45% each).

Fig. 1.7.4. **Difficulties companies face when looking for suitable employees with relevant knowledge and skills** (n=22)

The skills that experienced the largest increase of requirements are curiosity and commitment skills - 9,23 points each (in 10-point scale from 1=no increase to 10=largest increase), collaboration skills – 9,14 , basic skills for offering Spa treatments and customer oriented communication skills 8,95 each. (Fig. 1.7.5).

Fig. 1.7.5. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills are: Total Quality Management skills – 8,95 points (in 10-point scale from 1-not requested to 10-most requested), client relations skills – 8,86, capacity to work autonomously as well as reliability and precision – 8,82 each, teamwork skills – 8,59, honesty, integrity and loyalty – 8,55, problem solving skills – 8,5 (Fig. 1.7.6).

Fig. 1.7.6. **The most in-demand skills in professions, where there is a serious shortage of staff in the establishment** (on a scale from1-not requested to 10-most requested)

The most important knowledge for work: leadership and motivation of employees – 4,73 points (in 5-point scale from 1=the least important to 5=most important), knowledge about the Spa and Wellness services and products as well as work organization – 4,59 each, knowledge of Spa and Wellness services design – 4,5 as well as time management – 4.45 points

Fig. 1.7.7. **The importance of knowledge in different areas of the establishment** (on a scale from 1-the least important to 5-the most important)

The skills, when lacking, that have the greatest negative impact on the establishment: customer handling skills – 3.82 points (in 4-point scale from 1-very low impact to 4-very significant impact), oral communications skills – 3,77, team working skills as well as literacy skills – 3,41 points each.

Fig. 1.7.8. **The impact level of lacking skills on the establishment** (on a scale from 1-very low impact to 4-very significant impact)

The importance in their job of reading, becoming familiar with and comprehending the instructions, guidelines, manuals or reports of Spa establishment is indicated as very important by half of surveyed companies (50%); the rest marked it as rather important (50%). (Fig. 1.7.9).

In the survey, it did not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports.

Fig. 1.7.9. **Importance of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishment in respondent’s job** (n=22; %)

The importance level in the job of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages was indicated as very important by 41% of companies and as rather important by 55%of companies. (Fig. 1.7.10).

Fig. 1.7.10. **Importance of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages in respondent’s job** (n=22; %)

Referring to personnel jobs on a scale where 4-very important/ 3-rather important/ 2-rather unimportant/ 1-completely unimportant, as the most important skills respondents marked making speeches or presentations to internal or external audiences as well as working as a member of a group or team with 3,63 out of 4 each, followed by instructing, training or teaching people, individually or in groups with 3,58,

Fig. 1.7.11. **Importance of different skills in the establishment** (on a scale from 1-completely unimportant to 4-very important)

When evaluating importance of the Spa and Wellness professionals tasks in the establishment, most respondents of Slovenia (68%) emphasize acknowledging and responding to relevant customer queries, needs and expectations, 67% indicate suggesting treatment to customer based on their needs, 64% - customer-oriented, friendly but professional approach, 59% highlight suggesting and promoting retail products or additional services as well as applying best practices and be up to date with market trends.

Fig. 1.7.12. **Increase or decrease in importance of certain tasks** (n=22; %)

When evaluating level of difficulty to find skilled labour to fill vacancies, the highest level – 3,14 out of 4 was indicated for highly qualified specialists like medical staff, followed by heads and representatives of authority and all levels of authority and managers, (3,07 out of 4). As the third group of skilled labour to fill vacancies was mentioned skilled workers like Spa specialists, sales and marketing specialists (3,05 out of 4).

Fig. 1.7.13. **Difficulties to find skilled labour to fill vacancies at respondent’s establishment in different job categories** (on a scale from 1-completely simple to 4-very difficult)

The main subject that respondents mentioned as the most important for training or education programmes was Spa and Wellness services design (4,23 out of 5), physiotherapy and other subjects related to health, wellbeing, etc. (4,14 out of 5), and as third written and spoken communication (4,09 out of 5).

Fig. 1.7.14. **Importance of training topics** **if a training, or even an education programme would be offered** (on a scale from 1 – the least important to 5 – the most important)

## Slovenia VET provider survey result analysis

Slovenia VET providers survey respondent structure analysis

Respondent structure indicates that dominating majority of VET providers of Slovenia who filled the survey represented public institutions (26 institutions out of 29), only 2 respondents were from private institutions, and one from PPP (Public Private Partnership), also majority being VET institutions (27 institutions out of 29).

Fig. 1.7.15. **Type of organization represented by the respondents** (n=29)

Most of the VET institutions, who filled survey, are SMEs, majority small size organisations 55% with 10 to 49 employees, followed by medium size companies – 38% employing 50 to 249 employees.

Fig. 1.7.16. **Size of organization represented by the respondents** (n=29)

VET institutions of Slovenia who filled the survey have a wide range of time since offering Spa and Wellness training programs. Still more than half of institutions offer such education already for long period of time – more than 20 years (55% of institutions) and more than third of institutions (34%) are operating in this field already for 11 till 20 years.

Fig. 1.7.17. **The period of time during which the organization offers Spa and Wellness training programmes** (n=29)

Majority of respondents who filled the survey were teachers and trainers of VET institutions (86%), and 2 managers of VET institutions (7%).

Fig. 1.7.18. **Respondent 's current position** (n=29)

Slovenia VET providers survey result analyses

As the TOP3 most important skills and key competencies at Spa and Wellness establishments VET providers mentioned professionalism with wellness expertise, IT skills with marketing, sales skills and trends following as well as communication skills in foreign languages, kindness and empathy.

|  |
| --- |
| **The most important skills and key competencies at Spa and Wellness establishments** |
| Professionalism with wellness expertise |
| IT skills with marketing, sales skills and trends following |
| Communication skills in foreign languages, kindness and empathy |

When marking the TOP3 weakest skills and lack of knowledge in students, majority of respondents agreed that creativity and initiative (48%), inter-personal communication skills (45%) and problem-solving skills (41%) are the weakest. As the next weakest skills were indicated information management as well as reliability, and precision (34%).

Fig. 1.7.19. **The** **skills and knowledge that respondents see as the weakest in students** (n=29)

When marking the largest increase in the skill requirements using a 10 point scale (1=no increase, 10=largest increase), respondents outlined customer oriented communication skills (8,97), commitment skills (8,69), curiosity as well as work experience attitude (8,55 each). VET providers also highlighted social skills as well as Spa and Wellness services design skills (8,41) as having increase in requirements.

Fig. 1.7.20. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills for occupations in serious lack of personnel, VET providers using a 10 point scale (1=not requested, 10=most requested) mentioned client relations skills (9,72), reliability and precision (9,45), Total Quality Management skills as well as honesty, integrity and loyalty (9,17).

Fig. 1.7.21. **The most in-demand skills in the case of occupation, in which respondents experienced a serious lack of personnel** (on a scale from 1-not requested to 10-most requested)

When evaluating the importance of Spa and Wellness industry knowledge assessed in 5 point scale, VET providers mentioned knowledge about psychology of sales and marketing (3,41), knowledge about the Spa and Wellness services and products as well as work organization (3,34)

Fig. 1.7.22. **The importance of the knowledge for the Spa and Wellness industry** (on a scale from 1 – the least important to 5 – the most important)

When speaking about the lack of skills that have the greatest negative impact on the Spa and Wellness establishments using a 4 point scale (4=very significant impact to 1=very low impact), VET providers outlined that the following skills have a very significant impact have customer handling skills (3,71), oral communication skills (3,68), problem solving skills (3,32) and foreign language skills (3,29 out of 4 points).

Fig. 1.7.23. **Absence of skills with the greatest negative impact on the Spa and Wellness establishments?** (on a scale from 4- very significant impact to 1-very low impact)

Based on their experience, VET providers specified the level of difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments using a 4 point scale (4=very difficult, 1=completely simple) and identified that the most difficult task is to find heads, representatives of authority and all levels of authority, managers (3,38), also highly qualified specialists including medical staff (3,28), followed by skilled workers, like Spa specialists, sales & marketing specialists (3,00).

Fig. 1.7.24. **The difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments in different job categories** (on a scale from 1-completely simple to 4-very difficult)

When speaking about the reasons for increase in skill requirements in Spa and Wellness establishments (4=very significant impact to 1=very low impact), as the most important VET providers as having significant impact marked higher quality standards for the Spa and Wellness services (3,66) and more competitive business environment in Spa and Wellness industry (3,61).

Fig. 1.7.25. **The** **reason(s) for increase of skill requirements in Spa and Wellness establishments** (on a scale from 4-very significant impact to 1-very low impact)

When thinking about possible changes that are going to shape the future of the Spa and Wellness sector, majority of VET providers (66% or 19 institutions) highlighted changes in the market like client’s expectations, legal regulations.

Fig. 1.7.26. **Changes going to shape the future of the sector** (n=29)

## Conclusions from Slovenia SPA and Wellness employer survey and VET provider survey result analysis

Comparing survey results of Spa and Wellness employer opinion with VET providers in Slovenia, both groups indicated client relations skills, reliability, precision, and Total Quality Management skills. Also as the most in-demand skills from the point of view of Spa and Wellness employers is capacity to work autonomously. However, VET providers also highlighted honesty, integrity and loyalty.

Comparing survey results of Spa and Wellness employer opinion with VET providers, as the largest increase in the skill requirements both outlined commitment skills and curiosity. Large increase for collaboration skills was also mentioned by Spa and Wellness employers; but VET providers outlined also customer-oriented communication skills and work experience attitude.

In the importance of knowledge, Spa and Wellness employers and VET providers as the most important knowledge both mentioned knowledge about the Spa and Wellness services and products as well as work organization. Spa and Wellness employers also highlighted importance of knowledge of leadership and motivation of employees. However, VET providers mentioned importance of knowledge about psychology of sales and marketing.

When speaking about lack of skills that have the highest negative impact, both Spa and Wellness employers and VET providers had the same opinion that customer, handling skills and oral communications skills would have the most negative impact. Spa and Wellness employers also highlighted team working skills and literacy skills. However, VET providers mentioned problem-solving skills as have the highest negative impact.

When evaluating the difficulty to find skilled labour to fill vacancies both Spa and Wellness employers and VET providers had the same opinion about job categories with highest difficulty - the heads, representatives of authority and all levels of authority, managers, highly qualified specialists including medical staff, skilled workers, like Spa specialists, sales and marketing specialists.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Skill outlined by both Spa and Wellness employers and VET providers | Skill outlined only by Spa and Wellness employers | Skill outlined only by VET providers |
| The most in-demand skills | * client relations skills * reliability and precision * Total Quality Management skills | * capacity to work autonomously | * honesty, integrity and loyalty |
| The largest increase in the skill requirements | * commitment skills * curiosity | * collaboration skills | * customer oriented communication skills * work experience attitude |
| The importance of knowledge | * knowledge about the Spa and Wellness services and products * work organization | * leadership and motivation of employees | * knowledge about psychology of sales and marketing |
| Lacking skills that have the highest negative impact | * customer handling skills,   Icon  Description automatically generated   * oral communications skills | * team working skills * literacy skills | * problem solving skills |
| The difficulty to find skilled labour to fill vacancies | * heads, representatives of authority and all levels of authority, managers   Icon  Description automatically generated   * highly qualified specialists including medical staff   Icon  Description automatically generated   * skilled workers, like Spa specialists, sales and marketing specialists |  |  |

1.8. FEMTEC

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## 1.8.1. FEMTEC employer survey result analysis

FEMTEC employer survey respondent structure analysis

Of the 5 companies surveyed by the World Federation of Hydrotherapy and Climatotherapy (FEMTEC), one was Private Spa, Spa and Wellness hotel, one was Private Public partnership, Spa and Wellness center, the rest represented other type of organisations.

Fig. 1.8.1. **Organisation types represented by the respondents** (n=5)

Majority of FEMTEC respondents were from MSMEs, one represented enterprise with 1 to 4 employees, three small enterprises employing 10 to 49 employees and one medium enterprise with 50 to 249 employees.

Fig. 1.8.2. **Number of employees in the companies represented by the respondents** (n=5)

FEMTEC Spa and wellness sector respondent structure consists of:

one supervisor of establishment, one operator of establishment and two owners of establishment.

Fig 1.8.3. **Respondent’s occupation** (n=5)

FEMTEC employer survey result analyses

More than half of surveyed companies of FEMTEC, when looking for suitable employees with relevant knowledge and skills, faces most difficulties related to basic technical skills and computer and IT skills (3 out of 5 enterprises). Next most mentioned difficulties were foreign languages, problem-solving skills, versatility and capacity to fill in for absent workers as well as willingness to work overtime and flexitime, each mentioned by 2 out of 5 surveyed companies.

Fig. 1.8.4. **Difficulties companies face when looking for suitable employees with relevant knowledge and skills** (n=5)

The skills that experienced the largest increase of requirements are technical skills and use of new technologies of Spa – 9.4 points (in 10-point scale from 1=no increase to 10=largest increase), high level or specific ICT skills – 8,4 as well as complying with related legislation; occupational safety and health, fire protection and hygiene regulations– 8,2 (Fig. 1.8.5).

Fig. 1.8.5. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills are: decision making – 8,6 points (in 10-point scale from 1-not requested to 10-most requested), willingness to work overtime and flexitime – 8,4, as well as problem solving skills– 8,25 points (Fig. 1.8.6)

Fig. 1.8.6. **The most in-demand skills in professions, where there is a serious shortage of staff in the establishment** (on a scale from1-not requested to 10-most requested)

The most important knowledge for work: knowledge of foreign languages and information technology and database work - 3,8 points each (in 5-point scale from 1=the least important to 5=most important), followed by knowledge about the tourism services and products – 3,6 points.

Fig. 1.8.7. **The importance of knowledge in different areas of the establishment** (on a scale from 1-the least important to 5-the most important)

The skills, when lacking, that have the greatest negative impact on the establishment, employers mentioned IT professional skills and technical, practical or job-specific skills (3,8 out of 4 points). Also management skills were outlined as having negative impact (3,6 out of 4).

Fig. 1.8.8. **The impact level of lacking skills on the establishment** (on a scale from 1-very low impact to 4-very significant impact)

The importance in their job of reading, becoming familiar with and comprehending the instructions, guidelines, manuals or reports of Spa establishment is indicated as very important only by three of surveyed companies and two companies marked it as rather important. (Fig. 1.8.9)

In the survey, it did not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports.

All 5 respondents answered that the importance of that task is increasing.

Fig. 1.8.9. **Importance of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishment in respondent’s job** (n=5; %)

The importance level in the job of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages was indicated as very important by two companies and rather important also by two companies. one company indicated such instructions as rather unimportant (Fig. 1.8.10)

Fig. 1.8.10. **Importance of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages in respondent’s job** (n=5; %)

Referring to personnel jobs, on a scale where 4-very important/ 3-rather important/ 2-rather unimportant/ 1-completely unimportant, as the most important skill respondents marked instructing, training or teaching people, individually or in groups with 3,8 points, followed by communicating in a foreign language, learning new ideas, methods or techniques as well as adapting to new Spa and Wellness equipment or materials, each was evaluated with 3,2.

Fig. 1.8.11. **Importance of different skills in the establishment** (on a scale from 1-completely unimportant to 4-very important)

When evaluating the importance of the Spa and Wellness professional tasks in the establishment, all respondents (100%) emphasize the following 5 skills with the increasing importance – uphold hygiene standards and follow health and safety regulations, acknowledging and responding to relevant customer queries, needs and expectations, good time-management skills, interpersonal and communication skills as well as positive attitude and patience.

Fig. 1.8.12. **Increase or decrease in importance of certain tasks** (n=5; %)

When evaluating the level of difficulty to find skilled labour to fill vacancies, all respondents indicated heads and representatives of authority and all levels of authority and managers, as well as highly qualified specialists like medical staff (each 4 out of 4 points). As the third group of skilled labour to fill vacancies were mentioned skilled workers like Spa specialists, sales and marketing specialists (3 out of 4 points).

Fig. 1.8.13. **Difficulties to find skilled labour to fill vacancies at respondent’s establishment in different job categories** (on a scale from 1-completely simple to 4-very difficult)

The main subject that respondents mentioned as the most important for training or education programmes was HR – human resources management and training. (3,4 out of 5), followed by ensuring Epidemiological and hygiene requirements, construction, development, design and architecture of wellness centres, organisation and supervision of apprenticeships and other work-based learning forms as well as written and spoken communication (3, 2 out of 5).

Fig. 1.8.14. **Importance of training topics** **if a training, or even an education programme would be offered** (on a scale from 1 – the least important to 5 – the most important)

## 1.8.2. FEMTEC VET provider survey result analysis

FEMTEC VET providers survey respondent structure analysis

Respondent structure indicates that the majority of VET providers, who filled the survey of FEMTEC, represented public institutions (4 institutions out of 6), also one private institution and one PPPs (Private Public Partnership). Majority of respondents were from VET institutions (4 institutions out of 6).

Fig. 1.8.15. **Type of organization represented by the respondents** (n=6)

VET institutions, who filled survey represented different size organisations, one institution employs1 to 4 employees, two employ 5 to 9 employees, two employ 10 to 49 employees and one is large organisations with over 250 employees.

Fig. 1.8.16. **Size of organization represented by the respondents** (n=6)

VET institutions who filled the survey of FEMTEC have a long experience offering Spa and Wellness training programs. Majority of institutions started to offer training programmes in the Spa and Wellness already during the last 11 to 20 years (5 institutions out of 6), one institution offer training programmes already more than 20 years.

Fig. 1.8.17. **The period of time during which the organization offers Spa and Wellness training programmes** (n=6)

Majority of respondents who filled the survey were managers of VET institutions (5 respondents out of 6) and one teacher / trainers of VET institution.

Fig. 1.8.18. **Respondent 's current position** (n=6)

FEMTEC VET providers survey result analysis

As the most important skills and key competencies at Spa and Wellness establishments VET providers mentioned product knowledge, communication and customer orientation, holistic medicine, administration management, basic technical, management, working with the customer, legal knowledge and honesty, organization, clinical management, inter-personal communication, master skills, sales and management, biology and holistic vision, communication, hydrologic management, honesty, versatility and capacity to fill in for absent workers.

|  |
| --- |
| **The most important skills and key competencies at Spa and Wellness establishments** |
| Product knowledge  Communication and customer orientation  Holistic medicine  Administration Management, Management,  Basic technical, |
| Working with the customer  Legal knowledge and honesty  Organization  Clinical Management  Inter-personal communication  Master skills |
| Sales and management  Biology and holistic vision  Communication  Hydrologic Management  Honesty  Versatility and capacity to fill in for absent workers |

When marking the weakest skills and lack of knowledge in students, respondents mentioned basic technical skills and foreign languages (4 institutions each), followed by management and master skills as well as information management (3 institutions each).

Fig. 1.8.19. **The** **skills and knowledge that respondents see as the weakest in students** (n=6)

When marking the largest increase in the skill requirements using a 10 point scale (1=no increase, 10=largest increase), respondents outlined largest increase for basic skills for offering Spa treatments and technical skills like use of new technologies of Spa (8,5 each). Complying with related legislation; occupational safety and health, fire protection and hygiene regulations (7,67) also were marked as having increase by dominating majority of respondents.

Fig. 1.8.20. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

The most in-demand skills for occupations in serious lack of personnel, VET providers using a 10 point scale (1=not requested, 10=most requested) mentioned client relations skills (8,33), followed by basic technical skills, foreign languages skills for Spa terminology and willingness to work overtime, flexitime (7,67 each).

Fig. 1.8.21. **The most in-demand skills in the case of occupation, in which respondents experienced a serious lack of personnel** (on a scale from 1-not requested to 10-most requested)

When evaluating the importance of Spa and Wellness industry knowledge assessed in 5 point scale, VET providers gave high level of importance to knowledge about the time management and consumer rights (3,5 each), followed by knowledge about the tourism services and products as well as General Data Protection Regulation (3,33 each).

Fig. 1.8.22. **The importance of the knowledge listed below for the Spa and Wellness industry** (on a scale from 1 – the least important to 5 – the most important)

When speaking about the lack of skills that have the greatest negative impact on the Spa and Wellness establishments using a 4 point scale (4=very significant impact to 1=very low impact), VET providers highlighted technical, practical or job-specific skills (3,83). Also majority of VET providers outlined that the following skills have a very significant impact: customer handling skills (3,5) followed by team working skills, foreign language skills and problem solving skills (3,33 each).

Fig. 1.8.23. **Absence of skills with the greatest negative impact on the Spa and Wellness establishments** (on a scale from 4- very significant impact to 1-very low impact)

Based on their experience, VET providers specified the level of difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments using a 4 point scale (4=very difficult, 1=completely simple) and respondents identified that the most difficult task is to find heads and representatives of authority and all levels of authority, managers as well as highly qualified specialists like medical staff (3,67 each job category), followed by average qualification specialists like technicians, masters, accountants, salespersons, cashiers, etc. (3,00 points).

Fig. 1.8.24. **The difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments in different job categories** (on a scale from 1-completely simple to 4-very difficult)

VET providers marked opinion about the reasons for increase in skill requirements in Spa and Wellness establishments (4=very significant impact to 1=very low impact) and indicated higher quality standards for the Spa and Wellness services - as having very significant impact. (3,67 out of 4 points).

Fig. 1.8.25. **The** **reason(s) for increase of skill requirements in Spa and Wellness establishments** (on a scale from 4-very significant impact to 1-very low impact)

When thinking about possible changes that are going to shape the future of the Spa and Wellness sector, VET providers highlighted changes the market like client’s expectations, legal regulations etc., after corona new knowledge of the market, quality/price ratio, client's expectations, client's spa techniques knowledge, market competition, legal regulations, economic evolution, globalisation, quality of service, legal regulations. Also changes in employees will shape the future in sector, especially challenges getting more difficult to get employees, responsibility, professional skill, communication customer oriented, new medical and wellness skills, technical skills, professional profile, productivity, supply. In technologies, changes mentioned by respondents were new technologies, new therapies, new techniques, Web, Web and Social Marketing, Communication, Innovation, Quality of Facilities, Equipment, spa technologies, in production - Eco recycling, emerging technologies and wellness tests, hygiene, safety, quality

|  |  |
| --- | --- |
| **Changes going to shape the future of the sector** | |
| The market (e.g. client’s expectations, legal regulations etc.) | After corona new knowledge of the market, quality/price ratio, client's expectations, client's spa techniques knowledge, Market competition, Legal regulations, Economic evolution, Globalisation, Quality of Service, Legal regulations |
| Employees (supply, productivity etc.) | Getting more difficult to get, Responsibility, Professional skill, Communication customer oriented, New medical and wellness skills, Technical Skills, Professional Profile, Productivity, Supply |
| Technologies (Spa technologies, working methods, new therapies, new techniques, IT etc.) | new technologies, new therapies, new techniques, Web, Web&Social Marketing, Communication, Innovation, Quality of Facilities, Equipment, spa technologies, |
| Production (materials, quality, eco recycling etc.) | Eco recycling, Emerging technologies and wellness tests, Hygiene, Safety, Quality |

## Conclusions from FEMTEC SPA and Wellness employer survey and VET provider survey result analysis

Comparing survey results of Spa and Wellness employer opinion with VET providers surveyed by FEMTEC, both groups indicated willingness to work overtime and flexitime as most in-demand skills. Also as the most in-demand skills from the point of view of Spa and Wellness employers is decision making and problem solving skills. However, VET providers also highlighted client relations skills, basic technical skills and foreign languages skills for Spa terminology.

Comparing survey results of Spa and Wellness employer opinion with VET providers, as the largest increase in the skill requirements both outlined technical skills like use of new technologies of Spa, complying with related legislation; occupational safety and health, fire protection and hygiene regulations. Large increase for high level or specific ICT skills was also mentioned by Spa and Wellness employers; but VET providers outlined also basic skills for offering Spa treatments.

In the importance of knowledge, Spa and Wellness employers and VET providers as the most important knowledge both mentioned knowledge about the tourism services and products. Spa and Wellness employers also highlighted importance of knowledge of foreign languages and knowledge of information technology and database work. However, VET providers mentioned importance of knowledge about time management, knowledge of consumer rights and knowledge about General Data Protection Regulation.

When speaking about lack of skills that have the highest negative impact Spa and Wellness employers and VET providers did not have common opinion about skills would have the most negative impact. Spa and Wellness employers highlighted IT professional skills and technical, practical or job-specific skills and management skills. However, VET providers mentioned technical, practical or job-specific skills, customer handling skills, team working skills, foreign language skills and problem-solving skills.

When evaluating the difficulty to find skilled labour to fill vacancies both Spa and Wellness employers and VET providers had the same opinion about job categories with highest difficulty - heads and representatives of authority and all levels of authority and managers as well as highly qualified specialists like medical staff. Spa and Wellness employers also mentioned skilled workers like Spa specialists, sales and marketing specialists, but VET providers added also average qualification specialists like technicians, masters, accountants, salespersons, cashiers, etc.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Skill outlined by both Spa and Wellness employers and VET providers | Skill outlined only by Spa and Wellness employers | Skill outlined only by VET providers |
| The most in-demand skills | * willingness to work overtime and flexitime | * decision making * problem solving skills | * client relations skills * basic technical skills * foreign languages skills for Spa terminology |
| The largest increase in the skill requirements | * technical skills like use of new technologies of Spa * complying with related legislation; occupational safety and health, fire protection and hygiene regulations | * high level or specific ICT skills | * basic skills for offering Spa treatments |
| The importance of knowledge | * knowledge about the tourism services and products | * knowledge of foreign languages * knowledge of information technology and database work | * knowledge about time management * knowledge of consumer rights * knowledge about General Data Protection Regulation |
| Lacking skills that have the highest negative impact |  | * IT professional skills and technical, practical or job-specific skills * management skills | * technical, practical or job-specific skills * customer handling skills * team working skills * foreign language skills * problem solving skills |
| The difficulty to find skilled labour to fill vacancies | * heads and representatives of authority and all levels of authority and managers * highly qualified specialists like medical staff | * skilled workers like Spa specialists, sales and marketing specialists | * average qualification specialists like technicians, masters, accountants, salespersons, cashiers, etc. |

2. SPA AND WELLNESS EMPLOYER SURVEY AND VET PROVIDER SURVEY RESULT ANALYSES – SUMMARIES AND COMPARISONS

Map

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Spa and Wellness employer as well as Vocational education and training (VET) provider survey was conducted in seven countries of Europe – Bulgaria, France, Greece, Italy, Latvia, Serbia, Slovenia, also survey was filled by WeSkill project partner organisation World Federation of Hydrotherapy and Climatotherapy (FEMTEC).

The first part of analyses will comprise results from Spa and Wellness employer responses, second part will continue with VET provider opinion, and as the third part of analyses will be overall comparison of common and different opinions of both stakeholders. In each skill analyses at the beginning comprised data is included and afterwards calculation for each country separately is highlighted, as well as adding FEMTC opinion.

## 2.1. Employer survey result analysis

Spa and Wellness employer survey was filled by 150 companies from all seven countries of Europe Bulgaria, France, Greece, Italy, Latvia, Serbia, Slovenia, as well as by WeSkill project partner FEMTEC.

Employer survey respondent structure analysis

Spa and Wellness employer survey respondents were from variety of sector companies. Of the 150 surveyed companies in seven countries, the majority – 41% - are private SPA and Wellness centers and 30% are private Spa, Spa and Wellness hotels. Survey also was filled by public organisations.

Fig. 2.1. **Organisation types represented by the respondents** (n=150; %)

From the company size perspective, respondents of survey covered different size companies - 11% enterprises employing 1 to 4 employees, 21% enterprises employing 5 to 9 employees, majority or 36% represented small enterprises with 10 to 49 employees, 18% middle size enterprises with 50 to 249 employees, and 15% large enterprises with more than 250 employees.

Fig. 2.2. **Number of employees in the companies represented by the respondents** (n=150; %)

Spa and Wellness sector employer survey respondent structure consists mostly from managers and owners of the enterprises. Survey was filled by supervisors of establishments (11%), managers of establishments (37%), operators of establishments (9%) and owners of establishments (14%) and other positions like department managers, sales managers, etc.

Fig. 2.3. **Respondent’s occupation** (n=150; %)

Further analyses will include Spa and Wellness employer survey result analyses related to knowledge and skills curtail for the development of their sector.

Employer survey result analyses

More than half of surveyed companies (55% of companies), when looking for suitable employees with relevant knowledge and skills, faces most difficulties related to **problem solving skills**. Next most mentioned difficulties were related to knowledge of foreign languages (44%), employee reliability and precision, their willingness to work overtime and flexitime (42% each), their honesty, integrity and loyalty (40%) as well as **inter-personal and** **communication skills** (39%).

Spa and Wellness employer answers for difficulties to find employees with relevant knowledge and skills is based on the calculation of percentage of responses per 150 survey respondents showing how many percent of respondents have chosen the respective skill.

Fig. 2.4. **Difficulties companies face when looking for suitable employees with relevant knowledge and skills** (n=150; %)

The skills that experienced the largest increase of requirements are **customer oriented communication skills** – 7.98 points (in 10-point scale from 1=no increase to 10=largest increase), followed by **collaboration skills** (7,68), knowledge of foreign language (7,60), employee motivation or personality (7,59), **complying with related legislation, occupational safety and health, fire protection and hygiene regulations** (7,58), commitment skills (7,56). (Fig. 2.5).

Fig. 2.5. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

Customer oriented communication skills were mentioned in the list of TOP 6 skills with highest increase in requirements for Bulgaria, Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC. Collaboration skills were mentioned in the list of TOP 6 skills with highest increase in requirements for France, Greece, Italy, Latvia, and Slovenia. Knowledge of foreign language was mentioned in the list of TOP 6 skills with highest increase in requirements for Bulgaria and Serbia, Slovenia. Employee motivation or personality was mentioned in the list of TOP 6 skills with highest increase in requirements for Bulgaria, France, Italy and Serbia. Complying with related legislation, occupational safety and health, fire protection and hygiene regulations were mentioned in the list of TOP 6 skills with highest increase in requirements for Bulgaria, Greece as well as by FEMTEC. Commitment skills were mentioned in the list of TOP 6 skills with highest increase in requirements for Bulgaria, France, Latvia and Slovenia.

Table 2.1.

**Skills with the highest increase in requirements – by country**

(on a scale from 1-no increase to 10-largest increase)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| Basic skills (for offering Spa treatments) | 8,61 | 8,73 | 4,95 | 5,70 | 5,79 | 5,89 | 8,95 | **6,95** | 7 |
| Process skills (Spa process skills) | 8,23 | 7,93 | 4,85 | 6,05 | 7,31 | 6,68 | 8,46 | **7,07** | 7,4 |
| Social skills | 8,32 | 6,73 | 5,00 | 6,50 | 7,57 | 6,33 | 8,59 | **7,01** | 5 |
| Complex problem-solving skills | 7,48 | 6,93 | 6,65 | 7,30 | 7,57 | 7,12 | 7,73 | **7,25** | 6,8 |
| Technical skills (use of new technologies of Spa) | 8,00 | 7,53 | 6,35 | 6,95 | 6,93 | 7,79 | 6,68 | **7,18** | 9,4 |
| System skills | 7,58 | 6,13 | 5,35 | 6,00 | 5,82 | 6,56 | 7,64 | **6,44** | 5,6 |
| Resource management skills | 8,39 | 6,21 | 6,20 | 5,70 | 5,75 | 6,11 | 7,00 | **6,48** | 7,2 |
| Foreign language skills | 8,94 | 7,53 | 6,60 | 6,80 | 6,29 | 8,68 | 8,38 | **7,60** | 7 |
| Basic ICT skills | 8,10 | 6,57 | 6,35 | 6,50 | 5,54 | 6,94 | 7,36 | **6,77** | 7 |
| High level or specific ICT skills | 8,19 | 5,47 | 4,85 | 6,70 | 4,93 | 6,39 | 6,45 | **6,14** | 8,4 |
| Work experience attitude | 7,97 | 7,60 | 5,95 | 6,85 | 6,50 | 5,11 | 8,41 | **6,91** | 6,4 |
| Motivation or personality | 8,61 | 7,93 | 6,45 | 6,94 | 7,07 | 7,78 | 8,36 | **7,59** | 6,2 |
| Digital marketing skills (like video blogs, social media network etc.) | 8,10 | 5,40 | 7,25 | 6,85 | 6,80 | 7,65 | 7,18 | **7,03** | 6,8 |
| Customer oriented communication skills | 8,61 | 7,20 | 7,05 | 7,75 | 7,93 | 8,37 | 8,95 | **7,98** | 7,75 |
| Curiosity | 7,84 | 8,07 | 4,65 | 6,14 | 6,85 | 6,76 | 9,23 | **7,08** | 6,2 |
| Commitment skills | 8,48 | 7,67 | 6,44 | 6,75 | 7,42 | 6,94 | 9,23 | **7,56** | 6 |
| Critical thinking skills | 7,06 | 6,13 | 6,55 | 6,60 | 7,17 | 5,78 | 8,55 | **6,83** | 5,4 |
| Complying with related legislation; occupational safety and health, fire protection and hygiene regulations | 8,87 | 7,64 | 8,00 | 5,65 | 7,21 | 6,89 | 8,82 | **7,58** | 8,2 |
| Collaboration skills | 8,03 | 8,00 | 7,15 | 6,25 | 7,71 | 7,47 | 9,14 | **7,68** | 5,6 |
| Stress management skills | 8,29 | 7,47 | 5,90 | 6,25 | 8,08 | 7,44 | 8,91 | **7,48** | 5,8 |
| Sustainability management skills | 7,52 | 6,87 | 7,00 | 5,85 | 7,23 | 7,56 | 8,73 | **7,25** | 5,6 |
| Eco friendly skills | 8,48 | 6,29 | 6,15 | 5,95 | 7,06 | 6,83 | 8,36 | **7,02** | 6,4 |
| Sustainability, recycling skills | 7,77 | 6,27 | 5,80 | 5,85 | 5,69 | 5,89 | 8,41 | **6,53** | 8 |
| Spa and Wellness services design skills | 8,00 | 2,53 | 7,45 | 6,30 | 7,25 | 6,47 | 8,27 | **6,61** | 5,8 |

The most in-demand skills for occupations in serious lack of personnel, Spa and Wellness employers using a 10 point scale (1=not requested, 10=most requested) mentioned **client relation skills** (8,16), closely followed by honesty, integrity, loyalty (8,09). Reliability and precision (7,99), foreign language knowledge for Spa terminology (7,89), **Total Quality Management** (7,84), **inter-personal and communication skills**, p**roduct and service sales skills** (7,77) were also mentioned as the in-demand skills.

Fig. 2.6. **The most in-demand skills in professions, where there is a serious shortage of staff in the establishment** (on a scale from1-not requested to 10-most requested)

Client relation skills were mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by Spa and Wellness employers from France, Greece, Italy, Latvia and Slovenia. Honesty, integrity and loyalty were mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by Spa and Wellness employers from France, Greece, Italy, Serbia as well as by FEMTEC. Reliability and precision were mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by Spa and Wellness employers from Bulgaria, Latvia and Serbia as well as by FEMTEC. Foreign language knowledge for Spa terminology was mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by Spa and Wellness employers from Greece, Italy, and Serbia. Total Quality Management was mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by Spa and Wellness employers from Greece and Slovenia. Inter-personal and communication skills were mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by Spa and Wellness employers from Italy and Latvia. Product and service sales skills were mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by Spa and Wellness employers from Latvia and Serbia.

Table 2.2.

**The most in-demand skills in professions, where there is a serious shortage of staff in the establishment** (on a scale from1-not requested to 10-most requested)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| Basic technical skills | 6,48 | 9,27 | 6,05 | 5,50 | 7,86 | 5,78 | 6,41 | **6,76** | 7,8 |
| Basic professional skills | 8,42 | 8,87 | 6,65 | 7,10 | 8,14 | 6,24 | 8,32 | **7,68** | 7,8 |
| Inter-personal/ Communication skills | 8,12 | 8,80 | 6,70 | 7,50 | 8,93 | 6,17 | 8,18 | **7,77** | 7,6 |
| Computer/IT skills | 8,97 | 6,73 | 6,25 | 6,60 | 6,14 | 6,89 | 6,64 | **6,89** | 7,8 |
| Foreign languages skills (Spa terminology) | 8,48 | 8,73 | 7,25 | 7,05 | 7,31 | 8,63 | 7,77 | **7,89** | 5,8 |
| Creativity / initiative taking skills | 8,86 | 7,87 | 6,84 | 6,45 | 7,69 | 7,17 | 8,32 | **7,60** | 7 |
| Teamwork skills | 9,25 | 7,27 | 7,10 | 6,90 | 8,07 | 6,11 | 8,59 | **7,61** | 7,6 |
| Management/master skills | 8,89 | 7,67 | 6,15 | 6,60 | 5,92 | 6,24 | 7,14 | **6,94** | 8 |
| Learning skills | 7,97 | 7,06 | 6,05 | 6,55 | 7,31 | 6,06 | 7,27 | **6,90** | 5,8 |
| Client relations skills | 8,10 | 9,33 | 7,65 | 7,65 | 9,00 | 6,56 | 8,86 | **8,16** | 6,8 |
| Total quality management skills | 8,58 | 8,67 | 7,60 | 6,60 | 7,75 | 6,72 | 8,95 | **7,84** | 7,2 |
| Ability to improve personal learning and performance | 8,24 | 7,73 | 6,80 | 6,15 | 7,54 | 6,94 | 8,32 | **7,39** | 8,25 |
| Problem solving skills | 8,61 | 8,33 | 7,65 | 6,50 | 8,00 | 6,35 | 8,50 | **7,71** | 7,5 |
| Capacity to work autonomously | 8,25 | 9,80 | 6,60 | 6,60 | 7,00 | 6,06 | 8,82 | **7,59** | 8,6 |
| Decision making | 8,69 | 8,47 | 7,58 | 5,75 | 7,31 | 6,28 | 8,05 | **7,45** | 5,8 |
| Control and monitoring skills | 8,61 | 8,40 | 6,95 | 6,00 | 7,38 | 6,33 | 7,50 | **7,31** | 7,2 |
| Scheduling work | 9,05 | 9,33 | 7,00 | 6,60 | 7,38 | 6,47 | 7,82 | **7,67** | 5,6 |
| Product and services sales skills | 8,76 | 7,13 | 7,20 | 6,30 | 8,85 | 7,67 | 8,45 | **7,77** | 7,4 |
| Information management | 8,28 | 7,40 | 6,35 | 6,15 | 7,85 | 6,89 | 7,68 | **7,23** | 7,2 |
| Capacity to work under stress | 8,35 | 7,94 | 6,90 | 6,15 | 8,15 | 7,56 | 8,14 | **7,60** | 5,4 |
| Manual dexterity | 7,48 | 9,40 | 5,90 | 5,25 | 7,00 | 6,17 | 7,09 | **6,90** | 5,2 |
| E-commerce skills | 7,57 | 5,07 | 5,80 | 5,70 | 7,08 | 6,56 | 6,59 | **6,34** | 6 |
| Critical thinking skills | 7,83 | 6,73 | 6,50 | 6,55 | 6,92 | 5,89 | 7,77 | **6,89** | 6,6 |
| Stress management skills | 8,52 | 8,47 | 6,68 | 6,40 | 7,64 | 7,22 | 8,05 | **7,57** | 5,2 |
| Sustainability management skills | 8,19 | 9,53 | 6,45 | 6,70 | 7,08 | 6,41 | 7,59 | **7,42** | 4,8 |
| Spa and Wellness design skills | 8,68 | 3,87 | 6,65 | 5,60 | 6,92 | 6,28 | 7,59 | **6,51** | 7,2 |
| Complying with related legislation; occupational safety and health, fire protection and hygiene regulations | 9,27 | 9,53 | 7,00 | 5,80 | 7,62 | 6,05 | 7,82 | **7,58** | 7,6 |
| Versatility/capacity to fill in for absent workers | 7,89 | 8,87 | 7,00 | 5,40 | 7,00 | 6,44 | 8,27 | **7,27** | 7,4 |
| Business and entrepreneurial skills | 8,88 | 4,53 | 5,70 | 5,95 | 6,58 | 6,06 | 7,55 | **6,46** | 7,2 |
| Honesty/integrity/loyalty | 8,63 | 9,87 | 7,84 | 7,15 | 8,07 | 6,56 | 8,55 | **8,09** | 7,8 |
| Reliability/precision | 9,00 | 8,93 | 7,16 | 6,65 | 8,62 | 6,74 | 8,82 | **7,99** | 8,4 |
| Willingness to work overtime/flexitime | 8,64 | 9,33 | 6,50 | 6,75 | 7,85 | 6,22 | 8,36 | **7,67** | 7,8 |

As the most important knowledge for work Spa and Wellness employers outlined **knowledge about the Spa and Wellness services and products** – 4,29 points (in 5-point scale from 1=the least important to 5=most important), followed by **knowledge about the work organisation** (4,04), **time management, knowledge of Spa and Wellness services design** (3,86 each), knowledge of foreign languages (3,84), **knowledge about the psychology of sales and marketing** (3,81).

Fig. 2.7 **The importance of knowledge in different areas of the establishment** (on a scale from 1-the least important to 5-the most important)

Knowledge about the Spa and Wellness services and products was outlined as the most important knowledge by employers of all seven countries as well as by FEMTEC. Knowledge about the work organisation was outlined as important knowledge by employers of Bulgaria, France, Latvia, Serbia, Slovenia and by FEMTEC. Knowledge about time management was outlined as important knowledge by employers of Bulgaria, Greece, Italy, Latvia, Slovenia and by FEMTEC. Knowledge of Spa and Wellness services design was outlined as important knowledge by employers of Bulgaria, France, Latvia, Serbia and Slovenia. Knowledge of foreign languages was outlined as important knowledge by employers of Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC. Knowledge about the psychology of sales and marketing was outlined as important knowledge by employers of Italy, Latvia, Serbia and Slovenia.

Table 2.3.

**The importance of knowledge in different areas of the establishment – by country**

(on a scale from 1-the least important to 5-the most important)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| Knowledge about the Spa and Wellness services and products | 4,76 | 4,27 | 4,05 | 3,65 | 4,79 | 3,90 | 4,59 | **4,29** | 3,4 |
| Knowledge about the tourism services and products | 4,43 | 3,14 | 3,95 | 3,95 | 3,07 | 3,25 | 4,32 | **3,73** | 3,6 |
| Knowledge of foreign languages | 3,88 | 3,27 | 3,80 | 4,00 | 4,14 | 3,62 | 4,18 | **3,84** | 3,8 |
| Psychology of sales and marketing | 4,00 | 3,00 | 3,60 | 3,65 | 4,29 | 3,76 | 4,36 | **3,81** | 2,6 |
| Leadership and motivation of employees | 3,96 | 2,87 | 3,70 | 3,30 | 4,00 | 3,76 | 4,73 | **3,76** | 3 |
| Time management | 4,30 | 3,40 | 3,65 | 3,65 | 4,14 | 3,45 | 4,45 | **3,86** | 3,2 |
| Information technology and database work | 3,40 | 3,87 | 3,68 | 3,20 | 3,43 | 3,15 | 3,64 | **3,48** | 3,8 |
| Economic operations, financial planning, reporting, accountancy | 4,10 | 2,93 | 3,20 | 3,60 | 3,21 | 3,24 | 3,91 | **3,46** | 3 |
| Consumer rights | 4,16 | 2,60 | 3,20 | 3,20 | 3,38 | 3,05 | 4,05 | **3,38** | 3 |
| General Data Protection Regulation (GDPR) | 4,32 | 2,93 | 3,35 | 3,00 | 3,31 | 3,47 | 4,00 | **3,48** | 3,2 |
| Related legislation; occupational safety and health, fire protection and hygiene regulations | 4,07 | 3,73 | 3,58 | 3,45 | 3,77 | 3,60 | 4,14 | **3,76** | 2,4 |
| Knowledge of Spa and Wellness services design | 4,43 | 3,56 | 3,45 | 3,20 | 4,23 | 3,67 | 4,50 | **3,86** | 2,2 |
| Work organization | 4,50 | 4,40 | 3,45 | 3,15 | 4,31 | 3,89 | 4,59 | **4,04** | 3,4 |

The skills, when lacking, that have the greatest negative impact on the Spa and Wellness company, employers mentioned **customer handling skills** (3,53 out of 4 on a scale from 1-very low impact to 4-very significant impact), followed by **problem solving skills** (3,36), **oral communication skills** (3,29). Also skills like **management skills** and **technical, practical or job-specific skills** (3,30) as well as **team working skills** (3,18) were outlined as having negative impact in case if missing.

Fig. 2.8. **The impact level of lacking skills on the establishment** (on a scale from 1-very low impact to 4-very significant impact)

Customer handling skills were highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact on the Spa and Wellness companies in Bulgaria, Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC. Problem solving skills were highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact on the Spa and Wellness companies in all seven countries and by FEMTEC. Oral communication skills were highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact on the Spa and Wellness companies in Greece, Italy, Latvia, Serbia and Slovenia. Management skills were highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact on the Spa and Wellness companies in Bulgaria, France, Italy and by FEMTEC. Technical, practical or job-specific skills were highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact on the Spa and Wellness companies in Bulgaria, France, Greece, Italy, Latvia, Serbia and by FEMTEC. Team working skills. were highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact on the Spa and Wellness companies in Greece, Italy, Latvia, Serbia and Slovenia.

Table 2.4.

**The impact level of lacking skills on the establishment** (on a scale from 1-very low impact to 4-very significant impact)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| General IT user skills | 2,33 | 1,69 | 2,30 | 2,15 | 2,14 | 2,35 | 2,50 | **2,21** | 2,75 |
| IT professional skills | 1,81 | 2,87 | 2,39 | 2,58 | 2,45 | 2,07 | 2,10 | **2,32** | 3,8 |
| Oral communication skills | 3,00 | 2,59 | 3,50 | 3,20 | 3,50 | 3,50 | 3,77 | **3,29** | 2,8 |
| Written communication skills | 3,33 | 3,43 | 2,65 | 2,50 | 2,64 | 3,37 | 3,38 | **3,04** | 2,4 |
| Customer handling skills | 3,88 | 2,75 | 3,47 | 3,35 | 4,00 | 3,47 | 3,82 | **3,53** | 3,5 |
| Team working skills | 3,49 | 2,07 | 3,27 | 3,00 | 3,57 | 3,45 | 3,41 | **3,18** | 3 |
| Foreign language skills | 3,74 | 1,83 | 3,20 | 2,85 | 3,21 | 3,55 | 3,05 | **3,06** | 2,2 |
| Problem solving skills | 3,65 | 3,29 | 3,25 | 3,45 | 3,14 | 3,40 | 3,36 | **3,36** | 3,2 |
| Management skills | 3,55 | 4,00 | 2,85 | 3,25 | 3,00 | 3,25 | 3,18 | **3,30** | 3,6 |
| Technical, practical or job-specific skills | 3,56 | 3,09 | 3,05 | 3,30 | 3,69 | 3,40 | 3,00 | **3,30** | 3,8 |
| Literacy skills | 3,90 | 3,10 | 2,83 | 2,40 | 2,50 | 3,15 | 3,41 | **3,04** | 2,8 |
| Office admin skills | 2,74 | 4,00 | 2,60 | 2,25 | 2,77 | 2,71 | 2,73 | **2,83** | 3,4 |

The importance level in the job of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishment was indicated as very important by 59% of companies and 36% of companies indicated such instructions as rather important. Only 3% mentioned it as completely unimportant (Fig. 2.9).

Fig. 2.9. **Importance of reading and comprehending the instructions, guidelines, manuals or reports of Spa establishment in respondent’s job** (n=150; %)

The importance level in the job of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages was indicated as very important by majority of companies (61%) and rather important also by almost one third of companies (30%). 4% of respondent indicated such instructions as rather unimportant (Fig. 2.10)

Fig. 2.10. **Importance of writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages in respondent’s job** (n=150; %)

Referring to personnel jobs, on a scale where 4-very important/ 3-rather important/ 2-rather unimportant/ 1-completely unimportant, as the most important skill respondents marked learning new ideas, methods or techniques (3,52), closely followed by adapting to new Spa and Wellness equipment or materials (3,51) and working as a member of a group or team (3,50). Instructing, training or teaching people, individually or in groups was evaluated with 3,38 points.

Fig. 2.11. **Importance of different skills in the establishment** (on a scale from 1-completely unimportant to 4-very important)

Learning new ideas, methods or techniques were emphasized in the list of TOP 6 important skills for the Spa and Wellness companies of France, Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC. Adapting to new Spa and Wellness equipment or materials were emphasized in the list of TOP 6 important skills for the Spa and Wellness companies of France, Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC. Working as a member of a group or team were emphasized in the list of TOP 6 important skills for the Spa and Wellness companies of France, Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC. Instructing, training or teaching people, individually or in groups were emphasized in the list of TOP 6 important skills for the Spa and Wellness companies of Bulgaria, Italy, Latvia, Serbia, Slovenia and by FEMTEC.

Table 2.5.

**Importance of different skills in the establishment** (on a scale from 1-completely unimportant to 4-very important)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| Communicating in a foreign language | 3,76 | 2,53 | 3,65 | 3,10 | 3,29 | 3,55 | 2,72 | **3,23** | 3,4 |
| Making speeches or presentations to internal or external audiences | 3,71 | 2,83 | 3,20 | 3,15 | 2,46 | 2,94 | 2,89 | **3,03** | 3,2 |
| Working as a member of a group or team | 3,35 | 3,33 | 3,63 | 3,55 | 3,54 | 3,47 | 3,63 | **3,50** | 3,2 |
| Learning new ideas, methods or techniques | 3,30 | 3,36 | 3,62 | 3,45 | 3,50 | 3,75 | 3,63 | **3,52** | 3,4 |
| Adapting to new Spa and Wellness equipment or materials | 3,39 | 3,31 | 3,60 | 3,55 | 3,71 | 3,50 | 3,53 | **3,51** | 3,4 |
| Instructing, training or teaching people, individually or in groups | 3,81 | 2,57 | 3,05 | 3,65 | 3,54 | 3,47 | 3,58 | **3,38** | 3,8 |
| The implementation of practices to reduce the use of raw materials, energy or water? (eco-friendly company development) | 3,63 | 2,67 | 3,50 | 3,05 | 3,00 | 2,84 | 2,89 | **3,08** | 3,2 |

When evaluating the importance of the Spa and Wellness professional tasks in the establishment, most respondents (over 60%) emphasize the following 6 skills with the increasing importance – uphold hygiene standards and follow health and safety regulations (68%), communication and customer service skills (66%), acknowledging and responding to relevant customer queries, needs and expectations (65%), interpersonal and communication skills (62%), suggest treatments to customers based on their needs, creating and placing SPA packages on a website, or other platforms such as FB, Instagram, Video blogs etc. Work on e-shops with Spa offers (61% each).

Fig. 2.12. **Increase or decrease in importance of certain tasks** (importance is increasing (3), staying about the same (2), or decreasing (1), 0- Does not apply/ Don’t know) (n=150; %)

When evaluating the level of difficulty to find skilled labour to fill vacancies, the highest level – 3,34 out of 4 was indicated for highly qualified specialists like medical staff, followed by skilled workers as Spa specialists, sales and marketing specialists (3,23 out of 4) and heads and representatives of authority and all levels of authority, managers. (3,22). As the fourth group of skilled labour difficult to fill vacancies were mentioned average qualification specialists like technicians, masters, average accountants, sale persons, cashiers, etc. (3,08).

Fig. 2.13. **Difficulties to find skilled labour to fill vacancies at respondent’s establishment in different job categories** (on a scale from 1-completely simple to 4-very difficult)

Highly qualified specialists like medical staff were emphasized in the list of TOP 4 job categories difficult to find skilled labour to fill vacancies in all seven countries and by FEMTEC. Also skilled workers as Spa specialists, sales and marketing specialists were emphasized in the list of TOP 4 job categories difficult to find skilled labour to fill vacancies in all seven countries and by FEMTEC. Heads and representatives of authority and all levels of authority, managers were emphasized in the list of TOP 4 job categories difficult to find skilled labour to fill vacancies in France, Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC. Average qualification specialists like technicians, masters, average accountants, sale persons, cashiers, etc. were emphasized in the list of TOP 4 job categories difficult to find skilled labour to fill vacancies in France, Italy, Latvia, Serbia and by FEMTEC.

Table 2.6.

**Difficulties to find skilled labour to fill vacancies at respondent’s establishment in different job categories** (on a scale from 1-completely simple to 4-very difficult)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| Heads/reps of authority and all levels of authority (managers) | 3,33 | 3,17 | 3,37 | 3,44 | 3,08 | 3,06 | 3,07 | **3,22** | 4 |
| Highly qualified specialists (medical staff) | 3,90 | 2,67 | 3,37 | 3,39 | 3,67 | 3,26 | 3,14 | **3,34** | 4 |
| Average qualification specialists (technicians, masters, average accountants, sale persons, cashiers, etc.) | 3,26 | 2,67 | 2,47 | 2,22 | 2,62 | 2,76 | 2,63 | **2,66** | 2,4 |
| Employees responsible for preparation of information, registration of documents, other registration and services | 3,49 | 2,54 | 2,53 | 1,72 | 2,46 | 2,65 | 2,90 | **2,61** | 2 |
| Skilled workers (Spa specialists, sales & marketing specialists) | 3,83 | 3,00 | 3,30 | 2,94 | 3,14 | 3,37 | 3,05 | **3,23** | 3 |
| Support staff (drivers, security guys, etc.) | 3,03 | 1,71 | 2,00 | 1,59 | 2,25 | 1,94 | 2,08 | **2,09** | 1,2 |
| Unskilled workers (including unskilled support staff like office cleaners, yard-keepers) | 3,37 |  | 1,56 | 1,59 | 2,50 | 2,16 | 2,50 | **1,95** | 1 |

The main subject that respondents mentioned as the most important for training or education programmes was **physiotherapy and other subjects related to health, wellbeing**, etc. (4,11 out of 5), followed by **Spa and Wellness services design** as well as **written and spoken communication** (3,80 each). **Ensuring Epidemiological and hygiene requirements** was evaluated with 3,75 points.

Fig. 2.14. **Importance of training topics** **if a training, or even an education programme would be offered** (on a scale from 1 – the least important to 5 – the most important)

Physiotherapy and other subjects related to health and wellbeing were outlined in the list of TOP 4 as the most important subjects for training or education programmes in all seven countries. Spa and Wellness services design was outlined in the list of TOP 4 as the most important subjects for training or education programmes in Bulgaria, Greece, Latvia, Serbia and Slovenia. Written and spoken communication was outlined in the list of TOP 4 as the most important subjects for training or education programmes in Bulgaria, France, Italy, Latvia, Slovenia and by FEMTEC. Ensuring Epidemiological and hygiene requirements were outlined in the list of TOP 4 as the most important subjects for training or education programmes in France, Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC.

of Bulgaria, France, Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC.

Table 2.7.

**Importance of training topics** **if a training, or even an education programme would be offered** (on a scale from 1 – the least important to 5 – the most important)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| Physiotherapy and other subjects related to health, wellbeing, etc. | 4,81 | 3,73 | 3,65 | 4,35 | 4,00 | 4,10 | 4,14 | **4,11** | 3 |
| HR – human resources management and training | 4,19 | 2,67 | 3,35 | 3,75 | 3,54 | 3,63 | 3,45 | **3,51** | 3,4 |
| Economy and operation – calculations, marketing, budgeting, sales strategies | 4,32 | 3,36 | 3,59 | 4,10 | 3,23 | 3,65 | 3,45 | **3,67** | 2,6 |
| Ensuring Epidemiological and hygiene requirements | 4,27 | 3,47 | 3,76 | 3,80 | 3,85 | 3,50 | 3,59 | **3,75** | 3,2 |
| Spa and Wellness services design | 4,52 | 3,13 | 3,82 | 3,55 | 3,86 | 3,50 | 4,23 | **3,80** | 2,8 |
| Construction, development, design and architecture of wellness centres | 4,29 | 2,53 | 3,50 | 2,90 | 2,15 | 2,68 | 2,73 | **2,97** | 3,2 |
| Organisation and supervision of apprenticeships and other work-based learning forms | 4,13 | 3,27 | 3,71 | 3,05 | 3,46 | 3,15 | 3,18 | **3,42** | 3,2 |
| Written and spoken communication | 4,42 | 3,67 | 3,24 | 4,20 | 3,62 | 3,40 | 4,09 | **3,80** | 3,2 |

## 2.2. VET provider survey result analyses

Vocational education and training provider survey was filled by 165 institutions from all seven countries of Europe - Bulgaria, France, Greece, Italy, Latvia, Serbia, Slovenia, as well as by WeSkill project partner FEMTEC.

VET providers survey respondent structure analyses

Respondent structure indicates that VET providers, who filled the survey, represented a wide range of institutions, both private institutions (39%), public institutions (57%) and Public Private Partnerships (4%). Two thirds of respondents were VET institutions (67%), VET companies represent 29% of surveyed organisations.

Fig. 2.15. **Type of organization represented by the respondents** (n=165)

From the company size perspective, respondents of survey covered different size organisations - 5% organisations employing 1 to 4 employees, 15% organisations with 5 to 9 employees, 27% represented small organisations with 10 to 49 employees, one half or 50% middle size organisations with 50 to 249 employees, and 2% large organisations with more than 250 employees.

Fig. 2.16. **Size of organization represented by the respondents** (n=165)

VET institutions who filled the survey started to offer training programmes in the Spa and Wellness during different periods. 30% of institutions offer such training programmes recently during the last 1 to 5 years, 28% of institutions offer training programmes during the last 6 to 10 years, 29% of institutions offer training programmes already during the last 11 to 20 years and 13% of institutions are providing such program teaching even more than 20 years.

Fig. 2.17. **The period of time during which the organization offers Spa and Wellness training programmes** (n=165)

Spa and wellness sector VET provider respondent structure consists mostly from managers, teacher and trainers of VET insitutions. Survey was filled by managers of VET institutions in 18% of cases and by teachers and trainers of VET institutions in 68% of cases. 4% were quality mangers of VET institutions.

Fig. 2.18. **Respondent 's current position** (n=165)

VET providers survey result analyses

As the most important skills and key competencies at Spa and Wellness establishments, VET providers in open question most frequently were writing following skills and competences - professional positive communication with client, customer service skills/ customer service culture, foreign languages, especially English, quality of services provided, in-depth knowledge of manual and instrumental massage techniques, professional skills and techniques providing services, teamwork, knowledge of anatomy and physiology, management skills, digital marketing skills, IT skills, hand and manual dexterity and technique, reception, personalized consideration of customer needs, knowledge of hygiene, technical skills as well as knowledge of materials.

|  |
| --- |
| **The most important skills and key competencies at Spa and Wellness establishments** |
| Professional positive communication with client |
| Customer service skills/ customer service culture |
| Foreign languages/ English |
| Quality of services provided |
| In-depth knowledge of manual and instrumental massage techniques |
| Professional skills and techniques providing services |
| Teamwork |
| Knowledge of anatomy and physiology |
| Management skills |
| Digital marketing skills |
| IT skills |
| Hand/manual dexterity and technique |
| Reception |
| Personalized consideration of customer needs |
| Knowledge of hygiene |
| Technical skills |
| Knowledge of materials |
| Diversification offer |
| Knowledge of the fundamentals |
| Care |
| Social skills |
| Smile |
| Expertise |
| Efficiency |
| Knowledge of the sector |
| Holistic care of the client |
| Specialization |
| Organisation |
| Problem solving |
| Human resources |
| The ability to tell the client in detail, comprehensibly and interestedly about the procedures, their advantages and disadvantages, effects, possible side effects, the desired amount, etc. important issues |
| Diversity of Spa procedures |
| Good hygiene and beauty etiquette |
| Hospitality |
| Knowledge of epidemiological safety issues |
| Environmental design |
| Psychology |
| Innovation |
| Outstanding ethical behaviour and impeccable moral attitude, the ability to build trust |
| Maintain customer well-being |
| Kindness and empathy |

When marking the weakest skills and lack of knowledge in students, almost half of surveyed VET providers mentioned **inter-personal and communication skills** (44%), closely followed by knowledge of foreign languages (42%). **Problem-solving skills** (38%), computer and IT skills, **teamwork skills** (36% each), **management and master skills, creativity and initiative** (33%) also were marked as weak skills in students.

VET provider answers for weakest skills in students is based on the calculation of percentage of responses per 165 survey respondents showing how many percent of respondents have chosen the respective answer.

Fig. 2.19. **The** **skills and knowledge that respondents see as the weakest in students** (n=165; %)

When marking increase in the skill requirements using a 10 point scale (1=no increase, 10=largest increase), VET providers outlined largest increase for **customer oriented communication skills** (8,56) and **technical skills like use of new technologies of Spa** (8,03). **Social skills** (7,98), employee motivation or personality (7,94), knowledge of foreign language (7,88), **Spa and Wellness services design skills** (7,84) also were marked as having increase in the skill requirements.

Fig. 2.20. **Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

Customer oriented communication skills were mentioned in the list of TOP 6 skills with highest increase in requirements for Bulgaria, France, Greece, Italy, Latvia and Slovenia. Technical skills like use of new technologies of Spa were mentioned in the list of TOP 6 skills with highest increase in requirements for Greece, Italy, Serbia as well as by FEMTEC. Social skills were mentioned in the list of TOP 6 skills with highest increase in requirements for Bulgaria, Italy, Latvia and Slovenia. Employee motivation or personality was mentioned in the list of TOP 6 skills with highest increase in requirements for France and Italy. Knowledge of foreign language was mentioned in the list of TOP 6 skills with highest increase in requirements for France, Latvia as well as by FEMTEC. Spa and Wellness services design skills were mentioned in the list of TOP 6 skills with highest increase in requirements for Bulgaria, France, Serbia and Slovenia.

Table 2.8.

**Skills with the highest increase in requirements** (on a scale from 1-no increase to 10-largest increase)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| Basic skills (for offering Spa treatments) | 6,45 | 6,84 | 7,80 | 6,36 | 7,14 | 9,57 | 7,83 | **7,43** | 8,50 |
| Process skills (Spa process skills) | 6,76 | 5,00 | 7,15 | 5,20 | 7,86 | 9,95 | 7,59 | **7,07** | 7,33 |
| Social skills | 8,67 | 6,26 | 7,85 | 7,18 | 7,64 | 9,86 | 8,41 | **7,98** | 7,00 |
| Complex problem-solving skills | 8,82 | 5,89 | 8,05 | 6,91 | 7,07 | 8,81 | 7,97 | **7,65** | 7,00 |
| Technical skills (use of new technologies of Spa) | 7,94 | 6,05 | 8,80 | 8,23 | 7,57 | 10,0 | 7,62 | **8,03** | 8,50 |
| System skills | 8,15 | 5,00 | 7,55 | 5,23 | 6,79 | 8,10 | 8,10 | **6,99** | 6,00 |
| Resource management skills | 8,15 | 5,16 | 7,60 | 5,77 | 7,14 | 9,62 | 7,17 | **7,23** | 6,83 |
| Foreign language skills | 7,52 | 7,68 | 7,45 | 6,68 | 8,00 | 9,52 | 8,31 | **7,88** | 8,17 |
| Basic ICT skills | 8,27 | 6,53 | 6,80 | 6,09 | 7,36 | 8,86 | 7,86 | **7,39** | 7,00 |
| High level or specific ICT skills | 7,82 | 6,11 | 7,25 | 8,05 | 6,14 | 8,19 | 7,31 | **7,27** | 6,83 |
| Work experience attitude | 8,15 | 7,21 | 8,05 | 7,09 | 6,93 | 8,76 | 8,55 | **7,82** | 7,17 |
| Motivation or personality | 8,15 | 7,32 | 7,80 | 7,27 | 7,36 | 9,71 | 7,97 | **7,94** | 6,67 |
| Digital marketing skills (like video blogs, social media network etc.) | 7,52 | 7,68 | 8,45 | 8,41 | 7,07 | 7,43 | 8,17 | **7,82** | 7,50 |
| Customer oriented communication skills | 8,27 | 8,16 | 8,00 | 9,00 | 7,71 | 9,81 | 8,97 | **8,56** | 6,67 |
| Curiosity | 7,94 | 6,63 | 6,95 | 5,95 | 6,50 | 8,05 | 8,55 | **7,22** | 5,83 |
| Commitment skills | 8,00 | 6,79 | 6,60 | 6,36 | 6,79 | 8,95 | 8,69 | **7,46** | 6,33 |
| Critical thinking skills | 8,15 | 5,58 | 7,65 | 5,59 | 6,93 | 9,86 | 7,86 | **7,37** | 5,83 |
| Complying with related legislation; occupational safety and health, fire protection and hygiene regulations | 7,52 | 5,95 | 7,30 | 5,86 | 7,64 | 10,0 | 7,66 | **7,42** | 7,67 |
| Collaboration skills | 8,27 | 6,11 | 7,90 | 5,50 | 7,36 | 9,95 | 8,34 | **7,63** | 7,33 |
| Stress management skills | 7,94 | 5,53 | 7,90 | 5,41 | 7,57 | 10,0 | 8,00 | **7,48** | 7,00 |
| Sustainability management skills | 8,15 | 6,16 | 7,35 | 5,91 | 6,71 | 8,76 | 8,00 | **7,29** | 7,33 |
| Eco friendly skills | 8,15 | 5,95 | 7,80 | 6,09 | 7,29 | 9,67 | 8,14 | **7,58** | 6,17 |
| Sustainability, recycling skills | 7,52 | 6,53 | 7,50 | 6,79 | 6,79 | 9,90 | 8,14 | **7,59** | 6,67 |
| Spa and Wellness services design skills | 8,27 | 5,89 | 7,90 | 6,91 | 7,5 | 10,0 | 8,41 | **7,84** | 7,00 |

The most in-demand skills for occupations in serious lack of personnel, VET providers using a 10 point scale (1=not requested, 10=most requested) mentioned **client relation skills** (8,37), closely followed by **inter-personal and communication skills** (8,34). Foreign language knowledge for Spa terminology, honesty, integrity, loyalty, reliability and precision – all were marked with 8,12 points. **Product and service sales skills** were marked with 7,89.

Fig. 2.21. **The most in-demand skills in the case of occupation, in which respondents experienced a serious lack of personnel** (on a scale from 1-not requested to 10-most requested)

Client relation skills were mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by VET providers from Italy, Latvia, Slovenia as well as by FEMTEC. Inter-personal and communication skills were mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by VET providers from France, Italy, Latvia as well as by FEMTEC. Foreign language knowledge for Spa terminology was mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by VET providers from Bulgaria, France, Italy, Latvia, Serbia as well as by FEMTEC. Honesty, integrity and loyalty were mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by VET providers from Slovenia and by FEMTEC. Reliability and precision were mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by VET providers from Italy, Latvia, Serbia and Slovenia. Product and service sales skills were mentioned in the list of TOP 6 most in-demand skills in serious lack of personnel by VET providers from Greece and Italy.

Table 2.9.

**The most in-demand skills in the case of occupation, in which respondents experienced a serious lack of personnel** (on a scale from 1-not requested to 10-most requested)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| Basic technical skills | 7,94 | 6,47 | 7,40 | 7,55 | 8,14 | 10,0 | 7,55 | **7,86** | 7,00 |
| Basic professional skills | 8,15 | 6,63 | 7,45 | 6,45 | ... | 10,0 | 8,59 | **7,88** | 7,67 |
| Inter-personal/ Communication/ skills | 8,15 | 6,16 | 7,70 | 9,32 | 9,00 | 9,19 | 8,86 | **8,34** | 7,33 |
| Computer/IT skills | 7,52 | 6,00 | 6,80 | 7,00 | 6,86 | 9,24 | 7,69 | **7,30** | 6,33 |
| Foreign languages skills (Spa terminology) | 8,27 | 6,16 | 7,80 | 7,32 | 8,64 | 10,0 | 8,62 | **8,12** | 7,67 |
| Creativity/initiative taking skills | 8,09 | 4,42 | 7,45 | 5,50 | 8,36 | 9,90 | 8,69 | **7,49** | 6,17 |
| Teamwork skills | 8,15 | 5,37 | 7,85 | 6,64 | 8,21 | 10,0 | 8,66 | **7,84** | 7,17 |
| Management/master skills | 8,15 | 4,63 | 7,65 | 6,64 | 6,36 | 9,67 | 6,52 | **7,09** | 7,50 |
| Learning skills | 8,15 | 4,68 | 8,05 | 7,09 | 8,00 | 10,0 | 7,21 | **7,60** | 6,83 |
| Client relations skills | 7,52 | 5,47 | 7,45 | 9,32 | 9,21 | 9,90 | 9,72 | **8,37** | 8,33 |
| Total quality management skills | 8,27 | 5,26 | 7,65 | 6,64 | 7,86 | 9,24 | 9,17 | **7,73** | 6,83 |
| Ability to improve personal learning and performance | 7,97 | 4,95 | 7,75 | 6,59 | 8,50 | 9,86 | 8,72 | **7,76** | 7,00 |
| Curiosity/ initiative | 8,15 | 4,89 | 7,15 | 6,27 | 8,00 | 9,76 | 8,83 | **7,58** | 5,50 |
| Manual dexterity | 8,15 | 5,32 | 7,30 | 6,23 | 9,14 | 10,0 | 8,59 | **7,82** | 6,17 |
| Problem solving skills | 8,15 | 4,63 | 8,25 | 6,82 | 8,00 | 9,95 | 8,55 | **7,77** | 6,83 |
| Capacity to work autonomously | 7,52 | 5,00 | 8,20 | 7,09 | 8,29 | 8,71 | 8,83 | **7,66** | 7,00 |
| Information management | 8,27 | 5,21 | 8,05 | 6,59 | 7,71 | 9,62 | 7,93 | **7,63** | 6,33 |
| Decision making | 7,76 | 5,95 | 7,85 | 6,23 | 8,50 | 9,67 | 8,14 | **7,73** | 6,67 |
| Control and monitoring skills | 8,15 | 5,44 | 7,95 | 6,59 | 7,50 | 8,62 | 7,76 | **7,43** | 7,00 |
| Scheduling work | 8,36 | 4,89 | 7,90 | 7,09 | 8,21 | 9,90 | 8,72 | **7,87** | 6,83 |
| Product and services sales skills | 7,52 | 5,21 | 7,95 | 8,95 | 7,93 | 9,81 | 7,86 | **7,89** | 7,17 |
| Time management skills | 8,27 | 5,21 | 8,20 | 6,59 | 8,36 | 10,0 | 8,41 | **7,86** | 7,17 |
| Capacity to work under stress | 8,00 | 6,16 | 7,85 | 6,09 | 8,86 | 9,95 | 7,97 | **7,84** | 7,17 |
| E-commerce skills | 8,15 | 5,53 | 7,80 | 8,95 | 7,00 | 9,86 | 7,69 | **7,85** | 5,67 |
| Critical thinking skills | 8,15 | 4,53 | 7,70 | 5,50 | 7,71 | 10,0 | 8,00 | **7,37** | 5,50 |
| Stress management skills | 8,15 | 4,79 | 7,60 | 6,09 | 8,50 | 10,0 | 7,97 | **7,59** | 6,33 |
| Sustainability management skills | 7,52 | 5,68 | 7,90 | 6,36 | 7,36 | 9,38 | 8,24 | **7,49** | 6,67 |
| Spa and Wellness design skills | 8,27 | 5,63 | 7,15 | 7,23 | 8,57 | 10,0 | 8,03 | **7,84** | 6,33 |
| Complying with related legislation; occupational safety and health, fire protection and hygiene regulations | 7,97 | 5,00 | 7,45 | 6,14 | 8,64 | 10,0 | 8,03 | **7,60** | 6,33 |
| Business and entrepreneurial skills | 8,15 | 4,58 | 7,30 | 6,64 | 7,5 | 9,81 | 7,62 | **7,37** | 6,83 |
| Honesty/integrity/loyalty | 8,15 | 6,37 | 7,45 | 7,50 | 8,36 | 9,81 | 9,17 | **8,12** | 7,33 |
| Versatility/capacity to fill in for absent workers | 7,64 | 4,84 | 7,35 | 7,09 | 8,14 | 10,0 | 9,10 | **7,74** | 7,00 |
| Reliability/precision | 7,79 | 5,00 | 7,90 | 7,91 | 8,79 | 10,0 | 9,45 | **8,12** | 6,67 |
| Willingness to work overtime/flexitime | … | 4,95 | 7,75 | 7,23 | 8,29 | 9,95 | 9,14 | **7,88** | 7,67 |

When evaluating the importance of Spa and Wellness industry knowledge assessed in 5 point scale, majority of VET providers gave the highest level of importance to knowledge of foreign languages (3,82). Also **knowledge about the Spa and Wellness services and products** (3,72), **time management** (3,64), **psychology of sales and marketing** (3,60), **related legislation, occupational safety and health, fire protection and hygiene regulations, knowledge of Spa and Wellness services design** (3,59 each) were marked as important.

Fig. 2.22. **The importance of the knowledge listed below for the Spa and Wellness industry** (on a scale from 1 – the least important to 5 – the most important)

Knowledge of foreign languages was outlined in the list of TOP 6 most important knowledge by VET providers of Bulgaria, Greece, Italy, Latvia and Serbia. Knowledge about the Spa and Wellness services and products was outlined in the list of TOP 6 most important knowledge by VET providers of Bulgaria, Latvia, Serbia and Slovenia. Knowledge about time management was outlined in the list of TOP 6 most important knowledge by VET providers of Bulgaria, Italy, Latvia, Serbia, Slovenia and by FEMTEC. Knowledge of psychology of sales and marketing was outlined in the list of TOP 6 most important knowledge by VET providers of Bulgaria, Italy, Latvia and Slovenia. Knowledge of related legislation, occupational safety and health, fire protection and hygiene regulations was outlined in the list of TOP 6 most important knowledge by VET providers of Bulgaria, France, Latvia and Serbia. Knowledge of Spa and Wellness services design was outlined in the list of TOP 6 most important knowledge by VET providers of Bulgaria, Italy, Latvia, Serbia and Slovenia.

Table 2.10.

**The importance of the knowledge listed below for the Spa and Wellness industry** (on a scale from 1 – the least important to 5 – the most important)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| Knowledge about the Spa and Wellness services and products | 5,00 | 2,00 | 2,10 | 4,55 | 4,14 | 5,00 | 3,28 | **3,72** | 3,00 |
| Knowledge about the tourism services and products | 5,00 | 2,00 | 2,15 | 4,05 | 3,64 | 4,90 | 3,24 | **3,57** | 3,33 |
| Knowledge of foreign languages | 5,00 | 2,17 | 3,20 | 4,05 | 4,14 | 5,00 | 3,21 | **3,82** | 2,83 |
| Psychology of sales and marketing | 5,00 | 1,61 | 2,25 | 4,45 | 3,64 | 4,86 | 3,41 | **3,60** | 3,00 |
| Leadership and motivation of employees | 5,00 | 2,78 | 1,85 | 3,36 | 3,64 | 4,71 | 3,21 | **3,51** | 3,00 |
| Time management | 5,00 | 2,61 | 1,85 | 3,68 | 4,07 | 5,00 | 3,28 | **3,64** | 3,50 |
| Information technology and database work | 5,00 | 2,78 | 2,25 | 3,14 | 3,5 | 4,52 | 3,28 | **3,49** | 2,83 |
| Economic operations, financial planning, reporting, accountancy | 5,00 | 2,94 | 2,15 | 2,86 | 3,36 | 4,10 | 3,24 | **3,38** | 2,67 |
| Consumer rights | 5,00 | 3,00 | 2,35 | 2,95 | 3,57 | 4,71 | 3,17 | **3,54** | 3,50 |
| General Data Protection Regulation (GDPR) | 5,00 | 3,00 | 2,15 | 2,86 | 3,64 | 5,00 | 3,14 | **3,54** | 3,33 |
| Related legislation; occupational safety and health, fire protection and hygiene regulations | 5,00 | 3,00 | 1,95 | 3,18 | 3,86 | 5,00 | 3,17 | **3,59** | 3,17 |
| Knowledge of Spa and Wellness services design | 5,00 | 2,28 | 1,90 | 4,05 | - | 5,00 | 3,34 | **3,59** | 2,50 |
| Work organization | 5,00 | 2,39 | 1,90 | 3,32 | 3,64 | 5,00 | 3,34 | **3,51** | 2,33 |

When speaking about the lack of skills that have the greatest negative impact on the Spa and Wellness establishments using a 4 point scale (4=very significant impact to 1=very low impact), VET providers highlighted **customer handling skills and technical, practical or job-specific skills** (3,38 each). **Oral communication skills**, knowledge of foreign language (3,17 each), **problem solving skills** (3,12), **team working skills** (3,09) were mentioned as having negative impact in case of absence.

Fig. 2.23. **Absence of skills with the greatest negative impact on the Spa and Wellness establishments?** (on a scale from 4- very significant impact to 1-very low impact)

Customer handling skills were highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact in Bulgaria, Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC. Technical, practical or job-specific skills were highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact in Bulgaria, France, Italy, Latvia, Serbia and by FEMTEC. Oral communication skills were highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact in Bulgaria, Greece, Italy, Latvia, Slovenia and by FEMTEC. Knowledge of foreign language was highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact in Bulgaria, Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC. Problem solving skills were highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact in Bulgaria, Greece, Italy, Latvia, Serbia, Slovenia and by FEMTEC. Team working skills were highlighted in the list of TOP 6 skills, when lacking, that have the greatest negative impact in Bulgaria, Greece, Serbia, Slovenia and by FEMTEC.

Table 2.11.

**Absence of skills with the greatest negative impact on the Spa and Wellness establishments?** (on a scale from 4- very significant impact to 1-very low impact)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| General IT user skills | 3,44 | 1,72 | 2,30 | 2,32 | 1,79 | 2,48 | 2,62 | **2,38** | 3,17 |
| IT professional skills | 3,06 | 1,50 | 2,45 | 3,32 | 2,07 | 1,76 | 2,35 | **2,36** | 3,17 |
| Oral communication skills | 4,00 | 1,44 | 2,85 | 3,91 | 3,86 | 2,48 | 3,68 | **3,17** | 3,17 |
| Written communication skills | 3,61 | 1,50 | 2,50 | 2,95 | 2,79 | 1,81 | 3,18 | **2,62** | 2,50 |
| Customer handling skills | 4,00 | 1,28 | 3,25 | 3,86 | 3,93 | 3,62 | 3,71 | **3,38** | 3,50 |
| Team working skills | 4,00 | 1,65 | 3,25 | 2,36 | 3,36 | 3,86 | 3,18 | **3,09** | 3,33 |
| Foreign language skills | 4,00 | 1,44 | 2,85 | 3,14 | 3,5 | 3,95 | 3,29 | **3,17** | 3,33 |
| Problem solving skills | 4,00 | 1,67 | 2,85 | 3,05 | 3,5 | 3,48 | 3,32 | **3,12** | 3,33 |
| Management skills | 4,00 | 1,61 | 3,25 | 3,09 | 2,79 | 3,76 | 2,52 | **3,00** | 3,00 |
| Technical, practical or job-specific skills | 4,00 | 2,28 | 2,75 | 3,91 | 3,57 | 4,00 | 3,14 | **3,38** | 3,83 |
| Literacy skills | 4,00 | 1,83 | 2,35 | 1,86 | 2,57 | 2,80 | 3,00 | **2,63** | 2,40 |
| Office admin skills | 4,00 | 2,11 | 3,30 | 1,90 | 2,43 | 3,05 | 2,43 | **2,75** | 2,83 |

Based on their experience, VET providers specified the level of difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments using a 4 point scale (4=very difficult, 1=completely simple) and respondents identified that the most difficult task is to find highly qualified specialists like medical staff (2,94), closely followed by skilled workers like Spa specialists, sales and marketing specialists (2,92). Heads and representatives of authority and all levels of authority and managers (2,88) also were marked as skilled staff difficult to find.

Fig. 2.24. **The difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments in different job categories** (on a scale from 1-completely simple to 4-very difficult)

Highly qualified specialists like medical staff were emphasized in the list of TOP 4 job categories difficult to find skilled labour to fill vacancies in Bulgaria, Greece, Italy, Serbia, Serbia, Slovenia and by FEMTEC. Skilled workers as Spa specialists, sales and marketing specialists were emphasized in the list of TOP 4 job categories difficult to find skilled labour to fill vacancies in Bulgaria, Greece, Italy, Latvia, Serbia, Serbia, Slovenia and by FEMTEC. Heads and representatives of authority and all levels of authority, managers were emphasized in the list of TOP 4 job categories difficult to find skilled labour to fill vacancies in Greece, Italy, Serbia, Serbia, Slovenia and by FEMTEC. Average qualification specialists like technicians, masters, average accountants, sale persons and cashiers were emphasized in the list of TOP 4 job categories difficult to find skilled labour to fill vacancies in Bulgaria, Greece, Serbia, Serbia, and by FEMTEC.

Table 2.12.

**The difficulty to find skilled labour to fill vacancies at Spa and Wellness establishments in different job categories** (on a scale from 1-completely simple to 4-very difficult)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| Heads/reps of authority and all levels of authority (managers) | 2,61 | 1,89 | 3,20 | 3,36 | 1,71 | 4,00 | 3,38 | **2,88** | 3,67 |
| Highly qualified specialists (medical staff) | 3,88 | 1,78 | 2,75 | 3,24 | 1,86 | 3,81 | 3,28 | **2,94** | 3,67 |
| Average qualification specialists (technicians, masters, average accountants, sale persons, cashiers, etc.) | 3,61 | 1,94 | 2,45 | 1,95 | 1,57 | 3,57 | 2,08 | **2,45** | 3,00 |
| Employees responsible for preparation of information, registration of documents, other registration and services | 3,61 | 2,00 | 2,25 | 1,50 | 1,93 | 3,19 | 2,68 | **2,45** | 2,50 |
| Skilled workers (Spa specialists, sales & marketing specialists) | 3,61 | 1,83 | 2,70 | 2,86 | 2,5 | 3,90 | 3,00 | **2,92** | 2,83 |
| Support staff (drivers, security guys, etc.) | 3,61 | 2,00 | 2,45 | 1,10 | 1,07 | 2,67 | 1,71 | **2,09** | 2,00 |
| Unskilled workers (including unskilled support staff like office cleaners, yard-keepers) | 3,61 | 2,17 | 2,30 | 1,00 | 1,36 | 2,19 | 1,57 | **2,03** | 1,25 |

VET providers marked opinion about the reasons for increase in skill requirements in Spa and Wellness establishments (4=very significant impact to 1=very low impact) and indicated change in higher quality standards for the Spa and Wellness services (3,33), as well as more competitive business environment in Spa and Wellness industry (3,31 out of 4 points) and new technologies (2,81) - as having very significant impact.

Fig. 2.25. **The** **reason(s) for increase of skill requirements in Spa and Wellness establishments** (on a scale from 4-very significant impact to 1-very low impact)

Change in higher quality standards for the Spa and Wellness services was revealed in the list of TOP 3 reasons for increase in skill requirements in Spa and Wellness establishments in Bulgaria, Greece, Serbia, Slovenia and by FEMTEC. More competitive business environment in Spa and Wellness industry was revealed in the list of TOP 3 reasons for increase in skill requirements in Spa and Wellness establishments in all seven countries and by FEMTEC. New technologies was revealed in the list of TOP 3 reasons for increase in skill requirements in Spa and Wellness establishments in Bulgaria, Italy, Latvia and by FEMTEC.

Table 2.1

**The** **reason(s) for increase of skill requirements in Spa and Wellness establishments** (on a scale from 4-very significant impact to 1-very low impact)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | BGR | FRA | GRC | ITA | LVA | SRB | SVN | **ALL** | FEMTEC |
| New technology | 4,00 | 1,35 | 2,95 | 3,45 | 3,43 | 1,10 | 3,36 | **2,81** | 3,50 |
| Change in workplace organization (e.g., more emphasis on personal skills, etc.) | 4,00 | 1,83 | 2,80 | 2,81 | 3,07 | 1,37 | 3,41 | **2,76** | 2,83 |
| Higher quality standards (for the Spa and Wellness services) | 4,00 | 1,78 | 3,25 | 3,19 | 3,43 | 4,00 | 3,66 | **3,33** | 3,67 |
| More competitive business environment in Spa and Wellness industry | 4,00 | 1,83 | 3,15 | 3,32 | 3,29 | 3,95 | 3,61 | **3,31** | 3,50 |

When thinking about possible changes that are going to shape the future of the Spa and Wellness sector, VET providers highlighted changes in technologies like Spa technologies, working methods, new therapies, new techniques, IT (68%), closely followed by changes in the market, for example client’s expectations, legal regulations (64%).

Fig. 2.26. **Changes going to shape the future of the sector** (n=145)

## 2.3. Conclusions from SPA and Wellness employer survey and VET provider survey result analysis

Comparing survey results of Spa and Wellness employer opinion with VET providers, the TOP in-demand skills are quite similar for both stakeholders. **Client relation skills, inter-personal and communication skills, foreign language knowledge for Spa terminology, honesty, integrity, loyalty, reliability and precision, product and service sales skills** – all were mentioned by both stakeholders. Spa and Wellness employer also additionally mentioned Total Quality Management.

When speaking about the increase in the skill requirements, both Spa and Wellness employers and VET providers had the same opinion that **customer-oriented communication skills**, **knowledge of foreign language** and **employee motivation or personality** will have the largest increase. Large increase was mentioned by Spa and Wellness employers was also **collaboration skills** and complying with **related legislation, occupational safety and health, fire protection and hygiene regulations and commitment skills**. However, VET providers outlined also technical skills like use of **new technologies of Spa, social skills** and **Spa and Wellness services design skills**.

In the importance of knowledge, Spa and Wellness employers and VET providers as the most important knowledge both stakeholders mentioned **knowledge about the Spa and Wellness services and products, knowledge of foreign languages, knowledge about time management, knowledge of Spa and Wellness services design, knowledge about the psychology of sales and marketing**. Spa and Wellness employers also highlighted importance of knowledge about the work organisation. However, VET providers mentioned importance of the **knowledge about related legislation, occupational safety and health, fire protection and hygiene regulations**.

When speaking about lack of skills that have the highest negative impact, both Spa and Wellness employers and VET providers had the same opinion that **customer handling skills, technical, practical or job-specific skills, oral communication skills, problem solving skills** and **team working skills** would have the most negative impact. Spa and Wellness employers also mentioned **management skills**. However, VET providers outlined also **knowledge of foreign language**.

When evaluating the difficulty to find skilled labour to fill vacancies both Spa and Wellness employers and VET providers had the same opinion about job categories with highest difficulty - highly qualified specialists like medical staff, skilled workers as Spa specialists, sales and marketing specialists, heads and representatives of authority and all levels of authority and managers. Spa and Wellness employers also mentioned average qualification specialists like technicians, masters, average accountants, sale persons, cashiers, etc.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Skill outlined by both Spa and Wellness employers and VET providers | Skill outlined only by Spa and Wellness employers | Skill outlined only by VET providers |
| The most in-demand skills | * **client relation skills** * **inter-personal and communication skills** * foreign language knowledge for Spa terminology, * honesty, integrity, loyalty, * reliability and precision * **product and service sales skills** | * **Total Quality Management** |  |
| The largest increase in the skill requirements | * **customer oriented communication skills** * knowledge of foreign language * employee motivation or personality | * **collaboration skills** * **complying with related legislation, occupational safety and health, fire protection and hygiene regulations** * commitment skills | * **technical skills like use of new technologies of Spa** * **social skills** * **Spa and Wellness services design skills** |
| The importance of knowledge | * **knowledge about the Spa and Wellness services and products** * knowledge of foreign languages * **knowledge about** **time management** * **knowledge of Spa and Wellness services design** * **knowledge about the psychology of sales and marketing** | * **knowledge about the work organisation** | * **knowledge about** **related legislation, occupational safety and health, fire protection and hygiene regulations** |
| Lacking skills that have the highest negative impact | * **customer handling skills** * **technical, practical or job-specific skills** * **oral communication skills** * **problem solving skills** * **team working skills** | * **management skills** | * knowledge of foreign language |
| The difficulty to find skilled labour to fill vacancies | * highly qualified specialists like medical staff * skilled workers as Spa specialists, sales and marketing specialists * heads and representatives of authority and all levels of authority and managers | * average qualification specialists like technicians, masters, average accountants, sale persons, cashiers, etc. |  |

PART III: NATIONAL SPA AND WELLNESS STAKEHOLDERS’ FOCUS GROUP RESULT ANALYSES

INTRODUCTION

The tasks of the online stakeholder focus groups organized as part of the WeSkill project WP3 were:

* To organize and implement of online meeting of focus groups in all 7 project countries;
* To organize 1 day meetings on which industry representatives from the targeted sector participate, all national partners and attracted companies participate;
* To discuss the survey results and recommendations for final selection of skills gaps will be created
* To discuss and make answers for the survey open questions;
* To collect answers from stakeholders in partner countries with respect to adequacy, comprehensiveness and feasibility of the both project’s outputs mentioned above;
* To summarise the stakeholders’ opinions, suggestions and recommendation related to the skills gaps received in National stakeholders’ consultations reports;
* To create of national documents of focus groups’ findings;
* To use the online focus group participants’ opinion, suggestions and remarks for improving the report of skills gaps;
* To collect of national focus groups' findings, to create of general report of findings of focus groups.

Spa and Wellness employer focus groups were conducted in seven countries of Europe – Bulgaria, France, Greece, Italy, Latvia, Serbia, and Slovenia in the time from 1 to 31 May 2021. In each of the project country, one-day online focus group gathered industry representatives from the Spa and Wellness sector. All together, the focus groups comprised more than 70 companies. Focus groups were conducted using common procedures (Guidelines Annex…) – at the beginning of focus group WeSkill project aims, goals, main outputs, partner consortium and desk research results were presented. Afterwards focus group participants answer open questions, proposed suggestions and recommendations related to the project aims. In the final part of focus group participants discussed the survey results for final selection of skills gaps.

1. NATIONAL STAKEHOLDERS’ ONLINE FOCUS GROUP REPORTS

## 1.1. Bulgaria

Introduction

Within a month, the Bulgarian Tourist Chamber (BTC), which is the first and most popular non-governmental organization in tourism in Bulgaria, prepared for the organisation of a focus group of 10 companies that showed interest and willingness to participate in conducting research on what are the real problems and difficulties that faces the spa and wellness sector in Bulgaria.

In order to organise the focus group, BTC used the capacity and the experience of the organization built over the last 30 years to find the right participants and to provide accurate and useful information.

In connection with the measures to limit the spread of COVID-19, the meeting was held online on 16.07.2021 from 11 am to 3 pm. The meeting was attended by representatives of 10 hotels specializing in offering spa, balneal and wellness services.

The meeting was organised by BTC experts George Nikolov and Vladimir Chugunov. They prepared for the participants in the meeting a short presentation on the purpose and topic of the study and led the discussion, asking questions. The detailed knowledge of the spa industry in Bulgaria by the experts helped during the online meeting to identify the most important problems and difficulties faced by the Bulgarian spa, balneal and wellness hotels to attract and retain staff, offer a quality product and reach target customers. The experts also helped to synthesize the received information and to prepare this document, which summarizes the results of the answers received from the participants.

General participants’ information

These are the representatives of the companies that participated in the Focus Group:

1. *Elena Ivanova (Company director, IMPERIAL Group Hotels) - female*
2. *Panteley Memtsov (Chairman, RHODOPES Regional Tourim Association) - male*
3. *Toliana Gradinarova (Secretary General, UNION OF OWNERS - SUNNY BEACH Resort) – female*
4. *Tatyana Djilyanova (Human Resources, ALBENA Jsc.) - female*
5. *Martin Petkov (Partner and Managing Director, MPM Group Hotels) – male*
6. *Milko Rushanov (Partner and Managing Director, MPM Group Hotels) – male*
7. *Tihomir Kolev (Partner and Managing Director, M-Group Ltd. & Harmony Group Ltd. – HARMONY SUITES SPA & WELLNESS CLUB) – male*
8. *Nikolay Radev (Partner and Managing Director, Meridian Bolyarsky Plc., MERIDIAN BOLYARSKI Hotel – Veliko Tarnovo) - male*
9. *Stoyka Terzieva (Partner and Managing Director, MERIDIAN Hotels Group) - female*
10. *Velislava Kostova (Manager, IGLIKA PALACE Hotel, Borovets) - female*
11. *Antonia Madi (Manager, AQUA NEVIS Club Hotel, Sunny Beach) - female*
12. *Boris Popov (Executive Director, Boroinvest Plc. – Tour operator & Hotel Holder Company) - male*
13. *Plamen Panayotov (Partner, AVATAR TOUR Ltd., AQUA PARADISE, Ravda) – male*
14. *Vladimir Chugunov (Owner, KITT Ltd., Tour operator Company) – male*
15. *Desislava Aleksova (Chief Assistant, International Business School) - female*

Evaluation of the Survey Open Questions

1. Most important skills and key competencies at Spa and Wellness establishments

*High qualification in physical and rehabilitation medicine, foreign language qualification, team work*

1. Testing these skills

*During conversation*

*Through customer surveys*

*Terms for certification of SPA centres from Ministry of Tourism of Bulgaria*

1. Difficulties filling job vacancies during the last 2 years

*Medicine staff - Doctors, physiotherapists*

1. Difficulties when looking for suitable employees with the relevant knowledge and skills

*Creativity/Initiative*

*Problem-solving skills*

*Foreign languages*

*Teamwork*

*Willingness to work overtime/flexitime*

1. Departments in company experiencing the largest increase in skills requirements

*Customer Service (Medicine staff)*

*Management and Administration*

*Marketing & Sales*

1. Importance of the knowledge for work

|  |  |
| --- | --- |
| *Knowledge about the Spa and Wellness services and products* | *1* |
| *Knowledge about the tourism services and products* | *3* |
| *Knowledge of foreign languages* | *5* |
| *Psychology of sales and marketing* | *2* |
| *Leadership and motivation of employees* | *4* |

1. Lacking skills with the greatest negative impact on the establishment

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| *General IT user skills* |  |  | *2* |  |  | *1* |
| *IT professional skills* |  |  | *2* |  |  | *2* |
| *Oral communication skills* | *4* |  |  |  |  | *3* |
| *Written communication skills* |  |  | *2* |  |  | *4* |
| *Customer handling skills* | *4* |  |  |  |  | *5* |
| *Team working skills* |  | *3* |  |  |  | *6* |
| *Foreign language skills* |  | *3* |  |  |  | *7* |
| *Problem solving skills* |  | *3* |  |  |  | *8* |
| *Management skills* | *4* |  |  |  |  |  |
| *Technical, practical or job-specific skills* | *4* |  |  |  |  | *10* |
| *Literacy skills* |  |  |  | *1* |  | *11* |
| *Office admin skills* |  |  | *2* |  |  | *12* |

1. Referring to the recruitment difficulties, are these difficulties due to:

|  |  |  |  |
| --- | --- | --- | --- |
| *Low quality of applicants, due to:* | |  | |
| *lack of technical skills* |  | |
| *lack of professional expertise* | *4* | |
| *lack of basic ability to build upon* | *1* | |
| *poor attitude, motivation or personality* | *4* | |
| *lack of qualifications* | *3* | |
| *lack of work experience* | *3* | |
| *weak communication and presentation skills* | *2* | |
| *lack of commercial understanding and awareness* | *2* | |
| *Low number of applicants, due to:* | |  | |
| *Not being able to pay high enough salary* | *4* | |
| *Competition from other employers in the area* | *4* | |
| *Work seen as unattractive/unpleasant* | *2* | |
| *Work requirements very/too specialised* | *2* | |
| *Lack of suitable qualified people* | *3* | |
| *Location of company unattractive to graduates* | *2* | |

1. Regular reviewing the skill and training needs of individual employees

*YES*

1. Establishment vacancies with hard to fill due to the lack of adequate skills of applicants

*YES: High qualification staff in physical and rehabilitation medicine*

1. Comprehending the instructions, guidelines, manuals or reports of Spa establishment

*Very important (4)*

*The importance of that task is staying about the same (Very important)*

1. Instructions, guidelines, manuals regarding Spa treatments are

*Very important*

1. Importantance of skills of using and understanding statistical information and numbers

*Rather important*

1. Importantance of solving complex problems in work with customers

*In working with clients it is important to avoid complex problems*

*Very important*

1. Required specialists within Spa and Wellness industries

*Medicine staff - Doctors, physiotherapists*

1. Vacancies with difficulties to fill

*Medicine staff - Doctors, physiotherapists*

1. Reasons causing these difficultie (priority 4-1)

|  |  |  |
| --- | --- | --- |
| *1* | *lack of candidates* | *4* |
| *2* | *sufficient number of candidates, but their qualification was not relevant* | *3* |
| *3* | *candidates wished to receive larger salary* | *3* |

1. Changes that shape the future of the sector (priority 4-1)

|  |  |  |  |
| --- | --- | --- | --- |
| *1* | *the market (e.g. client’s expectations, legal regulations etc.)* |  | *4* |
|  | *Definitely covid legal regulations* |  |  |
| *2* | *employees (supply, productivity etc.)* |  | *4* |
|  |  |  |  |
| *3* | *technologies (Spa technologies, working methods, new therapies, new techniques, IT etc.)* |  | *4* |
|  |  |  |  |
| *4* | *production (materials, quality, eco recycling etc.)* |  | *2* |
|  |  |  |  |

1. Employees lacking skills or needing to be better developed (priority 4-1)

|  |  |  |
| --- | --- | --- |
| *1* | *for those with basic education* | *4* |
| *2* | *for those with secondary education* | *4* |
| *3* | *for those with higher education* | *3* |

1. Skills that have a key-role within company (priority 4-1)

|  |  |  |
| --- | --- | --- |
| *1* | *Multiple / poli-qualification* | *2* |
| *2* | *Teamwork / internal communication* | *2* |
| *3* | *Client / public relations* | *2* |
| *4* | *Accommodation to changes* | *2* |
| *5* | *Initiative taking / work autonomy* | *4* |

1. The most important skills for the good performance of company

*The most important thing is to have skills and basic knowledge and have enough attention to use them (turn on the mind on time)*

1. Difficulty to find skilled labour to fill vacancies (4-very difficult/ 3-rather difficult/ 2-rather simple/ 1-completely simple)

|  |  |
| --- | --- |
| *Heads/reps of authority and all levels of authority (managers)* | *4* |
| *Highly qualified specialists (medical staff)* | *4* |
| *Average qualification specialists (technicians, masters, average accountants, sale persons, cashiers, etc.)* | *2* |
| *Employees responsible for preparation of information, registration of documents, other registration and services* | *2* |
| *Skilled workers (Spa specialists, sales & marketing specialists)* | *3* |
| *Support staff (drivers, security guys, etc.)* | *2* |
| *Unskilled workers (including unskilled support staff like office cleaners, yard-keepers)* | *2* |

1. Skills/competencies that not acquired or poorly presented in profession standard

*The most important is to have a correct state policy. Until recently, in Bulgaria there was no adequate legislation regarding SPA tourism. Ten years ago, SPA and Wellness tourism wasn’t popular, and, one of the problems was that SPA treatments were a privilege for people with greater financial opportunities. Now, these services are more affordable and are offered through various social health programs and in the different categories of hotel complexes. It’s important to comply with the requirements of the relevant standard, so as not to become a destination offering fake services, for example – there are hotels with a Jacuzzi, one sauna and one shower, but they are called it selves a SPA hotel. This creates a bad image of Bulgaria as a SPA destination. Currently, in the newly adopted Law on Tourism, there are already a minimum requirements that must be met by these SPA centres.*

*The professional standards usually set out techniques, procedures and obligations that should be applied by employees in a standard/normal situation. In the reality, there are different situations, so it’s important to could rely on a qualified staff that could be flexible to work in a non-standard situations and to have an individual approach to each client, in each situation, none priory trained.*

1. Main customer complaints about employees

*Clients approach issues more imotional during vacations, while employees are more professional, which creates a certain tension.*

1. Do your employees know how to handle customer registration systems?

***YES***

1. Do your employees professionally manage digital tools in the marketing and sales of Spa and Wellness Centre products?

***YES***

1. Professional skills and competencies that will be needed in the future for Spa and Wellness industry

*Bulgaria is a country rich in mineral springs, and SPA is health through water. The mineral springs should be used exclusively in the field of tourism and balneal therapy, the so-called health tourism. In Bulgaria, the SPA and Wellness centres are not inferior to the European ones. It is very important, when providing SPA and Wellness services, to care about the conservation of natural resources and the protection of the ecosystem.*

*The current problems for the development of SPA and Wellness tourism are:*

*- Lack of prospects for sustainable development due to the weak advertising policy about Bulgaria in Europe and in the World*

*- The staff – the need for education and training of qualified staff with good level of language skills*

*- The lack of certificates and regulation in the National Tourist Register of Bulgaria, until soon was a problem for serious investors who are interested in an investments and creation in large SPA complexes.*

*- Also, a huge problem for Bulgaria is the suspension of the charter flights, in winter, as well as the insufficient number of flights offered by low-cost airlines.*

*Hotels and hotel complexes located in the established Bulgarian SPA resorts, given the availability of mineral water, in addition to traditional SPA-procedures, in most cases, offer their customers a wide range of rehabilitation therapies. The offered therapies require an initial medical consultation by a specialist and this service is offered on site. In the big cities of the country, without the presence of a mineral spring, SPA-procedures are offered by many centres, in most cases no initial medical consultation is required. These centres do not have the appropriate consultants. The most popular therapies are various types of massages and other procedures aimed entirely at full physical and mental unloading of the client from daily routine, but not to curative rehabilitation therapies.*

*Nowadays, especially in the current pandemic situation, there is an increasing need to expand the scope of activities of SPA-centres in order to provide more opportunities to restore and strengthen health, offering kinesiotherapy, physiotherapy and physical therapy. Gone are the days of a SPA treatments just for the ladies, today's men now benefit from the full range of SPA services. SPA and Wellness tourism gives the opportunity to combine the useful with the pleasant to restore health through different SPA-treatments. These procedures connect man with nature and are aimed not only at his health problems, but also at relieving stress. Natural resources have an amazing healing effect on the mind and body, and this is the reason why SPA-treatments are so popular.*

*In this regard, special attention should be emphasize to the training of staff in order to have the necessary knowledge for individual attention and offering the appropriate procedures, without necessarily having a doctor for a preliminary medical consultation. The presence of adequate and trained staff, who is not just a therapist and is also an adequate consultant regarding the client's health and need for specific procedures, would close the circle of good service. For this sector it is necessary to rely on the training of expert staff - with an individual approach to each client, able to recognize the specifics of the different health problem, as well as to assist in solving it through the correct SPA procedure. Also, in this hurry world, business clients require flexible working hours by SPA centres. Global social media must be present in this industry, as, currently, they have a very important role for the young people exploring the World by internet. There should also be surveys with feedback from customers, for feedback, in order to avoid omissions and improve the service.*

Evaluation of the workshop

Here is the generalized information that we received by some of the participants, who have complited the evaluation form:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Organization** | **Name** | **Location** | **Preliminary information about the focus group** | **Event room/Event web-platform** | **Materials provided** | **Quality of speakers** | **Quality of the presentation** | **Quality of discussion** | **Quality of agenda** | **Did the event meet your expectations?** | **The topics addressed in the event are useful** |
| ***IGLIKA PALACE Hotel*** | ***Velislava Kostova, Mrs.*** | ***BOROVETS Mountain resort*** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** |
| ***BOROINVEST Plc*** | ***Boris Popov, Mr.*** | ***Sofia*** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** |
| ***IMPERIAL GROUP Hotels*** | ***Elena Ivanova, Mrs.*** | ***Sunny Beach, Black Sea Resort*** | **5** | **4** | **5** | **5** | **5** | **5** | **5** | **5** | **5** |
| ***UNION OF OWNERS – SUNNY BEACH*** | ***Toliana Gradinarova, Mrs.*** | ***Sunny Beach, Black Sea Resort*** | **5** | **4** | **5** | **5** | **5** | **5** | **5** | **5** | **5** |
| ***AQUA NEVIS CLUB HOTEL*** | ***Antonia Madi, Mrs.*** | ***Sunny Beach, Black Sea Resort*** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** |
| ***RHODOPES REGIONAL TOURISM ASSOCIATION*** | ***Panteley Memtsov, Mr.*** | ***PAMPOROVO, Mountain resort*** | **5** | **5** | **5** | **5** | **4** | **4** | **4** | **5** | **5** |
| ***MPM GROUP HOTELS*** | ***Martin Petkov, Mr.*** | ***Sunny Beach, Black Sea Resort*** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** |

|  |
| --- |
| Are there any questions which were not discussed at the event/training and should be considered in the future? |
| ***NO*** |

|  |
| --- |
| Additional comments about the event |
|  |

## 1.2. France

Introduction

The UMIH 63, prepared the organization of a focus group composed of 10 companies that expressed their interest in participating in research on the real problems and difficulties faced by the spa and wellness sector in France.

In order to organize the discussion group, the Umihson network of member companies

The meeting was held in person on August 16, 2021, from 9:00 a.m. to 12:00 p.m. in compliance with the actions and measures to limit the spread of COVID-19.

The meeting was attended by representatives of 10 hotels specializing in spa and wellness services.

The meeting was organized by Marie Trebuchon and Martine Courbon with the help of Mathieu Shaeffer from OSSINGO for the questionnaire.

A short presentation of the project was given.

Each person around the table answered the questions asked.

The knowledge of the sector by the employers allowed, during the meeting, to identify the most important problems and difficulties encountered by the spa and wellness hotels in order to attract and retain staff and offer a quality product.

Employers also helped to synthesize the information received and to prepare this document, which summarizes the results of the responses received from participants.

General information about the participants

These are the company representatives who participated in the focus group:

1. ***Oscar Benoist (sancy resort )***
2. ***Valéry ESBELIN (le relais des puys)***
3. ***Alain Grégoire(Mercure les bains hotel)***
4. ***Bruno Vesval ( hotel les mouflons)***
5. ***Vincent Lanthony (residence du parc)***
6. ***Stéphane Mavel (hotel de l'abbaye)***
7. ***Xavier Verdy (the mildiss)***
8. ***Cathrine Descombin (Hotel lune étoile)***
9. ***Sonia Rocha (hotel oceania)***
10. ***Joffrey Chalafry (les grands thermes la bourboule)***

Evaluation of the survey open questions

1. Most important skills and key competencies in spa and wellness facilities

*High qualification in nursing (postpartum, weight loss, dietetics.... ), foreign language skills, teamwork, hours*.

1. Test these skills

*During the conversation*

*Through customer surveys*

*By assigning a concrete task and a time limit for its completion*

1. Difficulties in filling vacancies over the past 2 years

*Physiotherapists, naturopaths, dieticians*

1. Difficulty in finding suitable employees with the required knowledge and skills.

*Creativity/Initiative*

*Interpersonal/communication skills*

*Honesty/integrity/loyalty*

*Teamwork*

*Manual dexterity*

1. The company departments with the highest increase in skill requirements

*Care*

*Customer Service*

*Marketing and sales*

1. Importance of knowledge for the job

|  |  |
| --- | --- |
| *Knowledge of spa and wellness services and products* | *1* |
| *Knowledge of tourism services and products* | *2* |
| *Knowledge of foreign languages* | *3* |
| *Leadership and employee motivation* | *4* |
| *Related legislation; occupational safety and health, fire protection and hygiene regulations* | *5* |

1. Lack of skills having the greatest negative impact on the institution

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *General computer skills* |  |  | *2* |  |  |
| *Professional computer skills* |  |  | *2* |  |  |
| *Oral communication skills* | *4* |  |  |  |  |
| *Written communication skills* |  |  | *2* |  |  |
| *Customer management skills* | *4* |  |  |  |  |
| *Ability to work in a team* |  | *3* |  |  |  |
| *Foreign language skills* |  | *3* |  |  |  |
| *Problem solving skills* |  | *3* |  |  |  |
| *Management skills* | *4* |  |  |  |  |
| *Technical, practical or job-specific skills* | *4* |  |  |  |  |
| *Literacy skills* |  |  |  | *1* |  |
| *Office administration skills* |  |  | *2* |  |  |

8. Referring to the recruitment difficulties, are these difficulties due to:

|  |  |  |  |
| --- | --- | --- | --- |
| Low quality of candidates, due to *:* | |  | |
| *lack of technical skills* | *4* | |
| *lack of professional expertise* | *4* | |
| *the lack of a core capacity to build on* | *1* | |
| *poor attitude, motivation or personality* | *4* | |
| *lack of qualifications* | *3* | |
| *lack of work experience* | *3* | |
| *poor communication and presentation skills* | *2* | |
| *lack of commercial understanding and awareness* | *2* | |
| Low number of applicants, due to : | |  | |
| *Not being able to pay a high enough salary* | *4* | |
| *Competition from other employers in the region* | *4* | |
| *Perceived unattractive/unpleasant work* | *2* | |
| *Very/overly specialized work requirements* | *2* | |
| *Lack of qualified people* | *3* | |
| *The location of the company is not attractive to graduates* | *2* | |

9. Regular review of each employee's skills and training needs.

*YES*

10. Vacancies in the institution that are difficult to fill due to lack of adequate skills of candidates

*YES: Qualified personnel*

11. Understanding of the spa's instructions, guidelines, manuals or reports

*Very important (unanimity of participants)*

12. Instructions, guidelines, manuals regarding spa treatments are

*Very important*

13. Importance of skills in using and understanding statistical information and figures

*Somewhat important*

14. Importance of complex problem solving in working with clients

When working with clients, it is important to avoid complex problems

*Very important*

15. Which specialists are currently in demand in the spa and wellness industries

*Care technicians, physiotherapists, client management and reception and scheduling*

16. Which vacancies have been difficult to fill

*Medical and paramedical staff (for thermal baths) and spa technicians for hotels*

17. employees lacking skills or needing more training (priority 4-1)

|  |  |  |
| --- | --- | --- |
| *1* | *for people with a basic education* | *4* |
| *2* | *for people with secondary education* | *4* |
| *3* | *for people with higher education* | *3* |

18. Skills that are key to the business (priority 4-1)

|  |  |  |
| --- | --- | --- |
| *1* | *Multiple qualification / policy* | *4* |
| *2* | *Teamwork / internal communication* | *3* |
| *3* | *Customer and public relations* | *4* |
| *4* | *Adapting to change* | *3* |
| *5* | *Taking initiative / autonomy in work* | *4* |

19.The most important skills for the good functioning of the company

*The most important thing is to have basic skills and knowledge and to adapt to the needs of the company and the customers*

Difficulty in finding qualified labour to fill vacancies (4-very difficult/ 3-somewhat difficult/ 2-somewhat easy/ 1-completely easy)

|  |  |
| --- | --- |
| *Heads/authority representatives and all levels of authority (managers)* | *4* |
| *Highly qualified specialists (medical staff)* | *4* |
| *Medium-skilled specialists (technicians, masters, middle accountants, salespeople, cashiers, etc.)* | *2* |
| *Employees responsible for the preparation of information, registration of documents, other records and services* | *2* |
| *Skilled workers (spa specialists, sales and marketing specialists)* | *3* |
| *Support staff (drivers, security guards, etc.)* | *2* |
| *Unskilled workers (including unskilled support staff such as office cleaners, yard attendants)* | *2* |

21. Competencies not met or misrepresented in the occupational standard

*The training policy does not necessarily respond to the necessary needs of companies, and company managers have difficulty recruiting according to their area of establishment.*

*Rural areas are the most affected, due to their distance from large cities.*

*This makes mobility difficult, as there is also the problem of housing.*

*It is easier to find staff if the establishment is located in a large city, the thermal spas are often in the mountains or rural areas.*

*Staff with low qualifications are easily recruited in rural areas, as soon as the level of skills is higher it becomes problematic even with interesting salaries.*

*The development of SPAs has become commonplace even in city centre hotels, and qualified staff are quickly recruited. This is not the case elsewhere, so the situations are different, and it is important to be able to count on qualified staff who can be flexible and mobile to work in the mountains or in the city.*

*And customers are increasingly looking for establishments far from the city centre, but these are the ones that have the most difficulty in finding qualified staff.*

22. major customer complaints about employees

**Lack of advice on care, time slots often difficult to find according to their needs.**

Do your employees know how to manage customer registration systems?

***YES***

Do your employees professionally manage digital tools in the marketing and sales of spa and wellness products?

***YES***

25. Professional skills and competences that will be needed in the future in the spa and wellness sector

*The Auvergne is a very rural region and very rich in thermal spas (ROYAT, MONT DORE, BOURBOULE, CHATEL GUYON, VICHY, NERI LES BAINS, BOURBON L'ARCHAMBAULT .......).*

*An increasing demand for spa and wellness services means that establishments must adapt to the needs of their customers.*

*The biggest current problems for the development of SPA and wellness tourism are*

*- Recruitment of specialised personnel*

*- the need to train qualified personnel with a good level of language skills.*

*Following the pandemic, it will be necessary to offer more possibilities to restore and strengthen health, by proposing physiotherapy, naturopathy and diet. The thermal establishments have a card to play.*

*In this respect, particular attention should be paid to training staff to ensure that they have the necessary knowledge to give individual attention to customers and to propose appropriate procedures.*

*Only the thermal establishments need medical staff able to respect the follow-up during the care of the different pathologies that the clients of these establishments have.*

*The presence of an adequate and trained staff reassures the customers.*

*For the spa hotels, the clients are looking for massages, aesthetic treatments and well being, so the treatment times are more flexible.*

*The key word of this workshop is TRAINING in several fields and according to the needs of the institutions.*

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Organization** | **Name** | **Location** | **Preliminary information on the focus group** | **Event room/web event platform** | **Material provided** | **Quality of the speakers** | **Quality of presentation** | **Quality of the discussion** | **Quality of the agenda** | **Did the event meet your expectations?** | **The topics discussed at the event are useful** |
| ***sancy resort*** | ***Oscar benoist*** | ***THE SANCY*** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** |
| ***2. the relay of the puys*** | ***Mr Valery Esbelin*** | ***Orcines*** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** |
| ***3.***  ***hotel Mercure les bains*** | ***Mr Alain Gregoire*** | ***Saint Nectaire*** | **5** | **4** | **5** | **5** | **5** | **5** | **5** | **5** | **5** |
| ***4.***  ***hotel les mouflons*** | ***Mr Bruno Vesval*** | ***Besse Saint Anastaise*** | **5** |  | **5** | **5** | **5** | **5** | **5** | **5** | **5** |
| ***5***  ***park residence*** | ***Mr Vincent Lanthony*** | ***Vichy*** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** |
| ***6***  ***hotel de l'abbaye)*** | ***Mr Stephane MAVEL*** | ***Sauxillanges*** | **5** | **5** | **5** | **5** | **4** | **4** | **4** | **5** | **5** |
| ***6. (Hotel moon star*** | ***Ms. Catehrine***  ***Descombin*** | ***Clermont-Ferrand*** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** | **5** |

Workshop Evaluation

*Here is the general information we received from some of the participants who filled out the evaluation form:*

|  |
| --- |
| Are there any issues that were not addressed at the event/training that should be considered in the future? |
| ***NO*** |

|  |
| --- |
| Additional comments on the event |
|  |

## 1.3. Greece

Introduction

The online focus group process was implemented during May 2021. During the day of 24th of May, 2021, 10 industry representatives from the Spa and Wellness sector from Greece participated in an online focus group survey, comprising the Greek ‘WeSkill ‘national online focus group. The WeSkill partners involved were HATS, who were responsible for the coordination of the online focus groups implementation, and DIMITRA that supported in the organization and the conduction of the survey. The online focus group organization was implemented in 3 phases:

* Preparation of the survey. DIMITRA prepared and shared an invitation letter along with the agenda of the meeting to potential participants with information about the project and goals of the event. After the invitation, HATS communicated with the industry representatives to book the online meeting and 10 representatives with the appropriate profile agreed. During this phase, the survey questions were sent to the participants in order to promote and ensure their familiarity to the survey and their participation.
* Conduction of the survey. A 5-hours event was organized during May, 24th. The event was conducted by the project’s partners with representatives from the organizations while 10 representatives from companies of the Spa and Wellness sector in Greece participated in the survey. The participants and an overview of their complete information is presented below. Apart from answering the questions of the survey, the participants were also informed about the project’s goal and aims, its originality and the results of the previous surveys, which were also discussed.
* Summarization of the focus groups survey and results. The coordinator (HATS) summarised the stakeholders’ answers to the survey questions and created the present national document of the focus groups’ findings.

General participants’ information

The participants in the Focus Group represented the following companies:

1. Municipal Public Service of Gortynia – male – manager
2. Private Therma Spa Mitilini Hot Springs – female – manager
3. Thermal Springs of Sidirokastro – male – manager
4. Thermal Springs of Municipality of Konitsa – female – manager
5. ThermaeAgiasmata - female - manager
6. Public Benefit Organization/ H W C Krinides Mud Baths – male – manager
7. Thermal Spring of Lagadas – female – manager
8. Public Benefit Enterprise of the Municipality of Kassandra – male – manager
9. Pozar Thermal Baths – female - manager
10. Tieda S.A. – female – manager

Evaluation of the Survey Open Questions

From the discussion with the representatives concerning the skills gap that are noted in the Wellness and Spa tourism industries in Greece, the following results were delivered.

The most important skills and key competencies at Spa and Wellness establishments are soft skills (communicational, organizational, team work and flexibility skills). Those skills are being tested by most of them by assigning a concrete task and time for accomplishing.

In Greece, the job vacancies that are hard to be filled in during the past 2 years are doctors, lifeguards, safeguards (security). The following skills are the most difficult to be found among potential employees: basic technical skills, information management, problem-solving skills, foreign languages, teamwork and computer/IT skills. According to the participants’ views, customer service, marketing & sales and management and administration are the departments that experience the largest increase in skills requirements. In addition, the participants stated that knowledge about Spa and Wellness services and products, tourism services and products and foreign languages are the most important knowledge among employees.

The skills that have the greatest negative impact when lacking on the establishments are general IT user skills, oral communication skills, customer handling skills, foreign language skills, literacy skills. Team working skills, problem-solving skills, management skills, technical, practical or job-specific skills have also a great negative impact when they lack form the employees.

Regarding the recruitment difficulties, these are due to lack of work experience, weak communication and presentation skills, lack of commercial understanding and awareness (these refer to low quality of applicants) and due to not being able to pay high enough salary and lack of suitable qualified people (these refer to low number of applicants).

As for the importance concerning the ability in being familiar and comprehending the instructions, guidelines, manuals or reports of Spa establishments as well as writing them, this is considered very important, with the importance being characterized as steadily increasing.

At the moment, the specialties that are being required within Spa and Wellness industries in Greece are aestheticians, masseurs, physiotherapists, specialties in alternative forms of exercise (yoga), specialists in reflexology. The vacancy with the greatest difficulty to be filled are the doctors. Furthermore, the participants think that employees from all educational steps is necessary to be in continuous training.

Concerning the main complaints about the companies’ employees, these refer to inadequacy in good manners and behavioral issues. Also, all employees in the corresponding vacancies know how to use digital tools in marketing and sales and know how to handle customer registration systems.

**Participants’ feedback form**

*1. Which are the most important skills and key competencies at Spa and Wellness establishments? (please list the 3 most important skills (communicational, organizational skills, team work, adaptability, flexibility etc.)).*

|  |
| --- |
| *Communicational, organizational, team work, flexibiity* |

*2. How you test these skills?*

|  |  |  |
| --- | --- | --- |
| 1 | During conversation |  |
| 2 | By assigning a concrete task and time for accomplishing | x |
| 3 | Through customer surveys |  |
| 4 | Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

*3. In which positions of employees did you have difficulties filling job vacancies during the last 2 years?*

|  |
| --- |
| *Doctors, safeguards, lifeguards* |

*4. In which specific positions are you facing most difficulties when looking for suitable*

*employees with the relevant knowledge and skills? (coordinator of online focus group mark a maximum of 5 most important, first which named participants of online focus group)*

|  |  |
| --- | --- |
| **Skills** |  |
| Basic technical skills | *X* |
| Inter-personal/communication skills |  |
| Computer / IT skills | *X* |
| Management / masterskills |  |
| Foreign languages |  |
| Creativity/Initiative |  |
| Teamwork | *X* |
| Learning skills |  |
| Information management | *X* |
| Problem-solving skills | *X* |
| Time management |  |
| Manual dexterity |  |
| Versatility/capacity to fill in for absent workers |  |
| Business and entrepreneurial skills |  |
| Honesty/integrity/loyalty |  |
| Reliability/precision |  |
| Willingness to work overtime/flexitime |  |
| Other… |  |

*5. Which departments in your company experience the largest increase in skills*

*requirements? (mark top 3 of the list after discussion of focus group and after when answers are collected)*

|  |  |
| --- | --- |
|  | Largest increase in skills requirements |
| Management and Administration | X |
| Marketing & Sales | X |
| Customer Service | X |
| Financial |  |
| IT |  |
| Human Resources |  |
| Research & Development |  |
| Other…………… |  |

*6. Please assess the importance of the knowledge listed below for your work (please mark 5 most important after discussion)*

|  |  |
| --- | --- |
| *Knowledge about the Spa and Wellness services and products* | ***X*** |
| *Knowledge about the tourism services and products* | ***X*** |
| *Knowledge of foreign languages* | ***X*** |
| *Psychology of sales and marketing* |  |
| *Leadership and motivation of employees* |  |
| *Time management* |  |
| *Information technology and database work* |  |
| *Economic operations, financial planning, reporting, accountancy* |  |
| *Consumer rights* |  |
| *General Data Protection Regulation (GDPR)* |  |
| *Related legislation; occupational safety and health, fire protection and hygiene regulations* |  |
| *Knowledge of Spa and Wellness services design* | ***X*** |
| *Work organization* | ***X*** |
| *Other (please, specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* |  |

*7. Which of these lacking skills have the greatest negative impact on the establishment? (Please rate on a scale from 4-* *very significant impact to 1-very low impact, 0-* *can't evaluate after the discussion at online focus group)*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| General IT user skills | 4 | 3 | 2 | 1 | 0 | 1 |
| IT professional skills | 4 | 3 | 2 | 1 | 0 | 2 |
| Oral communication skills | 4 | 3 | 2 | 1 | 0 | 3 |
| Written communication skills | 4 | 3 | 2 | 1 | 0 | 4 |
| Customer handling skills | 4 | 3 | 2 | 1 | 0 | 5 |
| Team working skills | 4 | 3 | 2 | 1 | 0 | 6 |
| Foreign language skills | 4 | 3 | 2 | 1 | 0 | 7 |
| Problem solving skills | 4 | 3 | 2 | 1 | 0 | 8 |
| Management skills | 4 | 3 | 2 | 1 | 0 | 9 |
| Technical, practical or job-specific skills | 4 | 3 | 2 | 1 | 0 | 10 |
| Literacy skills | 4 | 3 | 2 | 1 | 0 | 11 |
| Office admin skills | 4 | 3 | 2 | 1 | 0 | 12 |
| Any other skills (please specify) |  |  |  |  |  |  |
|  | 4 | 3 | 2 | 1 | 0 | 13 |
|  | 4 | 3 | 2 | 1 | 0 | 14 |
|  | 4 | 3 | 2 | 1 | 0 | 15 |

*8. Referring to the recruitment difficulties, are these difficulties due to:*

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Low quality of applicants, due to: | |  |  |
|  | lack of technical skills |  | 1 |
|  | lack of professional expertise |  | 2 |
|  | lack of basic ability to build upon |  | 3 |
|  | poor attitude, motivation or personality |  | 4 |
|  | lack of qualifications |  | 5 |
|  | lack of work experience | X | 6 |
|  | weak communication and presentation skills | X | 7 |
|  | lack of commercial understanding and awareness | X | 8 |
|  | Other (please specify) |  | 9 |
|  |  |  |  |
| 2. Low number of applicants, due to: | |  |  |
|  | Not being able to pay high enough salary | X | 1 |
|  | Competition from other employers in the area |  | 2 |
|  | Work seen as unattractive/unpleasant |  | 3 |
|  | Work requirements very/too specialised |  | 4 |
|  | Lack of suitable qualified people | X | 5 |
|  | Location of company unattractive to graduates |  | 6 |
|  | Other (please specify) |  | 7 |
|  |  |  |  |

*9. Thinking about skill requirements in your establishment: does your establishment*

*regularly review the skill and training needs of individual employees?*

|  |  |  |
| --- | --- | --- |
| 1 | Yes | X |
| 2 | No |  |
| 3 | Partly (e.g. only for some employee groups) |  |
| 4 | Don’t know |  |

*10. Do you currently have at this establishment vacancies which are proving hard to fill due to the lack of adequate skills of applicants?*

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | Yes | X | If yes, please identify which skills: |
|  |  |  | Technical skills (claytheraphy) |
| 2 | No |  |  |
| 3 | Don’t know |  |  |

*11. How important in their job is reading (becoming familiar with) and comprehending the instructions, guidelines, manuals or reports of Spa establishment? We do not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | Is the importance of that task staying about |  |
| Very important | 4 |  | the same, increasing or decreasing? |  |
| Rather important | 3 |  | Increasing | 3 |
| Rather unimportant | 2 |  | Staying about the same | 2 |
| Completely unimportant | 1 |  | Decreasing | 1 |
| Does not apply/ Don’t know | 0 |  | Don’t know | 0 |

*12. In their job, how important is writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages etc.?*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | Is the importance of that task staying about |  |
| Very important | 4 |  | the same, increasing or decreasing? |  |
| Rather important | 3 |  | Increasing | 3 |
| Rather unimportant | 2 |  | Staying about the same | 2 |
| Completely unimportant | 1 |  | Decreasing | 1 |
| Does not apply/ Don’t know | 0 |  | Don’t know | 0 |

*13. How important are skills of using and understanding statistical information and numbers? (for example, in graphs, charts and tables)?*

|  |  |
| --- | --- |
| Very important | 4 |
| Rather important | 3 |
| Rather unimportant | 2 |
| Completely unimportant | 1 |
| Does not apply/ Don’t know | 0 |

*14. The next question is about solving complex problems, defined to be a problem which takes employees at least 30 minutes of thinking to find a good solution. In work with customers, how important is solving complex problems? (regarding with customer complaints, customer health problems etc.) The 30 minutes only refers to the time needed to THINK of a solution, it could be for the time needed to carry it out.*

*In the jobs with customers, how important is solving complex problems?*

|  |  |
| --- | --- |
| Very important | 4 |
| Rather important | 3 |
| Rather unimportant | 2 |
| Completely unimportant | 1 |
| Does not apply/ Don’t know | 0 |

*15. What specialists are being required at the moment within Spa and Wellness industries?*

|  |
| --- |
| *Aestheticians, masseurs, physiotherapists, trainers in alternative athletics (yoga etc.), reflexologists* |

*16. In your experience, what vacancies have been difficult to fill?*

|  |
| --- |
| *Doctors* |

*17. What were the reasons causing these difficulties:*

|  |  |  |
| --- | --- | --- |
| 1 | lack of candidates |  |
| 2 | sufficient number of candidates, but their qualification was not relevant |  |
| 3 | candidates wished to receive larger salary | x |
| 4 | other (please specify) |  |
|  |  |  |

*18. What changes are going to shape the future of the sector? Please specify in each*

*category:*

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | the market (e.g. client’s expectations, legal regulations etc.) |  | x |
|  | COVID-19 impact on economy |  |  |
| 2 | employees (supply, productivity etc.) |  |  |
|  |  |  |  |
| 3 | technologies (Spa technologies, working methods, new therapies, new techniques, IT etc.) |  | x |
|  |  |  |  |
| 4 | production (materials, quality, eco recycling etc.) |  |  |
|  |  |  |  |

*19. Considering your current employees, which skills do you think are lacking or need to be better developed?*

|  |  |  |
| --- | --- | --- |
| 1 | for those with basic education | x |
| 2 | for those with secondary education | x |
| 3 | for those with higher education | x |

*20. Which are the skills that have a key-role within your company (by staff positions)?*

|  |  |  |
| --- | --- | --- |
| 1 | Multiple / poli-qualification |  |
| 2 | Teamwork / internal communication | x |
| 3 | Client / public relations | x |
| 4 | Accommodation to changes | x |
| 5 | Initiative taking / work autonomy |  |

*21. Which skills do you consider to be the most important for the good performance of your company?*

|  |
| --- |
| *Teamwork, communication* |

*22. Based on your experience please specify how difficult it is to find skilled labour to fill*

*vacancies at your establishment in the following job categories. (Please rate on a scale where 4-very difficult/ 3-rather difficult/ 2-rather simple/ 1-completely simple/ 0- Does not apply/ Don’t know)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Heads/reps of authority and all levels of authority (managers) | 4 | 3 | 2 | 1 | 0 |
| Highly qualified specialists (medical staff) | 4 | 3 | 2 | 1 | 0 |
| Average qualification specialists (technicians, masters, average accountants, sale persons, cashiers, etc.) | 4 | 3 | 2 | 1 | 0 |
| Employees responsible for preparation of information, registration of documents, other registration and services | 4 | 3 | 2 | 1 | 0 |
| Skilled workers (Spa specialists, sales & marketing specialists) | 4 | 3 | 2 | 1 | 0 |
| Support staff (drivers, security guys, etc.) | 4 | 3 | 2 | 1 | 0 |
| Unskilled workers (including unskilled support staff like office cleaners, yard-keepers) | 4 | 3 | 2 | 1 | 0 |

23. *Based on your experience over your employees’ skills gap, which skills/competencies do you think are not acquired or poorly presented in profession standard? Please describe specific ones.*

|  |
| --- |
| Communication, customer experience, services, knowledge for spa & wellness |

24. *What are the main customer complaints about your employees?*

|  |
| --- |
| Behavioural issues, lack of manners |

25. *Do your employees know how to handle customer registration systems?*

|  |  |  |  |
| --- | --- | --- | --- |
| Yes | x |  |  |
| No |  |  |  |
| Weak |  |  |  |
| Other answer |  | Please specify |  |

26. *Do your employees professionally manage digital tools in the marketing and sales of Spa and Wellness Centre products?*

|  |  |  |  |
| --- | --- | --- | --- |
| Yes | x |  |  |
| No |  |  |  |
| Weak |  |  |  |

If answer: No/Weak\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Please mention which digital skills are not or poorly managed, such as selling Spa offers in e-shops, developing multi-day programs of SPA offers, creating and placing SPA packages on a website or other platforms such as FB, Instagram, Video blogs etc.)*

27. What professional skills and competencies do you foresee will be needed in the future for Spa and Wellness industry? Please describe specific for Spa and Wellness industry.

|  |
| --- |
| Adjustment to current trends |

Evaluation of the workshop

All participants completed the evaluation forms.

The responses got the highest score in general.

Additional comments were that there should be more often organized events like that with full participation, the participants were very pleased by the discussion and the organization and duration was satisfactory. Although, there is a concern that these activities apply to a concrete result.

## 1.4. Italy

Introduction

For about a month Federturismo Confindustria carried out a patient preparatory work for the Italian Focus Group, aimed not only at gathering the willingness to participate of companies operating in the spa and wellness sector that had already been involved in the survey, but also at establishing the best date and time to organise the online meeting.

In the end, once the availability of at least 10 companies had been gathered, it was decided to organise the Focus Group on the date and time that had received the most preference of the alternatives proposed: Wednesday 21 July from 11.00 to 13.00 CEST.

In the days leading up to the focus group, the Federturismo Confindustria project team (consisting of Antonio Barreca, Gennaro Vitelli, Laura Alese, Elsa Cattivera and Barbara Bellaveglia) worked on the preparation of the documents to be presented during the focus group and on the analysis of the results of the survey carried out in Italy.

From this last point of view, it was particularly useful the collaboration developed with the colleagues Maria Brizi, Debora Ercoli and Catia Trinari, working in the project team of TUCEP (the other Italian partner of the WeSkill Project), who ensured not only their participation to the focus group, but also a constant confrontation and support in the choice of the most significant topics to be discussed and the modalities of conducting the meeting.

General participants’ information

These are the representatives of the companies that participated in the Focus Group:

1. *Laura Natali* (Company director of Terme della Versilia) - female
2. *Elena Leonessa* (Company director of Hotel Continental Terme di Ischia) - female
3. *Emanuele Cristiano* (Human Resources Manager of Terme di Margherita di Savoia) - male
4. *Sonia Ferrari* (President of Terme Luigiane) - female
5. *Renato del Monaco* (Health Director of Terme di Fiuggi) - male
6. *Giuseppe Greco* (Sales Manager of Grand Hotel Nuove Terme di Acqui Terme) - male
7. *Gabriella Gibertini* (Deputy Director of Terme della Salvarola) - female
8. *Marco Maggia* (Chief Executive Officer of Ermitage Medical Hotel di Abano) - male
9. *Aurelio Crudeli* (General Manager of FEDERTERME – Italian Spa Federation) - male
10. *Luigi Fasano* (Legal and Trade Unions Manager of FEDERTERME - Italian Spa Federation) - male

Also present:

* for Federturismo Confindustria project team:

1. *Gennaro Vitelli*
2. *Laura Alese*
3. *Elsa Cattivera*

* for TUCEP:

1. *Maria Brizi*
2. *Debora Ercoli*
3. *Catia Trinari*

Evaluation of the Survey Open Questions

Below is a summary of the main open questions on which the most interesting and significant answers were collected:

*Which skills do you consider to be the most important for the good performance of your company?*

As also emerged from the results of the desk survey, all the companies participating in the focus group highlighted the increasing importance of **soft skills**, i.e. transversal and relational skills (in particular, the ability to listen and communicate effectively, showing understanding and empathy towards the customers and their needs).

These are often innate skills, which are difficult to teach (as opposed to hard skills) but which are nevertheless considered fundamental by companies in order to work successfully in this particular sector.

Moreover, the Covid-19 pandemic has made even more evident the need for creative human resources, able to solve problems in real time, to work in a team, to manage stress and to adapt to new requirements such as those of **crisis management**, **health safety** and **emergency insurance**.

All this leads us to believe that, even in the tourism sector, the future of work will revolve above all around those skills, abilities and capacities that are unique to the human mind and more difficult to automate (social intelligence, originality, creativity).

Therefore, the attention of the companies operating in the tourism sector will necessarily have to shift in the future from “jobs and professions” to “learning and developing skills” (less specific and more fluid).

*What specialists are being required at the moment within Spa and Wellness industries?*

**Doctors** and **physiotherapists**, but also **digital marketing specialists** (figures that are increasingly difficult to ignore because they need to be able to communicate the spa & wellness product on multiple levels, especially after the slowdown caused by the Covid-19 pandemic) and **social media managers** (able to constantly monitor the reviews received online by their company and immediately pick up on any dissatisfaction expressed by customers through social media, giving a prompt response).

However, it must be borne in mind that, in order to develop marketing activities profitably, it is necessary to know the identity of your company: if you do not assimilate its identity, you cannot transmit it. It’s therefore necessary to have **human resources who are able to take care of the company's identity** in order to enhance and promote it in the best possible way.

*Referring to the recruitment difficulties, are these difficulties due to low quality of applicants or low number of applicants?*

What is mainly lacking is previous **work experience** as well as **appropriate training**. There is a lack of qualifications and skills.

However, in the last two years there has also been a **lack of candidates**. There has been a drop of about 30% in the number of people willing to do seasonal work.

*What are the main customer complaints about your employees?*

The main complaints concern the **lack (or shortage) of flexibility**, which leads to a kind of refusal, of closure towards different and unforeseen ways of performing the expected services.

Customers complain about employees who do not show care and empathy towards their expectations and needs, preferring to remain in the enclosure of standardised tasks, without autonomy, rather than “entering unexplored areas” to try to provide satisfactory feedback to customers.

*What changes are going to shape the future of the sector?*

When thinking about the future of this sector, it is essential to consider that an important development opportunity will be the **increasing rate of ageing**, especially in European and Western countries. There are non-invasive therapies, such as physiotherapy and rehabilitation, which are sought after by a growing target group of active, wellbeing-conscious older people.

Furthermore, the focus on wellbeing will increasingly be expressed in holistic terms in the next future. So, it’s easy to predict that **the dimension of wellbeing will be ever more psychic as well as physical**.

It should also be emphasised that spas and wellness centres stay and operate in a territory: it is **the territory itself that can produce health and opportunities for recreation and wellbeing**, through a concerted work between all the public and private operators in the tourism sector. Thermal activities are only one piece of the overall offer of a tourist destination, which must be harmonised and strengthened with the other local attractions (cultural, environmental, landscape, gastronomic).

Given the multiple and increasingly complex needs of tourists, it’s necessary to integrate the destination’s resources and organise the offer to the market as that of a territorial tourism system in order to be truly competitive.

Evaluation of the workshop

To date, only 5 of the 10 focus group participants have completed the evaluation form.

As you can check by reading the results, shown below, the responses gave highest rating to each of the 9 questions contained in the focus group evaluation form.

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Chronological order of feedback** | **Organization** | **Name** | **Location** | **Preliminary information about the focus group** | **Event room/**  **Event web-platform** | **Materials provided** | **Quality of speakers** | **Quality of the presentation** | **Quality of discussion** | **Quality of agenda** | **Did the event meet your expectations?** | **The topics addressed in the event are useful** |
| **2021/07/21 3:00:13 PM EET** | Terme di Acqui S.p.A. | Giuseppe Greco | Acqui Terme | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| **2021/07/21 3:31:36 PM EET** | Terme di Margherita di Savoia | Emanuele Cristiano | Margherita di Savoia | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| **2021/07/23 11:21:56 AM EET** | Federterme | Luigi Fasano | Roma | 5 | 4 | 5 | 5 | 5 | 5 | 5 | 5 | 4 |
| **2021/07/23 12:18:44 PM EET** | Terme di Fiuggi | Renato del Monaco | Fiuggi | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| **2021/07/23 3:02:07 PM EET** | Terme Luigiane | Sonia Ferrari | Cosenza | 4 | 5 | 4 | 4 | 5 | 4 | 4 | 4 | 5 |

Anyway, from the organizers’ point of view there are other considerations that can be added to the overall evaluation of the focus group:

* Duration: the focus group lasted 30 minutes more than expected.
* Participation: All the participants stay until the end despite their numerous commitments.
* Technology issues: There were no problems with the connection and the chosen web communication platform (Zoom). Everyone was able to log in and share their screen. Only one participant had technical difficulties in the initial part of the meeting.
* All the material shown during the focus group was shared through email upon requests of participants.
* Engagement: the level of interaction was high both at the beginning and at the end of the meeting, with peaks of intensity in the middle, during the first round of interventions.

In conclusion, thanks to the workshop, it was possible to confirm and explore the findings of the surveys, with the support of participants who identified a clear vision of the training needs of the sector.

## 1.5. Latvia

Introduction

An invitation letter was prepared with the work agenda and sent out electronically to potential focus group participants, Spa and wellness sector stakeholders, as well as to all stakeholders on the Latvian project side of the WeSkill project. Some of the invited stakeholders could not take part due to work commitments.

The Latvian project partners’ Spa and wellness sector focus group took place on 16 June 2021. It was organised in online format.

Among the participants were National Centre for Education representative (VISC) Tatjana Daņilova, Riga Style and Fashion Technical school (RSMT) representative Laura Ait Ožmida, Latvian Health Tourism Cluster CEO Gunta Ušpele and specialists/lecturers/experts recruited for the project Ilze Medne and Kristīne Bērziņa (University of Latvia), along with Turība University and the State Social Integration College lecturer Armands Muižnieks.

Representatives of the Spa and wellness sector, who participated included spa rehabilitation centre “Līgatne” manager, spa hotel “Hotel Jūrmala Spa” Spa centre reception representative, spa hotel “Baltic Beach Hotel” sales manager, sanatorium “Belorusija” medical manager, rehabilitation centre “SIVA” marketing specialist, spa hotel “Amber Spa boutique hotel” manager, spa hotel “Amber spa & sea hotel” sales and marketing manager, Kurši Hotel & Spa marketing manager, “Dimensija”, “Liora”, Dermatology Clinic and Anti-ageing Institute directors.

Overall, participants in the focus group included 6 representatives of the Latvian side of the project and 12 Spa and Wellness company representatives.

General participants’ information

Evaluation of the Survey Open Questions

At the start of the focus group, the event moderator Latvian Health Tourism Cluster CEO Gunta Ušpele introduced those present to the focus group’s participants.

In accordance with the focus group’s plan:

Gunta Ušpele presented the “WeSkill” project goals, tasks, main planned results, as well as all project participants and the next planned activities.

All focus group participants were introduced to the results of the first project activity – results of research into reports on skill shortcomings using existing data sources (document research) in the 7 countries involved and in an additional 4 EU countries outside the partnership.

The focus group participants agreed with the overall results and those skills and competences, whose shortcomings need to be addressed.

Afterwards, the focus group moderator introduced all the focus group participants to the survey conducted by Spa and wellness sector employers and PIA institution representatives and their initial results in Latvia.

According to the survey results, the accent in the focus group was placed on discussion, listening to opinions and receiving answers to open questions from Spa and Wellness sector employers.

Stakeholders’ online focus group

Participants’ feedback form

1. Which are the most important skills and key competencies at Spa and Wellness establishments? (please list the 3 most important skills (communicational, organizational skills, team work, adaptability, flexibility etc.)).

*Answers:*

*Professional skill set, proficiency in foreign languages, work ethic, communication skills, teamwork, attitude to work, sales and marketing work, motivation and communication with the client.*

2. How you test these skills?

*1 During conversation*

*2 By assigning a concrete task and time for accomplishing*

*3 Through customer surveys*

*4 Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Answers:*

*Everything is combined, trial period (from a week to three months), interviews and surveys of clients regarding satisfaction with the service provided by the employee. Protocol for accreditation. Calling previous employers.*

3. In which positions of employees did you have difficulties filling job vacancies during the last 2 years?

*Answers: Physiotherapists, highly qualified broad profile spa personnel, who are masseurs, spa apparatus specialists as well as cosmetologists, i.e. highly qualified masseurs, who are very knowledgeable about the use of spa apparatus technologies.*

4. In which specific positions are you facing most difficulties when looking for suitable

employees with the relevant knowledge and skills? (coordinator of online focus group mark a maximum of 5 most important, first which named participants of online focus group)

*Skills*

*Basic technical skills X*

*Inter-personal/communication skills X*

*Computer / IT skills*

*Management / master skills*

*Foreign languages X*

*Creativity/Initiative*

*Teamwork X*

*Learning skills*

*Information management*

*Problem-solving skills*

*Time management*

*Manual dexterity*

*Versatility/capacity to fill in for absent workers*

*Business and entrepreneurial skills*

*Honesty/integrity/loyalty*

*Reliability/precision*

*Willingness to work overtime/flexitime X*

5. Which departments in your company experience the largest increase in skills

requirements? (mark top 3 of the list after discussion of focus group and after when answers are collected)

|  |  |
| --- | --- |
|  | Largest increase in skills requirements |
| Management and Administration | x |
| Marketing & Sales | x |
| Customer Service | x |
| Financial |  |
| IT |  |
| Human Resources |  |
| Research & Development |  |
| Other…………… |  |

6. Please assess the importance of the knowledge listed below for your work (please mark 5 most important after discussion)

|  |  |
| --- | --- |
| Knowledge about the Spa and Wellness services and products | **x** |
| Knowledge about the tourism services and products | **x** |
| Knowledge of foreign languages | **x** |
| Psychology of sales and marketing | **x** |
| Leadership and motivation of employees |  |
| Time management |  |
| Information technology and database work |  |
| Economic operations, financial planning, reporting, accountancy |  |
| Consumer rights |  |
| General Data Protection Regulation (GDPR) |  |
| Related legislation; occupational safety and health, fire protection and hygiene regulations |  |
| Knowledge of Spa and Wellness services design | **x** |
| Work organization |  |
| Other (please, specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

7. Which of these lacking skills have the greatest negative impact on the establishment? (Please rate on a scale from 4- very significant impact to 1-very low impact, 0- can't evaluate after the discussion at online focus group)

*General IT user skills*

*4 3 2 1 0 1*

*IT professional skills*

*4 3 2 1 0 2*

*Oral communication skills*

*4 3 2 1 0 3*

*Written communication skills*

*4 3 2 1 0 4*

*Customer handling skills*

*4 3 2 1 0 5*

*Team working skills*

*4 3 2 1 0 6*

*Foreign language skills*

*4 3 2 1 0 7*

*Problem solving skills*

*4 3 2 1 0 8*

*Management skills*

*4 3 2 1 0 9*

*Technical, practical or job-specific skills*

*4 3 2 1 0 10*

*Literacy skills*

*4 3 2 1 0 11*

*Office admin skills*

*4 3 2 1 0 12*

*Any other skills (please specify)*

*4 3 2 1 0 13*

*4 3 2 1 0 14*

*4 3 2 1 0 15*

8. Referring to the recruitment difficulties, are these difficulties due to:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 1. Low quality of applicants, due to: | |  | |  | |
| lack of technical skills | x | | 1 | |
| lack of professional expertise | x | | 2 | |
| lack of basic ability to build upon |  | | 3 | |
| poor attitude, motivation or personality |  | | 4 | |
| lack of qualifications | x | | 5 | |
| lack of work experience | x | | 6 | |
| weak communication and presentation skills |  | | 7 | |
| lack of commercial understanding and awareness |  | | 8 | |
| Other (please specify) |  | | 9 | |
|  |  | |  | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 2. Low number of applicants, due to: | |  | |  | |
| Not being able to pay high enough salary |  | | 1 | |
| Competition from other employers in the area |  | | 2 | |
| Work seen as unattractive/unpleasant |  | | 3 | |
| Work requirements very/too specialised |  | | 4 | |
| Lack of suitable qualified people |  | | 5 | |
| Location of company unattractive to graduates |  | | 6 | |
| Other (please specify) |  | | 7 | |
|  |  | |  | |
|  |  | |  | |

*Answers: Low quality of candidates in terms of their work experience, professional experience and lack of qualification. Low interest among potential employees, because they believe that salaries are inadequate, with flexible overtime work, changing remuneration, providing for a bonus system based on the number of clients served. They want to receive big salaries without doing anything “extra”. Location is also a reason for low activity in cases where the business is located outside Riga.*

9.Thinking about skill requirements in your establishment: does your establishment

regularly review the skill and training needs of individual employees?

*1 Yes x*

*2 No*

*3 Partly (e.g. only for some employee groups)*

*4 Don’t know*

*Answers: Yes, all businesses in the Spa and wellness sector conduct regular training for their employees.*

10. Do you currently have at this establishment vacancies which are proving hard to fill due to the lack of adequate skills of applicants?

1 Yes If yes, please identify which skills:

2 No

3 Don’t know

*Answers: Yes, these are vacancies for highly qualified employees, where the Spa specialist possesses a skill set combining several skills, in order to be able to provide massage, cosmetologist and a spa apparatus technologist services. There is a shortage of employees with experience - practitioners. It is hard to hire young people, who have graduated from professional schools or universities, because they lack experience of work with Spa technologies and services. They have to be trained from 0.*

11. How important in their job is reading (becoming familiar with) and comprehending the instructions, guidelines, manuals or reports of Spa establishment? We do not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports*.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | Is the importance of that task staying about |  |
| Very important | **4** |  | the same, increasing or decreasing? |  |
| Rather important | 3 |  | Increasing | **3** |
| Rather unimportant | 2 |  | Staying about the same | 2 |
| Completely unimportant | 1 |  | Decreasing | 1 |
| Does not apply/ Don’t know | 0 |  | Don’t know | 0 |

*Answers: It is important to be able to apply and follow guidelines, instructions and spa technologies usage manuals. Safety protocols must also be complied with. Compliance with epidemiological and hygiene protocols. Compliance with and following instructions is vital, especially at present during the pandemic.*

12. In their job, how important is writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages etc.?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | Is the importance of that task staying about |  |
| Very important | **4** |  | the same, increasing or decreasing? |  |
| Rather important | 3 |  | Increasing | **3** |
| Rather unimportant | 2 |  | Staying about the same | 2 |
| Completely unimportant | 1 |  | Decreasing | 1 |
| Does not apply/ Don’t know | 0 |  | Don’t know | 0 |

*Answers: Demand for instruction guideline development skills is significant and is likely to increase in the future.*

13. How important are skills of using and understanding statistical information and numbers? (for example, in graphs, charts and tables)?

|  |  |
| --- | --- |
| Very important | **4** |
| Rather important | 3 |
| Rather unimportant | 2 |
| Completely unimportant | 1 |
| Does not apply/ Don’t know | 0 |

*Answers: For analysis, marketing and sales implementation, these skills are important.*

14. The next question is about solving complex problems, defined to be a problem which takes employees at least 30 minutes of thinking to find a good solution. In work with customers, how important is solving complex problems? (regarding with customer complaints, customer health problems etc.) The 30 minutes only refers to the time needed to THINK of a solution, it could be for the time needed to carry it out.

In the jobs with customers, how important is solving complex problems?

|  |  |
| --- | --- |
| Very important | **4** |
| Rather important | 3 |
| Rather unimportant | 2 |
| Completely unimportant | 1 |
| Does not apply/ Don’t know | 0 |

*Answers:*

*The issue of problem-solving in very important, particularly in relation to work with clients, and especially in the Spa and wellness sector, where work with clients is dedicated to the improvement of human health, and to improving physical and mental health.*

15. What specialists are being required at the moment within Spa and Wellness industries?

*Answers:*

*Physiotherapists, highly qualified broad profile spa personnel, who are masseurs, spa apparatus specialists as well as cosmetologists, i.e. highly qualified masseurs, who are very knowledgeable about the use of spa apparatus technologies. Highly qualified employees in marketing and sales. Medical personnel with knowledge, experience and understanding of work with Spa technologies (essentially they require a medical education). Knowledge of new technologies. Specific massages. Client service personnel – at receptions – administrators.*

16. In your experience, what vacancies have been difficult to fill?

*Answers:*

*Spa specialists with medical experience, and experience working at Spa centres.*

17. What were the reasons causing these difficulties:

|  |  |
| --- | --- |
| lack of candidates | x |
| sufficient number of candidates, but their qualification was not relevant | x |
| candidates wished to receive larger salary | x |
| other (please specify) |  |
|  |  |

*Answers:*

*There is a shortage of people, professional people with work experience and knowledge. There is a lack of practitioners. It is not possible to find employees with a wide-ranging skill set. During the studies, young people obtain little practical experience. Or else they want to receive remuneration while working as interns.*

18. What changes are going to shape the future of the sector? Please specify in each category:

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | the market (e.g. client’s expectations, legal regulations etc.) |  | x |
|  |  |  |  |
| 2 | employees (supply, productivity etc.) |  |  |
|  |  |  |  |
| 3 | technologies (Spa technologies, working methods, new therapies, new techniques, IT etc.) |  | x |
|  |  |  |  |
| 4 | production (materials, quality, eco recycling etc.) |  |  |
|  |  |  |  |

*Answers:*

*Spa Technologies, digital tools, client expectations.*

19. Considering your current employees, which skills do you think are lacking or need to be better developed?

1 for those with basic education

2 for those with secondary education

3 for those with higher education

*Answers:*

*Within the Spa and wellness sector, employees in demand mostly have higher educations, especially with medical experience, and there is a more marked shortage of such employees. If they have a higher education, they usually lack practical skills. Therefore, if you hire an employee with professional education and knowledge, he or she is likely to lack medical knowledge and thus the skills to use Spa technologies so as not to harm the health of clients.*

20. Which are the skills that have a key-role within your company (by staff positions)?

1 Multiple / poli-qualification

2 Teamwork / internal communication

3 Client / public relations

4 Accommodation to changes

5 Initiative taking / work autonomy

*Answers:*

*Client communication/relations, teamwork, communication, Spa personnel multi- qualifications.*

21. Which skills do you consider to be the most important for the good performance of your company?

*Answers:*

*Client communication/relations, provision of services, professional skills, marketing and sales skills.*

22. Based on your experience please specify how difficult it is to find skilled labour to fill

vacancies at your establishment in the following job categories. (Please rate on a scale where 4-very difficult/ 3-rather difficult/ 2-rather simple/ 1-completely simple/ 0- Does not apply/ Don’t know)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Heads/reps of authority and all levels of authority (managers) | **4** | 3 | 2 | 1 | 0 |
| Highly qualified specialists (medical staff) | **4** | 3 | 2 | 1 | 0 |
| Average qualification specialists (technicians, masters, average accountants, sale persons, cashiers, etc.) | 4 | **3** | 2 | 1 | 0 |
| Employees responsible for preparation of information, registration of documents, other registration and services | 4 | **3** | 2 | 1 | 0 |
| Skilled workers (Spa specialists, sales & marketing specialists) | **4** | 3 | 2 | 1 | 0 |
| Support staff (drivers, security guys, etc.) | 4 | 3 | 2 | **1** | 0 |
| Unskilled workers (including unskilled support staff like office cleaners, yard-keepers) | 4 | 3 | 2 | **1** | 0 |

*Answers:*

*It is hardest to recruit highly qualified medical personnel, highly qualified marketing and sales specialists, as well as those at Spa and wellness business management level.*

24. Based on your experience over your employees’ skills gap, which skills/competencies do you think are not acquired or poorly presented in profession standard? Please describe specific ones.

*Answers:*

*Use of Spa technologies, use of Spa and wellness terminology in foreign languages, Client service hospitality skills.*

24. What are the main customer complaints about your employees?

*Answers: Lateness for appointments, failure to explain the service provided by the spa, do not inform clients about other additional services, which they could use, offer additionally, in regard to professional skills, providing services, clients’ expectations exceed the service they actually receive, employees complaining to clients about the difficult job or that they are tired, rude service, too informal service, young personnel don’t know how to treat clients. Continually changing service providers for clients (e.g. a different masseur every time).*

25. Do your employees know how to handle customer registration systems?

|  |  |  |  |
| --- | --- | --- | --- |
| Yes |  |  |  |
| No |  |  |  |
| Weak |  |  |  |
| Other answer |  | Please specify |  |

*Answers: There are employees, who replied that they know how to do so, but the majority drew attention to the fact that they don’t want to use all the options offered by the registration system to attract and keep regular clients, to create loyally systems and analyse the feedback loop from the client side. Administrative staff only want to do the most important task, i.e. registering the client and that’s all. They are unable to link technical matters to personal client service. They believe that by not doing additional tasks, they can provide better quality and more in-depth work. Young people lack motivation and have a different attitude to work, which needs to change. However, sector companies were unable to come up with proposals how to achieve this. Registration abilities, friendly service. Young people don’t want to learn or master additional skills. They lack motivation. This is the wrong attitude to work.*

26. Do your employees professionally manage digital tools in the marketing and sales of Spa and Wellness Centre products?

|  |  |  |  |
| --- | --- | --- | --- |
| Yes |  |  |  |
| No |  |  |  |
| Weak |  |  |  |

If answer: No/Weak\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Please mention which digital skills are not or poorly managed, such as selling Spa offers in e-shops, developing multi-day programs of SPA offers, creating and placing SPA packages on a website or other platforms such as FB, Instagram, Video blogs etc.)

*Answers:*

*Business mainly employ individual marketing/sales specialists, who do this. For the most part, they do their job, but lack enthusiasm and creativity, as well as the initiative to think for themselves, to keep track of the latest technologies and digital tools and use these in practice. In the implementation of digital marketing, analytical work tends not to get done, resulting in a lack of analysis that affect future work. There is no desire on the part of employees to analyse or make conclusions. Digital skills need to be constantly upgraded, but oftentimes if there is only one marketing specialist – he or she does not have enough time for this.*

27. What professional skills and competencies do you foresee will be needed in the future for Spa and Wellness industry? Please describe specific for Spa and Wellness industry.

*Answers:*

*Digital environment, applications, administration of service processes in digital format, greater use of technology, apparatus, spa robots, Spa and wellness service automation, human resource optimization. Using technology optimises costs. Increasingly problematic trends in relation to young workers. Internship opportunities for young people. Quality engagement of the Millennium generation in the Spa and wellness sector is going to be a major challenge.*

Evaluation of the workshop

Stakeholders, such as day spas, spa hotels, resort rehabilitation centres, noted as key skills and competencies, with the most importance for the best customer service are:

* Professional skills

It is hard to find good specialists with good experience, qualifications, with knowledge of professional skills, so that young specialists are competent in terms of complex know-how, whereby they possess a combination of knowledge in the realm of health and medicine, and in the use of the latest Spa and wellness technologies. Oftentimes, new employees need to be trained to do practical work involving the use of spa technologies, and in work with various apparatus. Additional training tends to be required before spa specialist is ready to work independently with clients.

* Communication skills

Communication with the client is the basis for everything. This falls into various categories: communication with client specialists, who perform treatments. And communication with client reception personnel, who often also double as sales specialists. Communication offering various services, communication with loyal clients, communication in conflict situations, written communication, verbal communication and interaction with clients, as well as communication over the phone.

* Teamwork

Teamwork and related skills are very important, particularly for businesses operating in this sector, bearing in mind shift work, sliding schedules, and work at weekends and on public holidays. Only work for a united team that supports one another and helps each other out in various situations can provide clients with the best service and facilitate for the formation of a network of regular clients.

* Knowledge of foreign languages

Focusing on foreign markets, serving foreign patients, good command of foreign languages, and the ability to use specific terminology in foreign languages in the Spa and wellness field are vital to providing quality professional client service.

* Customer oriented behaviour / attitude

A client-oriented attitude is extremely important, hospitality, communication, adaptation, openness and a positive, open and helpful attitude are vital to attracting and retaining clients.

* Spa and Wellness products marketing, sales and design

Spa and wellness product marketing, complex product development and sales vary. These skills must be continually improved and upgraded, in light of the development of different marketing and sales channels, and the rapid development of and latest trends in digital marketing and sales tools.

## 1.6. Serbia

Introduction

**Preparation** (from 23.June - 05.July 2021)

We have prepared an invitation letter for the WeSkill project online focus group meeting containing information about the project and goals of the event (one page) -along with the online focus group’s agenda (Annex1) in accordance with the WeSkill project Guidelines of Focus Group,WP3.

The invitation letter was sent to the selected key stakeholders from the Serban stakeholders’ list and other institutions not included in the list. Invited stakeholders were contacted by phone to provide their participation. Due to high tourist and the holiday season, some interested parties were not able to participate in the work of the Focus Group.

**Conducting**

Online focus group (zoom call) meeting was held on July 7, 2021. from 9 a.m. to 14 p.m. with participation of total 15 persons, representatives of stakeholders.

The meeting was attended by representatives of 10 leading companies in the wellness tourism sector in Serbia. Participants: Prolom Thermal Spa, Lukovska Thermal Spa, Kursumlijska Thermal Spa, Hotel Izvor Wellness Hotel, Hotel Tornik, Hotel Sloboda, Hotel Park, Sijarinska Thermal Spa, Ribarska Thermal Spa, VIP Casa Apartment Hotel.

The focus group meeting was organized and implemented by the Wellnes Cluster (ZVST), represented by Natasa Ranitovic and Miljka Bogićević. VET national partner, Farmaceutska-Fizioterapeutska škola Beograd, were presented by school teachers Sanja Vukov, Biljana Vasić i Vesna Gambiroža.

ZVST Cluster and VET partner were presented by PP presentations and other participants and their companies were presented as well. WeSkill project was presented by PP presentation as introduction by Natasa Ranitovic. Main conclusions of desk research and presentation of Results of Survey for the Managers/Employers in Serbia were presented by Natasa Ranitovic. Sanja Vukov, presented the Results of Survey for VET Providers in Serbia.

The Survey results for the Managers/Employers, VET providers and the Open questions of the Survey (Annex II) were discussed to get opinions, suggestions and remarks referring to skill gaps to find out which skills are the most important and which are the most important missing skills for the wellness sector/industry in Serbia

General participants’ information

Evaluation of the Survey Open Questions

**Participants’ feedback form**

*1. Which are the most important skills and key competencies at Spa and Wellness establishments? (please list the 3 most important skills (communicational, organizational skills, team work, adaptability, flexibility etc.)).*

|  |
| --- |
| *communicational, flexibility, foreign language, team work* |

*2. How you test these skills?*

|  |  |  |
| --- | --- | --- |
| 1 | During conversation | ***10*** |
| 2 | By assigning a concrete task and time for accomplishing |  |
| 3 | Through customer surveys | ***7*** |
| 4 | Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

*3. In which positions of employees did you have difficulties filling job vacancies during the last 2 years?*

|  |
| --- |
| wellness reception worker, beautician, manicure, pedicure, physiotherapist, hairdresser, maid technical service, wellness hygienists, physiotherapist, masseur |

*4. In which specific positions are you facing most difficulties when looking for suitable*

*employees with the relevant knowledge and skills? (coordinator of online focus group mark a maximum of 5 most important, first which named participants of online focus group)*

|  |  |
| --- | --- |
| **Skills** |  |
| Basic technical skills |  |
| Inter-personal/communication skills | ***5*** |
| Computer / IT skills | ***9*** |
| Management / masterskills |  |
| Foreign languages | ***8*** |
| Creativity/Initiative |  |
| Teamwork | ***4*** |
| Learning skills | ***4*** |
| Information management |  |
| Problem-solving skills |  |
| Time management |  |
| Manual dexterity |  |
| Versatility/capacity to fill in for absent workers |  |
| Business and entrepreneurial skills |  |
| Honesty/integrity/loyalty |  |
| Reliability/precision |  |
| Willingness to work overtime/flexitime | ***8*** |
| Other… |  |

*5. Which departments in your company experience the largest increase in skills*

*requirements? (mark top 3 of the list after discussion of focus group and after when answers are collected)*

|  |  |
| --- | --- |
|  | Largest increase in skills requirements |
| Management and Administration | ***2*** |
| Marketing & Sales | ***10*** |
| Customer Service |  |
| Financial |  |
| IT | ***7*** |
| Human Resources |  |
| Research & Development |  |
| Other…………… |  |

*6. Please assess the importance of the knowledge listed below for your work (please mark 5 most important after discussion)*

|  |  |
| --- | --- |
| *Knowledge about the Spa and Wellness services and products* | ***10*** |
| *Knowledge about the tourism services and products* |  |
| *Knowledge of foreign languages* | ***8*** |
| *Psychology of sales and marketing* | ***4*** |
| *Leadership and motivation of employees* | ***8*** |
| *Time management* |  |
| *Information technology and database work* |  |
| *Economic operations, financial planning, reporting, accountancy* |  |
| *Consumer rights* |  |
| *General Data Protection Regulation (GDPR)* |  |
| *Related legislation; occupational safety and health, fire protection and hygiene regulations* |  |
| *Knowledge of Spa and Wellness services design* |  |
| *Work organization* | ***8*** |
| *Other (please, specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* |  |

*7. Which of these lacking skills have the greatest negative impact on the establishment? (Please rate on a scale from 4-* *very significant impact to 1-very low impact, 0-* *can't evaluate after the discussion at online focus group)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | 4 | 3 | 2 | 1 | 0 |
| General IT user skills | **6** |  |  |  |  |
| IT professional skills | **6** |  |  |  |  |
| Oral communication skills | **9** |  |  |  |  |
| Written communication skills | **7** | **3** |  |  |  |
| Customer handling skills | **10** |  |  |  |  |
| Team working skills | **9** | **1** |  |  |  |
| Foreign language skills | 9 |  | **1** |  |  |
| Problem solving skills | **6** | **4** |  |  |  |
| Management skills | **6** | **2** | **2** |  |  |
| Technical, practical or job-specific skills | **2** | **4** |  | **1** |  |
| Literacy skills | **5** | **3** |  | **1** |  |
| Office admin skills | **7** |  | **2** |  |  |
| Any other skills (please specify) |  |  |  |  |  |

*8. Referring to the recruitment difficulties, are these difficulties due to:*

|  |  |  |
| --- | --- | --- |
| 1. Low quality of applicants, due to: | |  |
|  | lack of technical skills | ***2*** |
|  | lack of professional expertise | ***7*** |
|  | lack of basic ability to build upon | ***1*** |
|  | poor attitude, motivation or personality | ***3*** |
|  | lack of qualifications | ***5*** |
|  | lack of work experience | ***5*** |
|  | weak communication and presentation skills | ***3*** |
|  | lack of commercial understanding and awareness | ***0*** |
|  | Other (please specify) | ***0*** |
|  |  |  |
| 2. Low number of applicants, due to: | |  |
|  | Not being able to pay high enough salary | ***1*** |
|  | Competition from other employers in the area | ***5*** |
|  | Work seen as unattractive/unpleasant | ***0*** |
|  | Work requirements very/too specialised | ***1*** |
|  | Lack of suitable qualified people | ***9*** |
|  | Location of company unattractive to graduates | ***1*** |
|  | Other (please specify) | ***0*** |
|  |  |  |

*9. Thinking about skill requirements in your establishment: does your establishment*

*regularly review the skill and training needs of individual employees?*

|  |  |  |
| --- | --- | --- |
| 1 | Yes | ***9*** |
| 2 | No |  |
| 3 | Partly (e.g. only for some employee groups) |  |
| 4 | Don’t know |  |

*10. Do you currently have at this establishment vacancies which are proving hard to fill due to the lack of adequate skills of applicants?*

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | Yes | ***6*** | If yes, please identify which skills: |
|  |  |  | Technical staff, wellness receptionist, wellness therapist, wellness &spa manager, beautician |
| 2 | No | ***4*** |  |
| 3 | Don’t know |  |  |

*11. How important in their job is reading (becoming familiar with) and comprehending the instructions, guidelines, manuals or reports of Spa establishment? We do not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | Is the importance of that task staying about |  |
| Very important | ***8*** |  | the same, increasing or decreasing? |  |
| Rather important | ***0*** |  | Increasing | ***5*** |
| Rather unimportant | ***0*** |  | Staying about the same | ***3*** |
| Completely unimportant | ***0*** |  | Decreasing | ***0*** |
| Does not apply/ Don’t know | ***0*** |  | Don’t know | ***0*** |

*12. In their job, how important is writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages etc.?*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | Is the importance of that task staying about |  |
| Very important | ***6*** |  | the same, increasing or decreasing? |  |
| Rather important | ***0*** |  | Increasing | ***2*** |
| Rather unimportant | ***0*** |  | Staying about the same | ***4*** |
| Completely unimportant | ***0*** |  | Decreasing | ***0*** |
| Does not apply/ Don’t know | ***0*** |  | Don’t know | ***0*** |

*13. How important are skills of using and understanding statistical information and numbers? (for example, in graphs, charts and tables)?*

|  |  |
| --- | --- |
| Very important | ***6*** |
| Rather important | ***4*** |
| Rather unimportant | ***0*** |
| Completely unimportant | ***0*** |
| Does not apply/ Don’t know | ***0*** |

*14. The next question is about solving complex problems, defined to be a problem which takes employees at least 30 minutes of thinking to find a good solution. In work with customers, how important is solving complex problems? (regarding with customer complaints, customer health problems etc.) The 30 minutes only refers to the time needed to THINK of a solution, it could be for the time needed to carry it out.*

*In the jobs with customers, how important is solving complex problems?*

|  |  |
| --- | --- |
| Very important | ***7*** |
| Rather important | ***3*** |
| Rather unimportant | ***0*** |
| Completely unimportant | ***0*** |
| Does not apply/ Don’t know | ***0*** |

*15. What specialists are being required at the moment within Spa and Wellness industries?*

|  |
| --- |
| wellness therapist, .wellness& spa manager, fitness, yoga instructor, hairdresser, physiatrist, specialists with top knowledge of the wellness industry |

*16. In your experience, what vacancies have been difficult to fill?*

|  |
| --- |
| Wellness &spa manager, technical skills, beauticians, maids, managers, receptionists at the wellness center counter, hairdresser, receptionist |

*17. What were the reasons causing these difficulties:*

|  |  |  |
| --- | --- | --- |
| 1 | lack of candidates | ***9*** |
| 2 | sufficient number of candidates, but their qualification was not relevant | ***1*** |
| 3 | candidates wished to receive larger salary |  |
| 4 | other (please specify) |  |
|  |  |  |

*18. What changes are going to shape the future of the sector? Please specify in each*

*category:*

|  |  |  |
| --- | --- | --- |
| 1 | the market (e.g. client’s expectations, legal regulations etc.) | ***8*** |
|  |  |  |
| 2 | employees (supply, productivity etc.) | ***4*** |
|  |  |  |
| 3 | technologies (Spa technologies, working methods, new therapies, new techniques, IT etc.) | ***3*** |
|  |  |  |
| 4 | production (materials, quality, eco recycling etc.) | ***3*** |
|  | . |  |

*19. Considering your current employees, which skills do you think are lacking or need to be better developed?*

|  |  |  |
| --- | --- | --- |
| 1 | for those with basic education |  |
| 2 | for those with secondary education | ***8*** |
| 3 | for those with higher education | ***2*** |

*20. Which are the skills that have a key-role within your company (by staff positions)?*

|  |  |  |
| --- | --- | --- |
| 1 | Multiple / poli-qualification | ***5*** |
| 2 | Teamwork / internal communication |  |
| 3 | Client / public relations | ***8*** |
| 4 | Accommodation to changes | ***3*** |
| 5 | Initiative taking / work autonomy |  |

*21. Which skills do you consider to be the most important for the good performance of your company?*

|  |
| --- |
| teamwork, loyalty, flexibility, customer relationship, multilateral qualifications, communication, organizational, management skills, financial |

*22. Based on your experience please specify how difficult it is to find skilled labour to fill*

*vacancies at your establishment in the following job categories. (Please rate on a scale where 4-very difficult/ 3-rather difficult/ 2-rather simple/ 1-completely simple/ 0- Does not apply/ Don’t know)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | 4 | 3 | 2 | 1 | 0 |
| Heads/reps of authority and all levels of authority (managers) | ***2*** | ***3*** |  |  |  |
| Highly qualified specialists (medical staff) | ***7*** |  |  |  |  |
| Average qualification specialists (technicians, masters, average accountants, sale persons, cashiers, etc.) | ***1*** |  |  | ***3*** |  |
| Employees responsible for preparation of information, registration of documents, other registration and services |  |  | ***1*** | ***3*** |  |
| Skilled workers (Spa specialists, sales & marketing specialists) | ***8*** |  |  |  |  |
| Support staff (drivers, security guys, etc.) |  |  | ***1*** | ***3*** |  |
| Unskilled workers (including unskilled support staff like office cleaners, yard-keepers) |  | ***1*** |  | ***3*** |  |

23. *Based on your experience over your employees’ skills gap, which skills/competencies do you think are not acquired or poorly presented in profession standard? Please describe specific ones.*

|  |
| --- |
| Basic communication, foreign languages, organizational skills, good presentation of services, time management, proactivity, flexibility |

24. *What are the main customer complaints about your employees?*

|  |
| --- |
| mostly lack of terms for spa treatments, technical skills |

25. *Do your employees know how to handle customer registration systems?*

|  |  |  |  |
| --- | --- | --- | --- |
| Yes | ***6*** |  |  |
| No |  |  |  |
| Weak | ***4*** |  |  |
| Other answer |  | Please specify |  |

26. *Do your employees professionally manage digital tools in the marketing and sales of Spa and Wellness Centre products?*

|  |  |  |  |
| --- | --- | --- | --- |
| Yes | ***4*** |  |  |
| No | ***6*** |  |  |
| Weak |  |  |  |

If answer: No/Weak\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Please mention which digital skills are not or poorly managed, such as selling Spa offers in e-shops, developing multi-day programs of SPA offers, creating and placing SPA packages on a website or other platforms such as FB, Instagram, Video blogs etc.)*

27. What professional skills and competencies do you foresee will be needed in the future for Spa and Wellness industry? Please describe specific for Spa and Wellness industry.

|  |
| --- |
| foreign languages, management, computer skills, flexibility, empathy, communication, time management, implementation of new SPA techniques |

The most important knowledge in spa tourism sector is the knowledge about the spa & wellness services and products, knowledge of foreign language and leadership & motivation of employees.

Lacking skills which have the greatest negative impact on the establishments are Customer handling skills, oral communication skills, team work skills, foreign language skills and written communication skills.

The recruitment difficulties are due to the lack of professional expertise, lack of qualification, lack of work experience, lack of suitable qualified people and competition from other employers in the area.

Most establishments review the skill and training needs of employees on regular basis

Establishments vacancies which are proving hard to fill in are technical staff, wellness receptionist, wellness therapist, wellness & spa manager, beautician

Reading and comprehending the instructions etc. of spa establishments is very important and the importance of the task will increase.

Writing instructions, guidelines etc.re. spa treatments or spa packages is very important and will stay about the same

Skills of using and understanding statistical information and numbers are very important

Solving complex problems is very important and rather important.

Wellness therapist, wellness & spa manager, yoga instructors, hairdresser, physiatrist are specialists which are required at the moment within spa & wellness industry in Serbia.

Lack of candidated is a reason causing difficultiesfor vacancies to be filled.

Market and employees are changes which mainly are going to shape the future of the sector

Skills which are lacking to the current employees are mainly for those in secondary education.

Skills which have a key role in the companies are client-public relations and multiple qualifications.Teamwork, loyality,flexibility,custom relation,communication,organizational skills, managemet and financial skills are the most important skills for the good performance of the companies.

The most difficult to find out skilled labor to fill in is for the spa ,sales & marketing specialists and medical staff.

Basic communication,foreign languages,organizational skills,good presentation of services,time management,proactivity and flexibility are skills which are acquired or poorly presented in proffeesion standards.Lack of terms for spa treatments and technical skills are the main custom complaints about employees.

60% of employees know how to handle customer registration systems.

60% of employees are not able to proffesionaly manage digital tools in marketing&sales of spa&wellness centre products.

Foreign language, management,computer skills,flexibility,empathy,communication,time management,implementation of new Spa tehniques are proffesional skills and competences which will be needed in the future to spa& wellness

Evaluation of the workshop

-Customers are more educated regarding expected wellness&spa services and are increasengly demanding when it comes to wellness and spa services, which requires greater staff commitment, focus to details and a personalized approach. Also, the global trend of a healthy lifestyle, elimination of stress and commitment to one's health continuous to grow, which has a positive effect on the development of the wellness concept. The challenge for the wellness industry will certainly be the additional affirmation of wellness content as a significant tool for improving health and preventing many diseases of today, caused by stress, fast pace and unhealthy lifestyle.

- Continual education/training of employees based on regular evaluation, work on the so-called soft skills and acceptance of the core value system of the company, as a leading concept in work and decision-making, will contribute to the quality of services provided, productivity, enthusiasm and, ultimately, guest satisfaction.

-The development of technologies enables the introduction of new, modern systems in everyday business, but also provides an opportunity to achieve an individual approach and long-term relationship with customers, research their needs and desires, as well as gather information about their satisfaction and attitudes.

-Growing demands for quality, both on the part of consumers and in terms of legal regulations, will also accelerate work on improving quality in the wellness industry. The growing need for the natural environment and the care for natural resources also have a favourable effect, which is in line with the business model of companies from wellness & spa tourism sector.

-There is a lack of professional staff in the wellness and spa industry in Serbia due to the lack of formal education for wellness and spa (neither KF4 or higher), mainly secondary education. Existing non-formal education most often provides insufficient quality education and creates mistrust of employers in professional skills of job candidates and their willingness to hire such candidates.

## 1.7. Slovenia

Introduction

Preparations for the implementation of focus group began in May 2021. The first online meeting of Slovenian partners was on 27 May 2021. In total, there were 4 online meetings and a lot of electronic and telephone communication took place between the Slovenian partners. At the meetings, we agreed on the exact dates of the focus group, the location of the focus group (online event) and prepared a plan for the focus group. We received a guidelines of focus groups from the lead partner of the WP3, which served as a guide for the preparation of the focus group. The guidelines of focus groups contained:

- Objectives,

- Timeframe and online focus groups requirements,

- Budget and financial issues related to the online focus groups organizing,

- Annex I. Agenda of the online focus groups,

- Annex II. Focus groups participants’ feedback form,

- Annex III. Template for focus groups national reports.

At the meetings, we also agreed on who will be responsible for what.

Two weeks before the focus group was held, we sent invitations to all potential stakeholders along with the agenda of the focus group. One week before the start of the focus group, we sent a reminder to potential stakeholders.

The online focus group took place in Wednesday, June 16th, 2021 from 9 a.m. to 2 p.m..

16 participants were present at the focus group. Of all participants, 6 participants were project team members: Darko Mali (CPI), Polona Prosen Šprajc (CPI), Danuša Škapin (CPI), Lazar Pavić (CHT), Franci Kotnik (SSGZ) and Andreja Tamše (SSGZ). Other (10) participants were representatives of companies from the wellness tourism sector. Focus group evaluation form was distributed only to them.

General participants’ information

10 participants filled in the evaluation forms.

Chart, pie chart

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Of the participants included in the analysis, 90,0% are women and 10,0% are men.

Chart, pie chart

Description automatically generated

All participants are representatives of companies from the wellness tourism sector. 50,0% of the participants are manager of establishment, 30,0% are supervisor of establishment, 10,0% are owner of establishment and 10% are other.

Evaluation of the survey open questions

Following the guidelines of focus group, focus group participants should complete a "Participants' feedback form". However, the "Participants' feedback form" also contains questions that participants had already answered in another survey (Survey for Managers/Owners of Spa and Wellness Establishments).

The organizers of the focus group therefore decided to ask questions that the participants had not yet answered in the form of open-ended questions. These questions were answered by the participants during the discussion. Because the answers to the open-ended questions were collected within the discussion, the answers cannot be shown in graphs.

We did not distribute "Participants' feedback form" to the participants. In the following, the open-ended questions, answered by the focus group participants, are marked with sequential numbers of questions in the "Participants' feedback form".

***Q1: Which are the most important skills and key competencies at Spa and Wellness establishments?***

Focus group participants emphasized that the most important skills and key competencies in spa and wellness establishments are:

- basic professional knowledge in the field of wellness or. tourism,

- user-oriented communication skills,

- knowledge of foreign languages,

- innovation,

- commitment to work, dedication,

- marketing and sales.

***Q2: How you test these skills?***

Skills and competencies are monitored and tested during the practical training and final examination of students (Higher Vocational programs). Skills and competencies among employees are monitored during the conversation and through costumer surveys.

***Q3: In which positions of employees did you have difficulties filling job vacancies during the last 2 years?***

When looking for employees, focus group participants find it difficult to find people who would be responsible for communicating with customers and processing information, receptionists, and qualified / skilled workers such as spa professionals or marketing professionals.

***Q8: Referring to the recruitment difficulties, are these difficulties due to:***

Problems in hiring are seen by the participants in the factors that are interconnected. On the one hand, there is a shortage of staff, on the other hand, a large number of unqualified staff apply for the vacancy. Candidates expect higher salaries, and they are not enthusiastic about working on weekends, holidays, ...

***Q9: Thinking about skill requirements in your establishment: does your establishment***

***regularly review the skill and training needs of individual employees?***

Most participants say that they regularly check the skills needs of employees in their company.

***Q10: Do you currently have at this establishment vacancies which are proving hard to fill due to the lack of adequate skills of applicants?***

Those participants who have vacancies pointed out that these were caused by a pandemic. These positions are now difficult to fill precisely because of the lack of relevant skills of applicants.

***Q15: What specialists are being required at the moment within Spa and Wellness industries?***

* Receptionists
* Spa professionals
* Marketing professionals

***Q16: In your experience, what vacancies have been difficult to fill?***

- Receptionists

- Spa professionals

- Marketing professionals

***Q17: What were the reasons causing these difficulties?***

Problems in hiring certain staff are seen by the participants in the factors that are interconnected. On the one hand, there is a shortage of staff, on the other hand, a large number of unqualified staff apply for the vacancy. Candidates expect higher salaries, and they are not enthusiastic about working on weekends, holidays, ...

***Q19: Considering your current employees, which skills do you think are lacking or need to be better developed?***

Participants highlighted the following skills and attitudes:

- quality assurance,

- independence,

- reliability / accuracy,

- honesty / integrity / affiliation,

- attitude towards customers and

- teamwork.

***Q20: Which are the skills that have a key-role within your company (by staff positions)?***

Participants highlighted the following skills and attitudes:

- innovation,

- determination,

- flexibility.

***Q21: Which skills do you consider to be the most important for the good performance of your company?***

According to the participants, the following skills are important for the good operation of the company:

- basic professional knowledge in the field of wellness or tourism,

- user-oriented communication skills,

- knowledge of foreign languages,

- innovation,

- commitment to work, dedication,

- marketing and sales.

***Q23: Based on your experience over your employees’ skills gap, which skills/competencies do you think are not acquired or poorly presented in profession standard? Please describe specific ones.***

Competencies in occupational standards Wellness organizer are broadly defined, thus allowing the VET programs to be adapted to the needs of the market.

***Q24: What are the main customer complaints about your employees?***

Customers complain about employees mainly about:

- phone use, poor communication,

-orderliness at work,

-appropriate explanation to the customer why something (service, processing, etc.) is good,

-basic expertise of a wide range (healthy lifestyle, services, nutrition, knowledge of where to look for the right professional information, communication, work organization).

***Q25: Do your employees know how to handle customer registration systems?***

Employees know how to handle customer registration systems. All new employees must learn this immediately.

***Q26: Do your employees professionally manage digital tools in the marketing and sales of Spa and Wellness Centre products?***

Participants confirmed that their employees operate digital tools, namely:

- reservation platforms,

-communication with customers,

-CRM,

-hotel informational system.

***Q27: What professional skills and competencies do you foresee will be needed in the future for Spa and Wellness industry? Please describe specific for Spa and Wellness industry.***

According to the participants, the following skills will be needed in the future:

- innovation,

- search and upgrade of knowledge = where to get the right information,

- determination, flexibility,

- will for further training, education,

- digital competencies,

- teamwork.

Evaluation of the event

A picture containing bar chart

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Overall evaluation of the focus group by participants is very positive. Average grades of all aspects of the focus group are higher than 4,6. The lowest average grade is assigned to the “Online platform for events” aspect (4,6) and the highest average grades are assigned to the "Quality of speaker/s" aspect (5,0) and “Prepared presentation” aspect (5,0).

2. FOCUS GROUPS DISCUSSIONS RESULT ANALYSES – SUMMARIES AND COMPARISONS

The most important skills and key competences in Spa and Wellness establishments that were mentioned by most focus group company representatives were **teamwork,** knowledge of **foreign languages** and **communication skills**. Teamwork as important skills and key competencies at Spa and Wellness establishments was mentioned by Bulgaria, France, Greece, Latvia and Serbia. Foreign language as important knowledge at Spa and Wellness establishments was mentioned by Bulgaria, France, Latvia, Serbia and Slovenia. Communication as important skills and key competencies at Spa and Wellness establishments was mentioned by Greece, Latvia, Serbia and Slovenia.

As skills for specific positions where Spa and Wellness establishments face most difficulties when looking for suitable employees with the relevant knowledge and skills Spa and wellness company representatives outlined **foreign languages, teamwork, inter-personal/communication skills,** and **willingness to work overtime, flexible time.** Knowledge of foreign languages was mentioned by Bulgaria, Greece, Latvia and Serbia. Teamwork was mentioned by Bulgaria, France, Greece, Latvia and Serbia. Inter-personal/communication skills were mentioned by France, Latvia and Serbia. Willingness to work overtime and flexible time at Spa and Wellness establishments was mentioned by Bulgaria, Latvia and Serbia.

Most important knowledge for Spa and Wellness establishments most focus group participants listed **knowledge about the Spa and Wellness services and products, knowledge of foreign languages, knowledge about the tourism services and products,** also **leadership and employee motivation**, **knowledge of psychology of sales and marketing** as well as **leadership and motivation of employees.** Knowledge about the Spa and Wellness services and products was mentioned by Bulgaria, Greece, Latvia and Serbia. Knowledge of foreign languages was mentioned by Bulgaria, Greece, Latvia and Serbia, Slovenia. Knowledge about the tourism services and products was mentioned by Bulgaria, Greece, and Latvia. Knowledge about leadership and employee motivation was mentioned by Bulgaria, France and Serbia. Knowledge psychology of sales and marketing was mentioned by Bulgaria, Latvia and Serbia.

The lack of skills that have the greatest negative impact on the Spa and Wellness establishment, focus group company representatives highlighted **oral communication skills, customer-handling skills, team-working skills,** knowledge of **foreign language**, also **management skills**, **technical, practical or job-specific skills** and **management skills.** Negative impact on establishments in case of lack of oral communication skills was mentioned by Bulgaria, France, Greece, Latvia and Serbia. Negative impact on establishments in case of lack of customer-handling skills was mentioned again by Bulgaria, France, Greece, Latvia and Serbia. Negative impact on establishments in case of lack of team-working skills was mentioned by Greece, Latvia and Serbia. Negative impact on establishments in case of lack of knowledge of foreign language was mentioned by Greece, Latvia and Serbia. Negative impact on establishments in case of lack of management skills was mentioned by Bulgaria, France and Greece. Negative impact on establishments in case of lack of technical, practical or job-specific skills was mentioned by Bulgaria, France, Greece and Latvia.

As the skills that have a key-role for sector, Spa and Wellness company representatives outlined skills in **client and public relations** as well as **need for multiple and poliqualification specialists.** Client and public relations skill was mentioned by focus group participants of France, Greece, Latvia and Serbia. Need for multiple and poliqualification specialists was mentioned by focus group participants of France, Latvia and Serbia.

The skill that was considered to be the most important for the good performance of Spa and Wellness establishment was **client oriented communication skill** and **basic professional knowledge** **in the field of wellness or tourism**. Client oriented communication skill was mentioned by focus group participants of Italy, Latvia, Serbia and Slovenia. Basic professional knowledge in the field of wellness or tourism was mentioned by focus group participants of Bulgaria, France and Serbia.

Regarding professional skills and competencies that Spa and Wellness establishment representatives foresee as needed in the future for industry focus group participants outlined **digital competences and computer skills** in Latvia, Serbia and Slovenia.

Table …..

**Focus groups discussions result summary**

|  | Bulgaria | France | Greece | Italy | Latvia | Serbia | Slovenia |
| --- | --- | --- | --- | --- | --- | --- | --- |
| ***Q1: The most important skills and key competencies at Spa and Wellness establishments*** | \*High qualification in physical and rehabilitation medicine  \***Foreign language qualification**  \***Teamwork** | \*High qualification in nursing (postpartum, weight loss, dietetics, etc.) \***Foreign language skills**  \***Teamwork**  \*Hours | Soft skills: \***Communicational**, \*Organizational, \***Teamwork**, \*Flexibility skills |  | \*Professional skill set  \***Proficiency in foreign languages**,  \*Work ethic,  \***Communication skills**,  \***Teamwork**,  \*Attitude to work,  \*Sales and marketing work,  \*Motivation and communication with the client | \***Communicational**, \*Flexibility,  \***Foreign language**, \***Team work** | \*Basic professional knowledge in the field of wellness or. tourism,  \***User-oriented communication skills**,  \***Knowledge of foreign languages**,  \*Innovation,  \*Commitment to work, dedication,  \*Marketing and sales. |
| ***Q2: Test of skills*** | \***During conversation**  \*Through **customer surveys**  \*Terms for certification of SPA centres from Ministry of Tourism of Bulgaria | \***During the conversation**  \*Through **customer surveys**  \*By assigning a concrete task and a time limit for its completion | Those skills are being tested by most of them by assigning a concrete task and time for accomplishing |  | Everything is combined, trial period (from a week to three months), **interviews and surveys of clients** regarding satisfaction with the service provided by the employee. \*Protocol for accreditation. \*Calling previous employers | **\*During conversation** (10)  \*Through **customer surveys** (7) | Students:  \*During the practical training and final examination.  Employees are monitored  \*During the **conversation** and **\*T**hrough **costumer surveys** |
| ***Q3: Positions of employees having difficulties filling job vacancies during the last 2 years*** | Medicine staff: \*Doctors, \***Physiotherapists** | \***Physiotherapists**, \*Naturopaths, \*Dieticians | \*Doctors,  \*Lifeguards, \*Safeguards (security) |  | \***Physiotherapists**,  Highly qualified broad profile spa personnel: \***Masseurs**,  \*Spa apparatus specialists,  \*Cosmetologists, i.e. highly qualified masseurs, who are very knowledgeable about the use of spa apparatus technologies | \*Wellness reception worker,  \*Beautician,  \*Manicure,  \*Pedicure, \***Physiotherapist**, \*Hairdresser,  \*Maid technical service,  \*Wellness hygienists,  \***Masseur** | *People who would be responsible for communicating with customers and processing information****:*** \*Receptionists,  Qualified / skilled workers such as  \*Spa professionals or  \*Marketing professionals. |
| ***Q4: Skills for positions most difficult to find suitable employees with the relevant knowledge and skills*** | \*Creativity/Initiative  \*Problem-solving skills  \***Foreign languages**  \***Teamwork**  \***Willingness to work overtime/ flexitime** | \*Creativity/ Initiative  **\*Inter-personal/ communication skills**  \*Honesty/ integrity/ loyalty  \***Teamwork**  \*Manual dexterity | \*Basic technical skills,  \*Information management,  \*Problem-solving skills,  \***Foreign languages**, \***Teamwork**  \*Computer/IT skills |  | \*Basic technical skills  \***Inter-personal/ communication skills**  \***Foreign languages**  \* **Teamwork**  \***Willingness to work overtime/ flexitime** | \***Inter-personal/ communication skills** (5)  \*Computer/ IT skills (9)  \***Foreign languages** (8)  \***Teamwork** (4)  \* Learning skills (4)  \***Willingness to work overtime/ flexitime** (8) |  |
| ***Q5: Departments that experience the largest increase in skills***  ***requirements*** | \***Customer Service** (Medicine staff)  \***Management and Administration**  \***Marketing & Sales** | \*Care  **\*Customer Service**  **\*Marketing & Sales** | \***Customer service**  \***Marketing & Sales**  \***Management and administration** |  | \***Management and Administration**  \***Marketing & Sales**  \***Customer Service** | \***Management and Administration** (2)  \***Marketing & Sales** (10)  \*IT (7) |  |
| ***Q6: Importance of the knowledge for work*** | \***Knowledge about the Spa and Wellness services and products**  \***Knowledge about the tourism services and products**  \***Knowledge of foreign languages**  \***Psychology of sales and marketing**  \***Leadership and motivation of employees** | \***Knowledge of spa and wellness services and products**  \***Knowledge about the tourism services and products**  \***Knowledge of foreign languages**  **\*****Leadership and employee motivation**  \*Related legislation; occupational safety and health, fire protection and hygiene regulations | \***Knowledge about Spa and Wellness services and products**,  \* **Knowledge about the tourism services and products**  \* **Knowledge of foreign languages**  \*Knowledge of Spa and Wellness services design  \*Work organization |  | \***Knowledge about the Spa and Wellness services and products**  \***Knowledge about the tourism services and products**  \***Knowledge of foreign languages**  \***Psychology of sales and marketing**  \*Knowledge of Spa and Wellness services design | \***Knowledge about the Spa and Wellness services and products**(10)  \***Knowledge of foreign languages**(8)  \***Psychology of sales and marketing**(4)  \***Leadership and motivation of employees**(8)  \* Work organization(8) |  |
| ***Q7: Lack of skills that have the greatest negative impact*** | \***Oral communication skills**  \***Customer handling skills**  \***Management skills**  \***Technical, practical or job-specific skills** | \***Oral communication skills**  \***Customer handling skills**  \***Management skills**  \***Technical, practical or job-specific skills** | \*General IT user skills,  \***Oral communication skills**,  \***Customer handling skills**,  \***Foreign language skills**,  \*Literacy skills  \***Team working skills**,  \*Problem-solving skills,  \***Management skills**,  \***Technical, practical or job-specific skills** |  | \***Oral communication skills**  \*Written communication skills  \* **Customer handling skills**  \* **Team working skills**  \* **Foreign language skills**  \* Problem solving skills  \* **Technical, practical or job-specific skills**  \* Literacy skills  \* Office admin skills | \***Customer handling skills**  \***Oral communication skills**  \***Team working skills**  \***Foreign language skills**  \*Written communication skills  \*Office admin skills |  |
| ***Q8: Reasons for recruitment difficulties*** | Low quality of applicants, due to:  \* **Lack of professional expertise**  \***Poor attitude, motivation or personality**  Low number of applicants, due to:  \***Not being able to pay high enough salary**  \***Competition from other employers in the area** | Low quality of applicants, due to:  \*Lack of technical skills  \***Lack of professional expertise**  \***Poor attitude, motivation or personality**  Low number of applicants, due to:  \***Not being able to pay a high enough salary**  \***Competition from other employers in the area** | Low quality of applicants, due to:  \***Lack of work experience**,  \*Weak communication and presentation skills,  \*Lack of commercial understanding and awareness  Low number of applicants, due to:  \***Not being able to pay high enough salary**  \*Lack of suitable qualified people | \*Lacking is previous **work experience** as well as appropriate training  \***Lack of qualifications** and skills  \*Lack of candidates  (a drop of about 30% in the number of people willing to do seasonal work) | Low quality of applicants, due to:  \*Lack of technical skills  \***Lack of professional expertise**  \***Lack of qualifications**  \***Lack of work experience**  Low number of applicants, due to:  \***Not being able to pay high enough salary** (salaries are inadequate, with flexible overtime work, changing remuneration, providing for a bonus system based on the number of clients served) | Low quality of applicants, due to:  \***Lack of professional expertise**(7)  \***Lack of qualifications**(5)  \***Lack of work experience**(5)  \***Poor attitude, motivation or personality**(3)  \*Weak communication and presentation skills(3)  Low number of applicants, due to:  \*Lack of suitable qualified people(9)  \***Competition from other employers in the area** (5) | Problems in hiring are seen by the participants in the factors that are interconnected. On the one hand, there is a shortage of staff, on the other hand, a large number of unqualified staff apply for the vacancy. Candidates expect **higher salaries**, and they are not enthusiastic about working on weekends, holidays etc. |
| ***Q9: Review the skill and training needs of individual employees*** | **Yes** | **Yes** | **Yes** |  | **Yes**, all businesses in the Spa and wellness sector conduct regular training for their employees | **Yes** (9) | Most participants regularly check the skills, needs of employees in their company. |
| ***Q10: Vacancies which are hard to fill due to the lack of adequate skills of applicants*** | **Yes**  *High qualification staff* in *physical and rehabilitation medicine* | **Yes**:  *Qualified personnel* | **Yes**  Technical skills (claytheraphy) |  | **Yes**, vacancies ***for highly qualified employees***, where the Spa specialist possesses a skill set combining several skills, in order to be able to provide ***massage, cosmetologist and a spa apparatus technologist services***. Shortage of employees with experience - practitioners. Hard to hire young people, who have graduated from professional schools or universities, because they ***lack experience of work with Spa technologies and services***. They have to be trained from 0 | **Yes** (6)  \*Technical staff, \*wellness receptionist, \*wellness therapist, \*wellness &spa manager,  \*beautician  No(4) | Those participants who have vacancies pointed out that these were caused by a pandemic. These positions are now difficult to fill precisely because of the lack of relevant skills of applicants |
| ***Q15: Specialists required at the moment*** | Medicine staff: \*Doctors \***Physiotherapists** | \*Care technicians, \***Physiotherapists**, \*Client management \***Reception** and scheduling | \*Aestheticians,  \*Masseurs,  \***Physiotherapists**,  \*Specialties in alternative forms of exercise (yoga),  \*Specialists in reflexology | \*Doctors  \***Physiotherapists**, \*Digital marketing specialists  \*Social media managers  \*Human resources who are able to take care of the company's identity | \***Physiotherapists**,  Highly qualified broad profile spa personnel:  \*Masseurs,  \*Spa apparatus specialists  \*Cosmetologists,  \*Highly qualified masseurs, who are very knowledgeable about the use of spa apparatus technologies. \*Highly qualified employees in marketing and sales. \*Medical personnel with knowledge, experience and understanding of work with Spa technologies (essentially they require a medical education). \*Knowledge of new technologies. Specific massages. \*Client service personnel – at **receptions** – administrators | \*Wellness therapist, \*Wellness& spa manager,  \*Fitness, yoga instructor,  \*Hairdresser,  \*Physiatrist,  \*Specialists with top knowledge of the wellness industry | \***Receptionists**  \*Spa professionals  \*Marketing professionals |
| ***Q16: Vacancies have been difficult to fill*** | Medicine staff: \*Doctors \*Physiotherapists | \*Medical and paramedical staff (for thermal baths) \*Spa technicians for hotels | \*Doctors |  | \*Spa specialists with medical experience, and experience working at Spa centres | \*Wellness &spa manager,  \*Technical skills,  \*Beauticians,  \*Maids,  \*Managers,  \*Receptionists at the wellness center counter,  \*Hairdresser,  \*Receptionist | \*Receptionists  \*Spa professionals  \*Marketing professionals |
| ***Q17: Reasons causing difficulties to fill vacancies*** | \***Lack of candidates** |  | \*Candidates wished to receive larger salary |  | \***Lack of candidates**  \*Sufficient number of candidates, but their qualification was not relevant  \*Candidates wished to receive larger salary  Shortage of people, professional people with work experience and knowledge.  Lack of practitioners.  It is not possible to find employees with a wide-ranging skill set.  During the studies, young people obtain little practical experience, they want to receive remuneration while working as interns | \***Lack of candidates** (9)  \*Sufficient number of candidates, but their qualification was not relevant (1) | Problems in hiring certain staff are seen by the participants in the factors that are interconnected. On the one hand, there is a shortage of staff, on the other hand, a large number of unqualified staff apply for the vacancy. Candidates expect higher salaries, and they are not enthusiastic about working on weekends, holidays etc. |
| ***Q18: Changes going to shape the future of the sector*** | The market:  \*Definitely Covid legal regulations  Employees  Technologies |  | The market:  \*COVID-19 impact on economy  Technologies | ***Increasing rate of ageing***, especially in European and Western countries. Non-invasive therapies, such as physiotherapy and rehabilitation.  The focus on wellbeing will increasingly be expressed in holistic terms; dimension of wellbeing will be ever more ***psychic as well as physical***.  Spas and Wellness centres stay and operate in a territory: it is the territory itself that can produce health and opportunities for recreation and wellbeing, through a concerted work between all the public and private operators in the tourism sector. Thermal activities must be harmonised and strengthened with the other local attractions (cultural, environmental, landscape, gastronomic). | The market: \*Client’s expectations  Technologies:  \*Spa technologies,  \*Digital tools, |  |  |
| ***Q19: Skills that are lacking or need to be better developed*** | \*For those with basic education  \*For those with secondary education | \*For people with a basic education  \*For people with secondary education | \*For those with basic education  \*For those with secondary education  \*For those with higher education |  | Demand for employees with higher education, especially medical experience. Specialists that have a higher education, usually ***lack practical skills***. Therefore, if you hire an employee with professional education and knowledge, he or she is likely to ***lack medical knowledge and thus the skills to use Spa technologies*** so as not to harm the health of clients. |  | \*Quality assurance,  \*Independence,  \*Reliability/ accuracy,  \*Honesty/ integrity/ affiliation,  \*Attitude towards customers and  \*Teamwork |
| ***Q20: Skills that have a key-role*** | \*Initiative taking / work autonomy | \* **Multiple / poli-qualification**  \* **Client / public relations**  \* Initiative taking / work autonomy | \*Teamwork / internal communication  \***Client / public relations**  \*Accommodation to changes |  | \* **Client / public relations**,  \*Teamwork/ internal communication,  \*[Spa personnel] **Multiple / poli-qualification** | \***Client / public relations** (8)  \***Multiple / poli-qualification** (5)  \*Accommodation to changes (3) | \*Innovation,  \*Determination,  \*Flexibility |
| ***Q21: Most important skills for the good performance of the company*** | \***Basic skills and knowledge** | \***Basic skills and knowledge** and to adapt to the needs of the company and the customers | \*Teamwork, \***Communication** | Soft skills, i.e. ***transversal and relational skills*** (*ability to listen and communicate effectively*, *showing understanding and empathy towards the customers and their needs*).  These are often ***innate skills***, which are difficult to teach.  *The* ***need for creative human resources***, able to *solve problems in real time, to work in a team, to manage stress and to adapt to new requirements such as those of crisis management, health safety and emergency insurance*.  Skills, abilities and capacities that are unique to the human mind and more difficult to automate - *social intelligence, originality, creativity*, *learning and developing skills.* | \***Client communication/ relations**,  \*Provision of services,  \*Professional skills,  \*Marketing and sales skills | \*Teamwork,  \*Loyalty,  \*Flexibility,  \*Customer relationship,  \*Multilateral qualifications,  \***Communication**,  \*Organizational,  \*Management skills,  \*Financial | \***Basic professional knowledge in the field of wellness or tourism,**  \***User-oriented communication skills**,  \*Knowledge of foreign languages,  \*Innovation,  \*Commitment to work, dedication,  \*Marketing and sales. |
| ***Q22: Difficulty to find skilled labour to fill vacancies*** | \***Heads/reps of authority and all levels of authority (managers)**  \***Highly qualified specialists (medical staff)** | \***Heads/authority representatives and all levels of authority (managers)**  \***Highly qualified specialists (medical staff)** | \***Heads/reps of authority and all levels of authority (managers)**  **\*Highly qualified specialists (medical staff)**  \*Average qualification specialists (technicians, masters, average accountants, sale persons, cashiers, etc.)  \*Employees responsible for preparation of information, registration of documents, other registration and services  \***Skilled workers (Spa specialists, sales & marketing specialists)** |  | \***Heads/reps of authority and all levels of authority (managers)**  \***Highly qualified specialists (medical staff)**  \***Skilled workers (Spa specialists, sales & marketing specialists)** | \***Highly qualified specialists (medical staff)**  \***Skilled workers (Spa specialists, sales & marketing specialists)** |  |
| ***Q23: Skills and competencies that are not acquired or poorly presented in profession standard*** | The professional standards comprise standard/normal situation. In the reality, there are different situations, *it’s important to rely on a qualified staff that could be flexible to work in a non-standard situations and to have an individual approach to each client, in each situation, none priory trained.* | It is easier to find staff if the establishment is located in a large city, still the thermal spas are often in the mountains or rural areas and they are more demanded by customers.  Staff with low qualifications are easily recruited in rural areas, as soon as the level of skills is higher it becomes problematic even with interesting salaries.  It is important to be able to count on qualified staff who can be flexible and mobile to work in the mountains or in the city. | \*Communication, \*Customer experience,  \*Services, \*Knowledge for spa & wellness |  | \*Use of Spa technologies,  \*Use of Spa and wellness terminology in foreign languages,  \*Client service hospitality skills | \*Basic communication,  \*Foreign languages,  \*Organizational skills,  \*Good presentation of services,  \*Time management,  \*Proactivity,  \*Flexibility | Competencies in occupational standards Wellness organizer are broadly defined, thus allowing the VET programs to be adapted to the needs of the market. |
| ***Q24: Main customer complaints about company employees*** | Clients approach issues more emotional during vacations, while employees are more professional, which creates a certain tension | \*Lack of advice on care,  \*Time slots often difficult to find according to their needs. | \*Inadequacy in good manners \*Behavioural issues | \**Lack of flexibility*.  Customers complain about *employees who do not show care and empathy towards their expectations and needs*, preferring to remain in the enclosure of standardised tasks, without autonomy, rather than “entering unexplored areas” to try to provide satisfactory feedback to customers | \*Lateness for appointments,  \*Failure to explain the service provided by the spa, do not inform clients about other additional services, which they could use, offer additionally, in regard to professional skills, providing services, clients’ expectations exceed the service they actually receive,  \*Employees complaining to clients about the difficult job or that they are tired  \*Rude service, too informal service, young personnel don’t know how to treat clients. \*Continually changing service providers for clients (e.g. a different masseur every time) | \*mostly lack of terms for spa treatments,  \*technical skills | \*phone use, poor communication,  \*orderliness at work,  \*appropriate explanation to the customer why something (service, processing, etc.) is good,  \*basic expertise of a wide range (healthy lifestyle, services, nutrition, knowledge of where to look for the right professional information, communication, work organization). |
| ***Q25: Employee knowledge how to handle customer registration systems*** | Yes | Yes | Yes  All employees in the corresponding vacancies know how to handle customer registration systems. |  | Employees don’t want to use all the options offered by the registration system to attract and keep regular clients, to create loyally systems and analyse the feedback loop from the client side. Administrative staff only want to do the most important task, i.e. registering the client, unable to link technical matters to personal client service. Young people lack motivation and have a different attitude to work, which needs to change, don’t want to learn or master additional skills, lack motivation. | Yes (6)  Weak (4) | Employees know how to handle customer registration systems. All new employees must learn this immediately |
| ***Q26: Employee professional management of digital tools in the marketing and sales of Spa and Wellness Centre products*** | Yes | Yes | Yes  All employees in the corresponding vacancies know how to use digital tools in marketing and sales |  | Business mainly employ individual marketing/sales specialists. They do their job, but ***lack enthusiasm and creativity, as well as the initiative to think for themselves, to keep track of the latest technologies and digital tools and use these in practice***. Lack of analytical work. No desire to analyse or make conclusions. ***Digital skills need to be constantly upgraded***, but oftentimes if there is only one marketing specialist – he or she does not have enough time for this | Yes (4)  No (6) | \*Reservation platforms,  \*Communication with customers,  \*CRM,  \*Hotel informational system |
| ***Q27: Professional skills and competencies foreseen to be needed in the future for Spa and Wellness industry*** | \*Care about the conservation of *natural resources and the protection of the ecosystem*  \*Lack of prospects for sustainable development due to the weak advertising policy  \*The staff – the need for education and training of qualified staff with *good level of language skills*  \**Certificates and regulation* in the National Tourist Register of Bulgaria.  \**Provide more opportunities to restore and strengthen health, offering kinesiotherapy, physiotherapy and physical therapy*.  \*Training of expert staff - with *an individual approach to each client, able to recognize the specifics of the different health problem*, as well as to assist in solving it through the correct SPA procedure.  \*Business clients require *flexible working hours by SPA centres*.  \*Global social media must be present in this industry, as, currently, they have a very important role for the young people exploring the World by internet. \*Surveys with feedback from customers. | Necessary to offer more possibilities to restore and strengthen health, by proposing *physiotherapy, naturopathy* and *diet*.  Training to give individual attention to customers and to propose appropriate procedures.  Only the thermal establishments need medical staff able to respect the follow-up during the *care of the different pathologies* that the clients of these establishments have.  For the spa hotels, the clients are looking for massages, aesthetic *treatments and well being*, so the *treatment times are more flexible* | Adjustment to current trends |  | \*Digital environment, \*Applications, \*Administration of service processes in digital format, \*Greater use of technology, apparatus, spa robots,  \*Spa and wellness service automation, human resource optimization.  \*Using technology optimises costs. \*Increasingly problematic trends in relation to young workers.  \*Internship opportunities for young people. \*Quality engagement of the Millennium generation in the Spa and wellness sector is going to be a major challenge | \*Foreign languages,  \*Management,  \*Computer skills,  \*Flexibility,  \*Empathy,  \*Communication,  \*Time management,  \*Implementation of new SPA techniques | \*Innovation,  \*Search and upgrade of knowledge = where to get the right information,  \*Determination,  \*Flexibility,  \*Will for further training, education,  \*Digital competencies,  \*Teamwork |

PART IV: WELLNESS AND SPA SECTOR SKILLS’ GAPS SUMMARY

INTRODUCTION

This is the final Wellness and Spa sector skills’ gaps summary report of the Erasmus + project “Wellness and Spa Tourism Sectoral Skills’ Development” (WeSkill), Ref. No. 621401-EPP-1-2020-1-BG-EPPKA2-SSA.

The "WeSkill" project aims to develop and implement a curriculum for VET (vocational education and training) institutions in line with labour market needs, based on addressing skills and competency gaps in the spa and wellness sector.

First step of project was implementation of Working package No. 3 which includes development of:

1. Report on findings of skills gaps research in existing data sources.
2. Report on survey findings.
3. Report on findings of focus groups.
4. Wellness and Spa sector skills’ gaps summary report.

The cooperation partners involved in the project are vocational education and training institutions (VET), state institutions, companies in the spa and wellness sector and non-governmental organizations from Latvia, Slovenia, France, Italy, Serbia, the Netherlands, Greece and Bulgaria.

* + - 1. REPORT ON FINDINGS OF SKILLS GAPS RESEARCH IN EXISTING DATA SOURCES

The aim of the first report which was the first phase / activity of the "WeSkill working package 3" project was to summarize the research carried out in the project partner countries, the analysed data carried out at the national and regional level on the existing skills and competences gaps in the spa and wellness sector.

Report on findings of skills gaps research collected from existing data sources (desk research) in 7 participating countries and, in addition, in 4 EU countries beyond the partnership.

The report summarizes in detail presently existing data (from national databases, projects’ results, NRP, etc.) on skills gaps, occupational profiles, education programmes, curriculums and industry’s needs in the wellness and spa sector in project participating countries.

Partner organisations from all the projects partner states of Latvia, Slovenia, France, Italy, Serbia, Greece and Bulgaria were assigned the task of collating information about relevant national databases, projects, studies, situation assessments in their country and the opinions of experts about the required skills, which there are a lack of and which are need to be improved among employees working in the Spa and Wellness sector.

Parallel to this, the equivalent data was collated by member states of the project cooperation partner organisation Femtec 4: Germany, Malta, Spain and Portugal.

In order for the collated data to show as comprehensive a picture as possible in relation to which skills and knowledge are required to improve the Spa and wellness sector in the European Union, international projects implemented in the European Union were collated and analysed, which focus on the overall development of the Spa and wellness sector and tourism, and studies conducted by international organisations such as CEDEFOP and OECD.

To collate and analyse the data received according to a unified methodology, the Latvian project partner, the NGO “Latvian Association of Resort Towns” in collaboration with the Bulgarian project partner, the Institute for Training of Personnel in International Organizations (Itipio) developed a unified form for data collection. (Annex 1)

Data was collated including national, regional, local and international studies, laws and regulations, planning documents and interviews. This also included contact information of data providers, which could be useful during the future development of the project, organising Spa and wellness sector focus groups and in interviewing industry experts in-depth. Among the other data collated was information about existing proposals and next steps towards the eradication of these shortcomings if such have been devised.

Data collection took place over a two-month period from December 2020 to January 2021. From January-February 2021 the Latvian project partner “Latvian Association of Resort Towns” analysed the data received. Information required about project cooperation partners was revised. In February 2021 the first WP 3 report was compiled, which presents the collated results, as well as conclusions about the lack of skills and knowledge among employees working in the Spa and wellness sector.

More detailed information about results of surveys in Chapter 2. Report on findings of skills gaps research in existing data sources.

* + - 1. REPORT ON SURVEY FINDINGS

Next step of Working package No. 3 was work on surveys. Within the project, two surveys were conducted in each of the countries involved in the project - one for industry employers and the other for VET providers. (Annex 2/ Annex 3)

The aim of the employer’s survey – identifying skills, competences and qualifications needed at the workplace for Spa and Wellness sector, from the perspective of industry. Its main focus is on working tasks performed at the workplace, their change in importance and the preparedness of the workforce to cope with tasks that are becoming more important. This survey will help Spa and Wellness managers to highlight gaps in staff skills and competencies in order to promote professional and high-quality staff development by designing and implementing development of VET curriculum for corresponding needs of labour market.

The main aim of the VET providers survey – was identify skills, competences and qualifications that are needed at the workplace for the Spa and Wellness sector from the perspective of VET providers. VET institutions need continuously to adapt to increasingly rapid changes in the Spa and Wellness industry and adjust to demand for new skills and competencies in labour markets. This survey will help VET institutions to highlight gaps in the Spa and Wellness industry staff skills and competencies, in order to promote professional and high-quality staff development by designing and implementing development of VET curriculum for corresponding needs of labour market.

Data collection took place over a four-month period from March 2021 to May 2021. From May-June 2021 was made analyse of surveys and developed the report part of surveys.

Spa and Wellness employer survey was filled by 150 companies from all seven countries of Europe Bulgaria, France, Greece, Italy, Latvia, Serbia, Slovenia, as well as by the project’s partner organization, the World Federation of Hydrotherapy and Climatotherapy (FEMTEC).

Spa and Wellness employer survey respondents were from variety of sector companies. Of the 150 surveyed companies in seven countries, the majority – 41% - are private SPA and Wellness centers and 30% are private Spa, Spa and Wellness hotels. Survey also was filled by public organisations.

Vocational education and training provider survey was filled by 165 institutions from all seven countries of Europe - Bulgaria, France, Greece, Italy, Latvia, Serbia, Slovenia, as well as by WeSkill project partner FEMTEC.

Respondent structure indicates that VET providers, who filled the survey, represented a wide range of institutions, both private institutions (39%), public institutions (57%) and Public Private Partnerships (4%). Two thirds of respondents were VET institutions (67%), VET companies represent 29% of surveyed organisations.

More detailed information about results of surveys in Chapter. Report on survey findings.

3. REPORT ON FINDINGS OF FOCUS GROUPS

An important activity in "Working package 3" was the organization of focus groups, in-depth interviews with opinion leaders and experts in the "WeSkill" partner countries.

Spa and Wellness employer focus groups were conducted in seven countries of Europe – Bulgaria, France, Greece, Italy, Latvia, Serbia, and Slovenia in the time from 1 of May till 30 of July 2021. In each of the project country, one-day online focus group gathered industry representatives from the Spa and Wellness sector. Altogether, the focus groups comprised more than 70 companies. Focus groups were conducted using common procedures (Guidelines Annex 4, 5,6) – at the beginning of focus group WeSkill project aims, goals, main outputs, partner consortium and desk research results were presented. Afterwards focus group participants answer open questions, proposed suggestions and recommendations related to the project aims. In the final part of focus group participants discussed the survey results for final selection of skills gaps.

Regarding Guidelines aim of focus groups were:

• To organize and implement of online meeting of focus groups in all 7 project countries;

• To organize 1 day meetings on which industry representatives from the targeted sector participate, all national partners and attracted companies participate;

• To discuss the survey results and recommendations for final selection of skills gaps will be created

• To discuss and make answers for the survey open questions;

• To collect answers from stakeholders in partner countries with respect to adequacy, comprehensiveness and feasibility of the both project’s outputs mentioned above;

• To summarise the stakeholders’ opinions, suggestions and recommendation related to the skills gaps received in National stakeholders’ consultations reports;

• To create of national documents of focus groups’ findings;

• To use the online focus group participants’ opinion, suggestions and remarks for improving the report of skills gaps;

• To collect of national focus groups' findings, to create of general report of findings of focus groups.

The report contains analysis of skill gaps and needs detected by sector’s companies’ managers and will in detail present results from the national focus groups.

Online focus groups process was implemented in Bulgaria, Greece, France, Italy, Latvia, Slovenia and Serbia in the time period from 1 of May till 30 of July 2021. 1 day online focus group where participate industry representatives from the Spa and Wellness sector participate, all national partners and attracted companies participate. In each national focus group, participated at least representatives from 10 companies per project country, in total 70 companies (companies in all project countries have already expressed support for the project) research skills gaps in their working environments. Responsible for the coordination of the online focus groups implementation, regarding the project, were: BTCH (BG), LRA (LV), SSGZ (SI), ZVST (SR), UMIH63 (FR), HATS (GR) and FTC (IT). All other partners in the respective country supported the online focus groups’ coordinators in organizing and conducting the events. The online focus groups’ organizing and conducting were implemented in 3 phases: Preparation of focus groups. Implementation of focus groups as online focus groups organized as 1-day event. Summarizing the online focus groups’ participants feedback and creation of national evaluation report.

At the end of the working package No.3, a final report “Wellness and Spa sector skills’ gaps summary report” was developed. Analyse of all activity results, conclusions and proposals of project partner countries.

Finally, after all activities under Working package No.3 select 4 skills and the digital skill one for which 5 joint curricula will be created under project “WeSkill”.

Curricula will be developed according to the needs of the labour market in the spa and wellness sector under next Working package No.4.

CONCLUSIONS

Based on the desk research, survey and focus group analyses, following Spa and Wellness sector establishment skills were indicated as most important:

* **Knowledge of foreign language for professional Spa and Wellness terminology (English language)**
* **Communication and customer service skills (including written and spoken communication, interpersonal communication, and customer communication as well as customer handling skills, client relation skills)**
* **Problem solving skills**
* **Teamwork (including collaboration skills)**
* **Digital competences (including computer skills)**

Also **Knowledge about the Spa and Wellness services and products and their design** was mentioned**.**

|  |  |
| --- | --- |
| Research type | Main skills, competences and knowledge |
| Desk research | * Computer skills/digital skills/ICT skills * Communication skills/written and spoken communication/ telephone reception techniques/intercultural communication skills/multicultural communication skills * Foreign languages skills for the medical and spa personnel/English/multilingual skills/ knowledge of foreign languages/foreign language using professional terminology/Spa and Wellness terminology * Customer service/ customer-oriented service/ approach * Adaptability * Teamwork |
| Surveys of Employers and VET providers | * Client relation skills * Inter-personal and customer oriented communication skills * Knowledge of foreign language knowledge for Spa terminology * Honesty, integrity, loyalty * Reliability and precision * Product and service sales skills * Employee motivation or personality * Knowledge about the Spa and Wellness services and products * Knowledge about time management * Knowledge of Spa and Wellness services design * Knowledge about the psychology of sales and marketing * Customer handling skills * Technical, practical or job-specific skills * Problem solving skills * Team working skills |
| Focus groups | * Teamwork * Knowledge of foreign languages * Communication skills * Willingness to work overtime and flexible time. * Knowledge about the Spa and Wellness services and products * Knowledge about the tourism services and products * Knowledge of psychology of sales and marketing * Knowledge of leadership and motivation of employees * Customer-handling skills * Technical, practical or job-specific skills * Management skills * Client and public relations skills * Need for multiple and poliqualification specialists * Digital competences and computer skills |

ANNEXES

## Annex 1: Unified form for desk research data collection

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| WeSkill WP3 | **Desk research template** | | |  |  |  |  |
| Duration: | December, 2020 - January, 2021 | | |  |  |  |  |
| Country: |  | | |  |  |  |  |
| Projectpartner: |  | | |  |  |  |  |
| Name of the source where are identified needs on skills gaps, occupational profiles, education programmes, curriculums and industry’s needs | Short description of the content | In which level: national legislation, educational programmes, industry, etc | What type of document, information (National data base, project, research, surveys? Private or state information etc.) | Link to the source of European, national databases, project results, existing surveys etc. of spa and wellness industry (quantity or quality data information) source | Source author, provider or interviewed organisation: (Representative organizations, VET providers, regulators, state institution, companies, others.). | Suggestions for solutions of existing needs | Skills gaps identified in the source |
| (if any) |
| No | *Up to 300 characters (with spaces)* |  |  | *Link + description of projects, or data bases* | *Contact institution (name, website), contact person (name, surname, position, email, phone)* | *Short description if there are already further steps for solving some skill gaps, or other needs, what kind of solutions and timeframe for it etc.* | *There could be good information which could help to recognize needs and develop report.* |

## Annex 2: Questionnaire for Managers/Owners of Spa and Wellness Establishments

***Survey for Managers/Owners of Spa and Wellness Establishments***

*The main aim of the survey is to identify skills, competences and qualifications that are needed at the workplace for the Spa and Wellness sector from the perspective of employers.*

*Its main focus is on working tasks performed at the workplace, their change in importance and the preparedness of the workforce to cope with tasks that are becoming more important. This survey will help Spa and Wellness managers to highlight gaps in staff skills and competencies in order to promote professional and high-quality staff development by designing and implementing development of VET curriculum for corresponding needs of labour market.*

*The questions in this survey are about tasks and skills required in your establishment.*

*This survey is carried out within Erasmus+ Sector Skills Alliances project “WeSkill” which aims to design and implement development of VET curriculum for corresponding needs of labour market based on the eliminations of the skills and competence gaps. Project partners represent VET providers, public institutions, Spa and Wellness sector entrepreneurs and non-governmental organizations from Latvia, Slovenia, France, Italy, Serbia, the Netherlands, Greece and Bulgaria.*

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*By filling in the questionnaire below, I confirm that the information provided on this form is true, complete and accurate and that I have read, understood and accept the Privacy Notice.*

1. *Country you are representing: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.*
2. *Please select your current occupation´s title?*

* *Supervisor of establishment*
* *Manager* *of establishment*
* *Operator* *of establishment*
* *Owner* *of establishment*
* *Other (please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. *What type of organisation/s are you representing? (please mark in both columns)*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | Private |  |  | 4 | Spa, Wellness center |  |
| 2 | Public |  |  | 5 | Spa, Wellness hotel |  |
| 3 | Private Public Partnership |  |  | 6 | Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

1. *How many employees does your company have in total?*

*Please add up the number of employees of all local establishments.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | 1 to 4 employees |  |  | 4 | 50 to 249 employees |  |
| 2 | 5 to 9 employees |  |  | 5 | 250 or more employees |  |
| 3 | 10 to 49 employees |  |  | 6 | Don’t know |  |

*5. In which specific positions are you facing most difficulties when looking for suitable*

*employees with the relevant knowledge and skills? (please mark a maximum of 5 most important)*

|  |  |
| --- | --- |
| **Skills** |  |
| Basic technical skills |  |
| Inter-personal/communication skills |  |
| Computer / IT skills |  |
| Management / masterskills |  |
| Foreign languages |  |
| Creativity/Initiative |  |
| Teamwork |  |
| Learning skills |  |
| Information management |  |
| Problem-solving skills |  |
| Time management |  |
| Manual dexterity |  |
| Versatility/capacity to fill in for absent workers |  |
| Business and entrepreneurial skills |  |
| Honesty/integrity/loyalty |  |
| Reliability/precision |  |
| Willingness to work overtime/flexitime |  |
| Other… |  |

*6. Which of the following skills areas experience the largest increase in*

*requirements? (please mark from 1=no increase, 10=largest increase).*

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| *Basic skills (for offering Spa treatments)* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Process skills (Spa process skills)* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Social skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Complex problem-solving skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Technical skills (use of new technologies of Spa)* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *System skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Resource management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Foreign language skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Basic ICT skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *High level or specific ICT skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Work experience attitude* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Motivation or personality* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Digital marketing skills (like video blogs, social media network etc.)* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Customer oriented communication skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Curiosity* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Commitment skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Critical thinking skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Complying with related legislation; occupational safety and health, fire protection and hygiene regulations* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Collaboration skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Stress management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Sustainability management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Eco friendly skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Sustainability, recycling skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Spa and Wellness services design skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Others………………* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |

*7. Which are the most in-demand skills in the case of occupations in which you experience a serious lack of personnel? (please mark all the competences in this situation) (1=not requested, 10=most requested)*

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Skills** | *1=not requested, 10=most requested* | | | | | | | | | |
| *Basic technical skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Basic professional skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Inter-personal/Communication skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Computer/IT skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Foreign languages skills (Spa terminology)* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Creativity / initiative taking skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Teamwork skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Management/master skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Learning skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Client relations skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Total quality management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Ability to improve personal learning and performance* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Problem solving skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Capacity to work autonomously* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Decision making* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Control and monitoring skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Scheduling work* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Product and services sales skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Information management* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Capacity to work under stress* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Manual dexterity* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *E-commerce skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Critical thinking skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Stress management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Sustainability management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Spa and Wellness design skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Complying with related legislation; occupational safety and health, fire protection and hygiene regulations* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Versatility/capacity to fill in for absent workers* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Business and entrepreneurial skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Honesty/integrity/loyalty* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Reliability/precision* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Willingness to work overtime/flexitime* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Other, please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |

*8. Please assess the importance of the knowledge listed below for your work (1 – the most important, 5 – the least important)*

|  |  |
| --- | --- |
| *Knowledge about the Spa and Wellness services and products* |  |
| *Knowledge about the tourism services and products* |  |
| *Knowledge of foreign languages* |  |
| *Psychology of sales and marketing* |  |
| *Leadership and motivation of employees* |  |
| *Time management* |  |
| *Information technology and database work* |  |
| *Economic operations, financial planning, reporting, accountancy* |  |
| *Consumer rights* |  |
| *General Data Protection Regulation (GDPR)* |  |
| *Related legislation; occupational safety and health, fire protection and hygiene regulations* |  |
| *Knowledge of Spa and Wellness services design* |  |
| *Work organization* |  |
| *Other (please, specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* |  |

*9. Which of these lacking skills have the greatest negative impact on the establishment? (Please rate on a scale from 4-* *very significant impact to 1-very low impact, 0-* *can't evaluate)*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| General IT user skills | 4 | 3 | 2 | 1 | 0 | 1 |
| IT professional skills | 4 | 3 | 2 | 1 | 0 | 2 |
| Oral communication skills | 4 | 3 | 2 | 1 | 0 | 3 |
| Written communication skills | 4 | 3 | 2 | 1 | 0 | 4 |
| Customer handling skills | 4 | 3 | 2 | 1 | 0 | 5 |
| Team working skills | 4 | 3 | 2 | 1 | 0 | 6 |
| Foreign language skills | 4 | 3 | 2 | 1 | 0 | 7 |
| Problem solving skills | 4 | 3 | 2 | 1 | 0 | 8 |
| Management skills | 4 | 3 | 2 | 1 | 0 | 9 |
| Technical, practical or job-specific skills | 4 | 3 | 2 | 1 | 0 | 10 |
| Literacy skills | 4 | 3 | 2 | 1 | 0 | 11 |
| Office admin skills | 4 | 3 | 2 | 1 | 0 | 12 |
| Any other skills (please specify) |  |  |  |  |  |  |
|  | 4 | 3 | 2 | 1 | 0 | 13 |
|  | 4 | 3 | 2 | 1 | 0 | 14 |
|  | 4 | 3 | 2 | 1 | 0 | 15 |

*10. How important in their job is reading (becoming familiar with) and comprehending the instructions, guidelines, manuals or reports of Spa establishment? We do not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | Is the importance of that task staying about |  |
| Very important | 4 |  | the same, increasing or decreasing? |  |
| Rather important | 3 |  | Increasing | 3 |
| Rather unimportant | 2 |  | Staying about the same | 2 |
| Completely unimportant | 1 |  | Decreasing | 1 |
| Does not apply/ Don’t know | 0 |  | Don’t know | 0 |

*11. In their job, how important is writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages etc.?*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | Is the importance of that task staying about |  |
| Very important | 4 |  | the same, increasing or decreasing? |  |
| Rather important | 3 |  | Increasing | 3 |
| Rather unimportant | 2 |  | Staying about the same | 2 |
| Completely unimportant | 1 |  | Decreasing | 1 |
| Does not apply/ Don’t know | 0 |  | Don’t know | 0 |

*12. In your personnel job, how important is …*

*(Please rate on a scale where 4-very important/ 3-rather important/ 2-rather unimportant/ 1-completely unimportant/ 0- Does not apply/ Don’t know)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| communicating in a foreign language | 4 | 3 | 2 | 1 | 0 |
| making speeches or presentations to internal or external audiences | 4 | 3 | 2 | 1 | 0 |
| working as a member of a group or team | 4 | 3 | 2 | 1 | 0 |
| learning new ideas, methods or techniques | 4 | 3 | 2 | 1 | 0 |
| adapting to new Spa and Wellness equipment or materials | 4 | 3 | 2 | 1 | 0 |
| instructing, training or teaching people, individually or in groups | 4 | 3 | 2 | 1 | 0 |
| the implementation of practices to reduce the use of raw materials, energy or water? (eco-friendly company development) | 4 | 3 | 2 | 1 | 0 |

*13. In the next questions, key tasks of [Spa and Wellness professionals] are presented. Please tell us for each of the following tasks of [Spa and Wellness professionals] in your establishment whether its importance is increasing (3), staying about the same (2), or decreasing (1), 0- Does not apply/ Don’t know*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Uphold hygiene standards and follow health and safety regulations | 3 | 2 | 1 | 0 |
| Suggest treatments to customers based on their needs | 3 | 2 | 1 | 0 |
| Delivering a variety of spa services (body treatments, massages, facials, waxing and manicure/pedicure) in a safe and comfortable manner | 3 | 2 | 1 | 0 |
| Maintaining equipment and sample inventory of products | 3 | 2 | 1 | 0 |
| Acknowledging and responding to relevant customer queries, needs and expectations | 3 | 2 | 1 | 0 |
| Suggest and promote retail products or additional services | 3 | 2 | 1 | 0 |
| Spa and Wellness design | 3 | 2 | 1 | 0 |
| Apply best practices and be up to date with market trends | 3 | 2 | 1 | 0 |
| Critically assessing Spa and Wellness trends and translating these into suitable offers | 3 | 2 | 1 | 0 |
| Hands on experience in massage techniques, manicures, pedicures, waxing and face/body therapies | 3 | 2 | 1 | 0 |
| Experience in sales Spa services and products | 3 | 2 | 1 | 0 |
| Communication and customer service skills | 3 | 2 | 1 | 0 |
| Manage client files, clients scheduling, registration and work with a client register/ database | 3 | 2 | 1 | 0 |
| Good time-management skills | 3 | 2 | 1 | 0 |
| Interpersonal and communication skills | 3 | 2 | 1 | 0 |
| Customer-oriented, friendly but professional approach | 3 | 2 | 1 | 0 |
| Positive attitude and patience | 3 | 2 | 1 | 0 |
| Organization, coordination and monitoring of the Spa and Wellness services provided in the centre | 3 | 2 | 1 | 0 |
| Ensuring adequate conditions for the quality of Spa and Wellness services, creating harmonious and relaxing environment in the centre | 3 | 2 | 1 | 0 |
| Scheduling and coordination of the work of specialists providing Spa and Wellness services | 3 | 2 | 1 | 0 |
| Keeping inventory and ordering products necessary for Spa and Wellness services | 3 | 2 | 1 | 0 |
| Creating and placing SPA packages on a website, or other platforms such as FB, Instagram, Video blogs etc. Work on e-shops with Spa offers etc. | 3 | 2 | 1 | 0 |
| Supervision and coordination of apprenticeships and other work-based learning forms | 3 | 2 | 1 | 0 |
| Others, please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 3 | 2 | 1 | 0 |

*14. Based on your experience please specify how difficult it is to find skilled labour to fill*

*vacancies at your establishment in the following job categories. (Please rate on a scale where 4-very difficult/ 3-rather difficult/ 2-rather simple/ 1-completely simple/ 0- Does not apply/ Don’t know)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Heads/reps of authority and all levels of authority (managers) | 4 | 3 | 2 | 1 | 0 |
| Highly qualified specialists (medical staff) | 4 | 3 | 2 | 1 | 0 |
| Average qualification specialists (technicians, masters, average accountants, sale persons, cashiers, etc.) | 4 | 3 | 2 | 1 | 0 |
| Employees responsible for preparation of information, registration of documents, other registration and services | 4 | 3 | 2 | 1 | 0 |
| Skilled workers (Spa specialists, sales & marketing specialists) | 4 | 3 | 2 | 1 | 0 |
| Support staff (drivers, security guys, etc.) | 4 | 3 | 2 | 1 | 0 |
| Unskilled workers (including unskilled support staff like office cleaners, yard-keepers) | 4 | 3 | 2 | 1 | 0 |

15. *If a training, or even an education programme would be offered, please assess the importance of the following topics (from 1 – the most important, 5 – the least important)*

|  |  |
| --- | --- |
| Physiotherapy and other subjects related to health, wellbeing, etc. |  |
| HR – human resources management and training |  |
| Economy and operation – calculations, marketing, budgeting, sales strategies |  |
| Ensuring Epidemiological and hygiene requirements |  |
| Spa and Wellness services design |  |
| Construction, development, design and architecture of wellness centres |  |
| Organisation and supervision of apprenticeships and other work-based learning forms |  |
| Written and spoken communication |  |
| Other (please list all topics you consider important, start with the most important): \_\_\_\_ |  |

## Annex 3: Questionnaire for VET Providers in the Spa and Wellness Industry

***Survey for VET Providers in the Spa and Wellness Industry***

*The main aim of the survey is to identify skills, competences and qualifications that are needed at the workplace for the Spa and Wellness sector from the perspective of VET providers.*

*VET institutions need continuously to adapt to increasingly rapid changes in the Spa and Wellness industry and adjust to demand for new skills and competencies in labour markets.*

*This survey will help VET institutions to highlight gaps in the Spa and Wellness industry staff skills and competencies, in order to promote professional and high-quality staff development by designing and implementing development of VET curriculum for corresponding needs of labour market.*

*This survey is carried out within Erasmus+ Sector Skills Alliances project “WeSkill”, which aims to design and implement development of VET curriculum for corresponding needs of labour market based on the elimination of the skill and competency gaps. Project partners represent VET providers, public institutions, Spa and Wellness entrepreneurs and non-governmental organizations from Latvia, Slovenia, France, Italy, Serbia, the Netherlands, Greece and Bulgaria.*

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*By filling in the questionnaire below, I confirm that the information provided on this form is true, complete and accurate and that I have read, understood and accept the Privacy Notice.*

*1. Country you are representing: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.*

1. *Please select your current occupation´s title?*

* *Manager of VET institution*
* *Teacher, trainer of VET institution*
* *Quality manager of VET institution*
* *Other (please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. *What type of organisation/s are you representing?*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1 | Private |  |  |  |
| 2 | Public |  |  |  |
| 3 | Private Public Partnership |  |  |  |

1. *What type of organisation/s are you representing?*

|  |  |
| --- | --- |
| 1 VET institution |  |
| 2 VET company |  |
| 3 Other \_\_\_\_ |  |

1. *How many employees does your VET institution have in total?*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | 1 to 4 employees |  |  | 4 | 50 to 249 employees |  |
| 2 | 5 to 9 employees |  |  | 5 | 250 or more employees |  |
| 3 | 10 to 49 employees |  |  | 6 | Don’t know |  |

*6. How long have you been offering training programmes in the Spa and Wellness industry?*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | 1-5 years |  |  | 4 | More than 20 years |  |
| 2 | 6-10 years |  |  | 5 | Don’t know |  |
| 3 | 11-20 years |  |  |  |  |  |

*7. Which are currently the most important skills and key competencies at Spa and Wellness establishments from your point of view? (please list the 3 most important)*

|  |
| --- |
|  |

*8. What are the skills and knowledge that you see as the weakest in students? (please mark a maximum of 5 most important)*

|  |  |
| --- | --- |
| **Skills** |  |
| Basic technical skills |  |
| Inter-personal/communication skills |  |
| Computer/IT skills |  |
| Management/master skills |  |
| Foreign languages |  |
| Creativity/initiative |  |
| Teamwork skills |  |
| Learning skills |  |
| Information management |  |
| Problem-solving skills |  |
| Manual dexterity |  |
| Versatility/capacity to fill in for absent workers |  |
| Business and entrepreneurial skills |  |
| Honesty/integrity/loyalty |  |
| Reliability/precision |  |
| Willingness to work overtime/flexitime |  |
| Other, please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

*9. Which of the following skills areas are experiencing the largest increase in requirements in Spa and Wellness industry from your point of view? (please mark from 1=no increase, 10=largest increase)*

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| *Basic skills (for offering Spa treatments)* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Process skills (Spa process skills)* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Social skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Complex problem-solving skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Technical skills (use of new Spa technologies)* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *System skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Resource management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Foreign language skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Basic ICT skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *High-level or specific ICT skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Work experience attitude* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Motivation or personality* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Digital marketing skills (such as video blogs, social media network, etc.)* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Customer-oriented communication skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Curiosity* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Commitment skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Critical thinking skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Complying with related legislation, occupational safety and health, fire protection and hygiene regulations* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Collaboration skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Stress management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Sustainability management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Eco friendly skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Sustainability, recycling skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Spa and Wellness services design skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Other* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |

*10. Which are the most in-demand skills in the case of occupations in which you experience a serious demand from the industry side? (please mark all the competences in this situation) (1=not requested, 10=most requested)*

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ***Skills*** | *1=not requested, 10=most requested* | | | | | | | | | |
| *Basic technical skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Basic professional skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Inter-personal/Communication/ skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Computer/IT skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Foreign languages skills (Spa terminology)* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Creativity/initiative taking skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Teamwork skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Management/master skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Learning skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Client relations skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Total quality management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Ability to improve personal learning and performance* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Curiosity/ initiative* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Manual dexterity* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Problem solving skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Capacity to work autonomously* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Information management* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Decision making* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Control and monitoring skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Scheduling work* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Product and services sales skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Time management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Capacity to work under stress* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *E-commerce skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Critical thinking skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Stress management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Sustainability management skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Spa and Wellness design skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Complying with related legislation; occupational safety and health, fire protection and hygiene regulations* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Business and entrepreneurial skills* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Honesty/integrity/loyalty* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Versatility/capacity to fill in for absent workers* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Reliability/precision* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Willingness to work overtime/flexitime* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |
| *Other, please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* |

*11. Please assess the importance of the knowledge listed below for the Spa and Wellness industry from your point of view? (1=the most important, 5=the least important)*

|  |  |
| --- | --- |
| *Knowledge about the Spa and Wellness services and products* |  |
| *Knowledge about tourism services and products* |  |
| *Knowledge of foreign languages* |  |
| *Psychology of sales and marketing* |  |
| *Leadership and motivation of employees* |  |
| *Time management* |  |
| *Information technology and database work* |  |
| *Economic operations, financial planning, reporting, accountancy* |  |
| *Consumer rights* |  |
| *General Data Protection Regulation (GDPR)* |  |
| *Related legislation; occupational safety and health, fire protection and hygiene regulations* |  |
| *Work organization* |  |
| *Other, please, specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* |  |

*12. Which of these lacking skills have the greatest negative impact on the Spa and Wellness establishments? (please rate on a scale from 4*=*very significant impact to 1=very low impact, 0*=*can't evaluate)*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| General IT user skills | 4 | 3 | 2 | 1 | 0 | 1 |
| IT professional skills | 4 | 3 | 2 | 1 | 0 | 2 |
| Oral communication skills | 4 | 3 | 2 | 1 | 0 | 3 |
| Written communication skills | 4 | 3 | 2 | 1 | 0 | 4 |
| Customer handling skills | 4 | 3 | 2 | 1 | 0 | 5 |
| Teamwork skills | 4 | 3 | 2 | 1 | 0 | 6 |
| Foreign language skills | 4 | 3 | 2 | 1 | 0 | 7 |
| Problem-solving skills | 4 | 3 | 2 | 1 | 0 | 8 |
| Management skills | 4 | 3 | 2 | 1 | 0 | 9 |
| Technical, practical or job-specific skills | 4 | 3 | 2 | 1 | 0 | 10 |
| Literacy skills | 4 | 3 | 2 | 1 | 0 | 11 |
| Office admin skills | 4 | 3 | 2 | 1 | 0 | 12 |
| Any other skills, please specify: |  |  |  |  |  |  |

*13. Based on your experience, please specify how difficult it is to find skilled labour to fill*

*vacancies at Spa and Wellness establishments in the following job categories. (Please rate on a scale where 4=very difficult/ 3=rather difficult/ 2=rather simple/ 1=completely simple/ 0=Does not apply/Don’t know)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Heads/reps of authority and all levels of authority (managers) | 4 | 3 | 2 | 1 | 0 |
| Highly qualified specialists (medical staff) | 4 | 3 | 2 | 1 | 0 |
| Average qualification specialists (technicians, masters, accountants, salespersons, cashiers, etc.) | 4 | 3 | 2 | 1 | 0 |
| Employees responsible for preparation of information, registration of documents, other registration and services | 4 | 3 | 2 | 1 | 0 |
| Skilled workers (Spa specialists, sales & marketing specialists) | 4 | 3 | 2 | 1 | 0 |
| Support staff (drivers, security staff, etc.) | 4 | 3 | 2 | 1 | 0 |
| Unskilled workers (including unskilled support staff like office cleaners, yard-keepers) | 4 | 3 | 2 | 1 | 0 |

*14. What, in your opinion, is the reason(s) for increase of skill requirements in Spa and Wellness establishments (please mark every reason that applies in the table below):*

*(please rate on a scale from 4=very significant impact to 1=very low impact, 0=can't evaluate)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *New technology* | *4* | *3* | *2* | *1* | *0* |
| *Change in workplace organization (e.g., more emphasis on personal skills, etc.)* | *4* | *3* | *2* | *1* | *0* |
| *Higher quality standards (for the Spa and Wellness services)* | *4* | *3* | *2* | *1* | *0* |
| *More competitive business environment in Spa and Wellness industry* | *4* | *3* | *2* | *1* | *0* |
| *Other (please specify)* | *4* | *3* | *2* | *1* | *0* |

*15. What changes are going to shape the future of the sector? Please specify in each*

*category:*

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | the market (e.g. client’s expectations, legal regulations etc.) |  |  |
|  |  |  |  |
| 2 | employees (supply, productivity etc.) |  |  |
|  |  |  |  |
| 3 | technologies (Spa technologies, working methods, new therapies, new techniques, IT etc.) |  |  |
|  |  |  |  |
| 4 | production (materials, quality, eco recycling etc.) |  |  |
|  |  |  |  |

## 

## Annex 4: Agenda of the stakeholders’ online focus groups

**Present Stakeholders for Wellness and Spa Tourism Sectoral Skills’ Development (WeSkill)**

**Stakeholders’ online focus groups**

[Date of the event]  
[Online]

**AGENDA**

|  |  |
| --- | --- |
| *Time* | *Content* |
| 09:00 – 09:30\* | Registration of the participants |
| 09:30 – 09:35 | Opening and welcome |
| 09:35 – 09:50 | Participants’ presentation |
| 09:50 – 10:00 | Introduction with the WeSkill project  Aims, goals, main outcomes, partnership consortium, project’s website |
| 10:00 – 10:15 | Introduction with the main conclusions of desk research |
| 10:15 – 10:45 | Presentation of Results of Survey for Employers and VET providers |
| 10:45 – 11:45 | Session of discussion of results of survey and recommendation and answers to the Survey open questions  Opinions of participants presented, answers to the questions, suggestions and recommendations |
| 11:45 – 12:00 | Technical break |
| 12.00 – 13:00 | Session of discussions and answers to the Survey open questions  Opinions of participants presented, answers to the questions, suggestions and recommendations |
| 13:00 – 13:10 | Technical break |
| 13:10 – 13:45 | Presentation of the conclusions of answers to the Survey open questions |
| 13:45 – 14:00 | Summarising and closing |

\*Events’ starting time can be adjusted by the national teams

## Annex 5: Survey of open questions for online focus groups participants’ form

**“Wellness and Spa Tourism Sectoral Skills’ Development”**

**(WellTo)**

**Stakeholders’ online focus group**

**Participants’ feedback form**

*1. Which are the most important skills and key competencies at Spa and Wellness establishments? (please list the 3 most important skills (communicational, organizational skills, team work, adaptability, flexibility etc.)).*

|  |
| --- |
|  |

*2. How you test these skills?*

|  |  |  |
| --- | --- | --- |
| 1 | During conversation |  |
| 2 | By assigning a concrete task and time for accomplishing |  |
| 3 | Through customer surveys |  |
| 4 | Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

*3. In which positions of employees did you have difficulties filling job vacancies during the last 2 years?*

|  |
| --- |
|  |

*4. In which specific positions are you facing most difficulties when looking for suitable*

*employees with the relevant knowledge and skills? (coordinator of online focus group mark a maximum of 5 most important, first which named participants of online focus group)*

|  |  |
| --- | --- |
| **Skills** |  |
| Basic technical skills |  |
| Inter-personal/communication skills |  |
| Computer / IT skills |  |
| Management / masterskills |  |
| Foreign languages |  |
| Creativity/Initiative |  |
| Teamwork |  |
| Learning skills |  |
| Information management |  |
| Problem-solving skills |  |
| Time management |  |
| Manual dexterity |  |
| Versatility/capacity to fill in for absent workers |  |
| Business and entrepreneurial skills |  |
| Honesty/integrity/loyalty |  |
| Reliability/precision |  |
| Willingness to work overtime/flexitime |  |
| Other… |  |

*5. Which departments in your company experience the largest increase in skills*

*requirements? (mark top 3 of the list after discussion of focus group and after when answers are collected)*

|  |  |
| --- | --- |
|  | Largest increase in skills requirements |
| Management and Administration |  |
| Marketing & Sales |  |
| Customer Service |  |
| Financial |  |
| IT |  |
| Human Resources |  |
| Research & Development |  |
| Other…………… |  |

*6. Please assess the importance of the knowledge listed below for your work (please mark 5 most important after discussion)*

|  |  |
| --- | --- |
| *Knowledge about the Spa and Wellness services and products* |  |
| *Knowledge about the tourism services and products* |  |
| *Knowledge of foreign languages* |  |
| *Psychology of sales and marketing* |  |
| *Leadership and motivation of employees* |  |
| *Time management* |  |
| *Information technology and database work* |  |
| *Economic operations, financial planning, reporting, accountancy* |  |
| *Consumer rights* |  |
| *General Data Protection Regulation (GDPR)* |  |
| *Related legislation; occupational safety and health, fire protection and hygiene regulations* |  |
| *Knowledge of Spa and Wellness services design* |  |
| *Work organization* |  |
| *Other (please, specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* |  |

*7. Which of these lacking skills have the greatest negative impact on the establishment? (Please rate on a scale from 4-* *very significant impact to 1-very low impact, 0-* *can't evaluate after the discussion at online focus group)*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| General IT user skills | 4 | 3 | 2 | 1 | 0 | 1 |
| IT professional skills | 4 | 3 | 2 | 1 | 0 | 2 |
| Oral communication skills | 4 | 3 | 2 | 1 | 0 | 3 |
| Written communication skills | 4 | 3 | 2 | 1 | 0 | 4 |
| Customer handling skills | 4 | 3 | 2 | 1 | 0 | 5 |
| Team working skills | 4 | 3 | 2 | 1 | 0 | 6 |
| Foreign language skills | 4 | 3 | 2 | 1 | 0 | 7 |
| Problem solving skills | 4 | 3 | 2 | 1 | 0 | 8 |
| Management skills | 4 | 3 | 2 | 1 | 0 | 9 |
| Technical, practical or job-specific skills | 4 | 3 | 2 | 1 | 0 | 10 |
| Literacy skills | 4 | 3 | 2 | 1 | 0 | 11 |
| Office admin skills | 4 | 3 | 2 | 1 | 0 | 12 |
| Any other skills (please specify) |  |  |  |  |  |  |
|  | 4 | 3 | 2 | 1 | 0 | 13 |
|  | 4 | 3 | 2 | 1 | 0 | 14 |
|  | 4 | 3 | 2 | 1 | 0 | 15 |

*8. Referring to the recruitment difficulties, are these difficulties due to:*

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Low quality of applicants, due to: | |  |  |
|  | lack of technical skills |  | 1 |
|  | lack of professional expertise |  | 2 |
|  | lack of basic ability to build upon |  | 3 |
|  | poor attitude, motivation or personality |  | 4 |
|  | lack of qualifications |  | 5 |
|  | lack of work experience |  | 6 |
|  | weak communication and presentation skills |  | 7 |
|  | lack of commercial understanding and awareness |  | 8 |
|  | Other (please specify) |  | 9 |
|  |  |  |  |
| 2. Low number of applicants, due to: | |  |  |
|  | Not being able to pay high enough salary |  | 1 |
|  | Competition from other employers in the area |  | 2 |
|  | Work seen as unattractive/unpleasant |  | 3 |
|  | Work requirements very/too specialised |  | 4 |
|  | Lack of suitable qualified people |  | 5 |
|  | Location of company unattractive to graduates |  | 6 |
|  | Other (please specify) |  | 7 |
|  |  |  |  |

*9. Thinking about skill requirements in your establishment: does your establishment*

*regularly review the skill and training needs of individual employees?*

|  |  |  |
| --- | --- | --- |
| 1 | Yes |  |
| 2 | No |  |
| 3 | Partly (e.g. only for some employee groups) |  |
| 4 | Don’t know |  |

*10. Do you currently have at this establishment vacancies which are proving hard to fill due to the lack of adequate skills of applicants?*

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | Yes |  | If yes, please identify which skills: |
|  |  |  |  |
| 2 | No |  |  |
| 3 | Don’t know |  |  |

*11. How important in their job is reading (becoming familiar with) and comprehending the instructions, guidelines, manuals or reports of Spa establishment? We do not refer to reading in general, but to reading and comprehending instructions of Spa treatment techniques, using of Spa technologies, etc. guidelines, manuals or reports.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | Is the importance of that task staying about |  |
| Very important | 4 |  | the same, increasing or decreasing? |  |
| Rather important | 3 |  | Increasing | 3 |
| Rather unimportant | 2 |  | Staying about the same | 2 |
| Completely unimportant | 1 |  | Decreasing | 1 |
| Does not apply/ Don’t know | 0 |  | Don’t know | 0 |

*12. In their job, how important is writing instructions, guidelines, manuals or reports regarding Spa treatments or Spa packages etc.?*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | Is the importance of that task staying about |  |
| Very important | 4 |  | the same, increasing or decreasing? |  |
| Rather important | 3 |  | Increasing | 3 |
| Rather unimportant | 2 |  | Staying about the same | 2 |
| Completely unimportant | 1 |  | Decreasing | 1 |
| Does not apply/ Don’t know | 0 |  | Don’t know | 0 |

*13. How important are skills of using and understanding statistical information and numbers? (for example, in graphs, charts and tables)?*

|  |  |
| --- | --- |
| Very important | 4 |
| Rather important | 3 |
| Rather unimportant | 2 |
| Completely unimportant | 1 |
| Does not apply/ Don’t know | 0 |

*14. The next question is about solving complex problems, defined to be a problem which takes employees at least 30 minutes of thinking to find a good solution. In work with customers, how important is solving complex problems? (regarding with customer complaints, customer health problems etc.) The 30 minutes only refers to the time needed to THINK of a solution, it could be for the time needed to carry it out.*

*In the jobs with customers, how important is solving complex problems?*

|  |  |
| --- | --- |
| Very important | 4 |
| Rather important | 3 |
| Rather unimportant | 2 |
| Completely unimportant | 1 |
| Does not apply/ Don’t know | 0 |

*15. What specialists are being required at the moment within Spa and Wellness industries?*

|  |
| --- |
|  |

*16. In your experience, what vacancies have been difficult to fill?*

|  |
| --- |
|  |

*17. What were the reasons causing these difficulties:*

|  |  |  |
| --- | --- | --- |
| 1 | lack of candidates |  |
| 2 | sufficient number of candidates, but their qualification was not relevant |  |
| 3 | candidates wished to receive larger salary |  |
| 4 | other (please specify) |  |
|  |  |  |

*18. What changes are going to shape the future of the sector? Please specify in each*

*category:*

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | the market (e.g. client’s expectations, legal regulations etc.) |  |  |
|  |  |  |  |
| 2 | employees (supply, productivity etc.) |  |  |
|  |  |  |  |
| 3 | technologies (Spa technologies, working methods, new therapies, new techniques, IT etc.) |  |  |
|  |  |  |  |
| 4 | production (materials, quality, eco recycling etc.) |  |  |
|  |  |  |  |

*19. Considering your current employees, which skills do you think are lacking or need to be better developed?*

|  |  |  |
| --- | --- | --- |
| 1 | for those with basic education |  |
| 2 | for those with secondary education |  |
| 3 | for those with higher education |  |

*20. Which are the skills that have a key-role within your company (by staff positions)?*

|  |  |  |
| --- | --- | --- |
| 1 | Multiple / poli-qualification |  |
| 2 | Teamwork / internal communication |  |
| 3 | Client / public relations |  |
| 4 | Accommodation to changes |  |
| 5 | Initiative taking / work autonomy |  |

*21. Which skills do you consider to be the most important for the good performance of your company?*

|  |
| --- |
|  |

*22. Based on your experience please specify how difficult it is to find skilled labour to fill*

*vacancies at your establishment in the following job categories. (Please rate on a scale where 4-very difficult/ 3-rather difficult/ 2-rather simple/ 1-completely simple/ 0- Does not apply/ Don’t know)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Heads/reps of authority and all levels of authority (managers) | 4 | 3 | 2 | 1 | 0 |
| Highly qualified specialists (medical staff) | 4 | 3 | 2 | 1 | 0 |
| Average qualification specialists (technicians, masters, average accountants, sale persons, cashiers, etc.) | 4 | 3 | 2 | 1 | 0 |
| Employees responsible for preparation of information, registration of documents, other registration and services | 4 | 3 | 2 | 1 | 0 |
| Skilled workers (Spa specialists, sales & marketing specialists) | 4 | 3 | 2 | 1 | 0 |
| Support staff (drivers, security guys, etc.) | 4 | 3 | 2 | 1 | 0 |
| Unskilled workers (including unskilled support staff like office cleaners, yard-keepers) | 4 | 3 | 2 | 1 | 0 |

23. *Based on your experience over your employees’ skills gap, which skills/competencies do you think are not acquired or poorly presented in profession standard? Please describe specific ones.*

|  |
| --- |
|  |

24. *What are the main customer complaints about your employees?*

|  |
| --- |
|  |

25. *Do your employees know how to handle customer registration systems?*

|  |  |  |  |
| --- | --- | --- | --- |
| Yes |  |  |  |
| No |  |  |  |
| Weak |  |  |  |
| Other answer |  | Please specify |  |

26. *Do your employees professionally manage digital tools in the marketing and sales of Spa and Wellness Centre products?*

|  |  |  |  |
| --- | --- | --- | --- |
| Yes |  |  |  |
| No |  |  |  |
| Weak |  |  |  |

If answer: No/Weak\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Please mention which digital skills are not or poorly managed, such as selling Spa offers in e-shops, developing multi-day programs of SPA offers, creating and placing SPA packages on a website or other platforms such as FB, Instagram, Video blogs etc.)*

27. What professional skills and competencies do you foresee will be needed in the future for Spa and Wellness industry? Please describe specific for Spa and Wellness industry.

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| --- |
|  |

## Annex 6: Template for stakeholders’ online focus groups national reports

**National stakeholders’ online focus group report**

*[Country]*

1. **Introduction**

*Describe the preparatory work done.*

*Indicate the workshop’s date, time and number of participants.*

*List the project team members participated in the event.*

1. **General participants’ information**

*Present an overview of the workshop participants’ gender and occupation using graphs.*

1. **Evaluation of the Survey Open Questions**

*Present an overview of the participants’ answers on each of the Question of the Survey related to the skills gaps. If its suitable, please using graphs as well.*

*Comment the data presented.*

1. **Evaluation of the workshop**

*Present a summary of the online focus groups participants’ open opinions, suggestions and recommendations related to the online focus group, also using graphs where it is suitable.*

*Comment the data presented.*