Mapping and performance check of the supply side of tourism education and training

Country profile for France

February 2016
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ABBREVIATIONS

A

ADEC - Employment and Skills Development Actions · 8
AFTM - French Association of Travel Manager · 11
ANT - Animateur Numérique du territoire · 45

B

BTS - Brevet de Technicien supérieur - Higher Technician Certificates (Higher education EU level 5) · 42
BTS Higher Technician Certificate - Higher Education Diploma EU level 5 · 12

C

CAP - Certificate of Vocational Capacities · 13
CEP - Contract of Prospective Studies · 8
CFPT - Training Centre of the Travel · 11
CNCP - National Commission of Professional Certification · 9
CNEFOP - National Council for Employment, Training and Professional Orientation · 7
Collège - inferior secondary education establishment · 13
CPC · 5
CPRDFP - Regional Plan’s Contract for the Development of Professional Training · 7
CQP · 7
CREFOP · 7

D

DEUST - Technical University Study Diploma · 19
Doctorat - French PHD, EU level 8 · 16
DU - University Diploma · 19
DUT - Technical University Diploma · 19

E

EDEC - Development Commitments of Employment and Competences · 8

F

FAFIH - French Hotel Industry Federation · 44

G

GPEC · 8

L

Licence · 4
Licence - Higher education diploma - EU Level 6 · 12
Licence Professionnelle · 4
LP - Licence Professionnelle · 17
Lycée - Superior secondary education establishment · 13

M

Master · 4
Master - Higher education Diploma - EU level 7 · 12

O

ONISEP - National Information Office on Education and Training · 14

P

PMQ - Qualification and Occupation Prospective mechanism · 8

R

RNCP · 5

S

SNAV - National Trade Union for Travel Agents · 10

V

VAE - Recognition of Professional Experience · 10
PURPOSE OF THE COUNTRY PROFILE

This working document serves as the “country profile” for France, within the study on “Mapping and performance check of the supply side of tourism education and training”. It provides a description and analysis of the educational “system” for tourism occupations in France, based on evidence gathered from multiple sources (see the Annex).

More specifically, the profile provides the following:

- **Executive Summary**
  - Overview of France’s tourism sector, its strengths and weaknesses and the opportunities and threats it faces (section 1.1)
  - Overview of the current situation and current/expected trends in tourism employment and skills (section 1.2)
  - Description of France’s tourism education and training system, highlighting key features of the national education and training system in general (section 2.1), before describing strategic arrangements for planning tourism education and training (section 2.2) and the role of employers, employees and other stakeholders (section 2.3).
  - Summary of the main forms of education and training provision for tourism occupations, including higher education (section 3.1), vocational education and training (section 3.2), adult education and lifelong learning professional development (section 3.3), other training and work-based learning (section 3.4) and school education (section 3.5).
  - Description of the education and training available for specific tourism occupations (section 4)
  - Some findings on the performance of the system in terms of gaps in provision (section 5.1), addressing new skills and competences requirements (section 5.2), learning outcomes (section 5.3) and progression into/within employment in tourism occupations (section 5.4)

The breadth and diversity of the tourism sector, tourism occupations and education and training provision for those occupations mean that this profile can give no more than an overview. However, the country profiles of the 28 Member States have together provided the evidence for the analysis and research findings presented in the EU-level Final Report of the study.
EXECUTIVE SUMMARY

The Supply of Tourism Education & Training

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The Tourism sector accounted for **7.4% of national GDP in 2013, corresponding to €157bn Euros** carried out by 285,486 enterprises. One of the characteristics of tourism industry in France, is that it **includes the incoming and outgoing activities** of travel (leisure and business travel).

Concerning **incoming tourism**, France is the first in the world in terms of tourism arrivals but tourism in France remains at third place in the world in terms of revenue. In 2013, 85 million tourists from abroad visited France. The European market represents 91% of international tourism in France and national visitors account for 68% of global consumption. Whereas the destinations are similar, in terms of consumption there is a remarkable difference between French and International tourists. The tourism offer is very rich thanks to the diversity of the territory’s own resources:

- The tourism offer affects many stakeholders: destination management companies, accommodations, carriers, information offices, airports, railway stations. (rural and urban seaside, mountain destinations, urban and rural destinations all over the territory).
- The tourism offer affects many stakeholders: destination management companies, accommodations, carriers, information offices, airports, railway stations.
- There is a strong seasonality in incoming and outgoing tourism, with a twofold tendency, in summer from April to September and in winter from November to March. In the urban destinations such as Paris, there is less seasonality pattern, as tourism is very much present throughout the year.

Concerning **outgoing tourism**, in 2013, 23 million French completed a trip outside France; 75% of the destinations are located in Europe. The tourism products are very various: many destinations offered, many types of travel: vacation packages, all inclusive, flight + hotel, cruises. The tourism production concerns tour operators, travel agencies, on line agencies, hotel groups, hotel booking centres, airlines...

Actual and upcoming developments of French Tourism:

- The tourism industry is globally growing despite the economic crisis
- Professional trips progressively are turning into “business and pleasure”
- Internet broadens new horizons
- M-Tourism and social networks create new needs
- New tourism clients are targeted, e.g. in Brazil, Russia, India, China
- Modern knowledge of consumers thanks to data changes business models
- Innovative models of enterprises are emerging
- ICT is strongly impacting tourism consumption

**STRENGTHS**

- Number of tourism arrivals
- Good distribution of jobs in the French territory
- Large accommodation offer
- Diversity of climate and landscapes
- Current awareness (2014) of the government about the importance of tourism in the national economy
- France is the European leader on

**WEAKNESSES**

- Tourism revenues
- Accessibility of some very touristic seaside destinations
- Use of car needed
- Foreign language skills
- Lack of adaptation to non-European cultural and food habits
- Lack of information about progression opportunities and occupation requirements of
### The Supply of Tourism Education & Training

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### Tourism employment and skills

The Tourism sector in France represented 12.9m jobs in 2012, spread across enterprises with very different activities. **Incoming tourism enterprises:** Accommodation represents 16%, Catering 54%, Historic sites and monuments only 0.1%. **Outgoing tourism enterprises:** Travel agencies and Tour operators and other Booking systems represent 2.6%. Concerning employment, it represents more than 12 million jobs in 2012.

The biggest employer is the restaurant/catering subsector corresponding to 45% of the workforce, followed by the non-urban transport with 27%, the accommodation sector (18%) and finally cafés/bars with 5% and Travel Agencies/Tour Operators with 4%.

The tourism sector is a great source of employment all over France; of the 21 metropolitan regions, in majority (9/21) it represents between 6-7% of total employment, even 9% in Ile de France. In terms of businesses, the catering/restaurant sector remains the most numerous, but the Travel Agency/Tour Operators made a substantial increase of 37% more businesses in 4 years, whereas the café/bars sector lost 12% of businesses (more than 6000 enterprises closed) in the same time frame.

**Employment trends:** As with tourism arrivals, tourism employment has increased in the last years (2009-2013) in general in France even if some sectors are more impacted than others:

- Restaurant/Catering +36%
- Accommodation -1%
- Café/bar +14%
- Travel Agency/Tour Operator +4%
- Non-urban transport -1%
- “Other characteristic activities” (short rentals, cultural/sport/leisure services, Mountain resorts facilities) +12%

### Major Skills gaps
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Shortages of skilled labour

Recruitment: In 2013 and 2014, some recruiting difficulties were reported by employers. These difficulties seem to be caused by several factors: the lack of adapted applicants, a high level of expectations from the employer, the unattractiveness of temporary contracts (1 to 3 months), and sometimes the position or the enterprise is not attractive enough for applicants.

Gaps in university training: The industry is concerned by the volume of 'Licences Professionnelles' and the diversity of their specialisation, welcoming the university reform aiming at reducing the provision. The Director of the French Federation of Higher Tourism Technicians (FFTST), Annette Masson considers that “80% of the existing ‘Licences Professionnelles’ could be reviewed”.

For the profession of tourist guide, the training is regulated by law; official guides possess a “professional card of conference-guide”. To obtain this authorization, different paths are possible, either a Level 5 university degree (Licence Professionnelle) “Conference guide” or Level 7 university degrees (Master) with the validation of the three compulsory modules for conference guide.

The tourism education and training system

HIGHER EDUCATION

Universities or private Institutions under agreement with a university are the only ones authorized to deliver the Doctorate (EU level 8), the Master (EU level 7), Licence and Licence Professionnelle (EU level 6) and specific University diplomas at various levels.

Level 7 - Tourism Masters: 44 Master degrees in tourism have been identified. 251 specialisations have been listed by law; only one is named "tourism". Nevertheless, more than 40 specialisations could cover an occupation of a tourism subsector, in economy, law, territorial planning, culture, transport, marketing, heritage... Within the Master education, there is a notable tendency to cover several subsectors or occupations and not to prepare for one specific occupation.

Level 6 - Tourism Licence Professionnelle: 102 Licences Professionnelles in tourism have been identified. 173 specialisations have been selected within the law, eight of these directly refer to tourism subsectors/occupations and more than 40 others could be used to train students in a tourism occupation or subsector, in economy, law, territorial planning, events, real estate, distribution, commercialization, culture, transport, marketing, heritage... These degrees show very complex specialisations, covering often more than two subsectors and including geographical or sector specificities.

University diplomas: The universities themselves can develop and deliver diplomas rather than the Ministry of higher education. Three kinds of diplomas exist in tourism, the University Diploma (DU), The Technical University Diploma (DUT) and the Technical University Study Diploma (DEUST). Work experience (VAE) can be recognised totally or partially, in which case additional exams will have to be taken by the applicant to access the targeted education. In 2012, the VAE requests for the licence Professionnelle reached 39% and the Master degree 43%.

Private Institutions: Business Schools, Hotel Schools, Tourism and hospitality institutions, Chambers of Commerce, European Institutes, Specialised Tourism Schools, Training Institutions, Associations. The degrees cannot be named Master or ‘Licence Professionnelle’, therefore they are named after the occupation they target.

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or take other names such as “Bachelor for level 6”, or “MBA for level 7”.

**Level 7 and 6**: 71 identified diplomas of private institutions. Compared with the public provision, these diplomas seem to be narrowed towards 1 or 2 subsectors or occupations. The progression route within employment is one of the main arguments for students to consider private educational institutions, as a proof of quality of the training. Between 90-100% of students moving successfully into employment directly after the end of the programme.

**Level 5 - National Education – BTS**: The BTS (Higher Technician Certificate) is the most common basic higher education diploma for tourism.

1. BTS Tourism
2. BTS accommodation and catering
3. BTS Accommodation management – European Framework
4. BTS Agriculture: Development and entertainment of rural territories
5. BTS Agriculture: Management and protection of nature

The BTS can be delivered by Public institutions, mainly High Schools (Lycées) and Apprenticeship centres as well as by private institutions: training centres, chambers...

The Work experience recognition (VAE) in BTS is very important; in 2013, 6,577 applications were received with 4,268 leading to an entire validation and 1,402 to partial validation.

**Level 5 - Private Education**: Besides the BTS, other diplomas are delivered by the Private sector, 21 diplomas identified provide skills for the targeted occupations.

**VOCATIONAL EDUCATION AND TRAINING**

Vocational Education and training in France is composed of several diplomas or levels, enabling young people having left the classical school education to be trained for an employment of to be able to continue their study with a vocational path. This path can lead to a higher education. The school system is obligatory until 16 years, after which young people who want to continue school on a vocational path can follow a training leading to a CAP qualification.

**Level 3 - The Vocational Skills Qualification (CAP)**

The CAP is a national diploma certifying the first level of professional qualification. It lasts two years and aims at training students for a specific occupation. After a CAP, the student can either enter the labour market, specialize in a specific field with a ‘Complementary Grade’ or a Vocational High School preparing for a Vocational Diploma or a Vocational High School Diploma.

**Complementary Grade (Mention Complémentaire)**: They take one year, with an important period within an enterprise, mostly as an apprenticeship.

**Level 4**

**Vocational Diploma (Brevet Professionnel)**: The Vocational Diploma is a National diploma attesting the acquisition of a higher qualification in a specific professional activity. It is a diploma adapted for progression within employment, prepared while working or with an apprenticeship model. Its duration varies from the model chosen, 2 years in apprenticeship and 1 year in vocational training while working.

**High School Vocational Diploma (Bac Professionnel)**: Main types of institutions: Vocational High School, or private institutions under agreement with the National education System. The only Tourism Vocational High School Diploma is called “Commercialization and services in catering” and aims towards different catering and Accommodation operatives’ occupation, as well manager assistant level. In 2013, 3803 application for the Work experience recognition have been
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submitted and only 297 have received a negative answer.

**Complementary Mention (Mention Complémentaire):** These training courses are prepared in one year, with an important time within the enterprise, mostly in an apprenticeship model. After a Vocational High School diploma in tourism, the student can enter the labour market, specialize in a field with a Complementary Grade or continue the study with a BTS.

**Private VET:** The private sector is also very active in VET at level 3 and 4. Some of the training courses are recognised by the government if they are registered under the RNCP, other not. For the students undertaking recognised private training paths, they can more easily join the public education path or the higher education path. The main types of institutions include private sector - Chambers of Commerce, Tourism and hospitality Schools, European Institutes, Specialised Tourism Schools, Training Institutions, Associations, etc.

**Local Initiative Complementary Training (FCIL):** These training courses are created at local level in line local employment needs. They provide the owners of a professional or technological diploma an additional or double competence. These training courses do not provide a diploma, only a proof of training undertaken. They last one year and are undertaken within work or in an apprenticeship. Several training level 3 and 4 are provided by the tourism sector in tourism.

**School education: Accommodation Technological High School Degree**

Within the second cycle of secondary education, the students can choose between a generalist path (scientific, literature, economy), or a technological path, opening to equivalent rights concerning higher education. However the Technological path leads often to Technological universities; in tourism this means the BTS which is the main and first higher educational path after High School, for general or technical students. In France, there are eight technological High School degrees, 1 of them regards tourism, the “Accommodation Technological High School Degree”. Main Types of Institutions: General and technological High School (Lycée). Statistics shows that students coming out of a Technological high school have difficulties in University.

**ADULT EDUCATION, LIFE LONG LEARNING**

Known as “continuous vocational training” in France this category accounts for a large part of the training courses provided. It targets the people already active in the labour market or in a process to be (unemployed). Objectives: Facilitate adaptation to the evolution of work-techniques and condition / Maintain or improve professional qualification / Encourage social and professional promotion.

**Professional Titles** - The Ministry of Employment has developed a “Professional Title”. Recognised at national level, these certifications prove that the holder masters the skills and competences enabling to perform qualified professional activities. 15 professional Titles in tourism are provided within five subsectors: catering, accommodation, tourism, commercial operative and travel agency. The Professional titles do no train to general knowledge but for a specific occupation.

**OTHER TRAINING COURSES AND WORK BASED LEARNING**

**Vocational Qualification Certifications (CQP):** The professional branches can, through the National Joint Committee for Employment, create and deliver Vocational Qualification Certifications. These Certifications are delivered in order to answer the needs of qualification of enterprise, compensate lack of diplomas or titles corresponding to specific competences, face evolution of some occupations and reinforce the level of expertise of enterprise. They enable to recognize officially vocational competences. The National Joint Commission for Employment in The Hotel Industry (CNPE/IH) is the most active in the tourism sector for creating and delivering CQP since 1992.

**National Tourism regulatory Training – TA and TO:** A Travel Agency or a Tour
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Operator needs to be registered by the National Tourism Agency – Atout France – to be authorized to perform its activity. If the person requesting the registration does not possess a title or certification in tourism level 5 or 6 recognised by the National Register for Professional Certifications or a professional experience of one year or more in the tourism industry, a Professional Ability Internship and training is necessary.

**Short training courses:** An incalculable amount of short training courses are organised in the tourism industry in order to improve knowledge, skills or to discover new tools for employed people within the sector. They are organised within the enterprises, within the branch or individually. The latest reform of Vocational training increases the opportunities for individuals to receive certifying training.

**Analysis of gaps in skills & competences**

**Gaps in Provision:** The lack of skills is different from one professional sector to another, but some common needs are emerging, such as foreign languages, commercial skills, informatics skills, hygiene and security (for accommodation only). These gaps can be identified by the professional training followed within the sectors:

- For the campsites activities, the training needs of the employees reflect an important gap in **basic skills**
- For the accommodation / catering / leisure sector, the lack of skills is focused on **service, management, ICT skills** as well as “multiple skills” competences.
- For the cultural, sports and recreational activities, **administrative/support/commercial skills** are lacking, as well as **languages** skills and leisure management skills.
- In accommodation enterprises, the training needs of SMEs with fewer than 10 employees have concentrated their training mainly on **ICT, hygiene and food security, and languages**. Similar needs can be found for larger enterprises, adding management and commercial techniques.
- In social and family tourism, **ICT, Standards** and competences for the **diversification of service and evolution of the demand side** are necessary.
- For the Travel agencies, Tour operators and transport sector, the most followed training courses for professionals are commercial training related to **distribution, general informatics training, specific tourism informatics training**.

The main factor driving the requirement for new skills in general is the evolution of the tourism industry, losing the traditional division between Producers/Distributors/Reception due to the web, the economic crisis, the professionalization of the sector and the arrivals of new players (social medias, comparators, internet giants, shared economy websites...) which changes the activities of traditional players (Travel Agencies, Tour Operators, Accommodation, destinations management, events agency).

**The main level for which the provision is not responding to the needs seems to be at higher level, in particular regarding the universities.** French employers are very much concerned about the level of the students in terms of foreign languages skills, and find the level of competences in management (financial / human) insufficient. The lack of management skills has a direct effect when integrating a management position, frequently proposed to those higher level students and also for future progression. In terms of skills, the culture of client relations is not sufficient for an extremely relationship based sector. It seems that the technical tourism skills provided in the training corresponds to the expectations of the industry; on the other hand, the level of general cultural knowledge is far from satisfying as well as the ability to express ideas or argument opinions. University degrees are recognized as providers of essential knowledge of the sectors and the internships represent a high value added for the employability of
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The students. There is a tendency of training level rising corresponding to the need for professionalization of the employers and the increasing complexity of the industry. The great majority of young graduates satisfy their employers in terms of competences and these include in particular new challenges related to ICT and sustainable development. Yet it seems that these skills are due to shared values of the generation more than to up-to-date training.

Missing links between universities and employers have direct consequences on the recognition of the diplomas and progression into employment for the students. It seems that the university training provision has difficulties in adapting their content in sufficient time to keep up with the evolution of the challenges in tourism. There is often a quantitative gap in university provision training for senior management positions when the sector can offer only a few of those kinds of positions and they are mostly for people with professional experience rather than a high diploma only. The sector needs support positions in key commercial, finance, HR, communication aspects, whereas the university does not prepare for these skills.

There is a qualitative gap between the expectation of the professionals and the offer, when the training is concentrated on sector based knowledge and senior positions and the industry expects operational skills, professional spirits and flexibility. The employers perceive the candidates as “over qualified”.

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1.0 TOURISM IN FRANCE

1.1 The tourism sector in France

Incoming tourism: international tourism and domestic tourism

- **International tourism:**
  France is a major tourism destination, the first in the world in terms of tourism arrivals but tourism in France remains at third place in the world in terms of revenue - behind the United States and Spain - with €43bn.¹
  In 2013, 85mn tourists from abroad visited France - the European market represents 91% of international tourism in France.²
  In terms of activities, 2 million international tourists in 2013 stayed in France firstly for leisure and holidays (50%), 35% for cultural tourism activities, 25% for sightseeing, 20% for shopping; 18% visiting family or friends and finally 18% for business purposes and 4% for events and conferences.³

- **Domestic tourism:**
  French internal tourism represents 203 billion trips and 1.2bn overnight stays. National visitors account for 68% of total consumption. Whereas the destinations are similar, in terms of consumption there is a remarkable difference between French and International tourists. For example, the accommodation sector is very much dependant on international visitors, as 67% of international visitors stay in commercial accommodation whereas 71% of French tourists use non-commercial accommodation. Concerning the length of stay, the international tourist average length of stay is 7.1 nights against 5.3 nights for the French.⁴

- **Outgoing tourism:**
  In 2013, 23 million French people completed a trip outside France; the most popular destinations are located in Europe (75%), of which 3.7 million trips are made to Spain. In second place is Africa (10%), followed by the Americas (9%) and finally Asia/Oceania (6%).⁵ Around 25% of the French population take vacations abroad. Amongst these, 20.5m tourists use the services of a travel agency or a tour operator for their vacation abroad.⁶

Nature of the tourism offer, including regional differences and main strengths

- **Incoming tourism: destination and stakeholders**
  The tourism offer is very rich thanks to the diversity of the territory’s own resources:
  - Rural and urban seaside alongside Atlantic ocean, Mediterranean sea in addition to major lakes and rivers,
  - Mountain destinations and mountain resorts around the Alps, the Pyrenees as well as Jura, Vosges and the Massif central,
  - Urban destinations with important cities such as Paris or Marseille, offering a great cultural and leisure activities,
  - Rural destinations all over France, offering beautiful landscapes and outdoor activities. A 2013 study shows that urban destination have become more

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¹ Chiffres clés du tourisme 2014, source DGE, Banque de France, enquête EVE.
² Mémento du tourisme 2014, Direction Générale des Entreprises p121.
³ Ibid. p.133.
⁴ Chiffres clés du tourisme 2014, Direction Générale des Entreprises
⁵ Ibid.
⁶ Syndicat Européen des Entreprises du Tour Operating
popular than rural destinations which had the preference in previous years, followed closely by the seaside and mountain destinations.\(^7\)

The tourism offer affects many stakeholders: destination management companies, accommodations, carriers, information offices, airports, railway stations.\(^8\)

- **Outgoing tourism: production**
  - The tourism products are very various: many destinations offered, many types of travel, e.g. vacation packages, all inclusive, flight and hotel, cruises, etc.
  - The tourism production concerns tour operators, travel agencies, on line agencies, hotel groups, hotel booking centres, airlines...

**Size of the sector(s)**

- **Companies**
  The Tourism sector accounted for 7.4\% of GDP in 2013, corresponding to €157bn. The sector was comprised of more than 285,000 companies in 2012. Of these:
    - **Incoming tourism**: Accommodation represents 16\%, Catering 54\%, Historic sites and monuments only 0.1\%.
    - **Outgoing tourism**: Travel agencies and Tour operators and other Booking systems represent less than 3\%.\(^9\)

- **Employment**
  The Tourism sector accounted for 12.9m jobs in 2012.

- **Numbers of travellers:**
  - **Incoming tourism**: in 2013, 85m tourists from abroad have visited France;
  - **Outgoing tourism**: in 2013, the French have made 23m trips abroad. Some 5.5m tourists booked holidays via tour operators.\(^10\)

**Trends of French Tourism**

- **The tourism industry is globally growing despite the economic crisis**
  In terms of turnover, tourism in 2009 represented a turnover of €81bn creating and added value of €31bn. In 2012, the enterprises generated €168bn turnover with added value of €60bn.

- **Professional trips progressively turning into “business and pleasure”**
  The volume of professional trips outside France and in overseas territories is increasing (+200 trips in 2013) impacting also the number of overnights (+12\% from 2011 to 2013 and +2\% from 2012 to 2013) and the average length of stay (4.9 days in 2011 against 5.3 in 2013). On the contrary in France, professional trips tended to decrease (-700 in 2013), having direct consequences on the overnight stays (-694) while the lengths of stay remained stable since 2011 (between 3.4 and 3.2 days).\(^11\)

- **Internet broadens new horizons**
  The Internet creates new behaviours in terms of booking a trip, taking information during the trip and comment after the trip. Beyond this new consumer behaviour, it

\(^7\) Chiffres clés du tourisme 2014-2013-2012.
\(^9\) Memento du tourisme 2014, source INSEE, ESANE.
\(^10\) Syndicat Européen des Entreprises du Tour Operating.
\(^11\) Memento tourisme 2014.
also enabled the creation of new stakeholders such as the Online Travel Agencies (OTA) or online comparison websites. Online tourism represents €12bn in 2013, rapidly growing since 2006. In 2013, 62% of the French population (about 30 Million people) consulted internet pages in order to prepare their trip.12 By facilitating direct distribution, the internet has changed the traditional supplier chain between the travel producers, the travel integrator and the travel distributors.

- **M-Tourism and social networks create new needs**
  Mobile tourism is changing practices: Clients have new needs and do not expect to find the same information or tools on the Smartphone/tablet as on the personal computer. On mobile devices the clients expect instantaneous reaction, booking in several clicks as well as information during their stay. It appears that the mobile devices are used to read content in order to be able, afterwards, to make the reservation on a personal computer. The Brochure has become the mobile device, to be read whenever and wherever the client wants.

Social networks enable the Client experience to begin well before the stay, and continue during and after the stay as he/she is able to interact with the brand, and the community of the product concerning the trip in all circumstances and at any time.

- **New Tourism Clients: Brazil, Russia, India, China, the BRIC**
  According to a March 2015 study, the upper class expectations of the BRIC visitors are stimulating the tourism sector in France.13 Their number has rapidly increased in recent years, from 2.5m in 2010 to almost 4m in 2013. This implies an adaptation of the tourism service offer and infrastructures.

- **Modern Knowledge of consumers: data**
  The recent phenomenon of big data, smart data and open data has completely changed the observation of tourism behaviours in order to propose offers which match better with her/his wishes. In fact Orange, a main telephonic operator, has been collaborating with several public authorities to provide anonymous and very precise studies of the movements of the tourists, with information on their origin, the length of stay in different places etc.

**Outgoing tourism**

- **New model of enterprises**
  In recent years, French enterprises have been experimenting with new models, collaborative platforms, digital start-ups...which have very much developed in the tourism sector. Examples of this are “blablacar“, a collaborative platform for sharing cars, which is now European wide or “voyage Privé“ which developed the concept of private sales for holiday stays. The public Authorities are investing in these new economic models, such as the “Welcome City Lab” in Paris, a shared working place and support platform dedicated only to tourism innovation.

- **ICT for tourism**
  Technological innovation enables a better client experience management such as the new “inspiration browser” from companies such as Havas or smaller start-ups such as “mon nuage“ which enable customers to find an itinerary by pushing different buttons on the mood , the budget, key words such as “bikini“ or “fun“.

The Web-to-store concept is also changing the tourism industry, with for example the “beacon“ or “NFC“ technology, enabling you to receive promotion of the store you are passing by. Tourism consumption will be very much impacted by these new devices.

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**Seasonality**

In incoming and outgoing tourism, the seasonal tendency is twofold, in summer from April to September (with a climax in July and August) and in winter from November to March, with a climax from December to February. Naturally the season can vary from year to year depending on the weather. In the urban destinations such as Paris, there is less seasonality pattern, as tourism is very much present throughout the year.

Comparing the 2013 overnight stays of French visitors in months, some patterns appear according to the type of destination:

**Seaside**
- Rural seaside: (Lowest: 2.6m visitors; highest: 15.4m visitors); high season between April and October
- Urban seaside: (lowest: 9.5m visitors; highest: 26.2m visitors); high season between April and November

**Mountain**
- Outside resort (lowest: 10.9m visitors; highest 16.2m visitors); high season between January and April (no real peak and no real low)
- Resorts (lowest: 2.7m visitors; highest 25.5m visitors); high season February and March

**Rural areas**
- (Lowest 15.3m visitors; highest 24.2m visitors); high seasons April-May and October-December

**Urban areas**
- (Lowest 12.9m; highest: 40.7m); high season Oct-January

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Table 1.1 SWOT Analysis of tourism in FRANCE

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>OUTGOING</th>
<th>WEAKNESSES</th>
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<tr>
<td>INCOMING</td>
<td>OUTGOING</td>
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<tr>
<td>• Tourism arrivals</td>
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<tr>
<td>• Good repartition of jobs in the French territory</td>
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<td>• Large accommodation offer</td>
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<td>• Diversity of climate and landscapes</td>
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<td>• Current awareness (2014) of the government about the importance of tourism in the national economy</td>
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<tr>
<td>• France is the European leader on campsites</td>
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<tr>
<td>• Diversity of tourism enterprises covering all needs (All-inclusive packages, tailor made, dry products, business travel, sustainable products, shared economy products...)</td>
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<tr>
<td>• Numerous Online and offline travel companies</td>
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<td>• Strong cooperation between institutions, professional branches and industry.</td>
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<tr>
<td>• French tourists tend to stay in France</td>
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<tr>
<td>• Slow adaptation to new sales channels and techniques</td>
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<td>• Lack of information about occupations in outgoing tourism industry</td>
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<td>• Lack of high quality Training provision specialised in outgoing competences and skills.</td>
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<tr>
<td>• Tourism revenues</td>
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<tr>
<td>• Accessibility of some seaside destinations</td>
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<td>• Use of car</td>
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<td>• Foreign languages skills</td>
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<tr>
<td>• Lack of adaptation to non-European cultural and food habits</td>
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<td>• Lack of information about progression opportunities and occupational requirements within tourism</td>
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<tr>
<td>• Employment conditions of seasonal workers</td>
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<tr>
<th>OPPORTUNITIES</th>
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<tr>
<td>OUTGOING</td>
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<tr>
<td>• French Innovative tourism enterprises and industry</td>
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<td>• Shared economy</td>
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<tr>
<td>• Declaration of the government acknowledging the importance of better promoting tourism occupation and the essential role of the national government in this aspect.</td>
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<td>• European travel package directive soon implemented in French law</td>
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<td>• Reform of the Vocational Training System</td>
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<td>• Big data, open data</td>
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<td>• Growth potential of regional offer</td>
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<tr>
<td>• Gastronomy</td>
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<td>• Wine tourism</td>
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<td>• Cultural sites</td>
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<tr>
<td>• Shared economy</td>
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<tr>
<td>• New technologies (beacon)</td>
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<td>• Enough resources for new forms of tourism</td>
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<td>• Average length of stay (stay at family or friends’ house)</td>
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<tr>
<td>• Popularity of Paris and the seaside</td>
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<tr>
<td>• Declaration of government (cf. Outgoing)</td>
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<tr>
<td>• Big data, open data</td>
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<tr>
<td>• French tourists not spending in accommodations</td>
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<tr>
<td>• Rural destinations less popular, can create great unemployment in vulnerable areas</td>
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<tr>
<td>• Growing competition with other countries</td>
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<tr>
<td>• Slow adaptability of small enterprises / training to market or industry change</td>
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<td>• High development/acquisition costs and administrative procedures</td>
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<tr>
<td>• Complicate Visa procedures</td>
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<tr>
<td>• 1/3 of tourism entrepreneurs lack training or experience in the sector</td>
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<tr>
<td>• Non touristic and non-French stakeholders weakening the market (google, amazon...)</td>
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<tr>
<td>• Decreasing interest of the consumers for travel agencies in favour of Internet.</td>
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<tr>
<td>• Comparators and booking websites endangers Travel Agencies and tour operators.</td>
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<tr>
<td>• New expectations of the clients leading to new skills’ need</td>
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1.2 Tourism employment and skills

*Level of employment, for different sub-sectors and/or occupational groups*

With 286,000 enterprises, the tourism sector represented 7.4% of the total economy and employed more than 1 million persons in 2012.\(^{15}\)

The biggest employer is the restaurant/catering subsector corresponding to 45% of the workforce, followed by the non-urban transport with 27%, the accommodation sector (18%) and finally cafés/bars with 5% and Travel Agencies/Tour Operators with 4%.\(^{16}\)

The tourism sector is a great source of employment all over France:

- Of the 21 metropolitan regions, tourism related jobs represent less than 5% of total jobs in only 3 regions. In 5 it represents between 5 and 6%, in majority (9/21) it represents between 6 and 7% and in 4 regions, tourism represents more than 7% of total jobs in the region.
- In Ile de France, there are 414000 jobs in tourism related sectors, representing 9% of the region’s total employment; In Provence-Alpes-Côte d’Azur it provides 119.00 jobs, in Languedoc Roussillon 45,000 and in Corsica with 9000, representing in each region more than 7% of total employment.\(^{17}\)

In terms of businesses, the catering/restaurant sector remains the most numerous, but the Travel Agency/Tour Operators made a substantial increase of 37% more businesses in 4 years, whereas the café/bars sector lost 12% of businesses (more than 6000 enterprises closed) in the same time frame. The Accommodation and Restaurant/Catering sector, showed an increase of 27% and 12% of businesses.\(^{18}\)

The majority of the employers are SME, with an average number of 3.8 employees across the sector. In the catering/restaurant sector and in accommodation, 40% of the companies are working without employees.\(^{19}\)

*Employment trends, for different sub-sectors and/or occupational groups;*

As with tourism arrivals, tourism employment has increased in the last years (2009-2013) in general in France even if some sectors are more impacted than others:

The Restaurant/Catering subsector, main supplier of full time employees, has also noticed a major increase of 36% between 2009 and 2012 whereas Accommodation lost 1% of full time employees representing 86000 employments. Café/bar and Travel Agency/Tour Operators made an increase of 14% and 4% in this category.\(^{20}\)

The non-urban transport sector, included in the statistics since 2012, has shown a slight decrease of 1% between 2012 and 2013. The last sector “other characteristic activities”, including short rentals (car, equipment...), cultural/sport/leisure services, Mountain resorts facilities have generated an increase of employees of 12%.\(^{21}\)

Since 2009, in the accommodation, catering, bars and travel agencies and tour operators sectors, the level of full time employees has increased by 53% in 2012.

\(^{15}\) « Full-time employees equivalent »

\(^{16}\) *Chiffres clés du tourisme/Key facts on tourism; Ministère de l’économie, de l’industrie et du numérique, Direction Générale des Entreprises, (2014-2010).*

\(^{17}\) Pascal Faure, François Magnien et alii, *Key facts on tourism, Direction Générale des Entreprises, Edition 2014*

\(^{18}\) *Mémento du tourisme; Direction Générale des Entreprises (2014-2012).*


\(^{20}\) *Mémento du tourisme; Direction Générale des Entreprises (2014-2012).*

\(^{21}\) *Mémento du tourisme; Direction Générale des Entreprises, emploi par région traitement de 2010 à 2014.*
In 2014, the Tourism Employment Barometer\(^{22}\) shows that the number of tourism job offers has increased by 29.20% since 2013, the accommodation sector being still the biggest provider with 25% of the offers. 60% of the jobs offered are permanent contracts (+3% from 2013), 29% temporary and finally 5% were seasonal job offers.\(^{23}\)

The most sought profiles were *group commercials, tour wholesaler, multi-tasks sales advisor specialists for destinations and travel-business adviser*,

Some experts foresee an impact from the 2015 January attacks in Paris on tourism employment in France.\(^{24}\)

**Skills gaps or shortages of skilled labour, e.g. reported by employers or sector bodies**

**Recruitment**

In 2013 and 2014, some recruiting difficulties were reported by employers. These difficulties seem to be caused by several factors: the lack of adapted applicants, a high level of expectations from the employer, the unattractiveness of temporary contracts (1 to 3 months), and sometimes the position or the enterprise is not attractive enough for applicants.\(^{25}\)

**Gaps of university training**

Regarding the tourism sector, the industry is concerned by the volume of *Licences Professionnelles* and the diversity of their specialisation, welcoming the university reform aiming at reducing the provision. The Director of the French Federation of Higher Tourism Technicians (FFTST), Annette Masson considers that 80% of the existing *Licences Professionnelles* "could be reviewed"\(^{26}\), in fact a 2009 study shows qualitative inadequacy of the diplomas with the real needs of the sector.

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\(^{22}\) TourMaG.com/Apst „Emploi tourisme: le marché du recrutement a fait mieux que résister en 2014 » Tourmag.com.

\(^{23}\) Emploi tourisme: le marché du recrutement a fait mieux que résister en 2014, TourMag, 2/02/2015.

\(^{24}\) TourMaG.com/Apst „Emploi tourisme: le marché du recrutement a fait mieux que résister en 2014 » Tourmag.com, 2/02/2015.


\(^{26}\) « Les licences tourisme doivent revoir leur copie », Fédération Française des Techniciens du Tourisme, L’Echo Touristique, 14/03/2012.
2.0 THE TOURISM EDUCATION AND TRAINING SYSTEM

2.1 Overview of the national education and training system

Before embarking on a description of how tourism-specific education and training is organised in France, it would be useful to put the findings in context. A short summary is therefore provided below highlighting the key characteristics of the national education and training system and the main challenges to skills provision.27

- The quality of the French education system is demonstrated by the fact that it outperforms the EU average for ESL and its tertiary attainment rate of 43% in 2011 is already a better result than the EU target for 2020 of 40%.
- While the employment rate of graduates is close to the EU average, adult participation in lifelong learning is very low in EU comparison (5.5% vs. 8.9% in 2011) and performance has actually worsened in recent years.
- Employment in high qualification jobs is forecast to increase very strongly in France and represent 43% of total jobs in 2020 (vs EU average of 34%).
- Public spending in education as a share of GDP in France has been constantly above the EU average, but with no significant increase in recent years.
- Foreign language training lags seriously behind in EU comparison. Recent reforms have made compulsory to learn one language as of the age of 7 and a second language as of the age of 13.
- In VET two initiatives have been proposed and discussed in September 2012. A further Higher Education reform was discussed at a conference in July 2012. The discussion focused on success for all students, revival of research and innovation as well as a redefinition of the roles of the actors in Higher Education and Research, including governance and financing.
- Adult participation in lifelong learning was also the subject of country-specific recommendation to France in the European Semester 2012.
- The plan "Étudiants Entrepreneurs" (2009-2014) aims at bridging gaps between business and the higher education system whilst fostering entrepreneurship among students. This has resulted so far in establishing "entrepreneurship contact points" in 300 higher education institutions, including 71 universities.
- Major changes in governance were introduced in 2007 by the "Law on the Liberties and Responsibilities of universities". This law not only made universities more autonomous and more accountable, aiming to increase their efficiency, but also strengthened the link between training and the labour market.

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2.2 Planning of tourism education and training

Within the French system, it is very difficult to differentiate the Planning / Forecasting / Dialogue / Assessment procedures and mechanisms as they are undertaken by the same entities.

We will therefore differentiate three systems of education and training:

- Public Higher education and National education
- Professional
- Territorial

Planning of Public Higher Education

The universities have a structural legal framework for assessing their training and assuring therefore the expected quality. The following information is a direct translation of the national order of the 22nd of January 2014 stipulating the rules for Master, Licence and Licences Professionnelle.

Accreditation

Universities have to accredit their training offer. They propose a training offer with specializations related to fields in accordance to their training offer and strategy.28

Nomenclature

The follow-up committee of Master/Licence/Licence Professionnelle organise consultation leading to the periodic revision of the nomenclature in association with the university community.29

Pedagogy

A pedagogical team carries out a training project organizing the training. This is composed of professors, researchers, tutor student, library people, engineer, administrative, technicians, workers, and trainers participating to the training of the semester or of the training year.30

Each training path and its name are validated by the related specialization committee, and the Committee for training and university life of the academic council or of the Institution Council, in charge of training matters. Within Lifelong Learning, the list can have modalities specific to professional training or block release training.

Training31

Within the institution, assessment mechanisms are implemented for each training course or group of courses, with for instance the development of Council of improvements32 bringing together among others, representatives of professors, researchers, teachers, students and representatives from the socio economic world.

An assessment of the training and teaching is notably organized by means of regular surveys to students.

28 Arrêté du 22 janvier 2014 fixant le cadre national des formations conduisant à la délivrance des diplômes nationaux de licence, de licence professionnelle et de master, JORF n°0027 du 1 février 2014 page 1922, texte n°25, Article 3.
29 Ibid.
30 Ibid., Article 4
31 Ibid., Article 5
32 French: Conseils de perfectionnement
These mechanisms can be used as a basis to the evolution of the training programme of the institution in accordance with the local policy.

The results of the assessment are presented and discussed within the pedagogical teams, the improvement council, the specialisation council and the Committee for training and university life of the academic council or of the institution council which has the authority on training matters.

In addition the High Council for Evaluation, Research and Higher Education (HCERES)\(^33\) organizes two types of evaluation, both organised on multi-criteria assessment: An “integrated evaluation” of all the universities, centres of research and diplomas every three years, and some “ad hoc evaluation” of diplomas upon request of the university.

- The integrated evaluation enables an assessment of the level of the research centres and diplomas in key sectors for France, in order to establish the margin of improvement at national and regional level.
- The ad hoc evaluation of diplomas is conducted in two phases: first, the establishment undertakes a self-evaluation of the diploma; then the HCERES organises an external evaluation.

The main criteria for the evaluation of diplomas are the quality of pedagogical project, the results in terms of employment or continuation of studies, the quality of management of the training.

Some specific criteria are assessed according to the diplomas: For Master the interaction with scientific and/or socio-professional contexts, for the Licence, the mechanism for facilitating success, and for the Licence Professionnelle the involvement of professionals of the sector.\(^34\)

**Planning of National Education**

The Ministry of National Education is not only in charge of school training and diplomas but also of Vocational Paths. The National Education Ministry assures the quality of the provision and diplomas supported by Professional Consultative Commissions\(^35\) (CPC\(^36\)).

Vocational and technical diplomas under the authority of national education are frequently updated, in order to adapt the content to the employment condition and the evolution of the new technologies. The development and updating of these diplomas are undertaken by the (CPC). The CPC are composed of forty members within four colleges of representatives: employers, employees, public authorities and experts. They provide a yearly opinion on those diplomas. Every year, diplomas are created, improved or cancelled.

They formulate opinion on the needs for diplomas in accordance with the evolution of occupations and content of the training, as well as the position of these National Education degrees within professional certificates.

They enable also the inscription of those professional degrees in the National Directory of Professional Certifications (RNCP)

\(^{33}\) Haut Conseil de l’évaluation de la recherche et de l’Enseignement Supérieur, [www.hceres.fr](http://www.hceres.fr)


\(^{36}\) French: “Commission Professionnelle Consultative.”
Currently, 14 Professional Consultative Commissions exist, (last renewal in 2012), two of which concerns tourism VET diplomas and training courses:

- Tourism, accommodation catering;
- Transport, logistics, security and other services.

Outside of higher education, the forecasting and planning of skills and employment is strongly linked with the professional branches, coordinated at national or regional level. In 2014, a national reform of the Professional training policy and of the Territorial Organisation is changing the nature and the role repartition of the different stakeholders, impacting directly on professional training.

Two levels can be identified for the planning of training and education of tourism: the professional level and the territorial level.

**Planning of Professional tourism education and training**

The national inter-professional agreements of 2003 and 2009 and the latest reform of the professional training of 2014 give the legal framework of the system.

**The professional branches** have a significant role in the definition, planning, negotiation and certification of the professional training.

Professional branches are composed of trade unions representing the employers and the employees. Together they build a collective labour agreement defining the regulatory framework of the enterprises and employees of the branch (contract, leave, salary, procedures...) and a professional agreement handling specific themes such as professional training, salaries, equity...).

The National Joint Employment and Training Commissions of each branch steers a **Prospective Observatory of Qualifications and Competences.** The Observatory is a joint technical instrument of information, knowledge and analysis, enabling the branches to develop their policies in terms of employment, certification and professional training.\(^{37}\) It plays an essential role in the analysis of the evolution of employment within a branch and of the needs in terms of qualification. These observatories publish regularly statistic portraits of the branch as well as prospective studies, occupation and training analysis and results of pilot projects.

With the outputs of the observatory, the **National Joint Employment Commission** defines orientations in terms of employment and professional training within the branch, as well as certifications. This entity can also have the role of defining the list of training courses eligible for the Personal Training Account\(^ {38}\) and of developing the Quality mechanism to assess training courses.

Under the obligation of the law every three years the branch has to meet in order to analyse, assess and adapt their policy concerning work conditions, forecast management of employment and competences...\(^ {39}\)

At national level, all enterprises above 10 employees must give a minimum 1% of their payroll to an Authorised Joint Collection Body (0.5% for smaller enterprises) for professional training. These bodies are not only financing collective and individual actions of training but are since 2014 also accompanying enterprises and employees in the definition of their Training Plan.

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\(^{38}\) For individuals, the reform creates a Personal Training Account, enabling a simple visibility for the training rights and provisions.

\(^{39}\) Code du Travail, Article L932-1
The six main professional branches for the tourism sector:

- Social and Family Tourism
- Campsites ("Outdoor accommodation")
- Accommodation, Catering, Leisure activities
- Tourism organisations
- Travel and tourism agencies
- Leisure and cultural attraction

In addition, the professional branches can, through the National Joint Committee for Employment, create and deliver **Vocational Qualification Certificates (CQP)**.

These Certificates are delivered in order to:

- Answer the needs of qualification of enterprise
- Compensate lack of diplomas or titles corresponding to specific competences
- Face evolution of some occupations
- Reinforce the level of expertise of enterprise
- Validate officially recognised vocational competences.

The National Joint Commission for Employment of The Hotel Industry (CNPE/IH) is the most active in the tourism sector for creating and delivering CQP since 1992.

**Territorial system of tourism education and training**

Within the repartition of authority for professional training between the National and Regional Level, several mechanisms and entities are working together with the representatives of the employers and employees. The regional level has authority on employment, professional training, and secondary education and since 2014 Vocational Educational Training in secondary education. Therefore, the regional entity is regularly developing regional strategy for training and employment.

Since March 2014, the CNEFOP - **National Council for Employment, Training and Professional Orientation** - has been created replacing the national employment council of employment + national council of LLL.

The council is composed of 12 representatives of the ministries, representatives of the Regions, Social partners (national or sector-specific), Chambers of commerce and main operators in the field. It is the main consultation body concerning all legal and regulatory texts in the field. It is a vehicle for dialogue, monitoring, following, coordination and evaluation of employment policy, initial and professional training and Lifelong learning orientation.

Same entities have been developed in regions, with a similar composition they are called the **CREFOP** and are being implemented in the territory.

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41 Observatoire prospectif des métiers et des qualifications de l'hôtellerie de plein air, [http://www.agefos-pme.com/site-national/nous-connaitre/etudes-observatoires/observatoires-de-branche/activites-de-services/](http://www.agefos-pme.com/site-national/nous-connaitre/etudes-observatoires/observatoires-de-branche/activites-de-services/)

42 Observatoire prospectif des métiers et des qualifications des organismes de tourisme, [http://www.fafih.com/content/l-observatoire/service-etudes-et-statistiques](http://www.fafih.com/content/l-observatoire/service-etudes-et-statistiques)


45 *Cf.* Chapter 3 Main form of Provision - Other training.
In order to define and to implement the regional policy of professional training and apprenticeship the regional authorities have a planning instrument, the CPRDFP - Regional Plan’s Contract for the Development of Professional Training. Its signature by the President of the regional council and the rector of the academy ensures financial engagement in the plan. The representatives of professional training, the national employment agency and the Authorised Collection bodies during the development of the plan ensure its feasibility.

**Transversal mechanisms**

**Mechanism for Prospective and planning National and regional level**

- **PMQ -** Qualification and Occupation Prospective mechanism. At regional level, training provision orientation is increasingly driven by these mechanisms. Beyond frame working information, these procedures become an instrument of social dialogue in a field in which several stakeholders are in charge.

Three types of PMQ mechanism can be identified:
- Analysis of the sector, subsector of occupational group in the regional territory;
- General prospective view, i.e. concerning all sectors or occupations at regional level;
- Sub regional analysis/perspective in order to support a specific action.\(^{46}\)

**Planning Mechanism for bigger enterprises and territories**

- **GPEC\(^ {47}\)** - Forecasting management of employment and skills are obligatory planning methods for enterprises with a minimum of 300 employees. Every three years, these plans are revised in order to anticipate the needs in terms of HR and training. **Example of GPEC in tourism:** The Tourism development agencies and local information centres have engaged in Territorial GPEC, such as the North Alsatian Tourism offices.\(^ {48}\)

**Mechanism between Branch/territory/Public authority/ National Government**

- **EDEC –** Professional branches or inter-professional branches can sign a contract with the Government in order to anticipate and follow the evolution of employment and qualifications, The Contract is called “Development Commitments of Employment and Competences”. It is composed of a prospective and an implementation component:
  - **Prospective:** the Contract of Prospective Studies (CEP\(^ {49}\))
    - The Contract of Prospective Studies can target a territory or a sector and aims at financing studies in order to develop:
      - A social and economic diagnosis;
      - Short and mid-term Evolution hypothesis;
      - Recommendations of actions to monitor and accompany the employment and skills evolutions.
  - **Implementation:** Employment and Skills Development Actions (ADEC\(^ {50}\)) The ADEC aims at signing at national or regional level agreements with professional branches, in order to foster and support employment-training schemes for professional sectors with economic mutations and employees in difficulty with

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\(^{46}\) La prospective des métiers et des qualifications, un outil pour renforcer la concertation régionale, Bref du Cereq, n°327, décembre 2014.

\(^{47}\) Le portail des politiques publiques de l’emploi et de la formation professionnelle - [www.emploi.gouv.fr](http://www.emploi.gouv.fr)

\(^{48}\) La gestion prévisionnelle des emplois et des compétences dans les OT SI d’Alsace du Nord, Rapport détaillé de la phase 1, Comité Directeur, Organisation Tourisme Développement Territoire, 31/07/2014.

\(^{49}\) Contrat d’Etudes Prospectives, Le portail des politiques publiques de l’emploi et de la formation professionnelle - [www.emploi.gouv.fr](http://www.emploi.gouv.fr)

\(^{50}\) Le portail des politiques publiques de l’emploi et de la formation professionnelle - [www.emploi.gouv.fr](http://www.emploi.gouv.fr)
their occupations. It enables to maximise employment possibilities in emerging professional branches

- **Example of EDEC in the tourism Sector:** In 2013, The Authorized Collection Body of the Accommodation, Catering and Leisure Branch, FAFIH signed with the national government an EDEC concerning the French overseas territory “La Réunion” with a strategy developed around three development axes which should impact employment, skills and activities. This strategy has been developed under the CEP, with a participative methodology including more than 120 representatives of the employers and employees, social partners, public authorities and training institutions. The ADEC action plan has been developed for 2013-2015 to achieve the objectives and recommendations identified in the CEP. The ADEC is mostly focusing on the renewal, consolidation and development of adequate training paths for the sector.51

**Mechanism to assess the Professional certifications**

**The National Commission of Professional Certification (CNCP)52**

Created in 2002, under the authority of the Ministry of Vocational Training, the CNCP is the main stakeholder informing, certifying and assessing certifications and diplomas. The CNCP is also undertaking systematically the assessment of the CQP, the Vocational Certification Certificates (developed and delivered by the professional branches) as well as recommendation for any creation or renewal of certifications.

- **Methodology**

  The National Commission of Professional Certification (CNCP) assesses the applications for registration with two main criteria:

  - Skills - in particular professional skills, proven knowledge and competences;
  - Engineering of the training: Liability of the training process;
  - The CNCP is focusing on the results of a qualification path (training, work experience…) and not on the path itself.

- **Registration53**

  A registration into the National Directory must be renewed every five years.

  - **Registration ipso jure:** All professional certifications delivered under the authority of the National Government, which have been created after consultation within Consultation Commission with representatives of the Employees and employers.
  - **Registration on demand:** Professional diplomas, titles, certifications can apply for registration, on demand of each institution, after validation of the CNCP.

All certifications of the Directory are eligible to the system of Recognition of Professional Experience (VAE); except if a legal binding document is ruling otherwise.

**2.3 Role of tourism employers and other stakeholders**

The Professional Branches, as seen in the previous sections are very active in the training and education system, from prospective studies to the delivery of

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51 Le Fafih/Opcalia signe un Edéc à la Réunion, Fafih zoom 2013, [www.fafih.com](http://www.fafih.com)
52 Le portail de la Commission Nationale de la Certification Professionnelle [www.cnpc.gouv.fr](http://www.cnpc.gouv.fr)
53 Le Portail du Répertoire de la Commission Nationale de la Certification Professionnelle [www.cnpc.gouv.fr](http://www.cnpc.gouv.fr)
qualifications (CQP). Within the observation, prospection, and planning of training, several stakeholders play an important role:

**Institutes**

- **The CEREQ**, Centre of Studies and Research on Qualification is specialised in forecasting and assessing the institutional and professional developments concerning training, employment and qualification.
- **France Stratégie**, the State General Strategy and Prospective Commission, directly connected to the prime minister, is in charge of anticipating and assessing the evolution of society, including employment. A recent study forecast the evolution of occupations for 2022.\(^{54}\)
- **CARIF-OREF** are interregional entities concerning training and employment, focusing on 4 main axes: Observation / Information / Animation / Professionalization.

**National Tourism Agency: Atout France**

In 2012, the national tourism Agency “Atout France” has developed with various representatives of the tourism industry (employees, employers, trade unions, Branch, Authorized Collection Bodies...) a guide on tourism occupations for Accommodation, Catering and Leisure. This guide develops for each of the 50 occupations identified a list of skills, knowledge and competences expected.\(^{55}\) The guide has been renewed in 2014.

**Regional Authority**

The regional Authority Provence-Alpes-Côte d'Azur\(^{56}\) has developed a regional inventory to index all existing training courses in tourism in the Higher education system on the territory. This inventory is aimed at orienting the students but also to help the public authorities and the Higher education institutions to cooperate in order to respond to the sector's needs.

\(^{54}\) Les métiers en 2022, résultats et enseignements; rapport d’étape, DARES, France Stratégie, Juillet 2014.
\(^{56}\) Pôle Régional de Recherche et Innovation pour le Tourisme, Provence-Alpes-Côte d’Azur, [www.protis.ectd.eu](http://www.protis.ectd.eu)
Tourism Trade Unions

The National Trade Union for Travel Agents (SNAV) has actively participated in the reform concerning the BTS Tourism, the higher education Diploma in 2012. The reform aimed at combining two BTS (Local tourism management and Tourism Sales and promotion) into one single training path and Diploma. The SNAV’s input focused on « introducing a real culture of client relation » and on the Marketing side of tourism, which was corresponding to the needs of tourism information centres which are increasingly developing commercial activities in addition to information.57

In order to improve the training for their industry, the SNAV created in 2011 the CFPT, Training Centre of the Travel Professionals “Travelpro formations” with 7 competence axes: Management & Taxation, Client Relation, Marketing, techniques, Management, Personal efficiency, Multimedia and informatics.58

Tourism Associations

• French Association of Travel Manager (AFTM)

In April 2014, the association achieved after five years of discussions the integration of the occupation « Travel Manager » within the list of the « Association for Senior Manager Employment » (APEC). This is a first steps towards the recognition of the occupation and the training path into the national recognition system.59

Enterprises

• Internal training

First University created by a service enterprise in Europe, the Accor academy is situated in the suburbs of Paris and is training students and employees in all services related to the group. Accor Academy is connected with 17 campuses in order to provide tailor-made training for this international company.60

• Cross training

In some accommodation enterprises, the staff has to spend a week from time to time in another department, enabling them to understand better the whole functioning of the establishment and create new personal development opportunities.

57 « Le nouveau BTS Tourisme mise sur la relation client et le web », Fabrice Bugnot, l’Echo Touristique, 24/02/2012.
58 Le Centre de formation des professionnels du tourisme à Paris et en régions; http://www.travelproformations.fr/
59 L’AFTM obtient de l’APEC la reconnaissance du métier de Travel manager; Déplacement Pros, 01/04/2014.
60 Académie Accor France; www.formations-academie.accor.com/
3.0 MAIN FORMS OF PROVISION

3.1 Introduction

French/EU level correspondence for training recognition

In order to differentiate the main form of provision, it has been necessary to divide these, not only according to the institutions providing the training, but also according to the level of the obtained diploma. For transparency reasons, the EU level reference framework has been used within this study. The table below shows the correspondence from the names of the diplomas/training, to the French and EU nomenclature.

<table>
<thead>
<tr>
<th>Name of diploma/training</th>
<th>FR</th>
<th>UE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctorate (PhD)</td>
<td>I</td>
<td>8</td>
</tr>
<tr>
<td>Master</td>
<td>I</td>
<td>7</td>
</tr>
<tr>
<td>Licence, Licence Professionnelle</td>
<td>II</td>
<td>6</td>
</tr>
<tr>
<td>BAC +2</td>
<td>III</td>
<td>5</td>
</tr>
<tr>
<td>BACs - BP</td>
<td>IV</td>
<td>4</td>
</tr>
<tr>
<td>CAP, BEP...</td>
<td>V</td>
<td>3</td>
</tr>
<tr>
<td>N/A</td>
<td>Vbis</td>
<td>2</td>
</tr>
<tr>
<td>N/A</td>
<td>VI</td>
<td>1</td>
</tr>
</tbody>
</table>

Matching the French tourism education and training system to the study

A-Higher Education

Taking into account that on one side, the majority of Higher education training courses have increasingly vocational aims and can be followed as a student, as a worker and sometimes as an apprentice and on the other that parts of the vocational training offer the opportunity to obtain a diploma with an equivalent level to that of Higher education, we will proceed with a differentiation based on levels.

With the Bologna reform, three Higher education levels are recognized in the European framework: The Licence (French level II - European Level 6), The Master (French level I, European level 7) and the Doctorat (French level I, European Level 8). In the tourism sector, the European level 5, French level III is recognized in Higher education, which can take several forms BTS, DU, DUT, DEUST.

Within this study all training offers aiming at obtaining degrees with the European levels 5, 6, 7 and 8 will be considered in Higher education.

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61 Référencement du cadre national de certification français vers le cadre européen de certification pour la formation tout au long de la vie; Commission Nationale de la certification professionnelle, Rapport, p.15.
B- Differentiation between Vocational educational Training and Adult education / Life Long Learning

Both systems are integrated in the French “Lifelong learning vocational training” system, which is divided into two distinct parts:

- Initial vocational training, concerning young people in full time training in secondary education and/or in apprenticeship.
- Continuous vocational training concerning young people having left or terminated initial training and adults on the labour market.
- For the purpose of the study,
- The French “Initial Vocational Training” will be considered in the category Vocational Education and Training and;
- The French “Continuous Vocational Training” will be considered as Adult Education / Life Long Learning.

C- School education

In the French system, the second degree of the education system is composed of two cycles:

- “Collège” is the first cycle (inferior secondary education) regarding children from 11 to 15;
- After the last class at the college, pupils continuing their studies enter in the second cycle (superior secondary education) and can be oriented towards:
  - A general and technological education establishment, ("Lycée" in general) to prepare a general or technological Baccalauréat.
  - A vocational path which enables them to prepare vocational degrees such as the Vocational Baccalauréat or the Certificate of Vocational Capacities ("CAP") - in a “vocational lycée” or an apprenticeship supervised by an employer.
  - The vocational path of second degree education will be considered in the category Vocational Educational training, whereas the tourism oriented general or technical education will be part of School Education.

D- Other training and work based learning

In this category, we will consider three types of training:

- The training and certifications recognized and delivered by the tourism professional branches;
- The regulated “Tourism Operator” training necessary to be able to open a travel agency / a tour operator;
- Other original training forms.

Context and issues related to tourism education and training system

The French training and education system is quite complex with a large numbers of public and private stakeholders taking part. Depending on the level, form and location of the training, training courses can be organised under the authority of different stakeholders.

In addition since 2014, 3 reforms are being developed and/or implemented, the Higher education reform, the Professional training reform and the territorial organisation reform. All these reforms aim at the simplification of the systems for a better visibility for the student, pupil, unemployed person, and employees.

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62 French: « Formation professionnelle tout au long de la vie ».
63 Référencement du cadre national de certification français vers le cadre européen de certification pour la formation tout au long de la vie; Commission Nationale de la certification professionnelle, Rapport, p.15.
64 Ibid., p.12.
For now, the Higher education system is difficult to overview, in particular for tourism as the training courses are integrated in different educational fields, making the statistics and evidences hard to find.

Concerning the assessment of the quality of the training, several criteria can be taken into account, but they all tend to exclude a large part of the provision:

- Progression into employment: With this indicator, the private institutions are best positioned as their survival depends on that criterion, and the public training would be lower ranked. Unfortunately, every institution will give numbers which are not controlled by a specific authority.
- Recognition at national level: The Public Higher education diplomas are recognised ipso jure. This means a training course providing high quality without recognition would then be out of the scope of the study.
- Labels: Some training courses are recognised by a quality label (tourism related or not), which can prove recognition - but the assessment methods are really diverse and not always related to the progression within the targeted sector of the training.

Therefore, it has been decided to describe the assessment procedures where they exists for the various diplomas but a deeper survey of all the training institutions and students would be necessary to give a qualitative analysis of the assessments of training.

**Methodology to assess the subjects/occupations covered by training**

In order to give an overview of the main form of provision in tourism in France according to the sector and occupation identified for the study, the following methodology has been used:

- **Official training and education database**
  The search for diplomas has been carried out using two main sources:
  - The ONISEP, the National Information Office on Education and Training, which is under the authority of the two Ministries of National education and Higher education and research
  - The RNCP, the National Directory of Professional Certifications, which is under the authority of the Ministry of Employment, Professional training and social dialogue.

- **Methodology**
  - **Cross cutting research with key words**
    The listed training courses have been identified within the two databases using both, the existing search-category for the tourism sector and the key words of the occupation list. Additional key words have been used to assess the existence of specific tourism related occupations: E-tourism, business travel, territory, transport.
  - **Name analysis**
    For the training level with a large number of provision, it is the name of the training which has been analysed to identified the subjects and occupation covered.
  - **Occupation list as framework**
    According to their names, the training courses have been dispatched within the eight occupational groups of the study and if corresponding within the single occupations.
3.2 Higher Education

3.2.1 Public Higher Education

**Main Types of institutions:**

Universities or private Institutions under agreement with a university are the only ones authorized to deliver the Doctorat (EU level 8), the Master (EU level 7), Licence and Licence Professionnelle (EU level 6) and specific University diplomas which can give various levels.

**Tourism Master**

**Context**

In order to increase the clarity of the provision, a national law of February 2014 has established 4 domains and a list of specializations for the higher education diploma. This law will be effective for all universities in autumn 2015. With this reform, the Master degree name will contain a field of education + a specialization chosen from the official list.

The four educational fields are:

- Arts, literature and languages
- Human and social sciences
- Law, economy, management
- Science, technology, health

251 specializations have been listed by the law, only one is named “tourism”. Nevertheless more than 40 specializations could cover an occupation of a subsector of tourism, in economy, law, territorial planning, culture, transport, marketing, heritage...

In order to give a global vision of the subjects/occupation covered of these educational paths, the Masters have been regrouped under the four official educational fields when possible and filtered through the 8 occupational fields of this study.

**Main occupations and/or subjects covered**

**Within the 44 identified tourism Masters**, the majority can be found within the Law, economy and management field (24), 6 under Human and social sciences, 5 under arts, literature and languages, none of them in science, technology and health. One Master would fall under “territorial planning” and eight Master have been classified in “other”, as their title doesn’t correspond to an official field.

Within the Master’s course, there is a notable tendency to cover several subsectors or occupation and not to prepare for one specific occupation.

As an example, we can quote the Master “management and development of tourism, accommodation, catering and leisure specialization management of tourism, accommodation, catering and leisure organizations”.

The focus of the Master is not always consistent with the list of occupations; we find therefore the following results:

12 Masters cover “tourism”, 12 “tourism management”, and 7 “tourism project management”; 7 cover “development, promotion and valorisation of the territory” and 6 deal with territorial planning related to tourism. 7 masters specialize in Catering.

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65 Cross research between RNCP and ONISEP - ONISEP within the sectorial group “tourism accommodation catering” and RNCP with the key words corresponding to occupation groups + “tourism” and “catering”.

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catering management and gastronomy (wine), very often in combination with accommodation. 3 Master are specializing in e-tourism, and one focuses on the management of tourism organization.

Taking into account that the majority of the Masters are training more than one occupation group, the most occupation covered are:

- **Accommodation management (14)** without specific occupation targeted and often combined with « tourism », « leisure » or « catering » sectors;
- **Cultural, sports and recreation (13)** with 1 Master focused on customer relations, some of these provisions focuses on a specific territory (mountain, rural, urban, costal...);
- **Commercial Manager (7)** with 6 specific provision on Marketing and 1 Revenue management;
- **Destination management (6)** with no specific occupation targeted, often combined with the promotion, development and valorisation of the territory, and some specialize in tourism types (Sustainable, eco, rural...);
- **Other occupation groups:** Accommodation operatives (3), MICE (2), Tourism education, research, journalism, consulting (2) and Tour Operator (1).

**Tourism Licence Professionnelle**

**Context**

In France at EU level 6, the *Licence* and the *Licence professionnelle* (LP) are the diploma provided by the public Higher Education. In tourism, there is no classical “Licence”, only Licence Professionnelle.

In parallel to the Masters, a national law of May 2014 has established 4 domains and a list of authorized specializations for this higher education diploma. This law will be completely effective for all universities in autumn 2015. Thereafter, the Licence Professionnelle name will contain a field of education + a specialization.

The four educational fields are the same as for the Master degree:

- Arts, literature and languages
- Human and social sciences
- Law, economy, management
- Science, technology, health

For the study we will use the classification proposed by the law in order to facilitate the analysis of the results.

**173 specializations have been selected within the law, eight of these are directly referring to a tourism subsector/occupation** and more than 40 others could be used to train students on an occupation or a subsector of tourism, in economy, law, territorial planning, events, real estate, distribution, commercialization, culture, transport, marketing, heritage...

In order to give a global vision of the subjects/occupation covered of these educational paths, the *Licences Professionnelles* have been regrouped under the four official educational fields when possible and filtered through the 8 occupational fields of this study.

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67 Effective only for the university beginners choosing a first year of Licence - As the Licence pro are only the 3rd year of university they do not fall under this immediate obligation.
Main occupations and/or subjects covered

Within the 102 identified Licence Professionnelles (LP) and within the official 4 educational fields Law, economy and management is the most used with 14 LP, very far followed by Arts, literature and languages (2), human and social sciences (2) and no science technology, health.

Under non official educational fields, we find 5 LP named under “tourism and accommodation”, 7 “territorial planning”, 5 “development and protection of heritage”, 5 “sports activities”, 5 “activity and techniques of communication”, and finally 3 LP under the “Gastronomy” category.

Licences Professionnelles show very complex specialisations, covering often more than two subsectors and including geographical or sector specificities.

Taking into account that the majority of the Licence Professionnelles are training to more than one occupation group, the most occupation covered are:

- Accommodation management (18), with 1 hospitality establishment manager, and 1 commercial manager in the hospitality sector;
- Commercial Manager (13) with 3 specific provision towards Sales Manager, 3 Marketing Manager and 2 Web marketing Manager;
- Destination management (11) with 2 destination managers, 2 tourism promotion/communication agent, 2 tourist guides, 4 tourism development officers and 3 sustainability managers;
- Tour operator / Travel agency (6) with 1 Manager, and 4 tourism product manager;
- Cultural, sports and recreation (17) with 3 guide/instructor and 4 product manager;
- MICE (4)
- Tourism education, research, journalism, consulting: 1 training specific towards consultant.

No accommodation operative is specifically targeted by the Licences Professionnelles. However as the majority of the LP are targeting “catering and accommodation” without specifying it results difficult to target the level of the occupation.

The focus of the Licences Professionnelles is not always consistent with the list of occupations of the study, we find therefore the following focus: Development, promotion and valorisation of the territory (13), Catering (4), and catering management (13), Management of tourism organization (8), Tourism management (8), Gastronomy (7), Territorial planning (5), Tourism Projects (4) and Tourism project management (1), Foreign languages and tourism (3), e-tourism (2) and 1 LP focusing on tourism law (1).

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68 Cross research between RNCP and ONISEP - ONISEP within the sectorial group “tourism accommodation catering” and RNCP with the key words corresponding to occupation groups + “tourism” and “catering”.

February 2016 22
University diplomas

The university can develop and deliver training and diplomas. Those diplomas are not delivered by the Ministry of Higher education. Three kinds of diplomas exist in tourism, the University Diploma (DU), The Technical University Diploma (DUT) and the Technical University Study Diploma (DEUST).

- **EU Level 7 - Subjects/occupations covered:**
  One diploma about “Sciences of organisation, specialisation general management, focus management of cultural organisations”.

- **EU Level 6 - Subjects/occupations covered**
  4 diplomas:
  - E-commerce, e-tourism
  - Tourism, inter-cultural communication
  - Responsible of Tourism and Accommodation structure – High Environmental Quality
  - Intermediary for medieval heritage, specialisation digital development

- **EU Level 5 - Subjects/occupations covered**
  - 3 University Diplomas (DU):
    - Tourism development officer in rural areas
    - Wine tasting Ability
    - Mountain refuge staff
    - 1 Technical University diploma (DUT) in Tourism marketing
    - 2 Scientific and Technical University Studies Diploma (DEUST)
  - Production and transformation, speciality Gastronomy
  - Multi-lingual nature guide

Evidence of the scale of provision

As the tourism Licences Professionnelles/Master are found within 3 of the 4 education fields, and more than the half are under different denominations, the public statistics do not mention them; it is therefore difficult to have precise evidence on these without interviewing all existing Master/Licence Professionnelles in tourism.

Minimum length of study and Cost

- Doctorats minimum 3 years after a Master Diploma
- Master 2 years - 256€ a year (2 semesters)
- Licence Professionnelle 1 year - 184€ a year (2 semesters)
- DU/DEUST/DUT Level 7 (2 years), level 6 (1 year) level 5 (2 years) -184€ a year

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Number of Diplomas

Licences Professionnelles: Since their creation in 2000-2001, the Licence Professionnelle are yearly increasing (3,600 in 2001 – 46,800 in 2012)\(^70\)

Role of employers

The employers are involved in different stages of the provision in public Higher education:

- Creation of the provision: Each ministry develops the reference framework for a training/degree in consultation with professional representatives. Together they define the exam rules, deliver diplomas, provide different training in its establishment, recruit, train and pay the teacher, control quality of training and report the results and means used.\(^71\)
- Before the training: Jury for the recognition of work experience
- During the training:
  - Jury for the final exam
  - Providing internship and evaluating the students in its professional skills
  - Employers can be invited by the university to take some classes. For Licences Professionnelles – At least 25% of the teaching is carried out by professionals.\(^72\)
- After the training:
  - Assessment of the training and teaching

Nature and extent of work experience or work-based learning

The Recognition of Work Experience (VAE) is an individual right since 2002.

The procedure depends on the degree chosen by the applicant and the institution delivering it, but some general rules can be listed:

- 3 years minimum of work experience are necessary to submit an application
- The applicant must submit an application providing proof of the completion of certifications and work experience corresponding to the targeted diploma.
- A validation jury assess the request. It must be composed at least of 25% of professionals of the targeted sector. The jury can ask for an interview with the applicant and/or ask for a simulation exercise.

\(^71\) Commission Référencement du cadre national de certification français vers le cadre européen de certification pour la formation tout au long de la vie; Commission Nationale de la certification professionnelle, p.17.
\(^72\) La licence Professionnelle, ONISEP, Novembre 2014.
The Work experience can be recognised totally or partially, in this case, additional exams will have to be taken by the applicant in order to access the training targeted.

In 2012, of all VAE requests in Higher education 39% concerned the licence Professionnelle and 43% concerned the Masters.\(^{73}\)

**Work based learning**

- **Internship:** A time of internship is compulsory in *Licence Professionnelle* (12-16 weeks) and for the Master (3-5 months each year).
- **Block release training/Lifelong learning:** *Master* and *Licence Professionnelle* are often organised enabling professionals to follow the training or students to work and learn, in these organisations, half of the training is based in enterprise.
- **Apprenticeship:** In 2013, 12,676 students have followed a Master in apprenticeship, and 14,522 in Licence.\(^{74}\)

**Nature of progression routes into/within tourism employment from education and training**

In 2009, the government commissioned a study on the adequacy of the higher education provision in tourism as against the tourism - catering – accommodation's industry needs\(^{75}\), based on interviews of former students, employers and training teams.

Of the 279 former students, 84% had obtained a Master’s, 4% a *licence Professionnelle*, 4% licence and 8% other types of training. The results can therefore be in majority applied to this scale of provision.\(^{76}\)

**Nature of the employer**\(^{77}\)

63% of these students have found work in the private sector, 21% in the public sector, 15% in the non for profit sector and 1% are independents. Concerning the geographical progression into employment, 67% found work in a region other than the one in which they studied, and only 8% of them were working abroad.

The students found employment in the following employment subsectors:

- 15% accommodation
- 14% work in the travel industry (tour operator, Travel agency)
- 13% Information / Promotion of a territory
- 10% other tourism activities
- 8% Territorial planning
- 7% business travel
- 5% valorisation of cultural /natural heritage
- 5% leisure activities
- 4% Catering
- **19% of the students work outside the tourism sector, and for 56% of them it is because they did not find an employment corresponding to their training.**

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\(^{74}\) Ibid., p.162.

\(^{75}\) Adéquation entre les métiers du tourisme et de l’hôtellerie – restauration et l’offre de formations supérieures – rapport d’étude, Octobre 2009, Ernst & Young, Direction Générale de la compétitivité de l’industrie et des services.

\(^{76}\) Ibid., p.77.

\(^{77}\) Ibid., p.88.
Mapping and performance check of the supply side of tourism education and training

Regarding the tourism sector, the industry is concerned by the volume of Licences Professionnelles and the diversity of their specialisation, welcoming the university reform. The Director of the French Federation of Higher Tourism Technicians (FFTST), Annette Masson considers that 80% of the existing Licences Professionnelles “could be reviewed”\(^{78}\), in fact the 2009 study shows qualitative inadequacy of the diplomas with the real needs of the sector.

Concerning the access to employment, the numbers are rather good in 2009, as 30% of the students find an employment before receiving their diploma, 35% between 1 and 3 months after graduation, 18% 3-6 months, 13% 6+ to 12 months and only 4% find after one year.\(^{79}\)

In general for the Licence Professionnelle, the most recent survey shows that 91% of the students graduating in 2010 were employed in December 2012. These graduate students had an occupation at higher technician or assistant engineer level. In all specialisations, 26% of the students graduating decided to continue their studies further.\(^{80}\)

Mechanisms for assuring the quality of provision

The universities have a structural legal framework for assessing their training and for thereby assuring the expected quality. See Section 2.2.1.1 above.

3.2.2 Private Higher Education

Main Types of Institutions

Private sector - Business Schools, Hotel Schools, Chambers of Commerce, European Institutes, Specialised Tourism Schools, Training Institutions, Associations...

EU Level 7

Subjects/occupations covered

Within the 23 identified levels of private institutions\(^{81}\), the covered occupations are:

- Accommodation manager (8), with 2 specially on Hospitality establishment manager;
- MICE management (5), with 3 events manager and 1 Event project manager;
- Commercial manager (4) with 2 on specific occupation Travel manager and marketing manager;
- Cultural, sports and recreational (4)
- Tour operator (2) with 2 specific Tourism contract negotiator/buyer;
- Destination manager (1);
- Tourism education, research, journalism, consulting (1).

Other subjects covered by the provision:

1 agronomy, 1 management of tourism organization, 1 tourism project manager, 8 tourism management, 1 Promotion, development and valorisation of territory, 2 catering management.

\(^{78}\) Les licences tourisme doivent revoir leur copie, Fédération Française des Techniciens du Tourisme, L’Echo Touristique, 14/03/2012.


\(^{80}\) ONISEP

\(^{81}\) Cross research between RNCP and ONISEP - ONISEP within the sectorial group “tourism accommodation catering” and RNCP with the key words corresponding to occupation groups + “tourism” and “catering”.
EU Level 6 (“bachelor”)

**Subjects/occupations covered**

Within the 48 identified diplomas of private institutions, the covered occupations are:

- Accommodation manager (11), with 1 customer experience manager (relation client) and 3 hospitality establishment manager;
- MICE management (8), with 1 event manager and 1 Event project manager;
- Commercial manager (7), 2 Marketing manager and 4 on Business Travel;
- Cultural, sports and recreational (1), product manager;
- Tour operator (3), 2 Product manager;
- Travel agency (3) 2 product manager;
- Destination manager (1), Guide;
- Tourism education, research, journalism, consulting (1);
- Accommodation operative (1) international concierge.

Other subjects covered:

- 4 management of tourism organization, 1 e-tourism, 1 foreign language, 8 tourism management, 1 tourism development, 1 catering and 6 catering management.

**Compared with the public provision, the private institutions seem to narrow more their diploma towards 1 or 2 subsectors or occupation.**

**Evidence of the scale of provision**

25% of the higher education diploma in tourism is provided by private institutions. The degree cannot be named Master or Licence Professionnelle, therefore the courses are named after the occupation they provide or takes other names such as « Bachelor » for level 6 or « MBA », for level 7.

In 2012, the national newspaper ‘Le Figaro’ has published a ranking of the best level 6 diploma (« bachelor) of business schools, 45 have been identified. Within this classification, 2 tourism bachelors are in the 8th and 14th position, which gives a good credit to tourism training.

**Role of employers**

The employers have a strong role in private institutions as their success can only rely on the capacity of their students to integrate the labour market. Each institution decides how to organise their training and the involvement of employers in the life of the institution.

**Nature and extent of work experience or work-based learning**

The Work Outcomes Recognition (Validation des Acquis de l’Expérience) is an individual right since 2002. The procedure depends on the degree chosen by the applicant and the institution delivering it, but some general rules can be listed:

- 3 years minimum of work experience are necessary to submit an application
- The applicant must submit an application providing proof of the completion of certifications and work experience corresponding to the targeted diploma.
- A validation jury assess the request. It must be composed at least of 25% of professionals of the targeted sector. The jury can ask for an interview with the applicant and/or ask for a simulation exercise.

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82 Ibid.
The Work experience can be recognised totally or partially, in this case, additional exams will have to be taken by the applicant in order to access the training targeted.

**Work based learning**

- **Internship**: Not compulsory, but the internship is very much in use and in the process of development.
- **Block release training/Lifelong learning**: This form of training is increasingly used for higher education.
- **Apprenticeship**: In 2013, 9650 students have followed an EU level 7 Diploma in apprenticeship, and 7212 Level 6.\(^\text{84}\)

**Nature of progression routes into/within tourism employment from education and training**

The progression route within employment is one of the main arguments for students to consider private institutions for training, as a proof of quality of the training. The numbers declared are between 90% and 100% of students moving successfully into employment directly after the end of the training.

**Mechanisms for assuring the quality of provision**

The quality mechanisms vary with the institutions, but the successful progression towards employment is one of the main indicators for the quality of the training. In addition, if the training is listed in the National Directory of Professional Certification, the diploma, the skills provided and the training process is recognised at national level.

**3.2.3 Higher education short training**

The French system provides higher education short training, lasting two years after a high-level degree, ending with a level 5 degree.

**National Education - The BTS**

The BTS is the most common basic higher education diploma for tourism. The system provides three main tourism BTS and two tourism facing:

1- BTS Tourism  
2- BTS accommodation and catering  
3- BTS Accommodation management – European Framework  
4- BTS Agriculture: Development and entertainment of rural territories  
5- BTS Agriculture: Management and protection of nature

**Main Types of institutions**

- Public institutions: mainly High Schools (Lycées) and Apprenticeship centres.  
- Private institutions: training centres, chambers of commerce, hospitality schools, associations; Apprenticeship Centres...

**Main occupations and/or subjects covered**

1-The Tourism BTS

Since 2012, the BTS Tourism has replaced the Local tourism Management, Entertainment and the Tourism sales and products BTS.

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The Tourism BTS is very broad, but the main target occupation groups are Tour operators, travel agencies and destination management, with the following occupations:

- **Destination management**: Tourism promotion/communication agent, Tourist information agent, Tourism development officer;
- **Tour operator**: Tourism product manager, Tour/holiday representative;
- **Travel agency**: Tourism product manager, travel adviser/consultant;
- **MICE**: Host/hostess;

2- **BTS Accommodation and Catering is divided in two options**:

- **Option A - Accommodation Marketing and management**
  
  **Occupations**:
  - Catering and accommodation operative and low level management (team management)
  - Accommodation operatives: stock management
  - Accommodation management: Directors assistant

- **Option B - Culinary, Table and Service Art**
  
  **Occupations**:
  - Catering and accommodation operative and low level management (team management);
  - Catering, Line Cook, Kitchen agent Team manager, Chef;
  - Catering management: Manager of mass catering establishment;\(^{85}\)
  - Accommodation operative: Receptionist, Housekeeper supervisor, Room service manager;

3- **European frame worked BTS in accommodation** was created in 2003

**Occupations**:
- Accommodation operatives: Hotels /campsites information agent, Receptionists, Housekeeper supervisor,
- Destination manager: Tourism information/promotion manager

4- **BTS Agriculture: Development and entertainment of rural territories**\(^{86}\)

**Occupations**:
- Destination manager: Sustainability Manager
- Other: Local development manager, heritage promotion officer, territorial development adviser, rural territory Entertainer, Coordinator of local development structures.

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\(^{86}\) *Ibid.*
5-BTS Agriculture: Management and protection of nature

**Occupations:**
- Eco-tourism officer, Green tourism development/information/promotion officer, Heritage entertainer.

**Evidence of the scale of provision**

**Nature:** The BTS, Higher Technician Certification is a higher education degree delivered in 2 years, accessible after high school.

**Costs:**
- Private establishments under agreement with Government: 300 to 900€ yearly;
- Private institution outside agreement 1500 to 4500€;
- Institution under agreement with chambers of commerce, and industry which are in great majority apprenticeship institutions, then the training is free and remunerated.

**Statistics:**
According to the national employment study concerning the level of employment in February 2013, 66% of the students with a BTS in Tourism and accommodation are employed. This results is above the average of Students employed after obtaining service oriented BTS which is of 61%.

- **Tourism BTS**
  For 2014, the average success rate for the exam is 92%, 4 points higher than in 2013. Of the 174 institutions delivering the Tourism BTS training, 108 are private institutions (training centres, chambers of commerce, associations...) and 66 public, with a great majority of these are High Schools (Lycées).

**Ranking:**
Every year the specialized tourism online review "l'Echo Touristique" publishes a ranking of the best Tourism BTS according to their success rate, number of students, status and costs. The top five of this ranking is composed of 2 public establishments, 1 Apprenticeship Centre, and 2 private establishments. 2 Provide apprenticeship based training and 3 classical training.

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89 ONISEP.fr
90 Le classement 2015 des BTS Tourisme, L’Echo touristique, Fabrice Bugnot, 18/03/2015.
• **BTS Accommodation and Catering:**
  
  **Option Culinary Art:** 122 institutions are providing the training with a slight majority of public establishments;
  
  **Option Accommodation and Marketing:** 95 institutions delivering the training with a slight majority of public establishments.⁹¹
  
  **Origin of students:** 62% from accommodation education, 34% from other vocational training and 2% from Technological High school.⁹²
  
• **European Accommodation BTS**
  
  This BTS has been specially created with other EU countries in order to provide the opportunity for students to spend several months abroad in internship in another EU country.
  
  **Number of establishments:** 18
  
  **Origin of students:** 94% from accommodation training, 5% from other vocational education.⁹³
  
• **Role of employers**
  
• **Development of the training**
  
  Under the authority of the National Education Ministry, the BTS is regulated by the Ministry of National Education, which distributes the roles to different stakeholders.⁹⁴
  
  The diploma is based on shared authority between the National government, Regional Authorities, employers and social partners:
  
  - **Each ministry** develops the reference framework (referential) in consultation with professional representatives, defines the exam rules, delivers diplomas, provides different training courses in its establishments, recruits, trains and pays the teacher, controls quality of training and reports the results and means used.
  
  - **The professional representatives and social partners** contribute to the development of professional diplomas, participate in exam juries, and take in charge young people in enterprises. They also take part in the funding of initial technological and professional training by the payment of the “apprenticeship tax”.
  
• **During the training**
  
  If the BTS is followed in *initial training*, there is no specific role for employers; some institutions will invite professionals to make presentations in class for specific events, conferences or seminars.
  
  If the BTS is followed in apprenticeship, then the employer has an important role in the training, providing work and monitoring the apprentice.
Nature and extent of work experience or work-based learning

The Work outcomes recognition (VAE) in BTS is very important. In 2013, 6577 applications were received and 4268 led to an entire validation and 1402 to partial validation.95

Nature of progression routes into/within tourism employment from education and training

Tourism BTS: Product manager, Travel Agency CEO, Campsite ground manager, Hospitality establishment manager.

Catering-Accommodation BTS: From Accommodation/Catering operatives to management (team management) to establishments/campsite director.96

Mechanisms for assuring the quality of provision

The general Quality mechanism of the national education system is implemented for the BTS

Private Education Short training courses

Main Types of Institutions

Private sector - Business Schools, Chambers of Commerce, European Institutes, Specialised Tourism Schools, hospitality schools, Training Institutions, Associations...

Main Subject/occupation covered

The private institutions seem to narrow more their diploma towards 1 or 2 subsectors or occupations. Within the 21 identified diplomas of private institutions, the covered occupations are:

- Destination manager (7) 5 tourist information agent and 2 tourism development officer;
- MICE management (4), with 1 Event project manager;
- Accommodation manager (3);
- Travel agency (2) with 1 travel adviser/consultant;
- Tour operator (1);
- Accommodation operative (1).97

Other subjects covered: Management of tourism organization (1), wine-tourism (1), catering (3) and catering management (3).

Role of employers

The employers have a strong role in private institutions as their success can only rely on the capacity of their students to integrate within the labour market. Each institution decides how to organise their training and the involvement of employers in the life of the institution.

95 La validation des acquis de l’expérience: 129000 diplômes délivrés en dix ans; Direction de l’Evaluation, de la Prospectives et de la Performance, Note d’information n°32, Septembre 2014.
97 Cross research between RNCP and ONISEP - ONISEP within the sectorial group “tourism accommodation catering” and RNCP with the key words corresponding to occupation groups “tourism” and “catering”.
Nature of progression routes into/within tourism employment from education and training

The progression route within employment is one of the main arguments for students to consider private institutions for training, as a proof of quality of the training. The numbers declared are between 90% and 100% of successful employment directly after the end of the training.

Mechanisms for assuring the quality of provision

The quality mechanism is varying with the institutions, but the successful progression towards employment is the main indicators for the quality of the training,

In addition, if the training is listed in the National directory of Professional Certification, the diploma, the skills provided and the training process is recognised at national level.

3.3 Vocational Education and Training

The Vocational Education and training in France, named by “initial vocational training” is composed of several diplomas or levels, enabling young people having left the classical school education to be trained for an employment of to be able to continue their study with a vocational path. This path can lead to higher education.

We will observe the tourism VET from the lowest level to the highest, differentiating the national education diplomas and other diplomas.

3.3.1 VET under the National Education Ministry

The school system is obligatory until 16 years, after this age, if the young people want to continue school but on a vocational path, they can follow a training leading to a CAP, a Vocational Skills Qualifications.

The Vocational Skills Qualification EU level 3 (CAP98)

The CAP is a national diploma EU level 3 certifying of a first level of professional qualification. It lasts two years and aims at being trained for a specific occupation.

Main types of institutions:

Permanent training: Vocational high school (Lycée Professionnel), private establishment of technical education.

Apprenticeship: Apprenticeship training centre (CFA).

Main Subject/occupation covered

7 CAP are preparing for tourism occupations and 1 for tourism-facing occupations:

- 4 in the catering sector aiming at becoming catering assistant, kitchen assistant, restaurant assistant, waiter/waitress in Brasserie Café;
- 1 in the accommodation sector: “Accommodation services”99, targeting various basic accommodation operatives’ occupations.
- 1 CAP Development option handcraft, family, and tourism activities – Only in New Caledonia – French overseas territory.
- The Tourism facing CAP concerns “Technical assistant in family and mass-catering environment”, preparing to form of Accommodation and catering operatives.

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98 French: « Certificat d’Aptitude Professionnelle ».
99 CAP Services hoteliers, studyrama.com
Evidence of the scale of provision
14-16 hours of general education, 12-17h of technical and vocational training related to the specialization. Mix of theoretical education and on the field training.

Role of employer
In order to acquire the skills and competences necessary, the training includes a 12 to 16 weeks of internship or in case of dual training an apprenticeship contract / professionalization contract

Nature of progression routes into/within tourism employment from education and training
The CAP is made to learn an occupation and enter rapidly the labour market, but an increasing number of students consider the CAP as a first step and pursue their studies towards a vocational high school level or a Vocational Certification (brevet Professionnel) in 2 years, or further with a BTS or DUT.

The CAP Accommodation services aims at enabling the students, after a few years of experience to access the first management levels of Accommodation operatives (team leaders).

Mechanisms for assuring the quality of provision
The National Education Ministry is assuring the quality of the provision and diplomas supported by Professional Consultative Commissions.100

Under the authority of the Ministry of national education, these entities are composed of 40 members each, divided in 4 colleges: employers, employees, public authorities and qualified stakeholders. They formulate opinions on the creation, update or suppression of professional degrees from CAP to BTS.

They provide opinions on:
- Needs for diplomas in accordance with the evolution of occupations;
- Content of the training;
- The position of these National Education degrees within professional certifications;
- They enable also the inscription of those professional degrees in the National Directory of Professional Certifications (RNCP).

Nowadays, 14 Professional Consultative Commission exist, (last renewal in 2012), two of which concerns tourism VET diplomas and training courses:
- Tourism, accommodation catering
- Transport, logistics, security and other services

After a CAP, the student can either, enter the labour market, specialize in a specific field with a Complementary Mention or enter a vocational High school preparing for an EU level 3 training: a Vocational Diploma or a Vocational High School Diploma.

100 Portail National des professionnels de l’éducation, http://eduscol.education.fr/
**Complementary Grade EU Level 3** (*Mention Complémentaire*)

4 complementary grades exist in tourism:
- Arts of light cooking
- Desert cooking
- Bar employment
- Wine – sommelier

They are prepared in one year, with an important time within the enterprise, mostly in an apprenticeship model.

**Vocational Diploma EU Level 4** (*Brevet Professionnel*)

4 training courses exist in tourism:
- Housekeeping supervisor
- Restaurant
- Bar attendant
- Tourism Horse riding

The Vocational Diploma is a National diploma attesting the acquisition of a higher qualification in a specific professional activity. It is a diploma adapted for progression within employment, prepared while working or with an apprenticeship model. Its duration varies from the model chosen, 2 years in apprenticeship and 1 year in vocational training while working.

**High School Vocational Diploma EU Level 4** (*Bac Professionnel*)

**Main types of institutions:**
Vocational High School or private institutions under agreement with the national education system

**Main Subject/occupation covered**
The only Tourism Vocational High School Diploma is called "Commercialization and services in catering" and aims towards different catering and accommodation operative occupations, as well assistant manager level.

**Evidence of the scale of provision**
After a CAP, the training lasts three years. The Vocational High School Diploma is an EU level 4 diploma aiming at an entry into the labour market; however since 2005 this diploma enables the student to continue study towards a BTS.

**Role of employers**
In total 20 weeks are spent in the enterprise during the training.

**Nature and extent of work experience or work-based learning**
In 2013, 3803 application for the Work experience recognition have been submitted and only 297 have received a negative answer.101 After a Vocational High School diploma in tourism, the student can enter the labour market, specialize in a field with a Complementary Grade or continue the study with a BTS.

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**Complementary Mention EU Level 4 (Mention Complémentaire)**

**Main Subject/occupation covered**

Four training exists in tourism:

- **"Welcoming / reception"**: Receptionist, tourism information agent, steward/stewardess
- **"Receptions organiser"**: Can work in Accommodation or Catering enterprises, Leisure organization, MICE enterprise - Coordinate the staff working at a banquet
- **"Ticketing and travel services"** - Travel agency - informs the client and gives the ticket

The Ministry of agriculture has developed a **Specialization Certificate** following the same logic as Complementary Grade: "Green tourism, welcoming and informing in rural areas". These training courses are completed in one year, with an important time within the enterprise, mostly in an apprenticeship model.

### 3.3.2 Private Vocational Education and Training

The private sector is also very active in VET at level 3 and 4. Some of the training courses are recognised by the government if they are registered under the RNCP, other not. For the students undertaking recognised private training paths, they can more easily join the public education path or the higher education path.

**Main types of institutions:**

Private sector - Chambers of Commerce, European Institutes, Specialised Tourism Schools, Training Institutions, hospitality schools, Associations...

**The Local Initiative Complementary Training (FCIL)**

These training courses are created at local level for local employment characteristics. They provide the owners of a professional or technological diploma an additional or double competence. These training courses do not provide a diploma, only a proof of training undertaken.

**Main subjects/occupation covered**

Eight FCIL in tourism are provided:

- **"Reception organiser"** - MICE / Accommodation operative
- **"Welcoming and services of English-speaking clients”** – Receptionist
- **"Information hotel reception”** – Receptionist
- **"Accommodation Housekeeper supervisor assistant”** - Accommodation operative management
- **"Hotel Concierge”** – Concierge
- **“International sales of Bourgogne wine and wine-tourism”** - Commercial manager
- **"International mobility Accommodation-catering"** - Catering and accommodation operatives
- **“Sommelier”** - Catering

These one year training courses are undertaken within work, or in an apprenticeship.

**Training Level 3**

3 private training courses in tourism were identified

- Security agent for events

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¹⁰² This diploma enables to undertake a European exchange during 5 month in a partner country and to have European work experience.
- Waiter/waitress in restaurant
- Catering agent

**Training Level 4**

**Main subjects/occupation covered**

13 Training courses at EU level 4 are provided by the private sectors, they cover the following subsectors:

- **Accommodation/catering operatives (5)** with 1 receptionist and 1 Manager assistant;
- **Leisure, recreational, culture (5)** with 1 specialised on Handicaps, 1 specialised in tourism horse riding;
- 1 Sommelier in international catering;
- 1 Technician for Tourism holiday events.

**3.4 Adult education and lifelong learning**

Known as “continuous vocational training" in France this category accounts for a large part of the training courses provided. It targets the people already active in the labour market (private sector employees, civil servants, independents) or in a process to be (unemployed).

**Objectives:**

- Facilitate adaptation to the evolution of work-techniques and condition
- Maintain or improve professional qualification
- Encourage social and professional promotion

The training systems depend on the status of their beneficiaries

**Authority and stakeholders involved**

National government and the regional authorities are in charge of the implementation of the professional training.

The instrument of planning (Regional Plan of Vocational Training Development) is co-signed by the national government and the regional authority on the basis of a shared diagnostic and a Regional Plan of Vocational Training Development Contract.

Social partners have an essential role, notably in the choice of training policies for the employees of the private sector and the management of the funding arriving from enterprises.

**Financing the training**

There is an obligation to finance professional training (nouvelle réforme)

These funds are composed from different contributions. Except the training plan of enterprises of 10 employees and more, those contributions are jointly managed by Authorized Collection bodies at national, regional level and according to the branch or inter-professional level.

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103 *French: « Formation professionnelle continue ». *
Training of employees\textsuperscript{104}

The access to training for employees can be at the initiative of the employer in the framework of the training plan or at an individual’s initiative within special training holiday courses (CIF).

**Main type of institutions**

Adult education and lifelong learning courses are performed by a large number of stakeholders, public and private.

- Examples of institutions under the responsibility of the public authorities active in tourism training for adults: GRETA, AFPA, CNAM, Chambers of Commerce, Apprenticeship Training Centres, ADREP, Rural and Family houses...
- Some examples of private institutions active in tourism training for adults: VATEL, ESCAET, INFFA, COURS DIDEROT, IFTM...

3.4.1 **Professional Titles (Titres Professionnels)**

The Ministry of employment has developed a “Professional Title”\textsuperscript{105}. Recognised at national level, these certifications prove that the holder masters the skills and competences enabling to perform qualified professional activities.

**Main type of institutions**

To be able to deliver a Professional Title, a training centre need to be accredited by the representation of the Ministry at regional level, the DIRECCTE.

**Main subjects covered**

15 professional Titles in tourism are provided within five subsectors:

1. **Catering**
   - Mass Catering Manager
   - Mass Catering Kitchen Manager
   - Restaurant Agent
   - Restaurant waitress

2. **Accommodation**
   - Hotel Housekeeping supervisor
   - Hotel receptionist
   - Hotel agent

3. **Tourism**
   - Tourism Guide/instructor
   - Local tourism organizer

4. **Commercial operative**
   - Commercial technician of tourism, option commercialisation / option sales

5. **Travel Agency**
   - Travel and tourism adviser
   - Transport
   - Commercial and driving agent of urban travellers
   - Driver of inter urban travellers transports

\textsuperscript{104} Référencement du cadre national de certification français vers le cadre européen de certification pour la formation tout au long de la vie; Commission Nationale de la certification professionnelle, p.19.

\textsuperscript{105} Titres Professionnels, Le portail des politiques publiques de l’emploi et de la formation professionnelle - www.emploi.gouv.fr
The Professional titles do no train to general knowledge but for a specific occupation.

3.5 Other training and work-based learning

The professional branches can, through the National Joint Committee for Employment, create and deliver Vocational Qualification Certifications (Certificat de Qualification Professionnelle).

These Certifications are delivered in order to:

- Answer the needs of qualification of enterprise;
- Compensate lack of diplomas or titles corresponding to specific competences;
- Face evolution of some occupations;
- Reinforce the level of expertise of enterprise.
- Enable to recognize officially vocational competences.

The National Joint Commission for Employment in The Hotel Industry (CNPE/IH) is the most active in the tourism sector for creating and delivering CQP since 1992.

Main Subjects/Occupation covered

Two subsectors are covered by the 8 CQP in tourism:

1. Catering: Qualified employee / Technical employee / Agent / Manager / Waiter, specialisation Wine / Waiter;
2. Catering and Accommodation: Assistant Manager, specialisation Accommodation and Catering.

The main provider of tourism CQP is the Hotel industry; these are the characteristics of their certificates:

- Prepared in block release training for employee
- Built around an employment reference document
- Differentiate clearly training from certification
- Certification is entrusted to a national commission of certification proper to the CQP IH composed of professionals of the targeted occupation
- Rely on continuous evaluation, by the enterprise and the training centre
- The enterprise is the principle responsible of the evaluation undertaken during the work
- There is no level / diploma required.\(^{106}\)

Other CQP affecting tourism sectors have been created by professional Branches, such as:

- Development assistant in catering engineering
- Professional Branch: consulting (technical, advice, engineer)
- Security agent for events
- Professional Branch: Associations and Sports

3.6 School education

3.6.1 Accommodation Technological High School Degree

Within the second cycle of secondary education, the students can choose between a generalist path (scientific, literature, economy), or a technological path, opening to equivalent rights concerning higher education. However the Technological path leads

\(^{106}\) Observatoire Fafih - Service Certification www.fafih.com
often to Technological universities; in tourism this means the BTS which is the main
and first higher educational path after High School, for general or technical students.

In France, there are eight technological High School degrees, 1 of them regards
tourism, the “Accommodation Technological High School Degree”

Main Types of Institutions
General and technological High School (Lycée)

Main Subject/occupation covered
Accommodation and catering operatives

Role of employers
2 x 8 weeks of internships are foreseen during the three year of High school

Nature and extent of work experience or work-based learning
The training is very practical; several High schools have simulation hotel rooms or
restaurants in order to implement their theoretical knowledge.

Nature of progression routes into/within tourism employment from education
and training
Progression towards studies: BTS.
Progression into employment: Lower level management, such as director’s assistant,
Catering team leader, housekeeper supervisor.
Statistics shows that students coming out of a Technological high school have
difficulties in University.107

3.6.2 National Tourism regulatory Training – Travel Agency and Tour
Operators

A Travel Agency or a Tour Operator needs to be registered by the National Tourism
Agency – Atout France – to be authorized to perform its activity. If the person
requesting the registration does not possess a title or certification in tourism level 5 or
6 recognised by the National Register for Professional Certifications or a professional
experience of one year or more in the tourism industry, a Professional Ability
Internship and training is necessary.108

Subjects covered
The compulsory training modules to be followed

1- Overview of Tourism and Travel products (Accommodation, transport, package,
tailor made, MICE...)
2- Tourism and travel Law, in particular the requirements regarding the activities
related to travel and tourism products
3- Professional instruments for booking (the 3 Global Distribution Systems, BtoB
websites, multiple Tour Operator platforms, Hotel booking comparators’ websites,
self-booking tool) and Client Relation Management.
4- Commercialisation of Tourism and Travel products
5- Accounting and enterprise management applied to tourism sector
6- Professional English

107 Onisep.fr
Evidence of the scale of provision
Minimum 300 hours of training over 4 months, including 1 month by registered travel agent / tour operator

3.6.3 Short training courses
A very large amount of short training courses are organised in the tourism industry in order to improve knowledge, skills or to discover new tools for employed people within the sector. They are organised within the enterprises, within the branch or individually. The latest reform of Vocational training increases the opportunities for individuals to receive certification of training.
4.0 ANALYSIS OF OCCUPATIONS

4.1 Commercial managers

In general, the commercial managers in the tourism industry are high level positions requiring at least a level 5 degree supported by one or more years’ experience in the field. They can be found in each sub-sector of tourism. Several paths are possible to access the positions, which can begin from a VET or a classical Higher education diploma:

- Business school / Tourism Business School / Hotel business school / University with specialization in revenue, sales, marketing, communication - undertakes internships in the tourism sector to acquire the market knowledge facilitating the recruitment.
- After several years of experiences and short courses on the job, progression towards commercial managers positions

The commercial manager position requires initial professional training, of in generic business techniques and sector related knowledge, an important part of which is dedicated to implementation of techniques or use business instruments. The web marketing, revenue and yield management occupations are becoming more important in the tourism industry, and are therefore sought by recruiters.

Within the travel tourism business, the training options are not so varied as in the leisure tourism, as the occupations have been quite recently recognised in the French tourism sector. It is a very specific market, and therefore the training must be very focused on business travel sector, techniques and tools. The existing degrees are very specific to business travel. In addition, staff employed in this area undertake training on the job to acquire the necessary knowledge and techniques.

Performance

According to a study undertaken in 2009, there is a quantitative gap between university provision training for senior management positions and the needs of the sector.109

In fact, the sector can offer only a few of those kinds of positions and they are mostly for people with professional experience rather than a higher diploma only. The sector needs support positions in key commercial, finance, HR, and communication roles, whereas the university does not prepare for these skills.110

There is also a qualitative gap between the expectation of the professionals and the offers of HE providers, as the training is concentrated on sector based knowledge and senior positions and the industry expects operational skills, a professional approach and flexibility111. The employers perceive those candidates as “over qualified”.112

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110 Ibid., p.141.
111 Ibid.
112 Ibid.
It seems that high level support positions (buyer, business analyst, law, revenue manager…) are recruited from recognized generic training provisions, such as business schools, whereas the specialized tourism students are generally recruited in the marketing division.\textsuperscript{113}

On the contrary, Private Higher education establishments of business or tourism are perceived as much more adapted to the industry needs for several reasons\textsuperscript{114}:

- Professional: internships and experiences abroad are more numerous
- A better education in foreign languages
- Financial and human management skills better acquired
- Individual teaching on personal development and professional projects
- An important impact of the alumni network

Concerning the Travel manager occupation, specifically the person in charge of managing the business trips of the co-workers within an enterprise; current students have the opportunity to receive specific training. For staff already in employment, professional training is necessary as the Vice President of the French Association of Travel Manager explains that “there is no typical profile nor training path, or provision to access the occupation”\textsuperscript{115}. The sub-sector is characterised by a great diversity of occupations, though all of these require a thorough knowledge of purchasing techniques and economics.\textsuperscript{116}

4.2 Accommodation management

The accommodation sector is very specific, in part due to its very long existence and in part to its variety of establishments. Within a single establishment, depending on its size, the work may be either very compartmentalized - or on the other hand the staff may be required to form a wide variety of different tasks. In the catering sector hierarchy is very important and different positions range from the lowest to the highest level of the occupational structure. Accommodation and catering are often taught together.

Within the accommodation sector internal progression is the norm; in fact a large number of hotel managers currently in post have begun their careers in operational positions and progressed their career with years of experience and training on the job. Indeed, the bigger hotels or hotel chains organise frequent training courses for their employees. Management positions in the accommodation sector provide good opportunities for career progression, horizontally and vertically - as well as in an international context.

The actual challenges of the accommodation sector relate mainly to internet business and pricing policy, and therefore the Revenue, Distribution and Pricing management positions have taken a central role in the business, alongside traditional occupations.

Nowadays, young people wishing to access management or commercial positions in accommodation follow a higher education provision (level 5 to 7). Varied professional experiences and years of experience will normally then enable them to attain their expected position. Accommodation management remains a very experienced-based occupation. Business school diplomas are less important than in the commercial occupations For accommodation management, Hotel Schools, business tourism schools and universities are the main providers of those diplomas.

\textsuperscript{113}\textit{Ibid.}, p.129.
\textsuperscript{114}\textit{Adéquation entre les métiers du tourisme et de l'hôtellerie – restauration et l'offre de formations supérieures – rapport d'étude, Ernst & Young, Direction Générale de la Compétitivité de l'Industrie et des Services, Octobre 2009, p.133.}
\textsuperscript{115}\textit{Carrières Tourisme, Quels métiers choisir ?, e-book, TourMag, septembre 2012; p.340.}
\textsuperscript{116}\textit{Ibid.}
Performance of the system

The performance of the higher education system for these occupations is not as good as VET and experience or lifelong learning on the job. According to a study by the French Hotel Industry Federation (FAFIH), within Higher Education, 62% of the students with a level 6 and 7 diplomas in Accommodation/catering sector work in another sector. Another indicator of mismatch between training provision and actual job requirements is visible on the salary, in fact the difference of salary between the highest level graduates, level 6/7, and the lowest, level 3, is not so important: The average highest salary is of 1500€ and the lowest 1170€118. Another surprising fact is that at high level, staff without an accommodation/catering specific diploma is on average paid at a higher level than those with a specific diploma: 1600€ against 1500€119. This is in particular true in the bigger hotel chains.

It seems that the correlation between the training received and the targeted position is not the first objective of the young graduate, which is more about searching for a “good job”120 and not either for the enterprises recruiting staff - in particular for those facing recruitment difficulties.

The Vocational Path in accommodation/catering towards the Vocational high School Diploma seems well adapted to enable students to access multiple types of occupations in the sector.121

A director of a seaside resort interviewed in the course of the study, for example, obtained a level 5 tourism diploma (BTS) and after several years of work, became hotel manager. He explained the gap between the expectations of the higher education expectations and the reality of the sector: “Some schools train young people to become accommodation managers promising a manager function directly after the training, which is a utopia. It is an occupation in which it is necessary to accept gradual career progression - team leader, then division leader, then service leader, then director’s assistant - and in which it is necessary to acquire a wide knowledge of the whole structure. Young people will be able directly after finishing their study, to become a service leader or division leader and will not have to prove everything from the beginning. But it is often a disappointment for them not to become a manager by the end of their studies. The positions of entertainment manager and room division manager are the most relevant to practice before becoming manager of the whole structure”.122

According to FAFIH, “Today as yesterday, the relation between training and employment is not a verified link”.123

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118 Ibid., p.22.
119 Ibid., p.22.
120 Ibid., p.28.
121 Ibid., p.27.
**Good practices:**

“**Cross training**”: *Some hotel chain such as the Champs Elysées Plaza, “cross training” is used, so the staff spends from time to time one week in another service.*\(^{124}\)

“**Tutor training**”: As the apprenticeship or professional contract mechanism is considered as the most qualitative for accommodation/catering sector, a specific effort has been made in order to train staff wishing to become tutors in their enterprises; 1700 tutors were therefore trained in 2010.\(^{125}\)

### 4.3 Accommodation operatives

Accommodation operatives occupation require a lower qualification level (max level 5) and a high proportion of the staff followed a VET - or trained on the job after arriving with no qualifications. The operative occupation has the most hierarchical system, together with catering operatives; in this case various diplomas exists from level 3 to level 5 in VET, adult education, professional training, recognition of work experience...

Some occupations require a high level degree for bigger hotel chains and luxury accommodation Concierges and receptionists working in those establishments with a high level of knowledge (languages, partnerships, product management...) can progress to a management position. Appropriate courses are provided by prestigious hotel schools and some universities. *For instance, a receptionist and concierge at the 5 stars hotel Champs Elysee Plaza in Paris* began her career with higher education training in languages and completed a Tourism Master in a University, including internships in a hotel and in campsites.\(^{126}\)

**Performance of the system**

The Vocational Education and Training system provides quite well for accommodation operatives, in particular offering training courses with strong professional orientations. Within Accommodation / Catering VET education:

- At level 4, the students in apprenticeships work at 81% in the catering/accommodation sector after completing their studies, while only 61% of those following classical training work in the sector.\(^{127}\)
- More important at level 3, the students in apprenticeship and in block-release training work for 61% and 58% in the accommodation/catering sector whereas 52% of those following the classical training work in other sectors.\(^{128}\)

*It seems that in the accommodation/catering sector, a work-based learning system is more likely to access employment and to ensure the correspondence between training and working area.*\(^{129}\)

On the other hand, training in accommodation/catering does not necessary lead to a career in the sector: Whereas 6 of 10 young people find their first job in the accommodation/catering sector after obtaining their diplomas, only 56% of the young people trained for those occupations can be found in the enterprises of the sector three years after completion.\(^{130}\)

64% of the young people in accommodation/catering establishments have not received any initial training specific for their position.\(^{131}\)

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\(^1{24}\) Carrières Tourisme, Quels métiers choisir ?, e-book, Tourmag, septembre 2012; p.94.

\(^1{25}\) Portrait sectoriel Hôtellerie – restauration & activités de loisirs, FAFIH, 2011, p.56.

\(^1{26}\) Carrières Tourisme, Quels métiers choisir ?, e-book, Tourmag, septembre 2012; p.94.

\(^1{27}\) Insertion des jeunes dans l’hôtellerie restauration, Rapport d’études, Fafih, 2010, p.17.

\(^1{28}\) Ibid.

\(^1{29}\) Portrait sectoriel Hôtellerie – restauration & activités de loisirs, FAFIH, 2011, p.42.

\(^1{30}\) Insertion des jeunes dans l’hôtellerie restauration, Rapport d’études, Fafih, 2010, p.28.

\(^1{31}\) Ibid.
The failure of the system is apparent when we acknowledge that a great number of students with a High level degree not only begin in operative occupations, but stay at this level.

**Good Practices:**

The main challenge of accommodation operatives’ occupations is the seasonal rhythm of the work, creating precarious situations and difficulties relating to progression within the sector. Two mechanisms have been developed to address the challenge:

**Training for seasonal workers**

Access to training for seasonal workers is difficult in terms of regulation and time, the professional branch federation (FAFIH) has developed short 3-days training whatever the level of the person, 700 professionals were trained in 2010.132

**Camp sites: support to seasonal workers with the “Employment-training permanent contract” (CDI Emploi-Formation)133**

Due to the extremely high seasonality of the activities of the camp sites, seasonal workers represent an important part of the labour force in the establishments. In order to secure the employment of those seasonal workers and increase their qualifications, the mechanism “Employment-training permanent contract” has been tested during 2012-2014 in 4 regions before being included in the national professional branch contract of the camp sites in 2015. This mechanism enables the employers to hire a seasonal worker on a permanent contract with a threshold of 1607 hours a year, divided into training period and working periods. The training periods must be around 1000 hours over 5 years. As an example, working period from March to October, training in November, holidays in December, and training/holidays in January/February. The training periods aim mainly at obtaining the Professional Qualification Certificates of the Branch, such as “qualified maintenance worker” or “resort executive manager”.134 The Authorised joint Collection Body of the Branch, Agefos-pme” finances an important part of the training periods, with the contribution of public authorities and the establishments.

4.4 Management of meetings, incentives, conferences, and exhibitions management

The MICE sector occupations can be accessed after Higher education degree at level 6 or 7, within the tourism provision or the communication training offer. Several diplomas specialize in the sector. The students access a middle management level directly after their studies (project manager, managers of banqueting and seminars) and after several years higher management occupations can be accessed, such as MICE buyer, Coordinator or responsible of an event agency. The very practical occupation of steward/stewardess is prepared in specialised institutions or through VET, or without any training.

Even if the sector is growing, there is a quantitative gap between the training and the job offers, as event agencies are not as numerous. On the other hand, the independent market is growing such as the “wedding planners” and new tools are emerging such as online event management tools, or venue finders...

Lifelong learning provision enables employees to be updated with changes in practice within the sector. There are a high number of trainees within this sector, which could be compared to seasonal workers in accommodation.

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133 Accord IDCC 1631 - Accord du 18 janvier 2012 relatif à la pérennisation de l’emploi et à la formation professionnelle.
134 Signature des premiers CDI Emploi-Formation dans la branche de l’Hôtellerie de plein air, Agefos PME, 26/11/2013.
4.5 Destination management

Within destination management, the traditional way of accessing the position is with a level 5 tourism diploma, generally the Higher Technician Diploma (BTS). The progression is not very diverse due to the small number of establishments and to the prevalence of small organisations.

For the Destination manager, a higher level is expected but years of experience is necessary to access the position, in particular as the knowledge of law, HR and financial management are required.

The information agent occupation can be accessed with a Vocational Education Training - several vocational diplomas exist.

The communication/promotion manager occupation has changed as isolated printing tasks have now become a multilevel communications approach (online and offline). Tourism-specific training is therefore not sufficient and several communication diplomas are now offered in preparation for this occupation.

The sustainability manager is a relatively new occupation, accessed after a level 7 education in Higher education or lifelong learning. Several university diplomas prepare for the occupation, but there are few job opportunities.

For the tourist guide, the training is regulated by the tourism law, official guides possess a “professional card of conference-guide”. To obtain this authorization, different paths are possible:

- Level 5 university degrees (Licence Professionnelle) “Conference guide”
- Level 7 university degrees (Master) with the validation of the three compulsory modules for conference guide
- Recognition of Work experience (VAE)
- Recognition of Higher Education (VES). This system enables the European recognition and mobility of the guides.

Within tourism organisation, employees usually have a higher level diploma (level 5-7), at level 5 they mostly have a tourism-specific diploma, and at from level 6 up the diplomas are not generally tourism related. These are often language diplomas with a specialization in tourism or territorial planning.135 For smaller establishments recruitment takes place at a lower level.

The high level of employees is an asset for the branch; however the small size of establishments and the weak turnover of staff limit the opportunities for internal progression, which can lead to demotivation of the staff, reducing again the chances of progression.

The fact that the staff come mostly from the same higher education provision, creates homogeneity of occupations represented, leading to reproduction of existing models of practice rather than innovation.136

A new occupation has been developed in destination management, the “Territory's digital entertainer” (ANT - Animateur Numérique du territoire):

136 Ibid.
This was created in 2010 in the Aquitaine Region when it was realised that more than 50% of the local enterprises did not exist online. The ANT has to support the enterprises in their online development, promotion, social media...

There is no higher education training existing, only vocational training for employed people. Ideally a candidate for the training has already a level 5 training in tourism / e-tourism, e-marketing and or ICT.

In 2012, more than 500 persons were trained or are in training to become ANT, meaning that there is a strong demand for progression towards this new position from employers.137

4.6 Tour operators

In order to access the occupations in a tour operator company a minimum of higher education level 5 is expected. The universities and the business schools provide specific training courses for the sector. The tour operator industry has changed drastically with the web, and therefore new occupations or new skills are necessary. The VET system offers enable access only to low level occupations, which are not adapted to this sector. Communication positions within Tour operator companies have become more important, and therefore the communication degrees are appreciated.

There is an increasing demand for purchase, production and communication occupations in the Tour operator enterprises. Concerning the commercial occupations, they have evolved towards “commercial entertainers”, motivating the travel agencies in buying their products.

4.7 Travel agencies

Within the traditional sector of travel agencies, the lowest occupation of adviser or ticketing can be accessed with a level 5 or lower diploma. Several VET diplomas and adult education establishments provide training. Those operational and mono-task occupations are tending to disappear with the internet and the highly competitive environment, changing the business, the occupations and therefore the necessary skills. The actual challenges of the travel agencies focus on the commercial and internet-based positions, creating the need for a strong commercial team and in particular for web-marketing / marketing managers.

Tour operators & Travel Agencies

The industry is changing. In the past 15 years the division of the producers (Tour operators) and the distributors (Travel Agencies) has progressively disappeared and recently the travel agencies are coming back to their original functions of producing products and the tour operators are selling directly to the clients. The permanent changes of the Travel industry imply a need for great flexibility and visibility of the training offers.

As in the tourism sector in general, the commercial and financial aspects of the tour operators/travel agencies are increasing, and therefore graduates with commercial / financial degrees are able to access commercial and buying/negotiating positions within the job market. Several universities, businesses or tourism specific establishments prepare for these high level occupations. Historical Tour operators and big chains enable a progression of careers, with both practical experience and lifelong learning courses, but the sector is relatively small and a lot of online tour operator work with less than 10 employees, making the evolution difficult.

A Travel Agency or a Tour Operator needs to be registered by the National Tourism Agency – Atout France – to be authorized to perform its activity. If the person requesting the registration does not possess a title or certification in tourism level 5 or 6 recognized by the National Register for Professional Certifications or a professional experience of one year or more in the tourism industry, a Professional Ability Internship and training is necessary.138

The travel agency staffs are more qualified than in tour operators, 60% minimum level 5 in Travel Agencies and only 19% in TO Those who are more highly qualified tend to be mainly young people.139

It seems that there is a weak level of training at level 3, and oversupply of training at level 5, 6 and 7. The Higher technician Certificate (BTS) represents 87% of global provision. "The offer seems disproportionate compared to the needs of the branch.140

The Vocational education and training system seems more adapted to the access and progression of those occupations, as 67% of SMEs (with fewer than 10 employees) have at least one employee who has participated in a vocational training action, whereas 100% of larger enterprises have at least one employee who has done so. 1 of 4 enterprises has used the "professionalization contract".141 This contract is similar to apprenticeship but at a higher level.

In order to help the travel agencies and tour operators with the evolution of the occupations and therefore a better HR management and professional training management, the professional branch representative, SNAV has carried out several actions:

- Creation in 2011 of the CFPT, Training Centre of the Travel Professionals (Travelpro formations) with 7 competence axes: Management & Taxation, Client Relation, Marketing, techniques, Management, Personal efficiency, Multimedia and informatics.142
- Development of a mechanism to manage and develop the competences (GPEC) with the regional authority of Paris region for a pilot testing. This mechanism supports enterprises in analysing the training needs, providing HR tools,

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139 Contrat d’études prospectives, branche des professionnels du voyage, Synthèse du rapport final, SNAV Septembre 2011, p.5
140 Ibid.
141 Ibid., p.6
142 Panorama de Branche des agences de voyages, SNAV, édition 2012, p.204
developing work schedule organisation and individual training needs and path of the employees.\textsuperscript{143}

4.8 Cultural, sports and recreational activities

This sector is characterized by the diversity of the training adapted to the occupations, as the entertainment / guide instructor can be accessed from education, cultural, sports, or tourism degrees (level 4 to 5). An important VET provision provides access to these occupations, which requires, depending on the participant group, additional first aid, security, sports certificates.

\textbf{Commercial occupations are accessed with the same degrees as all commercial managers, communication / promotion manager as in the destination management and product manager as in the Travel Agencies/Tour operators sectors.}

\textit{In the larger companies, such as leisure parks, lifelong learning training systems are frequently used to enable internal promotion of the employees; this is less possible in smaller entities.} The use of seasonal qualified and/or not qualified staff is important.

The enterprises report difficulties in the recruitment of permanent staff, as employers tend to find that applicants for positions on offer lack appropriate skills or professional experience.\textsuperscript{144}

The lack of skills in the sub-sector is compensated by professional training, which represented 20,000 trained staff between 2007 and 2009. In the operating business sub-sector in 2009, the majority of tourism related training courses are in languages, management / communication and commercial skills.\textsuperscript{145} In the culture/communication sub-sector, the "leisure" training has been by far the most followed in 2009, representing half of the training provided.\textsuperscript{146}

In general professional training courses are followed in private institutes (77%), which is an increasing tendency.\textsuperscript{147}

4.9 Tourism education, research journalism and consulting

\textbf{Tourism education staff positions are generally accessed after a tourism degree and years of experience in the sector} - no specific training is requested. Some establishments provided specific pedagogy training to their trainers before beginning the work.

\textit{Research in tourism does exist but less than the industry would need.} Several PhDs relate to tourism in informatics, economy, law, environment, territorial planning, culture, agronomy...but in other academic disciplines than tourism.

\textbf{Tourism journalism has changed, as in the whole sector, with the web.} Today, passionate bloggers or ex professionals write for different enterprises in the sector to promote the destination, the products, and the services. A web journalist and community manager for a territorial tourism agency has a +4 in geography and a level 6 in communication. She was recruited after she developed her

\textsuperscript{141} Ibid., p.22.
\textsuperscript{142} AFDAS, Pratiques d’emploi et de formation dans la branche ELAC, Amnyos-Additiv, December 2010, p.33.
\textsuperscript{143} Ibid., p.54.
\textsuperscript{144} Ibid., p.55.
\textsuperscript{145} Ibid., p.56.
own blog on tips relating to tourism for the city of Nantes. The staffs from tourism specialist reviews are composed of journalists and professionals within the sector.

Tourism consultant is an important occupation and it exists in the entire tourism sector. Traditionally undertaken by senior professionals, it has opened the doors to younger graduates with specific skills and vision for tourism. In addition, as the permanent staff represent an important cost, the enterprises sub contract an important number of missions to consulting agencies or independent consultants.

For bigger players, such as hotel chains, tourism specific consulting agencies assess the market for investors willing to acquire or develop tourism resorts / hotels... These consultants have business analysis skills, deep knowledge of the sector and strong methodological competences.

For consultants, an important and deep knowledge of the sector, techniques and instruments is necessary, and therefore a level 6 or 7 degree in tourism and/or related market is expected.

See an overview of the education provision for the different occupations in Annex B.

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5.0 PERFORMANCE OF THE SYSTEM

5.1 Gaps in Provision

For the campsites activities, the training needs of the employees reflect an important gap in basic skills: the employers indicate 31% of the training needs in maintenance and 24% in information/sales skills, followed by cleaning (16%), administrative (14%), catering-bar (13%), entertainment (13%) and finally security (4%).

For the accommodation / catering / leisure sector, the lack of skills is focused on:

- Service skills
- Management skills, in terms of human resource organisation but also in financial strategy in order to ensure the profitability of the establishments, as well as contract management as more and more subcontracting will be necessary.
- ICT skills which are impacting all positions in the accommodation sector, beyond the classical booking/marketing instruments, the new tools in terms of management, yield, storage, equipment...need to be mastered.
- Multiple skills: Better addressing the needs of the clients without increasing the wage bill will inevitably lead to multi-skilled staff. It is a challenge to achieve this result and keep the staff qualified in various skills.

Skills necessary and missing in cultural, sports and recreational activities:

75% of the employees of the sector work directly with the general public. Concerning the difficulties of recruitment, the employers list the following occupations in tourism causing problems:

- Administrative / Support: Commercial managers, commercial operatives, sales assistants
- Operation: cook, waiters, catering occupations, bilingual information agents
- Show: activity leaders, guides.

Accommodation enterprises training needs:

SMEs with fewer than 10 employees have concentrated their training on seven main areas reflecting the skills lacking in their employees: Informatics represents 30% of the requested training, 20% in hygiene and food security, and 15% in languages.

For larger enterprises, the training courses followed are much broader with more than 14 topics, the most popular being informatics, security, hygiene, management and commercial techniques.
Social and family tourism:

Considering the main occupation group; catering, organisation, accommodation, cleaning and management), three kinds of training needs have been identified by the branch:155:

- Basic technical skills
- Standards and accreditations
- **Strategy of diversification of service and evolution of the demand side (foreign languages, sustainable development, communication, marketing), in particular for the catering occupations.**

Concerning seasonal workers, it is mostly in basic skills training, hygiene and security for catering occupations, followed by training needs in accommodation / organisation / cleaning skills.156

Half of the e managers of establishments recognise the need for a specific training for seasonal workers.157

Travel agencies, Tour operators and transport sector training needs:

The most followed training for professionals is commercial training related to distribution (25% of the training hours) which is even more important for over 10 staff enterprises (30%) and only 14% for smaller companies. In second position we find general informatics training, before the tourism specific informatics training. For smaller enterprises, tourism specific informatics training is twice as important as for bigger companies, as well as languages which represent 21% of the training hours, and only 4% of bigger enterprises.158

The lack of skills is different from one professional sector to another, but some common needs are emerging, such as foreign languages, commercial skills, informatics skills, hygiene and security (for accommodation only).

The main factors driving the requirement for new skills is in general the evolution of the tourism industry, losing the traditional division between Producers/Distributors/Reception due to the web, the economic crisis, the professionalization of the sector and the arrivals of new players (social medias, comparators, internet giants, shared economy websites...) which changes the activities of traditional players (Travel Agencies, Tour Operators, Accommodation, destinations management, events agency).

These changes are explained differently according to the sector.

For destination management, the territorial reform and the decrease of public funding is leading to disappearance of smaller organisations and emergence of larger tourism destination management organisations. This will lead to an increase of staff number in the establishments, and therefore more work differentiation which will then lead to a specialization of the positions. This change will be accompanied by professional short training courses on the job. This will also imply a change of work culture which is difficult in those establishments with very weak turnover and mobility.

Several occupations are therefore evolving:

157Ibid.
The “edition” position has become more and more web oriented, and the person has a role not only in relation to tourists but also inside the establishment as a communication officer, with the contribution of all employees to content development. This can lead also to transfer of the “press relation” occupation from the promotion department to the communication department, and the development of a global editorial policy.

Emerging of a real marketing and commercial position (replacing the “promotion department”), including tasks such as “market analysis, commercial strategy development, product development, partnership and commercial management...”

Network management becomes a real position with skills and dedicated resources.

The monitoring position will not be isolated anymore and get closer to the marketing and sales department and the network management – which can facilitate the simplification of data analysis provided to the partners.

Support functions need to increase their range of competences in order to support the other departments (in law, administrative, financial management of the partnerships, HR management...)

The managing position is decompartmentalized and middle management is emerging in order to improve team management and strategic development

Engineering positions stay quite isolated though this may be by their very nature

The information agent is still isolated from the rest of the team, which can create difficulties in management.

For Travel Agencies, Tour Operators, Transport companies, the changes are driven mostly by the web and the arrivals of new stakeholders:

New stakeholders take part in the tourism industry, the “infomediaries”, it is an information or community website producing and disseminating qualified information and proposing a direct link to purchase the product towards a commercial site. Four kinds of infomediaries are impacting the sector:

Touristic guides (routard.com, viamichelin.fr),
Local recommendation players (dismoiou.fr, qyoe.fr...)
Tourism offer comparators (tripadvisor.fr, kayak.fr)
Internet giants (google.com, facebook.com)

The use of the internet created new “sectors”, e-tourism and m-tourism, driving new challenges:

E-tourism
Travel is the first group of products bought online by French residents (58%) with the highest Average Purchase Value of 258€. In detail, 37% of internet users in France have bought train tickets online, 28% accommodation, 23% seasonal rental properties, 17% packages in France, 16% packages abroad.

M-tourism
Transport represents the second most important bought product with 12% and tourism packages the fourth place with 8%.

Impact of M-tourism on stakeholders:
For booking stakeholders (off or online) it has not had a real impact for hotel chains transport or car rental companies, however m-tourism enables them...
to accompany the client and ensure loyalty. For local stakeholders, m-tourism means better attracting the clients on site.

For TA and TO, existing on mobile devices address two main challenges:

- Reinforce the client relation, in particular highlighting “crush actions”
- Accompany the traveller during his/her stay by providing information on services, practical information, etc.\textsuperscript{165}

**E-tourism and m-tourism creates new challenges for all the stakeholders:**

- Development of specific tourism content and services for mobile devices (geo localisation, community forum, multimedia content...)
- Multi-channel presence
- Need to generate revenues from mobile audience, sales of specific content...\textsuperscript{166}
- Increased number of services with geo localisation
- Development of profiling, learning customer preferences, tastes of the user for future recommendations
- Emergence of mobile tourism services developed specifically for tablets.

**For the Accommodation/Catering / leisure activities sector,** beside the new use of the internet, the new consumer behaviour impacts daily work and create new skill needs:

- Less time is taken to meals, holidays, wellness and leisure, which is changing the services and increasing the exigency of the clients.
- Aging of the population impacts human resource policy in terms of maintaining employment and developing new skills for older clients.
- "client segmentation" is losing sense as a single client can have very different buying behaviours from several categories.\textsuperscript{167}
- Difficulty of analysing the needs of the clients, which are becoming much more complex - and with higher expectations.\textsuperscript{168}
- Adapting the work to the new technologies while ensuring profitability.
- Research for more quality in the environment, food security and wellness services: 8 out of 10 consumers express concern regarding the quality of the food and 9 out of 10 want to know the origin and the composition of the products.\textsuperscript{169}

\textsuperscript{165} Ibid. p.36.

\textsuperscript{166} Ibid., p.41.

\textsuperscript{167} Etude prospective, Quel avenir pour les métiers du secteur HCR ? Comprendre et agir aujourd’hui pour relever les défis de demain, FAFIH, 2009, p.9.

\textsuperscript{168} Ibid.

\textsuperscript{169} Ibid.
5.2 Addressing new skills and competences requirements

The main level for which the provision is not responding to the needs seems to be at higher level, in particular regarding the universities.

Insufficiency of university provision in light of industry needs:
- Head Office / Support functions (marketing, HR, Finances...) and Management occupations are not accessible after university training but after a Higher business school training.
- The university is not providing sufficient skills for sales and commercial occupations which are better provided within commercial degrees of Technical university and Higher Business Schools and within Higher Technician Diplomas (BTS).
- E-commerce skills are better prepared in informatics of communication institutions.
- Operational team management occupations seem not to interest university students, due to the high instability and flexible work patterns they imply.

French employers are very much concerned about the level of the students in terms of foreign languages skills, and find the level of competences in management (financial / human) insufficient.

The lack of management skills has a direct effect when integrating a management position, frequently proposed to those higher level students and also for future progression. In terms of skills, the culture of client relations is not sufficient for an extremely relationship based sector.

It seems that the technical tourism skills provided in the training corresponds to the expectations of the industry; on the other hand, the level of general cultural knowledge is far from satisfying as well as the ability to express ideas or argument opinions.

University degrees are recognized as providers of essential knowledge of the sectors and the internships represent a high value added for the employability of the students. There is a tendency of training level rising corresponding to the need for professionalization of the employers and the increasing complexity of the industry. The great majority of young graduates satisfy their employers in terms of competences and these include in particular new challenges related to ICT and sustainable development. Yet it seems that these skills are due to shared values of the generation more than to up to date training.

Missing links between universities and employers have direct consequences on the recognition of the diplomas and progression into employment for the students. Within the study undertaken by Ernst & Young, assessing the performance of the higher education system with the needs of the industry in France, several enterprises were asked, among other things, to identify training provisions. As a result, the establishments most mentioned were 9 private institutions from Higher education level of VET centres and no university provision.

Employers are often contacted for partnerships with training establishments (but rarely by universities) in order to ask mostly for internship opportunities for the students. Those employers declare themselves ready to contribute during the training but would like to be involved before the programme is already settled and not the contrary as it is common practice now.

It seems that the university training provision has difficulties in adapting their content in sufficient time to keep up with the evolution of the challenges in tourism.

170 Adéquation entre les métiers du tourisme et de l'hôtellerie – restauration et l'offre de formations supérieures – rapport d'étude, Ernst & Young, Direction Générale de la Compétitivité de l'Industrie et des Services, Octobre 2009.
Comments made in relation to Commercial Managers in Section 4.1 above are also true in relation to the Tourism sector as a whole:

There is often a quantitative gap in university provision training for senior management positions when the sector can offer only a few of those kinds of positions and they are mostly for people with professional experience rather than a high diploma only. The sector needs support positions in key commercial, finance, HR, communication aspects, whereas the university does not prepare for these skills.\textsuperscript{171}

There is a qualitative gap between the expectation of the professionals and the offer, when the training is concentrated on sector based knowledge and senior positions and the industry expects operational skills, professional spirits and flexibility. The employers perceive the candidates as “over qualified”.\textsuperscript{172}

- High level support functions for the tourism sector
  Within the study, several essential occupations are missing, as they are currently not considered tourism-specific, and a few tourism training/education establishments are providing diplomas. Those occupations are linked with specific business skills such as data analysis, revenue and yield management, pricing techniques, buying and negotiating competences, Client Relation Management; they require specific technical knowledge of GDS instruments, planning, booking and distribution software; they are better performed with the knowledge of the sector in order to apply the business skills and technical knowledge to the tourism enterprise. Those occupations are “account manager”, “negotiation manager”, “business analyst”, “pricing manager”, “distribution manager”, “production manager”. Those profiles were traditionally recruited from generic business schools, as the students besides knowledge in those establishments also acquire personal development skills; recently HR Managers tend to acknowledge that this is not sufficient any more, that the sectoral expertise is missing.\textsuperscript{173} Only a few establishments offer training providing both tourism and management competences; however there is a recent tendency to develop dedicated tourism programmes.

- Fragile link between initial training and employment
  It seems that in accommodation/catering sector, a work-based learning system is more likely to access employment and to ensure the correspondence between training and working area. “The frequent request to the initial training system to provide a greater number of young people with specific qualification is not changing the situation”. Initial training ignores the other leverages such as networking or recruitment strategies oriented towards personal skills.\textsuperscript{174}

At a lower level, it appears clearly that the diploma trains students in tourism techniques but for public establishments, and that it is difficult to adapt rapidly to the changes. The people trained are not prepared for the evolution of the market. For an important number of employees, access to tourism occupations is due to coincidence, opportunity or parental experience. Those people have therefore a general or vocational training background but in another sector, tourism related skills or techniques being acquired in the field or for larger groups with short training courses on the job.

Vocational short or long training provision is therefore essential to acquire the occupation related-techniques and skills for the persons without qualifications.\textsuperscript{175}

Proposals to improve training and education:

\textsuperscript{171} Ibid.
\textsuperscript{172} Ibid.
\textsuperscript{173} Meeting between ESCAET Staff and HR manager of the sector, 19-21/01/2015
\textsuperscript{174} Portrait sectoriel Hôtellerie – restauration & activités de loisirs, FAFIH, 2011, p.42.
\textsuperscript{175} Portrait sectoriel Hôtellerie – restauration & activités de loisirs, FAFIH, 2011, p.42.
• Disseminate or create training in “service culture” for all occupations in order to learn the techniques and tools to discover the client’s needs and be able to respond.

• Create manager training and establishment director training adapted to the emerging challenges:
  ▪ Strategic and team management will accompany the changes in the tourism sector, defining marketing/product marketing strategies, developing management policy, inventing new time management structures...
  ▪ The direction of a hotel/restaurant will become more and more complex as will the financial structure of the establishments, with hotel owners disappearing and being replaced by general manager responding to a management group or shareholders.
  ▪ Better dissemination of training regarding social media and web tools for accommodation managers.
  ▪ Disseminate or create training enabling professionals to adapt rapidly to the changes of the industry in health, security, hygiene, environment, climate change, sustainable development.
  ▪ Develop training on “inter-culturality” for all occupations confronted with clients from very different origins and cultures, which requires skills in understanding and adaptation.
  ▪ For destination management, the proposal of the sector is to diversify recruitment, with staff from outside tourism training, which will lead to integration difficulties but should increase the capacities of adaptation to tourism industry needs.\textsuperscript{176}
  ▪ Create new and innovative “employment-position descriptions” in order to be adaptable and progressive.\textsuperscript{177}
  ▪ Develop inter-sector mobility enabling the professionals to acquire various experiences in a sector and creating progression opportunities.\textsuperscript{178}

Some systemic failures which need to be addressed:

One in three of the new entrepreneurs in Accommodation / Catering leisure activities open without any experience in the tourism sector; maybe a regulation requiring compulsory training should be proposed to avoid business failure.\textsuperscript{179}

The employers regret the creation of more and more Higher education degrees whereas Apprenticeship or professional contracts (part school / part enterprise) are the main path to access to the accommodation/catering/leisure sector as an employee.\textsuperscript{180}

Tourism is a sector in which internal progression is very much developed and sometimes more appreciated than recruiting externally. Indeed occupations proposed to young graduates with higher education diplomas in reality correspond better with operational positions, which is often not consistent with their expectation of management positions. In this sense, the Level 7 diplomas are sometimes perceived as a mean to avoid an operational position, which are essential in the sector to enable career progression.

\textsuperscript{176} Gestion Prévisionnelle des Emplois et des Compétences (GPEC) Synthèse à l’usage des organismes de tourisme, Agefos-pme, 2011, p.5.
\textsuperscript{177} Ibid. p.22-23.
\textsuperscript{178} Etude prospective, Quel avenir pour les métiers du secteur HCR ? Comprendre et agir aujourd’hui pour relever les défis de demain, FAFIH, 2009, p.12.
\textsuperscript{179} Portrait sectoriel Hôtellerie – restauration & activités de loisirs, FAFIH, 2011, p.44.
\textsuperscript{180} Ibid.
5.1 Learning outcomes

Occupation for which university training addresses the industry needs:
- Promotion / territorial planning officers in public tourism structures
- Technical occupations in Yield management and revenue management
- Partnership officer of public authorities
- Marketing officer in destinations and resorts
- Business officers in Business travel

Private Higher education establishments of business or tourism are perceived as much more adapted to industry needs for several reasons:
- Professional: internships and experiences abroad are more numerous
- A better education in foreign languages
- Financial and human management skills better acquired
- Individual teaching on personal development and professional projects
- Important impact of the alumni network

Hotel schools also comply with industry needs for several reasons:
- More experiences abroad and internships
- Better foreign language skills - in fact 50% of the graduates of hotel schools begin their career abroad.
- Adapted equipment for practical application
- Individual students coaching
- Selection for entry
- Strong impact of alumni network, integration and monitoring (example of Vatel with an ERP for former students)181

5.2 Progression into/within employment

- Difficulties of University Diplomas

The deficiencies of university training provision generate strong needs for vocational short training on the jobs. High level support positions (buyer, business analyst, law, revenue manager...) are recruited from recognized generic training provisions, such as business schools, whereas as the specialized tourism students are generally recruited in the marketing division.

The employers state that the university training provision prepares students mostly for institutional and territorial subsectors; this is inconsistent with the small number of positions available in those sectors.

The strong specialization of training for “Business travel” and “hospitality” is appreciated by the employers as those subsectors require very specific skills and knowledge.

The best model for employers would be a general solid training in tourism, completed by a professionally oriented short specialization developed in co-operation with professionals from the sector.

- Recruitment difficulties of the employers – seasonal workers

In the campsite businesses, the difficulties of recruitment are mainly (45%) to find motivated and available staff for the high season, 34% to find seasonal workers that do not need accommodation, 31% to find staff with the right

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181 Adéquation entre les métiers du tourisme et de l'hôtellerie – restauration et l'offre de formations supérieures – rapport d'étude, Ernst & Young, Direction Générale de la Compétitivité de l'Industrie et des Services, Octobre 2009.
competences, 24% to keep the same staff for the next few years and finally (5%) to be able to send them on training courses.\(^{182}\) It seems that independent

Campsites’ main concern is about the motivation/availability of the workers, whereas for the bigger groups or chains the accommodation issue of the seasonal workers is far more important (61%).\(^{183}\)

In the cultural, sports and recreational activities, the recruitment habits are highly dependent on seasonal workers which represent 39% of the recruitment for permanent staff, as the employers declare that the applicants for the open positions lack appropriate skills or professional experience.\(^{184}\)

For management positions, SME have for 21% recruited internally, 9% without providing management training and 15% after training and only 9% have recruited external staff having experience in management.\(^ {185}\)

- **Information about existing provision**
  In the campsites, 67% of the employers report not knowing about the Professional Qualifications Certificates (CQP) of their sector, in particular the independent campsites\(^ {186}\). On the other hand, 64% of the employers do know about the Recognition of Experience Outcome mechanism (VAE), enabling the recognition of diplomas used to access a position or to progress within employment.\(^ {187}\)

- **Languages**
  An important number of tourism professionals are not able to speak a second language, and this weakens the quality of the services. In 2011, 1/3 of the mobile websites of public destination management establishment are available in French only.\(^ {188}\)

- **Tourism training is not compulsory in reality, only on paper**
  Looking at the profile of the employees, it seems that a tourism specific training is not compulsory in order to work in destination management, but when employers are interrogated, 2/3 declare that a tourism specific diploma/training is an asset to become proficient in a position and to reduce the time of adaptation, for the 1/3 it represents only an additional quality but it is not a recruitment criterion.\(^ {189}\)

\(^{182}\) Hôtellerie de plein air, rapport de branche, FNHA-AGEFOS-PME, 2013, p.94.
\(^{184}\) Pratiques d’emploi et de formation dans la branche ELAC, Amnyos-Additiv, AFDAS, December 2010, p.33.
\(^{186}\) Hôtellerie de plein air, rapport de branche, FNHA-AGEFOS-PME, 2013, p.112.
\(^{188}\) Panorama de Branche des agences de voyages, SNAV, édition 2012, p.41.
\(^{189}\) Gestion Prévisionnelle des Emplois et des Compétences (GPEC) Synthèse à l’usage des organismes de tourisme, Agefos-pme, 2011, p.5.
ANNEX A: SOURCES

Reports

- Enquête auprès des établissements et des groupes, observatoire prospectif des métiers et des qualifications du tourisme social et familial, Synthèse 2010, UNIFORMATION.
- Etude prospective, Quel avenir pour les métiers du secteur HCR ? Comprendre et agir aujourd’hui pour relever les défis de demain, FAFIH, 2009
- Hôtellerie de plein air, rapport de branche, FNHA-AGEFOS-PME, 2013.
- La gestion prévisionnelle des emplois et des compétences dans les OT SI d ’Alsace du Nord, Rapport détaillé de la phase 1, Comité Directeur, Organisation Tourisme Développement Territoire, 31/07/2014.
- Panorama de Branche des agences de voyages, SNAV, édition 2012.
- Portrait sectoriel Hôtellerie – restauration & activités de loisirs, FAFIH, 2011
- Pratiques d’emploi et de formation dans la branche ELAC, Amnyos-Additiv, AFDAS, December 2010..
- Rapport de branche hôtellerie de plein air 2012, FNHPA – Service Etudes et Statistiques AGEFOS PME
- Référencement du cadre national de certification français vers le cadre européen de certification pour la formation tout au long de la vie; Commission Nationale de la certification professionnelle
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Studies

- Insertion des jeunes dans l’hôtellerie restauration, Rapport d’études, Fafih, 2010,
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- La prospective des métiers et des qualifications, un outil pour renforcer la concertation régionale, Bref du Cereq, n°327, décembre 2014.
• Portrait sectoriel Hôtellerie – restauration & activités de loisirs, FAFIH, 2011.

**Articles/publications**

- « Emploi tourisme: le marché du recrutement a fait mieux que résister en 2014 », Valérie DUFFOUR, Tourmag.com, 02/02/2015.
- « L’AFTM obtient de l’APEC la reconnaissance du métier de Travel manager », Déplacement pros, 01/04/2014.
- « Les licences tourisme doivent revoir leur copie », Fédération Française des Techniciens du Tourisme, L’Echo Touristique, 14/03/2012.

**Websites**

**Government**

- Le portail de la Commission Nationale de la Certification Professionnelle www.cncp.gouv.fr
- Ministère des affaires étrangères et du développement international http://www.diplomatie.gouv.fr/
- Veille Info Tourisme http://www.veilleinfotourisme.fr/

**Tourism stakeholders**

- Académie Accor France; www.formations-academie.accor.com/
- Association française des Travel Manager http://www.aftm.fr/
- Association Professionnelle de Solidarité du Tourisme - https://www.apst.travel/
- Fédération Française des techniciens et Scientifiques du Tourisme http://www.fftst.org/

**Institutes / Specialised reviews**

- Centre d'études et de recherches sur les qualifications, CEREQ, http://www.cereq.fr/
- Centre info http://wwwcentre-inffo.fr/
- L'Echo Touristique http://www.lechotouristique.com/
- Tourmag - http://www.tourmag.com/
Training / research

- ESCAE, [www.escaet.fr](http://www.escaet.fr)
- Haut Conseil de l'évaluation de la recherche et de l'Enseignement Supérieur, [www.hceres.fr](http://www.hceres.fr)
- Pôle Régional de Recherche et Innovation pour le Tourisme, Provence-Alpes-Côte d’Azur, [www.protis.cecctd.eu](http://www.protis.cecctd.eu)
- STUDYRAMA - [www.studyrama.com](http://www.studyrama.com)
- Professional branches
  - OPCA Agefos-pme [www.agefos-pme.fr](http://www.agefos-pme.fr)
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Legal documents

- Arrêté du 22 janvier 2014 fixant le cadre national des formations conduisant à la délivrance des diplômes nationaux de licence, de licence professionnelle et de master, JORF n°0027 du 1 février 2014 page 1922, texte n°25.
- Code du Travail, Article L932-1
### ANNEX B: SUMMARY OF EDUCATION PROVISION FOR DIFFERENT OCCUPATIONAL GROUPS

#### SUMMARY OF THE VOLUME OF PROVISION AGAINST OCCUPATIONAL GROUPS

*Please note that some provision can target several occupational groups*

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<th>Main form provision / occupation groups</th>
<th>Commercial managers</th>
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<th>Accommodation operatives</th>
<th>MICE</th>
<th>Destination management</th>
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