



**Promoting Core VET skills and
competences for unskilled and
semi-skilled employees
in the tourism sector**

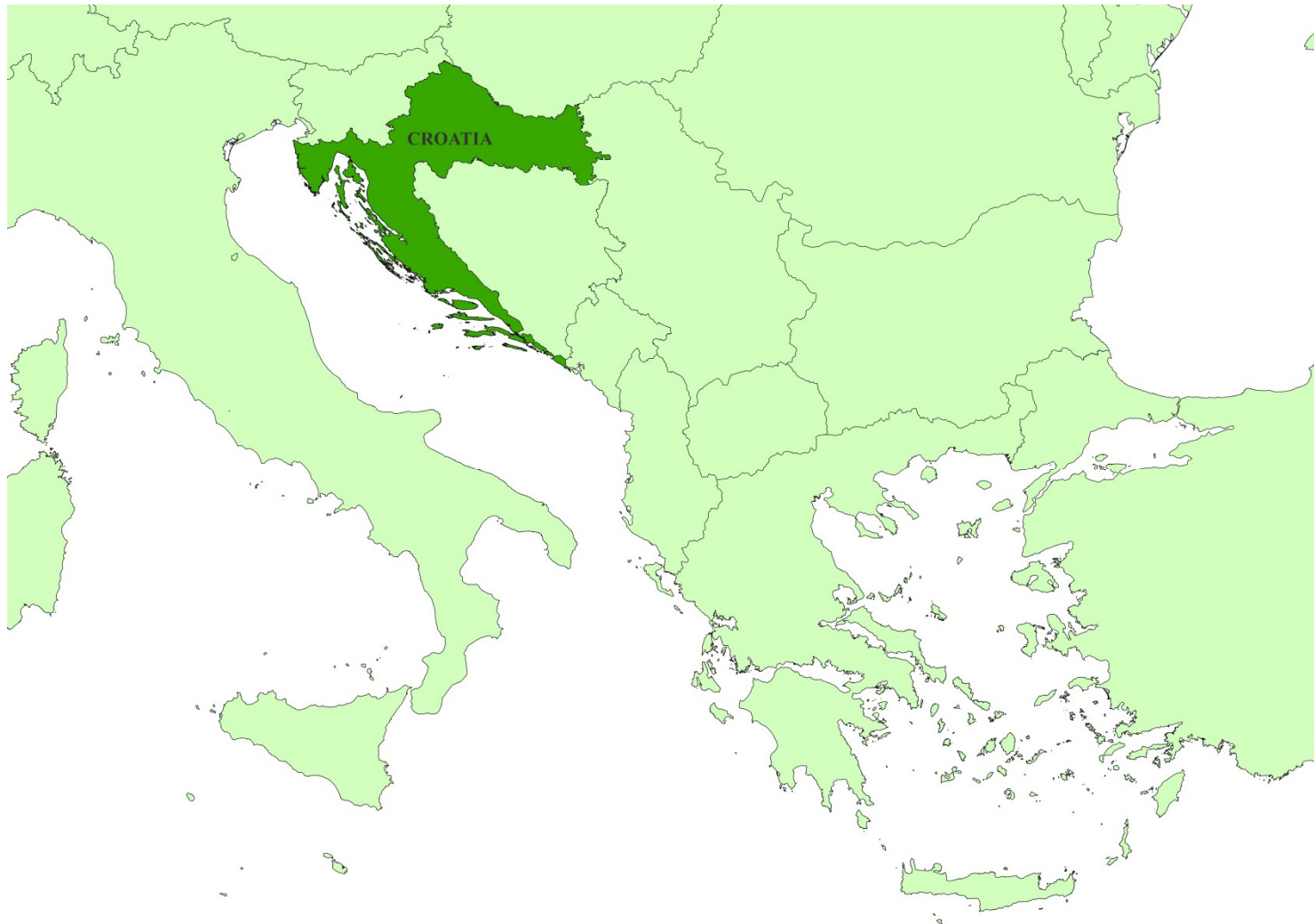
EDUCATION FOR TOURISM: SNAPSHOT ON CROATIA

Zrinka Marušić, Zagreb, Croatia

institute for tourism 

Tips4skills

Athens, October 23rd, 2014



Croatia at glance

- Population 4.3 million
- Size 56.5 thousand km²
(76 people per km²)
- Capital: Zagreb (1 million)
- Low population density
- Expanse of pristine nature
 - 8 National Parks
 - 11 Nature Parks
 - 7 UNESCO heritage sites
 - 14 UNESCO intangible heritage sites



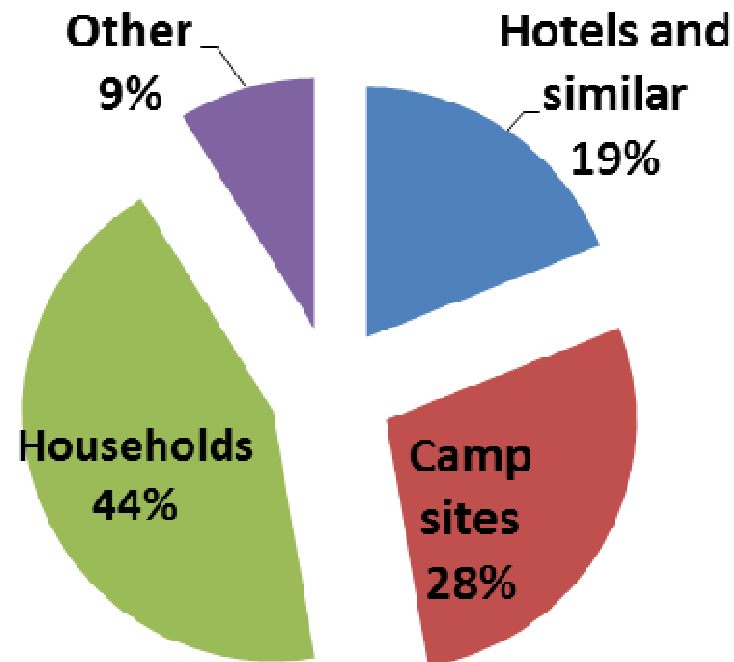
Croatian Tourism: Impacts

- At the moment, just about **only healthy economic activity**
- Direct contribution **10.4% to the GDP** (Tourism Satellite Account Methodological Framework, UNWTO)
- Total impact **14.3%** to the gross value added (Input-output model)
- Employs directly **9% of Croatian workforce**

Croatian Tourism: Demand

- **65 million overnights** in 2013, 60 million foreign overnights
- Top 5 generating countries (54% of total overnights)
(Germany, Slovenia, Austria, Czech Republic, Italy)
- Demand by accommodation type:
 - 30% in hotels
 - 25% in camps
 - **35% in household accommodation** (rooms, apartments, B&B)
 - 10% other
- **Geographically concentrated** demand
(96% in narrow coastal strip)
- **Seasonality** of demand – 62% in VII-VIII

Croatian Tourism: Accommodation Supply



Total number of **permanent beds: 839** thousand

Croatian Tourism Industry

- 15 thousand enterprises
 - 2 thousand in **accommodation sector**
 - Accommodation enterprises employ, on average, 20 people
 - 13 thousand in **F&B**
 - F&B enterprises mostly micro in size, with 4 employees on average
- About 50 thousand **families** engaged in short-term holiday rentals

Employment in Croatian Tourism Industry

- Accommodation and food service (in legal entities)
 - Employs about **48 thousand persons**
 - Women overrepresented (56% are women)
 - 64% employed in accommodation and 36% in food and beverage sector
- Accommodation and food service (enterprises registered as craft and trade)
 - Employs **36 thousand persons** (52% women)

Employment in Croatian Tourism Industry

- Age structure (in legal entities)
 - About 80% between 25 and 55 years of age
 - 13% of those older than 55 and
 - 7% younger than 25
- Workforce education (in legal entities)
 - 54% secondary school education
 - 18% are highly skilled/skilled workers
 - 12% semiskilled/unskilled and
 - 4% have just basic education
 - only 12% of employees with university or college degree in the sector

Key Work-Force Issues in Croatian Tourism and Hospitality

- High seasonality of demand creates large pool of seasonal workforce - often less skilled, underpaid and poorly motivated
- Geographical concentration of demand along the coast requires large migration of seasonal workers from north to south
- Unfavorable work conditions – attracts low skilled workers or those with little experience in T&H
- Employment/unemployment statistics difficult to obtain – official statistics collects data from legal entities only; significant share of unregistered workers

Education for Croatian Tourism Industry

Vocational training (secondary school level)

Number of pupils

- 5.5 thousand enrolled each year (of 49.8 thousand)

Schools

- 17 vocational schools specialized for tourism and hospitality education
- 74 schools offering some of tourism and hospitality programs

T&H programs

- 4-year – Certificate for hotels and tourism operations, Certificate for agro-tourism
- 3-year – chef, waiter, pastry maker

Education for Croatian Tourism Industry

Tertiary level

Number of students

- 2 thousand students enrolled each year

Institutions

- Tourism programs offered at 15 universities and colleges of higher education

T&H programs

- Bachelor of hotel management
- Bachelor of tourism management
- Postgraduate business and research masters and PhD programs
- More recently – multidisciplinary courses offer students possibilities to combine tourism with other specialties

Life-Long Learning in Tourism and Hospitality

- Only **2%** of Croatian workforce participate in some form of LLL (compared to 40% three decades ago)
- Tourism and hospitality enterprises **below the national average**
- **Restricted to certified programs** (director of DMO, travel guide, travel agent) and ad-hoc short seminars
- Only few large hotel companies offer structured on-the-job training

Key Educational Issues in Croatian Tourism and Hospitality

- Modernization of educational system **under way** with structures set up to bridge gap between education and employers
- Key intervention areas:
 - Introduction of new curriculums
 - Setting up of national network of Centers of excellence for Tourism and hospitality education
 - Greater involvement of employers in articulating training needs and participating in education process



Core-vet addresses these challenges by:

- ⇒ Facilitating **wide-ranging access to the training material** for learners, teachers and employees through **e-teaching approach** promoting learning any-time and anywhere at the speed self-paced by learners
- ⇒ Made learning material available to **a huge number of micro and small businesses** that prevail in tourism and hospitality sector that, traditionally, do not have access to most of the training courses provided commercially

Thank you!
Institute for Tourism, Zagreb, Croatia

www.iztzg.hr
info@iztzg.hr