Training materials

Tourism Sector

MENTORCERT project
Work Package 3

Budapest, 2019

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Introduction and learning objectives

These training materials have been prepared for the MentorCert Project. They aim to help business mentors or potential business mentors acquire knowledge and skills associated with the development of knowledge in specific business sectors. They are to be used as a resource to underpin the development of (1) project related e-learning materials (2) Face to face training.

Aim of the materials

The aim of the materials is to support business mentors and potential business mentors to achieve the 'hard' skills identified in the MentorCert skills card and outlined in the table below

Learning outcome
To understand options available to identify the scale and scope of the sector
To be able to identify relevant value creation models and apply at least one in a relevant sector context
To understand options available to map the sector eco-system and to apply at least one
Hypothesize about the future of the sector

Structure of the training materials

The training materials are ordered in the following way:
- A brief introduction to the Tourism Sector
- Examples of techniques that can be applied in the sector to achieve the learning outcomes (e-learning materials) (including case studies)
- Short case studies to be used in face to face teaching and learning
- Further references and resources

The training materials contain eight case studies to encourage work-related learning.

Long cases (to be used in the on-line training materials)
- Magic Wellness and Conference Hotel (1) – Case with the Ishikawa (Fishbone) method
- Neverland Travel Agency (2) – Case with the Pimento map method
- Rubicon Hungarian Restaurant (3) – Case with the Backcasting method
- Harden Consulting Group for Tourism (4) – Case with the Future User method

Short cases (to be used in face-to-face training)
- Hotel Beacon (HB) (5) – Strategic planning – Short case
- Heywater Agency (6) – Value Creation model – Short case
- Fisherman's Restaurant (7) – Understanding the eco-system – Short case
- Iconic Management Consulting Ltd. (8) – Futures – Short case

Time and materials needed

These materials should be used in combination with other resources developed during the MentorCert Project and the TRUST ME project.

- A methodology handbook introducing a selection of thirty two tools and techniques that can be used to identify the scale and scope of the sector, value creation, eco-system mapping and hypothesise about the future of the sector (MentorCert available here)
- A TRUST ME Handbook for trainers available here

To complete the full e-learning module should take about fifteen hours in total (eight for the methodology module and seven for the Tourism module). It will take about 4 hours to complete the face to face element of the training.

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The European Commission support for the production of this publication does not constitute endorsement of the contents which reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

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Overview of the sector

I.   Brief overview of the sector

The economic weight of the sector

The construction industry is very important to the EU economy. The sector provides 18 million direct jobs and contributes to about 9% of the EU's GDP. It also creates new jobs, drives economic growth, and provides solutions for social, climate and energy challenges. The goal of the European Commission is to help the sector become more competitive, resource efficient and sustainable. (https://ec.europa.eu/growth/sectors/construction_pl)

II.   Brief overview

Tourism is more and more popular all over the world. It not only creates plenty of jobs for countries, but it can even contribute huge economic growth (UNWTO, 2018). 1 326 million international tourists counted all over the world.

Since the economic crisis the tourism had grown all over the world and in 2017 the International tourist arrival reached 672 million in Europe giving 51 % of world international tourists arrivals and provided 10 % of the GDP worldwide. France continues to be the most visited destination with 86.9 million tourist arrivals, followed by Spain, USA and China. Asia and the Americas are also rising in numbers, the most revenues generated by tourism was in the US (UNWTO 2018).

TOURISM WORLDWIDE AND IN EUROPE

„Yet, tourism, a sector accounting for 10% of world GDP, 7% of global trade and one in 10 jobs, can contribute to all 17 Goals." – stated in the Global Report 2016 of UNWTO.

In the last 7 years tourism had grown above the average appr. 4 % annually. In 2016 the international tourists arrival reached 1 235 million providing 10 % of the GDP and 7 % of world's export, in 2017 these numbers have grown, 1 326 million international tourists, 10% of GDP, 7% of world's export (UNWTO 2017).

„Tourism continues to demonstrate its key role in generating economic activity, employment and export revenues in the OECD area, where it directly contributes, on average, 4.1% of GDP, 5.9% of employment and 21.3% of service exports."

Europe traditionally has 51 % of the total tourist arrivals. In 2017 it was in accordance with the previous years, Europe had 672 million tourists arrivals.
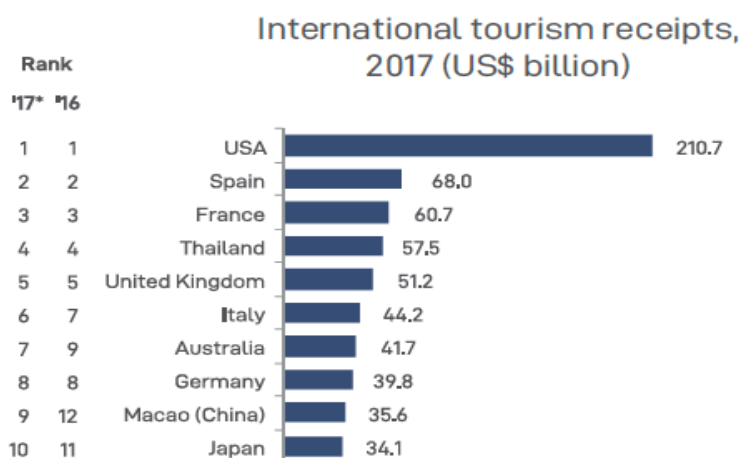
As tourism plays such an important role in the economy and in the EU SMEs have their big role and weight in the economy, plus EU is supporting SMEs. "The European Commission has implemented several actions to boost the competitiveness of small businesses in the European tourism sector, integrate them into global digital value chains, and improve their ability to create more jobs." (OECD 2016)

France had been the mostly preferred, visited country and the 2017 figures underline the trend.
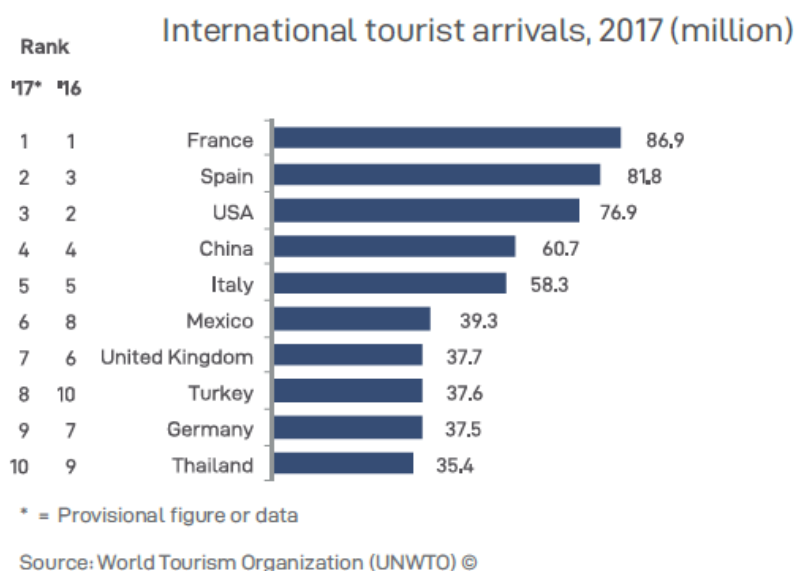
1. Figure: International tourist arrivals 2017 (UNWTO 2018)

The other main indicator of the tourism is how much money tourists have spent in the given country. In this case the USA leads the market significantly.

International tourism receipts,
2017 (US$ billion)

Rank '17*	Rank '16	Country	Receipts
1	1	USA	210.7
2	2	Spain	68.0
3	3	France	60.7
4	4	Thailand	57.5
5	5	United Kingdom	51.2
6	7	Italy	44.2
7	9	Australia	41.7
8	8	Germany	39.8
9	12	Macao (China)	35.6
10	11	Japan	34.1

* = Provisional figure or data

Source: World Tourism Organization (UNWTO) ©

2. Figure International tourism receipts 2017 (UNWTO 2018)

EU Objectives

According to the latest European Parliament Fact Sheet the EU's tourism industry in the strict sense of the term (traditional providers of holidays and tourism services) is made up of 2.3 million businesses, primarily small and medium-sized enterprises (SMEs), employing an estimated 12.3 million people. In 2014, one in 10 enterprises in the European non-financial business economy belonged to the tourism industries. In 2018, the 'travel & tourism' sector directly contributed 3.9% to EU GDP and accounted for 5.1% of the total labour force (which equates to some 11.9 million jobs). When its close links with other economic sectors are taken into account, the tourism sector's figures increase significantly (10.3% of GDP and 11.7% of total employment, which equates to 27.3 million workers).

In 2017, the number of international tourist arrivals reached 1.32 billion worldwide (+7%), 671 million of which, or 51% of the market (+8%), were in Europe. A long-term study by the World Tourism Organisation (UNWTO) forecasts more modest growth in European tourism, to an estimated 744 million tourists (+1.8%), or 41.1% of the global market, over the period to 2030.

Tourism policy is also a means by which the EU can pursue broader employment and growth objectives. The environmental dimension of tourism will gain in significance over time, and is already reflected in projects involving sustainable, responsible and ethical tourism.

Hospitality sector in the EU

Importance of the sector

The hospitality sector makes a major contribution to the European economy. It supported approximately 18 million jobs, or one out of every 13 jobs in Europe. The sector contributed almost €126bn to government treasuries in excise duties, Value Added Tax (VAT) and employment and social security taxes. The sector is very responsive to economic conditions, supporting job creation and economic growth in the good times, but also vulnerable to revenue raising policy measures in a downturn. With €1.16 additional demand generated in the wider economy for every €1 spent in the sector, supportive policy measures are likely to result in positive outcomes for the economy as a whole. These are likely to support not only economic, but social objectives, providing work for young and first-time labour market entrants and those returning to the job market. Measures adopted in times of austerity, which increase tax rates at a time when disposable incomes are falling, are likely to undermine the ability of the sector to generate growth. The short-term response to this is likely to be cost cutting measures, and later, a loss in permanent capacity.

Key success areas for Hotels

Employment

In terms of direct support for EU socio-economic aims, the hospitality sector is the largest employer of migrant labour in Europe. It also offers many groups, who can find labour market participation difficult (parents, students, rural workers, those with caring responsibilities) a flexible approach to working that can enable them to take a job whilst also pursuing other activities or meeting care responsibilities. This enables greater labour mobility and higher participation, contributing to a more flexible and responsive labour market that can adjust quickly to changing economic conditions.

Great problem is that the average income of employees in the accommodation and catering sector remains lower than the overall average. On the other hand, more than one third of tourism accommodation employees have a lower level of education. The general level of education remains lower in hospitality sector than in the whole EU27 economy. Most employees in hotels and restaurants have a level of education that corresponds to "lower secondary" or "upper secondary" and this group is larger than in the overall workforce of the EU. Due to the good mobility possibilities these employees move easily from one place, even from one country, to another. Nowadays one of the major tasks of hotel managers is to find qualified employees and keep them for longer periods.

Qualification

In many European countries the education system is not adequate to provide a qualified workforce in hospitality industry. The need for more qualified staff in the sector has been identified in such countries as Austria, Slovenia, Poland, Czech Republic, Hungary, Lithuania, Slovakia and Cyprus. Therefore, social partners sitting on the industrial committee for vocational training in hotels and restaurants have introduced more innovative skills to training courses: IT knowledge for all levels of employees, leadership/management skills, food and health, tourism/hospitality knowledge, and finally social skills such as different languages.

One of the most important topics for the new hospitality era is unfortunately forgotten by many employers: the need for tourism employees to learn guest service skills and the culture to serve. Training is critical to ensuring quality service and meeting these objectives.
Trends are moving towards technology; several IT solutions have been made in the past years in this industry. Robotization, automatization and high-tech is a way more profitable solution for hotels.

Quality

Quality guest service is an experience of feeling valued or heard. It is the most important competitive advantage of tourist business, "the key to competitiveness". And it's a critical factor for tourism success, both as a mean of satisfying ever-increasing customer expectations, and to achieve business profitability. In fact, service quality represents the gap the between the expected service and the actual perceived service. The high service quality includes not only the professional skills and experience. Moreover, the quality of services doesn't depend only on the brand name, location or facilities. It includes the employee's manners, attitude, behaviour and professional etiquette, their respect to the guest etc.

Sustainability

Global trends and priorities change – more than ever the overarching challenge for the tourism sector is to remain competitive while also embracing sustainability recognising that, in the long term, competitiveness depends on sustainability. Climate change is now seen as a fundamental issue also requiring the tourism industry to reduce its contribution to greenhouse gas emissions and the destinations to adapt to changes in the pattern of

demand and in the types of tourism they offer. The future of European tourism relies on the quality of the tourist experience – tourists will recognise that places that care for the environment, their employees and local communities are also more likely to care for them. By integrating sustainability concerns into their activities, tourism stakeholders will thus protect the competitive advantages that make Europe the most attractive tourist destination in the world – its intrinsic diversity, its variety of landscapes and cultures. In addition, addressing sustainability concerns in a socially responsible manner will help the tourism industry to innovate its products and services and increase their quality and value.

Eco-friendly and green solutions are even more popular in this industry: gardens or green areas on the top of the building, inside gardens, pools with fishes, energy generating windows etc.

FUTURE

New Trends of travellers

TripBarometer carried out a research in 2016 with a 44000 sample to learn about the travel trends. International forecasts and the eTurboNews named several trends (Marffy 2018). These trends were published in Turizmus.com (2018 January-February page 10-13).

The most important four trends of the researches are as follows:

1. Women travelling alone will grow

It is a tendency that the women are more reluctant to experience something new and this is the reason why there is a big growing potential in this group. It is noticeable that the number of women grows among the participants of the active tourism. Their proportion 60%.

2. Preference of travel giving experience

Getting experience is not a new trend – it is a motivation for travelling that can be noticed for several years. People's motivation for travelling is to get experience is more important than just to see a monument.

"Nowadays specially the younger generation goes to see and participate on festivals, to speak to locals, to understand their everyday life. This is the reason why Airbnb is very popular."

Euromonitor International phrased this as "Pooling Resources is Becoming Integral to Urban Living".

3. New destinations i.e. destination making a step forward

There are several destinations that were in the very first places but the travellers are always looking for something new.

Some destinations like China, Japan, and several countries in Africa were not among those destinations that were targeted among the first ones. These destinations became and are becoming more and popular as a result of the transport development. The development of the air transportation made these destinations more accessible, so transportation development results in making the far away destinations popular.

4. Strengthening of the sustainable tourism

Sustainable tourism is to see cultural heritage sights and also to support the cultural heritage.

Example: in Budapest the biggest synagogue of Europe is visited 90 % not by Jewish people. Visitors paying the entrance fee (EUR 13) might choose a 30-40 minutes guided tour on several language and can visit the Jewish Museum too.

Industry 4.0 is happening, technology is the driver of several industries. The Online Cross-Border Purchases Booming people's attachment to their smartphones, phablets and tablets is increasing. (Euromonitor 2016). People would like to be permanently connected i.e. connected to the internet. Therefore, WIFI is looked for during travel on trains, coaches etc.

EUROPEAN TOURISM STRATEGY AND PLAN OF ACTIONS- 2015-2020

According to AALEP's publication, the European Union submitted a strategy to enhance tourism in a global level. Key points have been named as aims for the given period.

1. <u>Streamlining the regulatory framework for tourism at European, national, regional and local level</u>

A public consultation on the regulatory and administrative framework affecting tourism was carried out in 2014. Proposed actions under this point:

- Assessment of the existing regulatory and administrative framework on tourism with a focus on EU level and the assessment of taxation related to competitiveness of tourism destinations

- Close cooperation with the Commission

- Event/workshops about possible legislations in tourism

- Exchange of best practices between nations.

2. <u>Promoting the digitalisation of the tourism SMEs</u>

Digitalisation is the key to competitiveness of the tourism industry, current SME-s are far behind in this matter. The Commission is willing to assist them by identifying key challenges. The strategy has 3 key pillars:

- Better access for consumers and businesses to digital goods and services across Europe

- Creating the right conditions for digital networks and services to flourish

- Maximising the growth potential of the Digital Economy.

3. <u>Upgrading skills and competences in the tourism sector</u>

The competences of professionals are a key element for a consumer-oriented service like tourism. Insufficient skills to cater for the needs of modern travellers are quoted as key barriers to the competitiveness of EU tourism. The Commission is proposing the following actions under this priority point:

- Identification of the gap between the education supply and labour market demand

- SME access to e-skills and e-leadership (e.g. YouTube live seminars

- Development and dissemination of e-/m-skills taxonomy / framework / guidelines on adaptation of existing tourism curricula

4. <u>Promoting sustainable and responsible tourism, among other through adoption of a Charter for Sustainable and Responsible Tourism</u>

Sustainability is a fundamental aspect for the European tourism competitiveness in the short, medium and long term. It is important to work on raising awareness about the sustainable and responsible tourism supply (public authorities, destinations and business) and demand (tourists). The priority points are:

- Adoption of a European Charter for Sustainable and Responsible Tourism address to all stakeholders

- Joint EU /UNWTO event on ethical and responsible tourism

- Further roll-out of European Tourism Indicators System for Sustainable Management at destinations

- Promote accessibility for PRMs, facilitate exchange of good practices, etc.

5. Fostering low and medium season tourism exchanges

Seasonality is a constant challenge for the European tourism as it often impacts negatively on a destination's economic fabric and business models, as well as on its socio-cultural and ecological environment. The priority points are:

- Support via calls for proposals of trans-national project partnerships to foster low and medium season exchanges for seniors and youth

- Analysis of seasonality patterns in the EU and inventory of senior & youth tourism profile

- Elaboration of guidelines for the design of transnational tourism packages for elderly and young tourists in low-medium season

- Organisation of dedicated workshops for awareness-raising and exchange of best practice.

6. Improving intermodality and transparent connectivity

Insufficient transport connectivity is a serious challenge for EU tourism. The improvement of inter-modality and transport connectivity is a key issue to tourism development. The priority points are:

- Analysis of the challenges for providing better connectivity and intermodality from major hubs to tourism destinations in close cooperation with the OECD Tourism Committee

- Cooperation with relevant Commission DGs to help deliver multimodal travel information, planning and ticketing services

- Facilitate cooperation and coordination amongst transport modes stakeholders to enhance intermodality and interconnectivity.

7. Joint promotion of Europe as a tourist destination, mainly in third countries

The EU is the world's number one tourist destination. However, the increasing competition from emerging markets, the EU's share of international tourist arrivals is predicted to decrease. Therefore, in order to keep Europe's leading position as a tourist destination, supporting promotion of Europe and its destinations. Proposed concrete actions:

- Support the diversification of the tourism offer

- Continued cooperation with the European Travel Commission (ETC)

- Facilitate and support the launch of a joint public-private partnership initiative for the promotion of Europe via the promotion of thematic products and encourage a much closer involvement of the EU tourism industry

- Events and communication campaigns.

8. <u>Improving the governance of tourism</u>

Governance of tourism is a complex issue involving numerous types of public and private actors at several levels: EU, national, regional and local. It is essential to improve the governance of tourism issues both within the Commission and between the Commission and other EU institutions, but also at the level of the national administrations of the Member States and within the industry at large. The priority points are:

- Improve cooperation with relevant other DGs within the Commission, with the other institutions as well as with national administrations, the industry and other stakeholders

- Organise meetings between the TAC (national tourism administrations) and the industry on pre-defined topics

- Encourage the enhancement of a travel and tourism value chain platform

The mentioned steps and planned elements are happening, and the European Union focuses on keeping its existing position in the tourism industry.
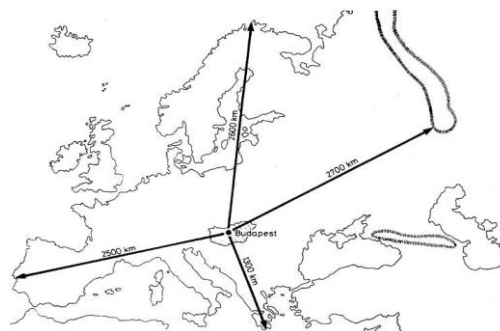
HUNGARY

Tourism sector in Hungary

„There are places, the mere mention of which is enough

to inspire wanderlust in our hearts."

Hans Christian Andersen

Tourism only started in 1990 in Hungary since that tourism plays a very important role in the country's economy. Tourism sector is mostly depending on Hotel industry so the main KPI's are: capacity, guest number, guest nights (overnights), airport passengers and revenues.

International tourism arrivals and guest nights had grown significantly by 2016. The growth rates and performance of the industry mainly depends on the country's location in Europe and its uniqueness. The length of the borders of Hungary totals 2238 km. Hungary's borders with: Austria (359 km), Slovakia (667 km), Ukraine (144 km), Romania (437 km), Slovenia (99 km), Croatia 348 km), Serbia (174 km).

*3. Figure: Location of Hungary (mek.oszk.hu)*

Contribution of tourism to GDP and employment

The contribution of tourism to the GDP is about 4-5 %. The overall contribution (directly and indirectly) is at around 8 per cent, the government's goal is to reach 10 per cent in the long term. According to UNWTO every tenth person works in the tourism industry.

Looking at the figures published by the World Travel and Tourism Council (WTTC) the contribution to the GDP is around 4 % every year and by 2026 it is forecasted to grow by 5 % (WTTC 2017).

Added value of sector I (Tourism and Hospitality)

Tourism shows increasing numbers and results; however, it is growing slower than other industries of Hungary. Even more, the absolute generated added value of the sector is growing by year to year but the distribution compared to the economy has just got back to the state of 2008's with the percentage points of 1.89.

Added Value of Sector I
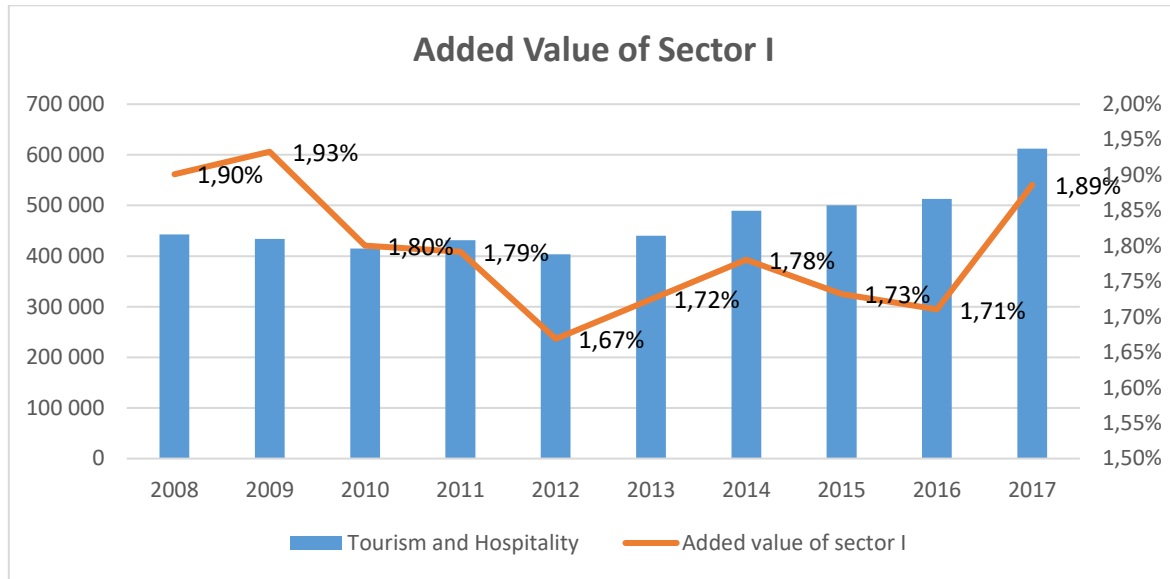
4. Figure Added value of sector I (KSH)

International tourism arrivals

According to UNWTO 15 785 thousand tourists have arrived at Hungary in 2017, which is 3.5 per cent higher than in 2016. Tourism receipts have reached 6 170 million US$ which has increased by 8.9 per cent since 2016. However, the international tourist arrivals were able to grow by 65.9 per cent, the revenues generated by tourism have only increased by 9.6 per cent in 7 years.

Number of tourist arrivals (000s) and change (%)

2010	2016	2017	Change (17/16)
9,510	15,256	15,785	+3.5%

5. Figure: Number of tourist arrivals in 2017 (UNWTO 2018)

Tourism receipts (million US$) and change (%)

| 2010	2016	2017	Change (17/16)
5,628	5,664	6,170	+8.9%

6. Figure: Tourism receipts in 2017 (UNWTO 2018)

Commercial Accommodation and Hotel market

The total capacity of commercial accommodation in Hungary is at around 350 000. Even though hotels have only 43 per cent of the total capacity, 75 per cent of the total number of guests and 89 per cent of the revenues generated by hotels in Hungary. The total hotel units in Hungary in 2018 July (the greatest number of hotels operates in July due to seasonality) was 1079 with the capacity of 147,9 thousand and room number of 61,2 thousand (KSH).
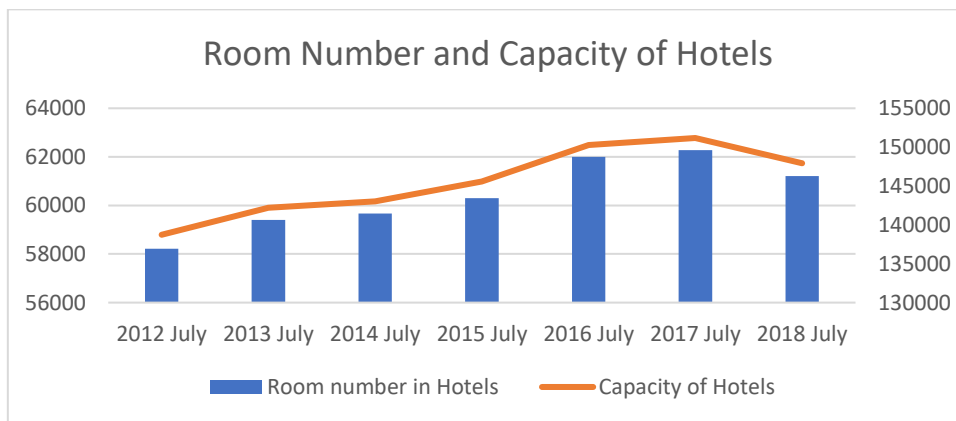

7. Figure: Room number and Capacity of Hotels (KSH)

Number of guests, overnights and revenues

The number of guests and overnights are increasing by year to year. Overnights have reached 22.4 million while guest nights reached 9.2 million in 2017. The distribution of guests is 48-52 per cent (native-foreigner), while the overnights' is 45-55 per cent. The average length of stay is 2.4 days.

Budapest is performing differently, 88.6 per cent of the overnights have been generated by foreigners there and the average length of stay is 2.4 days, which is below the national average.
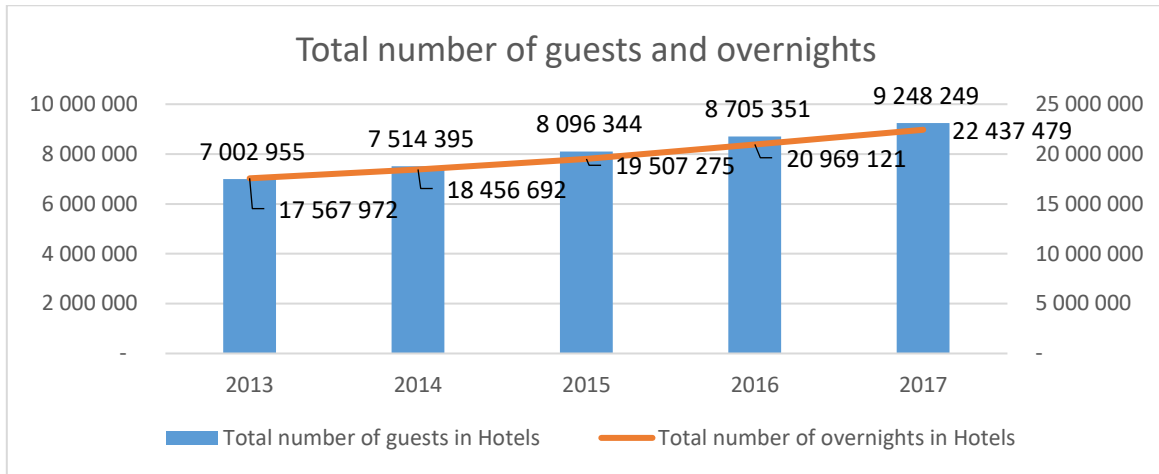
8. Figure Total number of guests and overnights (KSH)

Even though, the distribution of guest nights and overnights is almost 50-50, the revenues generated by foreigners in the hotel industry is 65 per cent, which mostly focuses on Budapest since the foreigners mainly visit only Budapest. The main season is summer, July and August are the most popular months, the greatest amount of revenues generated in this period. The season graph has not changed in the past five years.
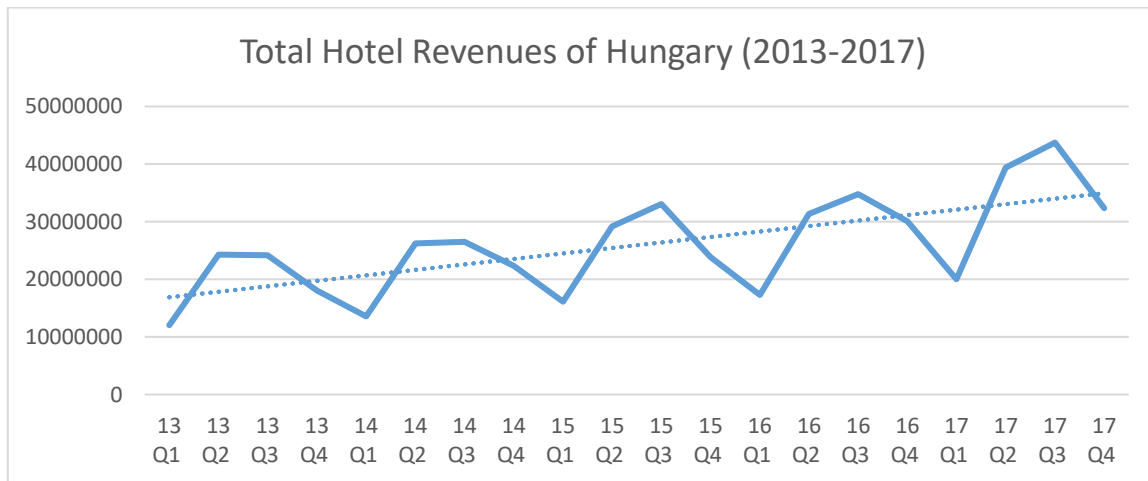
9. Figure Season graph of Hotel Revenues (KSH)

Main sending markets of Hungary

The main sending markets in 2017: Germany, United Kingdom, Austria, Czech Republic, Poland, Italy, USA, Romania, Russia, Slovakia (KSH).

Traditionally Germany and Austria always represented by appr. 60 %. As of the tourists taking advantage of the services of the travel agencies is not more than 10 %. It should be mentioned that the experts of tourism in Hungary always noted that the visitors/tourist do not spend overnights in the countryside. This trend seems to be changing, more and more people are traveling inbound.

Domestic tourism

According to the figures KSH (2017) 5.8 million Hungarians (National Tourism Dev. Strategy 2030) spent over 13 million guest nights in the 10 most popular cities of the country. The first 3 most popular cities are: Budapest, Heviz, Hajduszoboszló.

Most important motivation of the Hungarians participating in domestic tourism: VFR, (44.9 %) holiday, entertainment (42.3 %).

Balaton is the most important popular touristic region regarding spending overnights. The overall average is 4.1 guest-nights there.

Airport visitation

The most popular way of travel is air transportation, Budapest is growing significantly in terms of passenger numbers. 14.8 million passengers have arrived at Budapest Airport in 2018 which is 13.5 per cent more than in 2017. The year on year growth is higher than in Vienna, Krakow and Prague.
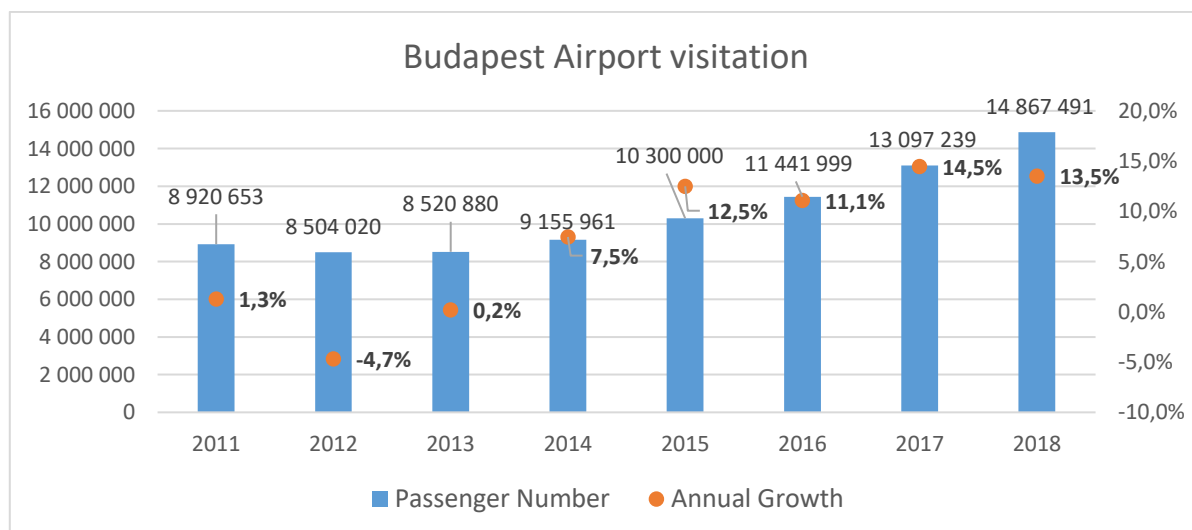
10. Figure Budapest Airport visitation (KSH, BUD)

It should be noted that the Szechenyi Card as paying method plays important role in the Hungarian domestic travel.

Szechenyi Holiday Card[1]

Szechenyi Holiday Card is introduced by the government in 2011 changing the Holiday Cheque. The aim is the same i.e. incentivize the Hungarians for domestic travel i.e.: spending overnights, eating out in a restaurant, participating on a programme etc. Therefore, the Szechenyi Holiday Card has several subaccounts to which companies might give the cafeteria.   Hungarian companies pay a considerable cafeteria amount for the Szechenyi Holiday Card of their employees i.e. instead of paying salary companies pay cafeteria, and the employee can spend and only spend it for the given purpose i.e. pay with it (no cash withdrawal) from the subaccount as a bank card.

The amount paid by the employer for the Szechenyi Holiday Card as cafeteria element has more favorable taxation than paying salary. Note: After the salary paid to the employee companies have to pay 21 % tax to the government.

Foreign companies and leaders are not favouring this option due they do not wish to spend their holidays in Hungary, and they cannot contribute the amount placed on the Card to real cash.

Travel Agencies in Hungary

Travel agency activity – tour operation and travel agent – is regulated by laws, and governmental acts. The main directive is 213/1996 (XII.28) and its modifications. The relevant directive meets the requirements of the 90/314/EEC Council Directive.

"In November 2015, the EU adopted a revision of the Package Travel Directive. The new Directive must be implemented by Member States before 1st January 2018 and will apply from 1st July 2018" (www.ecta.org 2018).

In accordance with this the Hungarian government in December 2017 passed the modification of the relevant legal act to become in force July, 2018.

Number of travel agencies –tour operator and travel agency - in Hungary in the last decade always was 1200-1500. In January 2017 their number was 1052. 246 was registered only for agent activity and 806 registered tour operation.

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[1] 55/2011. (IV. 12.) Governmental Act about how to use the Szechenyi Card

In Hungary only a registered company might carry out tourism activity and in accordance with the 213/1996 Governmental Act and its modifications for outbound activity must employ min. one person with tourism qualification (diploma, language skill etc.).

At the same time tour operators of outbound activity in order to meet the customer protection requirements must have financial deposit too. Min. financial deposit is HUF 5 million or 12 % of the net sales volume. In case of operating charter flight the min. deposit is HUF 20 million or 20 % of the net sales volume.

Tour operators of domestic travel also must have a min. financial deposit of HUF 0.5 million or 3 % of the net sales volume.

FUTURE

National Tourism Development Strategy 2030

In 2017 National Tourism Development Strategy 2030 was accepted and published by the government. The strategy emphases the importance of tourism and that the conclusion and evaluation of the previous development strategy for the period 2005-2013 was taken into consideration and the following strategic priorities were concluded:

1. Tourism together

Tourism with the local communities and the nature.

2. Family friendly tourism

Developing tourism attractions taking into consideration family friendly criteria.

3. Accessible tourism

Physical and info communication accessibility to develop accessible destinations.

4. Understandable tourism

Multilinguistic information.

5. Digital tourism

Taking advantage of digital technologies.

The CLVI. Law of 2016 emphasizes the focus is on the regions and declares that the destinations is the key to success.

The strategy also deals with the integral tourism policy declaring that the Hungarian Tourism Agency is the top institution of the tourism. At the same time the strategy allocates domestic and EU resources too.

The Hungarian Tourism Agency

The Hungarian Tourism Agency is the governmental organization responsible for the development and public administration of tourism in Hungary. Defining the tourism development strategy, supervising the utilization of EU funds and domestic budgetary sources dedicated for tourism development and managing the tourism brand of Hungary are all belonging to the Agency's scope of duties. Its main mission is to gain competitiveness of Hungary as a tourism destination and to promote the country in order to be more attractive for international, domestic and business travellers (MTÜ).

The Hungarian Tourism Agency's role:

1 To inform about the results of the industry

2 To promote the tourism i.e. to promote Hungary as a destination

3 To take part in working out the tourism related plans on all levels

4 To evaluate the tourism related processes in Hungary and also worldwide

5 To work out quality assurances, brands

Hungary has a considerable high amount of thermal springs appr. 2,500 as the country lay over a huge thermal water basin and the big number of springs is qualified to be medical. Therefore, the National Development Strategy 2030 pays significant role to the thermal springs and services that can be provided in connection with it. Past developments are must be highlighted, Hungary paid a huge attention to the thermal water and services to be developed already in 2000 with the Szechenyi Program[2].

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[2] Istvan Szechenyi was a rich count in the 19th century playing important role in the economic development of Hungary, ensuring financial resources for the Academy of Science and also building the 1st bridge – Chain Bridge – over the Danube. He is known as the Greatest Hungarian too. (The author)

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Turizmus.com XVIII. issue No.1-2 January-February 2018 (page 10-13)

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Case studies

to the selected Hard Skills of the MentorCert Skill Card

I. Strategic planning

Long Case

Case with the Ishikawa (Fishbone) method

Content of the Case

1. Company

Magic Wellness and Conference Hotel****

Magic Wellness and Conference Hotel is a four-star hotel, has a very high standard of service and works with a proven, qualified team. On the Booking.com site the hotel is highly rated. The professional staff has always been the main strength of the company. The management's main goal is to keep the guests satisfied at all costs.

The Hotel can provide the following:

Breakfast options: on weekdays from 06:30 am until 11:00 am, on weekends from 07:00 am to 12:00 am, high quality buffet breakfast or á la carte options.

Wellness: 1500 square meters of pool area including outdoor and indoor pools, for both sport and recreational purposes, and a sauna and massage. Inside there is a water slide, and they plan to make a playground next to the pool. They are planning to build at least one more, slightly smaller, pool for younger children.

Conference room: Equipped with a projector, suitable for 50 persons.

Check-out: 11:00 am, same on weekdays and weekends. The luggage room is available for storing suitcases of departing guests.

2. Case

The management noticed a decreasing trend in the four-star Magic Wellness & Conference Hotel. The average rating on Booking.com decreased from 9.5 to 9.1 from 2017 to 2018. The hotel wishes to take some action to keep the reviews above 9 points, so it will not lose its "excellent" status. To manage the problem, the staff have checked guest reviews and identified all the problems in different departments.
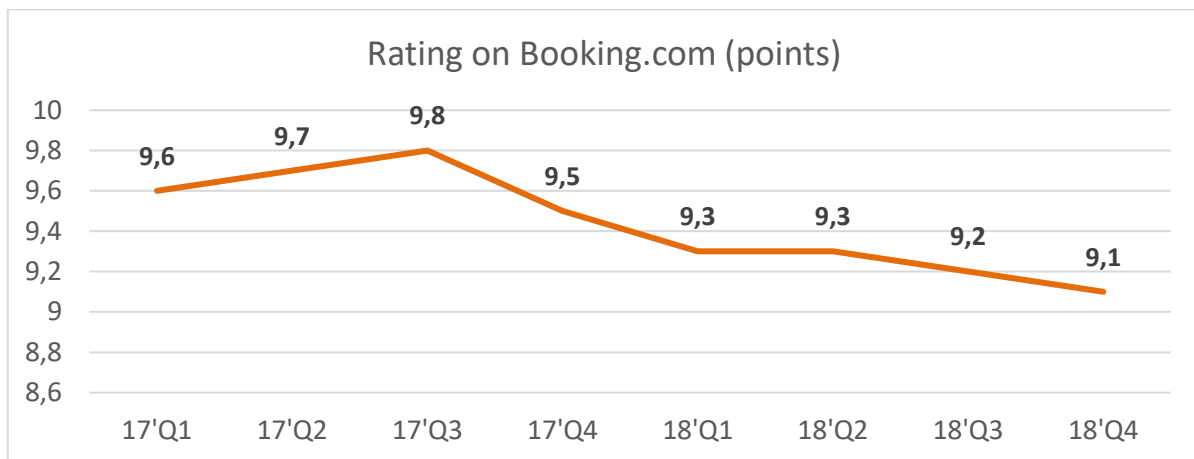

Figure 1: Decreasing trend of Booking.com rating (own edited)

The team have found a solution to be able to provide the best quality in the future as well, since the most important thing for the hotel is that their guests are satisfied with the whole experience.

The leader of the company

The leader of the company is George, a 45 year-old youthful man. George studied Hotel Management in Germany and worked in several hotels and positions before becoming a General Manager (GM). He speaks English, German and Spanish. George is a family-oriented person, he has a wife and 2 children.

The staff of Magic Wellness and Conference Hotel admires the passion and generosity of George. His leadership and strength come from the relationships with his colleagues. People want to follow him because of his personality, and he respects every member of the staff. His focus in leading is influencing people to make the atmosphere better. In this industry it is inevitable to be humble, George desires to serve, and values people more

than the position. However, his positive attitude and thinking are sometimes too optimistic.

He invests a lot of time and energy into his relationships which could affect the success of the tasks. Even though his character is strong, George mostly makes a decision with his advisors help, he does not like to act and decide alone.

Explanation of the case

Applying the given method

First step in using the Ishikawa diagram:

1. Create a head, which lists the problem or issue to be studied. The head contains the effect of a cause. In our case, the 'head' of the fish - the main problem - is that the rating of the hotel has decreased from 9.5 to 9.1. The hotel's goal is to keep the reviews above 9 points. To manage the problem, the hotel has checked guest reviews and identified all the problems in different departments.

2. Create a backbone for the fish (straight line which leads to the head). The line represents the route which has led to the problem and how it has changed by the different causes. The study starts with the Front Office and the comments given by the guests on Booking.com website.

3. Identify at least four "causes" that contribute to the problem. Connect these four causes with arrows to the spine. These will create the first bones of the fish.

4. Brainstorm around each "cause" to document those things that contributed to the cause. Use the 5 Whys or another questioning process such as the 4P's (Policies, Procedures, People and Plant) to keep the conversation focused.

5. Continue breaking down each cause until the root causes have been identified.

The Ishikawa diagram is best used for managers, who have an analytical mindset, and prefer to visualize the problems. It is a tool that uses a top-down approach. When communicating to the manager, the focus must be on what her/his advantages are, and how s/he prefers to deal with problems and the key is to recognize whether s/he prefers abstract thinking or prefers to visualize the problems. This method is suitable for people who prefer to envision problems. The different problems must be highlighted at the same time to solve them in one piece. It is best used when the causes of the observed problem have multiple roots, and the different roots are not interlinked.

The analysis of the key areas:

In the hotel industry everything depends on details. There are key challenges which were recognized as the main reasons for the significant decrease. Although these issues come from different departments, they must be managed as one. First, the departments (key issues) must be analysed one by one to find coherence and make conclusions.

Check-in and out time:

Many guests, who have their flights later in the afternoon or at night, often tend to stay in their room without permission, so the receptionists have to ask them to leave their rooms, causing a negative judgment on the person who asked the guest. If guests do not leave their rooms in time, the staff of housekeeping cannot begin cleaning them. The early check-in time (2:00 pm) causes problems, especially on weekends, and on some busy weekdays.

Staff:

The housekeeping staff (HK) uses their phones during working hours, having constant conversations and listening to music while cleaning, which disorient them from their duties. Moreover, these noises could disturb the guests as well.

The HK leader may fail to properly manage the daily cleaning plan. If the manager does not keep proper records of rooms that are occupied and those just recently vacated. Moreover, the HK leader does not have any supervisors or coordinators to help her on everyday duties or inspections.

The staff have a half an hour breakfast break together, this could take away a lot of time from achieving the pre-planned goal of the cleaning process.

There might be a problem at the Front Office too, trainees often have to stay alone at the reception for several hours a day.

The communication between different departments has to be improved, for example the wellness and housekeeping department should cooperate more.

Wellness:

The guests have some problems with our pools. The guests have already reported several times that the pools are not look like in real life as on pictures, many of them have problems with the types of the pool (the swimming pool does not fit for swimming, the thermal is not warm enough and the Jacuzzis are small). The gym is not developed well,

the machines are out of date and difficult to use. The hotel should provide new sport facilities or renovate the fitness area.

Conference:

Guests sometimes reported problems with the quality of the projector's image. This not happened so often, so this is not the main reason of the rating decrease.

Equipment:

Guests are satisfied with the smell and variety of the detergents that are used in the rooms, but the variety causes a problem for the housekeeping staff. The trolleys used are large, hard to navigate, and it is time-consuming and difficult to move them from room to room, especially if it is not organised well.

Sales:

Online promotions are effective, but in order to get increased bookings (especially direct), the team need to refresh the platform and invest more in marketing. The marketing team should be pushed and inspired for new innovative ideas and promotion.

*The analysis of the relevant departments:*

Front Office:

There were several comments where guests are mentioning the non-professional way of work at the reception. The hotel employs two trainees each semester and there are working hours when they are alone at the front desk. On one hand, the senior employees take care of the trainees but on the other hand, they teach them to be self-supporting and courageous in the way they create and maintain contact with the guests. The employees only interfere in situations where their help and support are unambiguously needed.

Many of the comments say that the reception is helpful and professional, but there are some where they criticise the attitude of the receptionists. According to the database, the guests who needed to stay longer in their room and had to be asked to leave, were approached by the trainees.

Housekeeping:

The housekeeping staff is not educated well enough and they do not behave like they should. There were comments which mentioned that the chambermaids were rude and did not understand the question. The HK staff feel comfortable in the Hotel due to the friendly work environment, they are often using their phones close to guests and listening to music. Furthermore, the rooms are mostly not prepared on time.

These comments lead to every bones of the fish, which ends up in:

Sources: https://whatis.techtarget.com/definition/fishbone-diagram
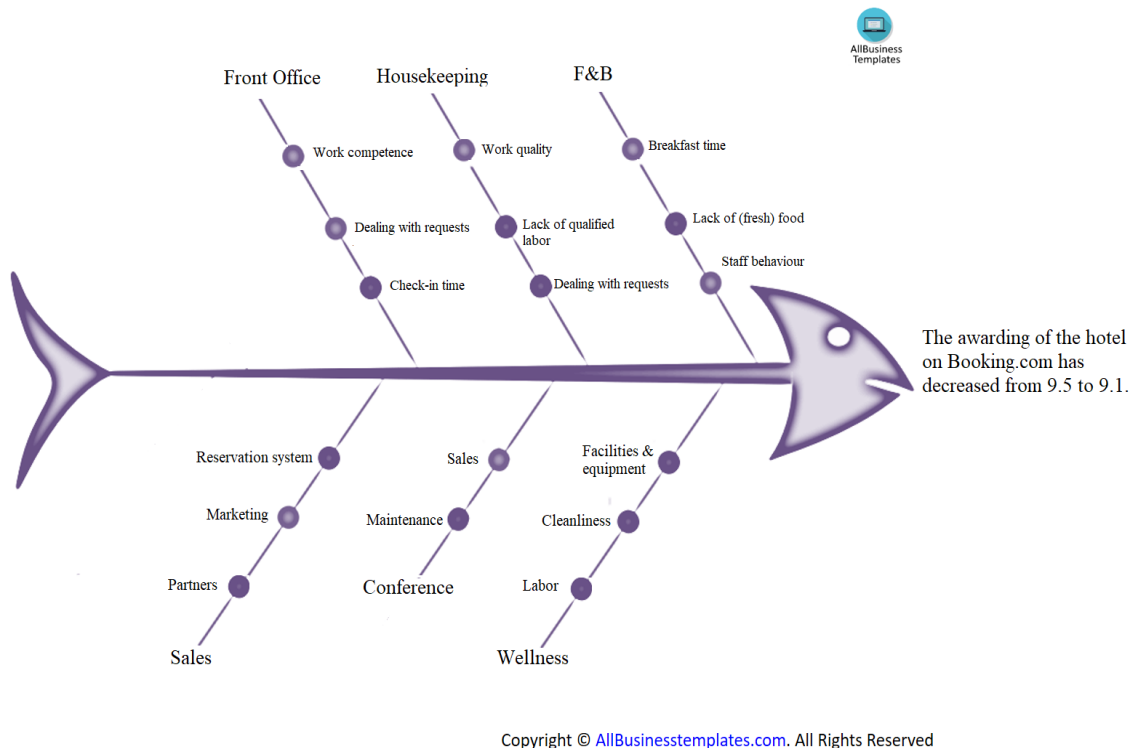
Word document: Hotel_Ishikawa_diagram

Using the Ishikawa diagram, the hotel found out the origins of the decreasing trend:

- The arrival rooms are not ready on time

- The trainees are not prepared well for every task

- The Housekeeping staff is not professional enough, there is no supervisor or coordinator role.

Managing the situation

Regarding the fact that the management's key value is to keep the guests satisfied at all costs, the first step is to tell him the exact problem lies in the fact that the rating of the hotel is decreasing, and it must be stopped before it drops below 9 points. Furthermore, George as a human-oriented person would be shocked by the fact that the decreasing tendency's main reason is the staff's attitude. He would do everything to keep up the existing reputation, so his advisory council must prepare the whole plan to manage the situation. He mostly relies on his advisors, so they should inform him about the decreasing tendency and after that they must focus on the prepared Ishikawa method and solution.

While communicating the issue to George the key issue of the staff must be highlighted. The mentor should tell him that he could be the same person as now but he must be more confident to keep the staff – especially the HK – motivated. Before starting the real conversation, the mentor must ask what George thinks about the company's position at the present, and what he expects. After that he has to show George the Ishikawa diagram and the prepared solution, the mentor must focus on his advisors too. The key is that George must be more confident if he wants to be more respected. The idea of a HK coordinator would be an ideal solution for him too.

Short Case

Strategic planning – Short case

Company and case

1. Company

Hotel Beacon (HB) is a three-starred hotel in the qualification of HOTELSTARS in Siófok. It has 150 rooms and the hotel lays on the shore of Lake Balaton, which can only used by the hotel's guests. The hotel operated only in the Hungarian peak-season, from May to September.

The hotel's main segments:

- individual foreign tourists
- seniors
- families
- other individuals

The hotel does not focus on corporate segment due its focus on the summer period. Balaton has always been affected by seasonality, many other hotels are operating the same way as HB does.

The hotel's price-level is a low-midrange, but attractive to tourists considering the competitors' pricing. Mostly breakfast is included in the offers. None of the competitors (which lays next to the lake) offer this attractive price level. Besides, every offshore hotel are four-starred ones which also have wellness and spa facilities.

Strengths of HB:

- Frequented, unique location in Siófok
- Entertainment facilities on the beach
- Sport opportunities
- Bars and shop nearby
- More than 95% occupancy in the summer

2. The Case

The hotel requires serious renovations due its current state. Most of the hotels in this region have been built around the 1970s and did not change in style. The owner of the hotel has just become the owner a year ago. He was a leader in a telecommunication management company, he does not have any relevant industrial experience. After seeing the market, he suggested to develop the hotel into a four-star wellness and spa complex and then the hotel will be able to operate all year. The Sales Director does not like this idea and willing to bring off the idea. The current and estimated OCC, ARR and REVPAR are not in the new project's favour, the investment would not be as profitable as he thinks, the investment would return in 15 years, but the expectation is 8 years. CAPEX of the investment: 10 million EUR.

The Sales Director's opinion is to renovate the hotel and continue to prioritize the existing segments. The renovation would cost 2 million EUR.

3. The leader

László is a 42 years old engineer-economist, who speaks Russian, English and Hungarian fluently. After graduation he started work in the telecommunication industry as engineer. He became a leader of a project team there.

He has great communication and problem-solving skills and learns very fast. His employees always respected him not only for his passion and knowledge but for his attitude too. He has been nominated as the leader of the year two times. He needed some atmosphere change, then he decided to move to operate a hotel, to a whole new industry for him without any experience.

Ask the participants to:

1) Raise one problem for face-to-face in the material without any solution!
   a) What arguments could you raise to proof László or the Sales Director's viewpoint?
   b) What do you think about the lack of experience as a leader in this industry?

2) Ask them to raise other problems for the face-to-face!
   a) What would you recommend for a hotel owner in Siófok?
   b) What do you think about the wellness and spa complex?

   c) What would you do in a case where seasonality affects the company's business that much?

3) Ask them to think over which methods can be applied!
   a) What method would be the best to solve this case?
   b) What do you think about SWOT analysis in this case?
   c) Which method is the best to compare hotels in an area?

4) Ask them how they would treat with that leader style!
   a) How would you start a conversation with László?
   b) What arguments would you recommend to the Sales Director?
   c) What is the best way to convince a leader like László?

II. Value creation models

Long Case

Case with the Pimento map method

Content of the case

1. Company

Neverland Travel Agency is an active travel agency in Hungary. Currently there are 10 employees; two of them have the responsibility of running a project on expansion of the market. From the beginning the company's vision was to expand to a global level and to be the leader of the industry.

Details about the travel agency
Specialized in:
- Outbound tourism
- Inbound tourism

Focus countries:
- Czech Republic, France, Greece, Italy, Poland, Romania, Slovakia

Priority segment:
- Families
- Groups aged between 35 and 50
- Seniors

The company specializes in leisure tourism, a negligible percentage of travelers use the company's services. Guests mostly use the agency's services for the purpose of VFR, spa and healthcare, skiing or other leisure opportunities.

2. Case

The current project is to extend supply and to expand to a global level. The project team had a task of finding potential new markets where the company could expand its products and services. According to the tourism industry's growth and trends a new destination has to be added to the existing portfolio to maintain the company's market position.
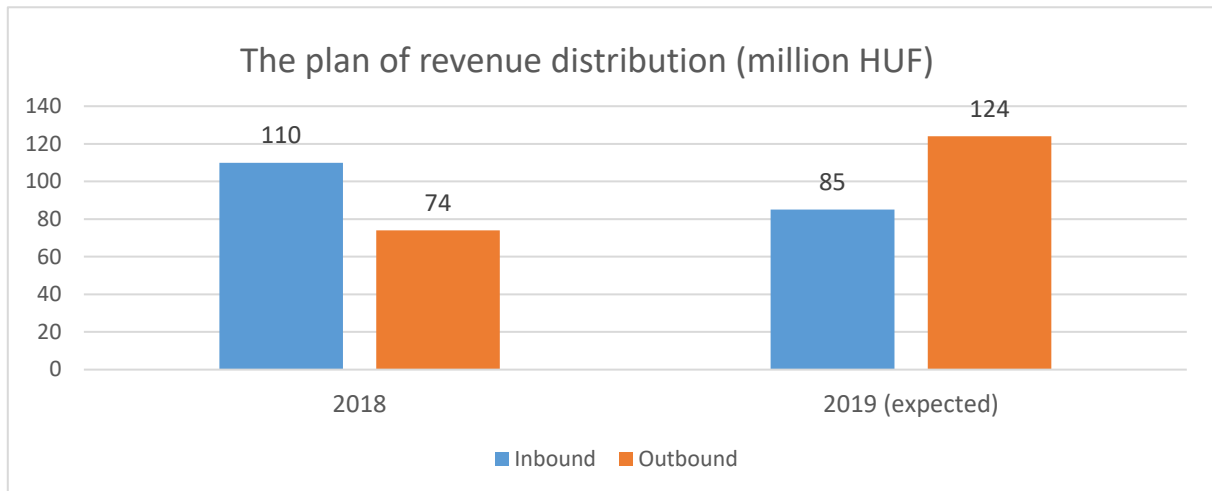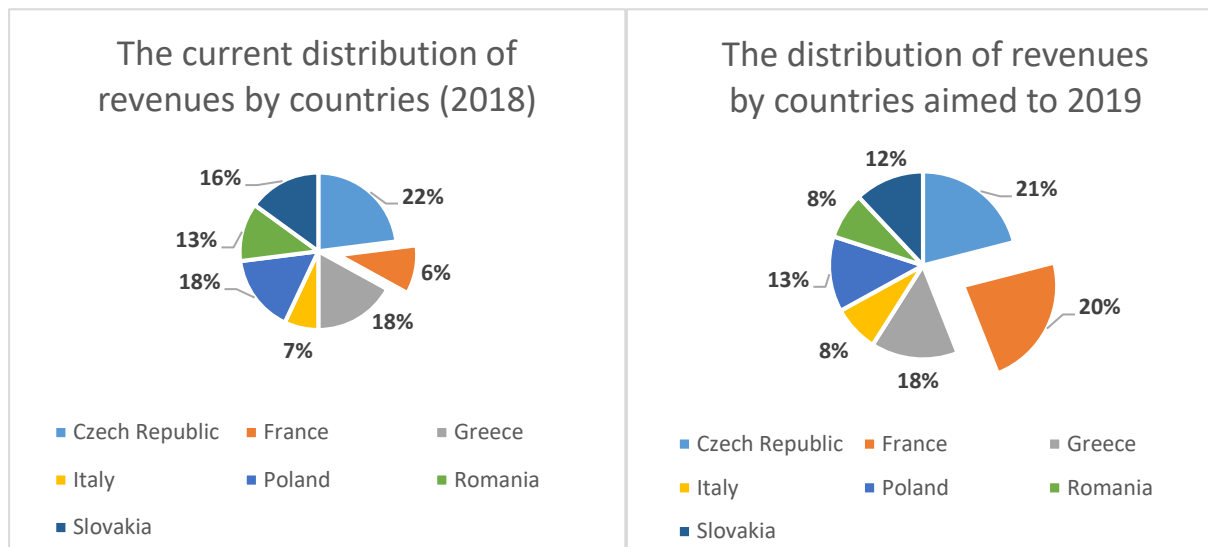
11. Figure: The plan of revenue distribution (million HUF)
(own edit)

France has always been an important market for building brand awareness and its cultural potential is uprising. The new destination is going to be the Loire-valley. The main goal is to introduce the French castles' culture to our customers as a new product. France was not a primary destination for the company until the project team's market research showed its gap, the leader does not know about the results yet.

In order to evaluate the likely success of the project the Pimento Map method will be applied.

The company's current and aimed revenue breakdown:
The company's revenues are mostly generated by inbound tourism, the plan for the future is to succeed in outbound tourism. Further opportunities lie in this segment.

Products and services related to France are expected to generate 23% of the total revenues in 2019 with the development of the new project.

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The European Commission support for the production of this publication does not constitute endorsement of the contents which reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

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The current distribution of revenues by countries (2018)

13. Figure: The current distribution of revenues by countries (2018) (own edit)

12. Figure The planned distribution of revenues by countries for 2019 (own edit)

3. The personality of the leader

The leader of the team is Jack, a middle-aged man who established the company on his own. He studied tourism in Switzerland, and he speaks English, German and Spanish. He worked as a Travel Agent for 2 years, Sales Director for 3 years and another 3 years as a project manager when he decided to establish a whole new company. He has always been a precise, career-oriented and stubborn person who can rarely be convinced by others. Despite that, he thinks that he works well in teams, but their colleagues do not like to work with him because of his arrogant style and methods. Jack always wanted to enter the international market, and always wanted to be the market leader. The company's results are promising but people do not enjoy in the company due to stressful environment. Jack mostly focuses on the results and barely pays attention to the people. Jack's greatest advantage in the industry is his experience and his entrepreneurial spirit. He doesn't distinguish between weekends and working days, and he expects the same from his colleagues. He is a person who makes decisions easily and no one questions his expertise. He knows his strengths and does not care about his weaknesses.

Most of the time he is alone in the office, or out of the office, so the employees cannot really see him. Due to a lack of communication with Jack and a lack of team spirit the environment feels strict and tough.

Explanation of the case

Apply the given method – Pimento map

The Pimento map is a method for evaluating a business plan. Eighteen questions are grouped around four main themes: the market, the sector, the financial aspects and the team. For the eighteen questions there are four answers, one of which is the most appropriate for ascertaining the strengths and weaknesses of a project.

The questions related to Pimento map cover all the terminology needed to respond to business planning by keeping the market participants involved. This is a simple and quick evaluation method for both business leaders and investors. The 18-question table is an annex to the study and 18 responses to the design of a new travel office product. The graphic representation of the Pimento map helps to answer the questions in a pictorial manner with 4 different colors within a scale (green-strong, yellow-good, orange-weak, red-very weak).

In considering whether the extension of the existing supply is necessary for the new Loire Valley destination, Figure 1 gives an answer.
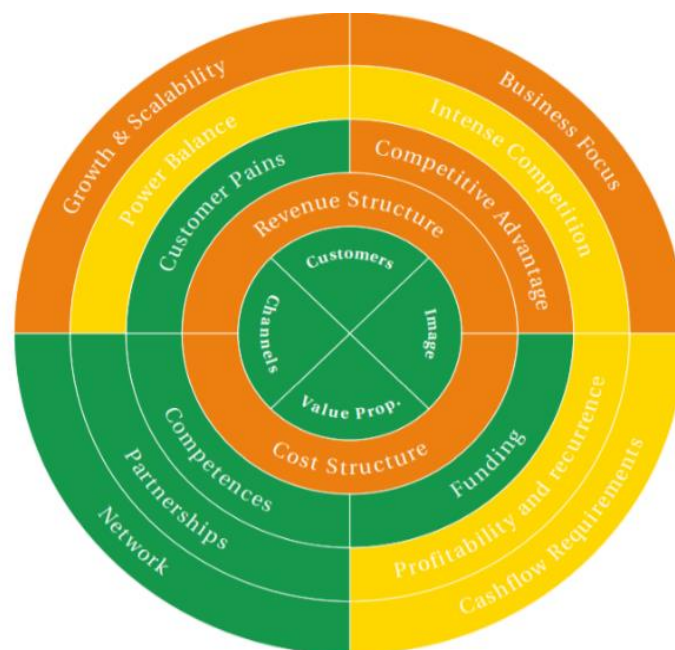
4. Figure Evaluation of the introduction of a new product from the analysis at pimentomap.com

Use the four themes about the project of the travel agency

The Pimento Map method can help to evaluate whether this project could be successful or not. Each theme assesses from different perspectives of the given project and gives more information about the potential opportunities and threats of the project.

- <u>The Market</u>: Is the market promising for the travel agency? Based on the answer given, there is a market where there could be huge demand for the product. In addition, the travel agency is in a relatively strong position to be able to negotiate with customers (travelers) properly. The demand is increasing for the region, the company must plan its market penetration plan. Based on the results, there is an opportunity for the product to achieve long-term growth in the given market if the penetration happens at the right time.

- <u>The Sector:</u> Can the project accomplish the strategy of becoming the main revenue generator for the company? The introduction of the new destination currently does not have a major competitive advantage over travel agency products with other similar destinations, which is not necessarily a disadvantage or a negative point. The external effects must be monitored in order to create and develop better and more attractive products. The target sector has no competitive market at the moment but the company has different competitors who could also reveal the potential in the Loire valley. There are several alternatives that companies can try in this case: bonuses, and/or focus on growth or smaller competitors. More attention needs to be paid to product development.

- <u>The Financial Aspects:</u> One of the most important issues in implementing a new project is whether the company has enough capital to fulfill the idea. It is inevitable that there is need to estimate possible outcomes of the financials. Firstly, is there enough capital, if so, then the business can be profitable within a reasonable time, but can it be sustained in the long run? The company can forecast using the region's average prices and adjust it to the needs of local spending. The agency is in a good position to introduce its product at lower prices when entering the market. It also has adequate resources in case the trip becomes profitable later than expected. Marketing and sales costs will significantly reduce after the company starts its first trips. In the current situation, there is no need for a large amount of investment. This does not mean that it is not necessary to invest capital into the project. In the first few trips it could generate a loss until it becomes popular by word of mouth and other possibilities created by marketing. It seems that the cumulated profits made so far make it possible to finance new markets.

- <u>The Team:</u> Does the agency have the team required to successfully complete the office business plan? The TEAM is the driving force behind the project. They are the people who help to find the best market opportunities to gain competitive advantage and convince investors (shareholders). The staff has all the necessary competences and experience (problem-solving skills, attitudes, creativity in the compilation of a travel package, change and willingness to change to strengthen the company's position). Teamwork plays a significant role in the sector, collaboration in the team and partner communication are also among the strengths of the travel agency and an important condition for achieving the goals set. The responsibility among members is harmoniously divided, which is a step to success. Limited market, strong competition or a lack of money can be overcome by a strong and skilled team. The only major setback is the relationship with the boss. The team faces a strict autocracy when it comes to decision-making, which makes it difficult to work as a team on the given project.

Overall, the travel agency's prospects and the viability of the project are encouraging. The market bears potential, the sector and the aimed segment is relevant, the financial background is stable, the team is professional, but has some significant difficulties. The analysis with the method used also shows that the idea of introducing a new destination is promising except for the fact that Jack is hard to work with.

How to know the leader and manage them
The project of a new destination could be a promising option for the company's main vision. The forecasted results are also encouraging but these are probably not enough for Jack, as it mentioned he does not know about the project's results yet. A person like Jack can hardly be convinced by others - especially if he has something different in mind. The team examined the market research on the existing focus countries and found the potential in the Loire-valley. Before starting the negotiation, the mentor must ask him if he has any plans about the exact expansion project.

Jack makes every important decision in the company, so the project will not start if he does not agree with it. The best way of negotiating with an autocratic type of leader is to highlight the possible risks and losses and talk about them as forecasted facts if the new destination is not going to be developed. Furthermore, he must be asked of his ideas and plans for the future, after that the mentor must try to guide him with questions until he recognizes the opportunities in France himself. The mentor should highlight to Jack the team's professional attitude and that he should change his leadership style to keep the company's staff.

The Pimento map shows the advantages and disadvantages of the project. Jack is going to question every red part and he will try to figure out himself how to manage them. The question should be how to establish the project, not where to establish it. This way the mentor must let him figure out on his own. He also going to consider the opportunities which the green areas have, so the mentor has to prepare for some obstacles because not everything will go as planned, Jack will try to add something more from his experiences. The key points which must be mentioned to Jack are the possible profits and success which the project could bring for the company, and the negative outcomes if he keeps up his current attitude towards his teammates.

Short Case

Value Creation model – Short case

Company and case

1. Company

Heywater Agency is a Hungarian Travel Agency which specializes in inbound tourism, specifically organizing tourists only to Hévíz. None of the other Hungarian regions or outbound tourism appears in HA's supply. The priority region is the Baltic States but Belarus and Ukraine are also favoured. The agency has a wide-range of contacts in these countries; it operates for more than 20 years now.

The fluctuation in the company is low, most of the employees work in the company since the beginning. All the employees speak Russian and English, the agency is the market leader in this segment.

There were several attempt on widening the existing product and service portfolio to Budapest and other destinations in Hungary but without any success due to lack of experience and knowledge of expansion.

Strengths:
- Market leader on a very specified segment
- Good reputation
- Consumer reviews are promising

Weaknesses:
- Limited clientele
- Limited growing opportunities

2. The Case

A market research based on the priority segment has shown that the clientele would visit and try further spa opportunities in Hungary such as Hajdúszoboszló. The leader of the agency is willing to expand so he wants to add Hajdúszoboszló to the supply. The issue is if the agency adds a new destination to its portfolio, then it would generate further competitors who could get the company's clientele.

The company's aim to keep its current position in Hévíz. Furthermore, the agency is willing to become the leader of the market in Hajdúszoboszló in 3-5 years. This would be difficult due to the hotel's pricing is not as flexible and negotiable as in a well-run business in

Hévíz. The agency would need to give up on its commission in the beginning period to be competitive at the new destination, and the return of it is uncertain.

3. The leader

The leader of the company is Boris a 52 years old Russian man who lives in Hungary since 1995. He is a very confident person who does not know how to give up on ideas and goals. He studied in Russia and speaks English and Hungarian. He knows every strengths and weaknesses of the region, follows the new upcoming trends.

He likes to work with his employees; in fact they are like a family and know each other since the beginning of the company. He likes risky management decisions and unstoppable if he wants to achieve something. Despite the friendly atmosphere in the company, he only listens to his wife.

If the expansion of the current product portfolio does not go well, it could lead to the company's bankruptcy.

Ask the participants to:

1) Raise one problem for face-to-face in the material without any solution!
    a) What do you think about the situation, is it worth to try?
    b) What do you think about the company's main goals, what is the key figure for them?

2) Ask them to raise other problems for the face-to-face!
    a) How do you see travel agencies today?
    b) What do you think about the destination?
    c) How do you think the business is going?

3) Ask them to think over which methods can be applied!
    a) What method would be the best to solve this case?
    b) What are the opportunities for the agency?
    c) Which method is the best for a market penetration strategy?

4) Ask them how they would treat with that leader style!
    a) How would you start a conversation with Boris?
    b) What is the best way to convince a leader like Boris?

III. Understanding the ecosystem

Long Case

Case with the Backcasting method

Content of the case

1. Company

Rubicon Hungarian Restaurant
Rubicon Hungarian Restaurant (RHR) is a restaurant featuring Hungarian folk art in the heart of Budapest. It was one of the first privatized restaurant in the area. The company is very popular; it has plenty of returning guests. Foreigners also prefer to visit RHR to taste national cuisine. Most of the revenues are generated between 6 and 11 pm. RHR works with local suppliers to keep all the resources fresh and real. The staff of the company is like a family, most of the waiters and chefs have been working there since the opening. The company's main goal and vision is to provide unforgettable service to the guests to keep them satisfied. Furthermore, they are willing to earn the "Green Restaurant" award in five years.

| Strengths	Weaknesses
- Frequented location in the heart of the city - Professional staff - Unique product and service - A history of more than 25 years	- Staff turnover is high, especially among part-time staff - High costs, especially labour costs - Lack of promotion - Low profit margins
Opportunities	Threats
- Budapest is more and more popular - The demand for quality products is growing - Unique, well-known brand	- Unreliable and expensive suppliers - New entrants in the market with niche products - Changing trends for the young generations

14. Figure: SWOT Analysis of RHR (own edit)

RHR could face difficulties if they are not willing to change their business profile for the upcoming trends.
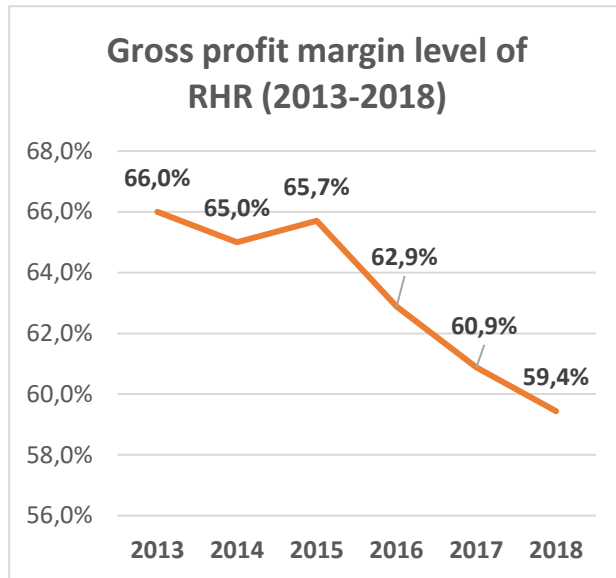
2. Figure: Gross profit margin level of RHR
(own edit)
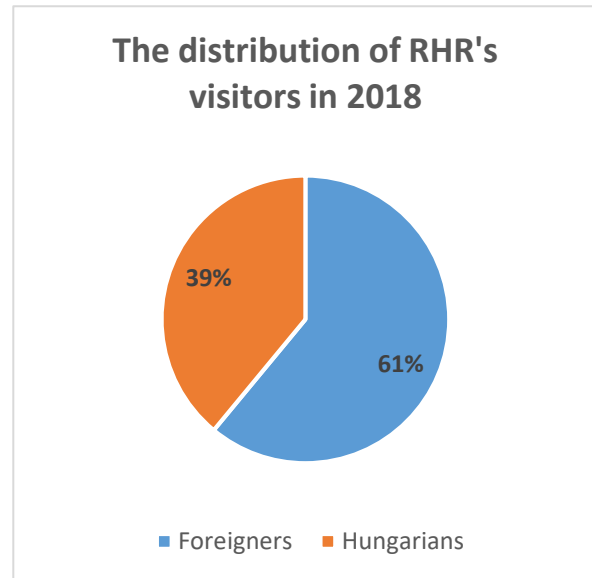
3. Figure: Distribution of RHR's visitors in 2018
(own edit)

Although the restaurant's revenues have increased by 19 percent since 2013, its cost of goods sold has grown by 42.3 per cent. The suppliers increase prices which makes it difficult for RHR to maintain its financial position. Most of the visitors are foreigners and by the purpose of dinner; they spend one and a half hours on average in RHR.

2. The case

The globalization and changing trends are affecting RHR's business as well. The aim is to provide the existing service in the long term, so the company must adapt its profile to the new trends. Word of mouth and internet recommendations have become one of the most relevant promotion tools. Being a green and eco-friendly restaurant provides more possible guests. The company is willing to earn the Green Restaurant award which means they must use environment friendly solutions and methods in the restaurant. It could extremely increase cost of sales. The task is to become a Green Restaurant and to increase gross profit margin level in the long-term.

3. The leader of the company

The leader of the company is Eszter, a 46-year-old woman who succeeded the restaurant from her father five years ago. Eszter is married with two children; the whole family is hospitality-oriented. She studied tourism and hospitality at Budapest Business School, participated in many hospitality related conferences and exhibitions as a student. She speaks English and Hungarian.

Eszter used to work in several departments in restaurants before succeeding RHR. Her father always involved her in operation and planning, she became very passionate about the business and always respected her father for his achievements. Her employees also use two words for her personality: passion and generosity. However, she feels that she became the leader of the company too soon, she does not feel she suits the position yet. The manager of the company (Ádám) does not like the way the ownership changed.

Eszter is a very energetic leader with a very warm heart. She can hardly say no to guests even if it should happen sometimes. Her energetic style results in some non-precise features from her e.g. she would forget deadlines and meetings if her assistant does not mention them to her. She does not really know how to lead, instead she likes to do everything on her own. The staff is frustrated since the change of their leader, Eszter is not like a team-player.

Content of explanation of the case

Analysis of key areas

Before setting up the plan for the business model change, Budapest's restaurant market must be overviewed.

Budapest has a growing potential, the number of tourists and the overnights are increasing from year to year, according to KSH (The Hungarian Statistical Office) the number of overnights in the capital has grown by 22.4% since 2012. According to EUROMONITOR, Budapest is the fourth fastest-growing tourist destination in Europe. The city can be reached easily by low-cost carriers, this is one of the main reasons why the youngsters choose Budapest as their destination, on the other hand, the low price level is attractive. Tourists even more prefer restaurants where they use local resources and ingredients. Globalization also took place in the heart of the city; any kind of foods and brands can be found in the shopping areas.

According to KSH, 85.9% of the tourists and 88.6% of the overnights were generated by foreigners in 2017 in Budapest. RHR's guests are mostly foreigners (Figure 3), the company could make an advantage of the increasing number of foreigners, who generated 91 percent of total hotel revenues in Budapest in 2017.

Number of restaurants in Budapest (2011-2018)
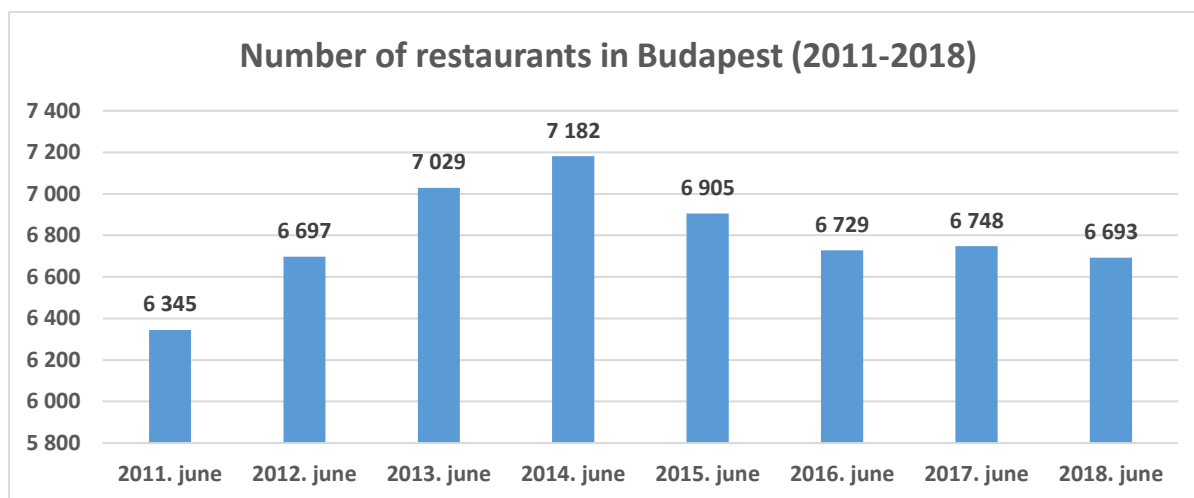
4. Figure: Number of restaurants in Budapest (2011-2018) (KSH, own edit)

The number of restaurants in Budapest stagnates around 6,500 units. Even small buffets are included in the statistics, RHR has the advantage due its location.

Applying and the explanation of the given method
The method is used in situations where there is a normative objective and fundamentally uncertain future events that influence these objectives. The knowledge about the system conditions and the underlying social dynamics can also have a powerful impact on the environment but are unpredictable. The desired future cannot be achieved by simple extrapolation from the present arrangements but needs a fundamentally different approach to meet the social expectations.

Backcasting, on the contrary, starts by defining a desired future (e.g. vision) and then looks back to assess what would be required in order to get there. It can enable stakeholders to introduce more imaginative new ideas – opening up the dialogue to a future we can create.

Instead of extrapolating the present to predict the future, *interpolating* the future from the outcome is desired back to where the company is staying at the moment and define the values in between — i.e. the roadmap needed to arrive at our intended destination.

The Backcasting method is adaptive in its steps based on the specific context under which it is applied, the stakeholders involved, and which complementary methods are being used within the broader foresight exercise. The result is a process that can be considered more as a set of guiding principles than as a strict process.

Domain and Demographics – First, the team needs to clarify the issues of the current state and identify which areas are to be targeted. This stage also involves the identification of all key and relevant stakeholders.

Future Vision – The team defines and describes a future in which the problems and issues identified have been solved. This involves creating future scenarios whereby the problem has been solved by reaching the stated objectives.

Session – The team develops possible steps on how to reach the future vision from the present, addressing the variety of dimensions (i.e., technological, cultural, social, institutional and organizational) that require consideration. This step also includes developing multiple options from which the best option can be assessed, as well as addressing the feasibility of the possible steps involved.
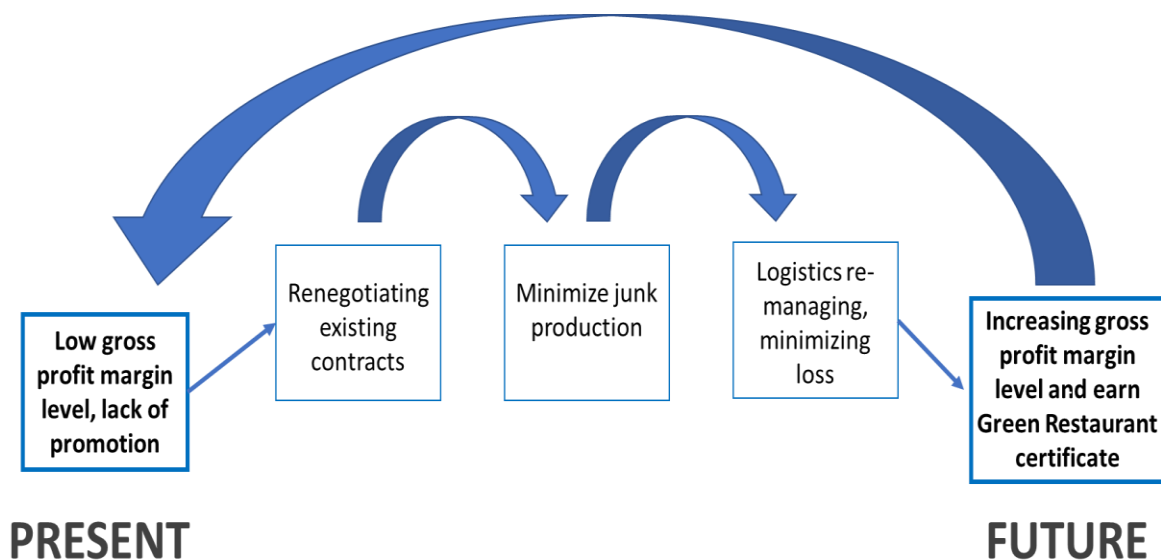
5. Figure: Backcasting method for RHR (own edit)

Key steps of the Backcasting method
RHR's financial position is stable but cannot generate further profits in its current state. The two key profit elements must be analysed. Further revenues can hardly be imagined for the company in the existing competition, there is only limited opportunity to increase prices, which would not generate the aimed result. The other option is to decrease costs, which seems a promising solution.

The following steps would make the plan possible:

Supplier contracts renegotiation: There would be an option to change the existing suppliers to other ones but that would not fit the requirements for the Green Restaurant since other suppliers mostly use less environment-friendly ingredients. Firstly, renegotiating the contracts would be a win-win situation for both the suppliers and RHR, too, the suppliers could be nominated as a 'positive' and 'eco-friendly' partner, and RHR could lower its costs and keep its existing fresh material provider.

Minimizing junk production: Junk production, water and energy consumption, air pollution are also analysed when Green Restaurants are certificated. There are plenty of 'environment-friendly' machines in the restaurant. From this perspective, junk production is the only issue for RHR since the company cannot really deal with that amount of junk in the middle of the city. The solution would be to use less plastic.

Logistics re-managing and minimizing loss: There were plenty of losses in the numbers of ingredients and fresh food due to logistic and storage issues. Restructuring the whole system and hiring a person responsible for this matter is the solution for this issue.

Managing the situation

Eszter has never been a leader before, she lacks experience in managing operations, however she was tried to be involved by her father. The mentor must tell her the whole situation, has to know how operations worked in the past and adapt them to Eszter's personality. She needs to be aware of what the current situation is and what the employees think of her style.

The mentor has to visualize the company's current position after the succession; the gross profit margin level is decreasing. However, her passion for hospitality is indisputable, Eszter likes to solve problems on her own, and this should not be the way to deal with situations in this industry. Eszter must adapt her work experience and use it as her shield. A leader like Eszter can easily be convinced if her father is mentioned as an example.

In this case if the mentor grabs Eszter's attention, the mentor should show her the method of Backcasting with the explanation of its steps. A hospitality-oriented person with plenty of experience would not contest the upcoming facts of changes in the industry, so she just needs to know the exact steps and parts of the plan. The mentor should highlight the fact of working as a team since she often forgets to think before acting. Allocation of the tasks would preserve the atmosphere of the restaurant which most of the staff like to work in.

Short Case

Understanding the eco-system – Short case

Company and case

1. Company

Fisherman's Restaurant is a traditional Hungarian restaurant in Siófok. FR offers only quality selection of fish meals on its menu. The restaurant stores its own fishes in a pool near the main building to provide the best quality and service for the guests. The building has a special look with its wood-based furniture and design. FR has one of the best price-quality index in Hungary.

The most number of the guests visit the restaurant in the summer but due its uniqueness Hungarian people are visiting the restaurant quite often at low-mid season too, from all over the country. FR is not interested in organizing events. The restaurant earned the "Best quality service" award in 2016, and the "Best Hungarian restaurant" in 2017.

Key strengths of Fisherman's Restaurant:
- The restaurant is 50 meters walk from Lake Balaton
- Unique product and service
- Traditional cuisine and theme
- Environment-friendly ingredients, materials and methods

2. The Case

The owner of the place faces difficulties despite the reputation and the successfulness of the restaurant. Growing opportunities of the business are limited due its storage, kitchen and guest area have lack of place. The negative reviews are only based on the tightness of the restaurant. The only opportunity to expand is to buy the settlement next to the place.

The owner asked some consultants about the case and they suggested concentrating on the existing business by increasing prices due to the outstanding reputation of the restaurant, expansion could affect the quality of the product and service negatively.

The owner intends to buy the land next to the restaurant despite the viewpoint of the consultants and the directors, whether it could transform the current brand image.

3. The leader

The leader of the company is Sandor, a 62 years old hospitality passionate friendly man. He always wanted to work in a restaurant since he was a child, running a restaurant business was his dream. He speaks only Hungarian, he asks for help of his directors if it is necessary to communicate in English.
Sandor never gets embarrassed if he needs to join into work in the kitchen or in serving, he always thought this is the way how he wants to lead and motivate his employees. His attitude and charm makes the place's atmosphere.
Despite the passion and professionalism of Sandor, he was never good in finances and management decisions, he always hire consultants to make conclusions. Besides, he always decides alone without the opinion of his employees.

Ask the participants to:

1) Raise one problem for face-to-face in the material without any solution!
    a) What would be the solution for FR's future success?
    b) What could be the possible come out of the situation?

2) Ask them to raise other problems for the face-to-face!
    a) What would you recommend for a restaurant in Siófok?
    b) What do you think about the idea of expanding?
    c) How much do you think seasonality affects restaurant business?

3) Ask them to think over which methods can be applied!
    a) What method would be the best to solve this case?
    b) What are the opportunities and threats for FR?

4) Ask them how they would treat with that leader style!
    a) How would you start a conversation with Sandor?
    b) What do you think about the leader's personality?
    c) What is the best way to convince a leader like Sandor?

IV. Futures

Long Case

Case with the Future User method

Content of the case
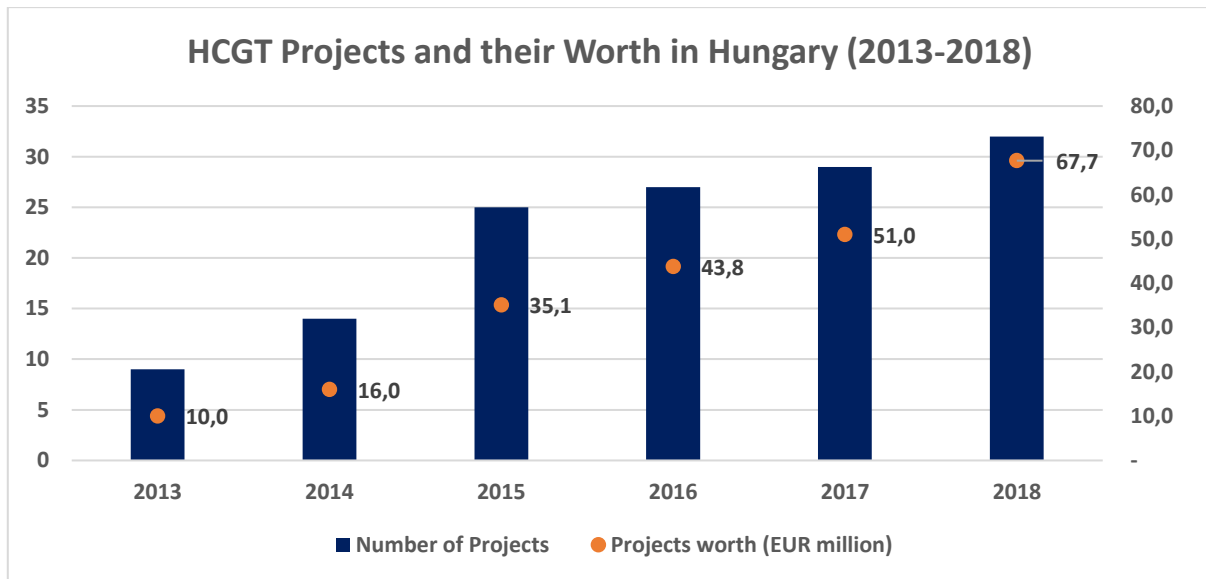
1. Company

Harden Consulting Group for Tourism
Harden Consulting Group for Tourism (HCGT) is a privatized company for making feasibility studies for tourism-related investments in Europe. Many projects have been achieved through the support of HCGT. The company's main goal is to develop the cities' infrastructure and services for tourism. Beside that it aims to deal with companies and investors to raise their prestigious position in the industry with further projects. Their main target market is Budapest for the next few years.

Staff: HCGT has six employees including the CEO
- Director
- Associate Director
- Consultant
- Junior Consultant
- Auditor

Services: HCGT provides professional solutions for companies and investors too. The following services can be found in HCGT's portfolio:
- Management consulting services for hotels if there are issues or financial instability
- Expansion or restructuring consulting
- Feasibility studies for hotel developments all over the world
- Find the best financial solution for projects (Management, Leasing, Franchise or Hybrid)
- Provide market research for relevant regions and markets

15. Figure: HCGT Projects and worth in Hungary (2013-2018) (own edit)

The number of projects has been growing since 2013 as the value of the projects also increases. There were less employees before 2015. After that the company needed to hire more consultants due to increasing demand.

2. The case

The company has staff shortages and the number of projects is increasing by year to year. HCGT has difficulties due to its employees. The government is willing to give a huge role to HCGT in the new national project. The main task is to identify the future users of Budapest and create an agenda and time-table for possible development opportunities for the new segment with the vision of Budapest as a smart city. What kind of expectations the younger generations will have in 10-15 years, and how will Budapest change and adapt to it?

3. The leader of the company

The leader and founder of the company is Craig, a 58 year old entrepreneur. Craig has a son from his marriage, but he has been divorced for 9 years and focuses only on business. He studied a BA in Business management in Vienna and an MSC in Finance in Frankfurt. He speaks English and German.
Craig worked for several companies before establishing one; he worked in a Hotel as Sales Director, after that he was a consultant for more than ten years, then he became a

General Manager in Vienna for three years. He missed consultancy so he went back to it by establishing a regional company in tourism consultancy and project development.

Craig is a charismatic leader, he relies on his charm and confidence; their employees respect him because of his knowledge and experience, but fear him because of his attitude if a project does not go well. He has been a leader for more than 20 years and he does not remember how it feels to be a subordinate. His business is his life since he divorced. He respects every member of the team, however he does not know how to show it.

His leadership is not favourable since every project - including its success - is attributed to him.

Explanation of the case

Analysis of key areas
Budapest
Before setting exact plans the company must explore its target market.

Budapest is a city where there is a unique combination of favourable natural conditions and historical heritage, cultural, gastronomic and bathing facilities. The Buda side of the Danube has the magnificent panoramic Gellért Hill, a sprawling site for thermal baths, with its royal palace, Matthias Church, and Pest with rich treasures, and fantastic Art Nouveau buildings. The Hungarian Parliament has been named as the most beautiful parliament in the world. In addition to the historical values, there is also a various culture in Budapest: the festivals, theatres, museums, concert halls and sporting events of the Hungarian capital could compete with any other prestigious city in Europe. Margaret Island provides great relaxation opportunities despite the noisy everyday life of Budapest. Globalization also took place in the heart of the city; all kinds of foods and brands can be found in the shopping areas. In addition, it is also very attractive to tourists (especially for youngsters) as the price level is low.

The public transport system is well-developed, and every part of the city can be reached by metro, tram, trolley, suburban railway or bus. The city tries to innovate solutions for sustainability in its transport system; it provides MOL Bubi bike rental, GreenGO electronic car-rental, MOL Limo electronic car rental, Donkey Republic bike rental.

The number of guests and hotel nights has been increasing:

Evolution of Guest Nights at Hotels in Budapest (2008-2017)
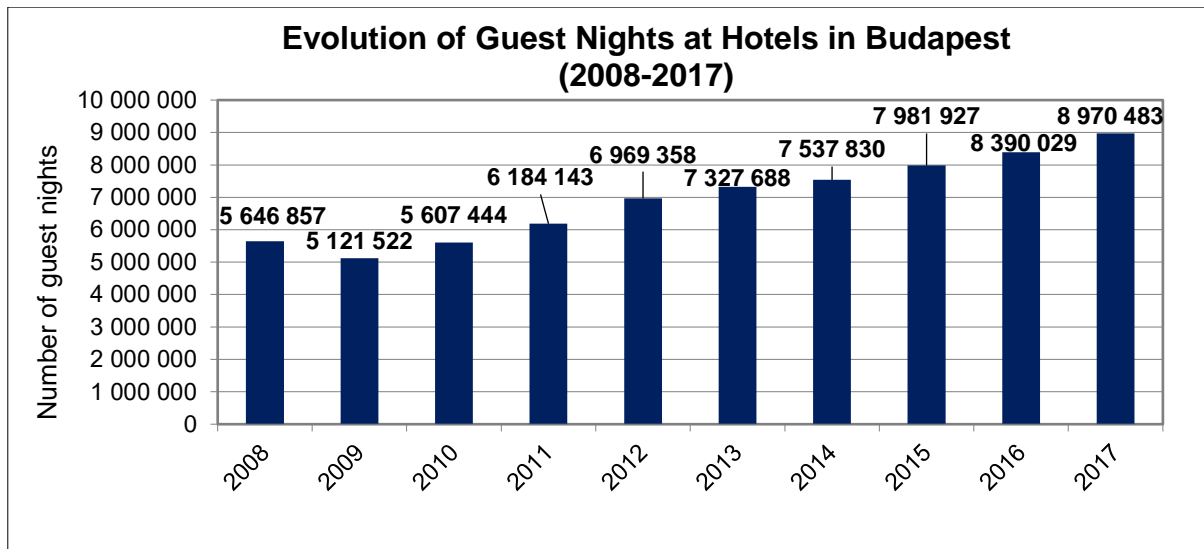
16. Figure: Evolution of Guest Nights at Hotels in Budapest (2018-2017) (KSH, own edit)

Tourism in Budapest has grown explosively over the past few years, the number of guest nights in hotels has been increasing from year to year. 2017 was a record-year in terms of guest nights due to FINA 2017 (worldwide swimming competition), however in 2018 Budapest generated even more guest nights without any large-scale events and it is expected to grow further. According to EUROMONITOR Budapest is the fourth fastest-growing tourist destination in Europe. This is largely due to lower-priced (mainly under-priced) hotels. Airbnb is getting more and more popular, as well as other low-cost carriers in the area of Central and Eastern Europe.

Applying and explanation of the given method

Future User creates a profile of a user within a targeted demographic by comparing similar groups over time. It can be used to expand a study of existing customer personas, to identify the user needs of a specific market segment in the future, to identify similarities and differences in values, attitudes, and behaviours between two customer generations. Every user persona tells a story. The common practice is to develop personas for your market segments as you know them today. The Future User method extends the classic persona used in design marketing and sales. This method lets you develop smart profiles of your future customers, by relying on current evidence and historical facts.

By putting the persona of the future user or customer in the context, it will create a clear view of that user's buying habits, beliefs, motivations, lifestyle, and more in the future.

Future user can be used to analyse consumers, business buyers, or any other user role. Some groups have adopted this method to even compare different products, business models, and international markets. Ultimately, it can develop multiple profiles over time

for two different customer segments, or users, looking at how they compare at similar points, as well as how they have changed over time.

The steps of the method:

1. Draw a box that represents the primary customer today. Name the customer and note his/her age today. A developed detailed profile (persona) is helpful while using data from interviews, generational studies, surveys, market reports, etc.

2. Draw a second box to show this person in the future and use an arrow to connect the two boxes. Note the customer's starting age. Discuss this person's views, behaviours, and choices in the past, and how they have changed over time.

3. Under the first box, draw a third box that represents the future customer as he/she exists today. Name this future user, and his/her age will be the same starting age as the first customer. A developed detailed profile (persona) is helpful while using data from interviews, generational studies, surveys, market reports, etc.

4. Draw an arrow forward from the third box that connects to a fourth box for the future user. His/her age will be the same as today's customers.

5. Compare the two people at their starting ages, the targeted ages. It might be helpful to develop a profile of the future user, which will include a mix of dominant generational values, similarities with today's customers and new differences extending from the young future user today.
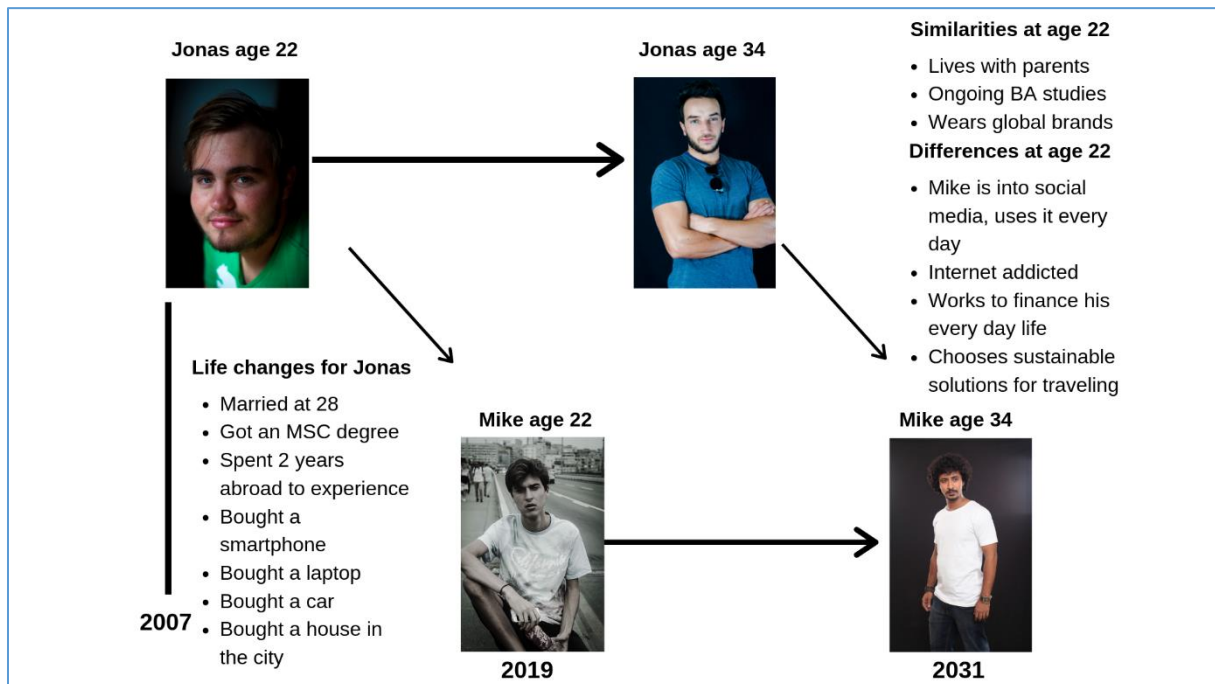
17. Figure: Future user (own edit)

As the future user method shows: the consumer of tomorrow will be a technology-oriented, busy and environmentally-friendly person. As the analysis of Budapest shown that the younger generations intend to visit Budapest with the purpose of leisure due to its low-price level, they can be attracted by making conclusions of Mike's future preferences. The younger generations are highly relying on word-of-mouth.

Key motives for the future consumer:

Sustainability: The customer of the future intends to use environment friendly solutions for travelling. There were steps taken in Budapest to provide bikers with the opportunity to travel to work (or elsewhere) by constructing bike paths, but Budapest bears even more potential in this matter. Some parts of the city cannot be reached by bike or by foot. Furthermore, accessibility is a global problem in the city.

Technologically developed: Budapest needs up-to-date information about its sights and local network access for its future visitors to locate those sights easily. Public transport requires different ticket options which makes the system hard to understand. The public transport system requires further developments to make it easily understandable and usable for foreign tourists.

Safety: Budapest is also known as the capital of nightlife, leading to the need to ensure security day and night.

<u>Public transport system development</u> is under construction; further bike path expansion, information updates, and security restructuring are needed in Budapest. HCGT created its agenda to develop the city's infrastructure but they found out that they need more employees to complete the project.

Managing the situation
Craig has never worked with any government, he has no experience in doing that. The mentor should mention that the procedures will be more burocratic than before. At first, they must imagine the situation in one piece together.

The mentor must mention that the company has staff-shortages for this work and must employ more consultants to complete the work. Craig had many difficult projects with this team and never had to employ more (except the expansion in 2015) since they managed to complete the tasks in time. A leader like Craig is difficult to convince, so the mentor must highlight the possible risks if they lose this project, such as losing the market position and reputation in the CEE market if they cannot complete the project in time.

In this case the future user method is something new for Craig. A business-oriented person needs real arguments and statistics about the market they are going to target. Leaders like Craig often act differently in prestigious situations, so the mentor must tell him that they should not work differently. Even though this is going to be the greatest opportunity in the company's life, it is a project just like any other. They must function as a team just as they used to.

Short Case

Futures – Short case

Company and case

1. Company

Iconic Management Consulting Ltd. (IMC) is a management consulting and project development company in Hungary which operates in several industries, such as telecommunication, tourism-health and sport, education, insurance and retail. Most of the projects focus on Hungary but the consulting services are popular in the CEE (Central and Eastern Europe) region as well.

The most profitable departments of IMC are retail and telecommunication; education and insurance run on an average, and tourism generated loss for the third year in a row in 2018.

The company's main strengths:
- Experienced and well-known staff in the industry
- Reliable service, the clients have never complained about the results
- Stable financial position despite the generated losses
- Satisfied employees; above-the-average salaries (compared to competitors)

The company's key threats:
- Many famous global competitors
- Huge competition for tourism, health and sport-oriented projects
- Investors are loyal to the competitors

2. The Case

Budapest as the sport's capital in 2019 needs to be developed as to infrastructure. The government has announced a new way of application for the best project which could be feasible in the next 5 years. IMC is willing to participate with its ideas. The plan is to set up a schedule for the upcoming events and ask the locals about their current needs (in general).

More than 50,000 people have been asked and the survey showed that they are dissatisfied with education and they feel as if they were not properly educated after college to become a full-time employee. In fact, the locals also said they were not interested in any sports or tourism related investments in the capital. The results of this

research could act as a break-through point for IMC in the education industry, but this would mean that they will not compete for the government's announcement.

Some of the experts said IMC should stop operating in tourism and the sports industry due to its market size but the owner of the company is not willing to give up on this segment because of its growing potential. Furthermore, Budapest has become the Best European Destination so this could be the last chance to grow on the market.

3. The leader

The leader of the company is Peter a 60-year-old expert. He studied Finance and Management in the USA. He speaks English and German fluently, and understands Hungarian. His dream was to establish a company which is related to real-estate business, he has partly achieved this. He worked as a consultant in the USA for more than twenty years, then he met his wife and they moved together to Hungary, where he established IMC.

His aim was to get into the real-estate business and evolve its infrastructure, but the demand was characteristic in telecommunication and retail business. His knowledge about management systems is outstanding, but Peter is not that confident and charming as he looks. He rarely talks to his employees and is hard to deal with. The atmosphere of IMC is one of the weaknesses of the company.

Ask the participants to:

1) Raise one problem for face-to-face in the material without any solution!
   a) What would be a better project for IMC to focus on?
   b) What could future bring for IMC if it opts for education?
   c) What could future bring for IMC if it opts for tourism and sport?

2) Ask them to raise other problems for the face-to-face!
   a) How do you see the consulting and project development business in Budapest?
   b) Which project do you think could be more profitable for IMC?
   c) What would you do if you were an employee at IMC?

3) Ask them to think over which methods can be applied!
   a) What method would be the best to make a decision between the two projects?
   b) What are the weaknesses and the opportunities of IMC?

4) Ask them how they would handle that leader style!
   a) How would you start a conversation with Peter?
   b) What do you think about a leader like Peter?
   c) What is the best way to convince a leader like Peter?
   d) What could be the key argument if you wish to convince Peter?

References and additional resources

Methods

Ishikawa method
https://www.youtube.com/watch?v=I0c6Gd26Fxw
https://creately.com/diagram/example/hs2mdijc/hotel - hotel example in case of a given problem

Pigmento Map method
https://www.youtube.com/watch?v=KaGngQ9XWZ0
Pimento Map's website: http://www.pimentomap.com/ - there you can make your own Pimento map

Backcasting
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https://www.youtube.com/watch?time_continue=118&v=QJC2GtM56rc

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Backcasting to identify food waste prevention and mitigation opportunities for infant feeding in maternity services
Yvonne Ryan-Fogarty, Genevieve Becker, Richard Moles, Bernadette O'Regan
Department of Chemical Sciences, University of Limerick, V94 T9PX, Ireland
BEST Services, Galway H91T22T, Ireland

Participative backcasting: A tool for involving stakeholders in local sustainability planning
Annika Carlsson-Kanyamaa, Karl Henrik Dreborga, H.C. Mollb, Dario Padovanc
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Division of Defence Analysis, SE-164 90 Stockholm, Sweden
Centre for Energy and Environmental Studies, IVEM, University of Groningen, The Netherlands
The Consortium for Research and Continuing Education, Turin, Italy

Experiences of the development and use of scenarios for evaluating Swedish environmental quality objectives
Mattias Höjer, Karl Henrik Dreborg, Rebecka Engström, Ulrika Gunnarsson-Östling, Asa Svenfelt
Environmental Strategies Research, Royal Institute of Technology, SE-100 44 Stockholm, Sweden

Futures studies' backcasting method used for strategic sustainable city planning
Aumnad Phdungsilp
Department of Energy Management, Faculty of Engineering, Dhurakij Pundit University, Laksi, Bangkok 10210, Thailand

Metropolitan vision making – using backcasting as a strategic learning process to shape metropolitan futures
Aleksi Neuvonena, Peter Acheb
Demos Helsinki, Töölönkatu 11, 00100 Helsinki, Finland
Radboud University, Institute for Management Research, Nijmegen, Netherlands

Envisioning sustainability: Recent progress in the use of participatory backcasting approaches for sustainability research
John Robinson, Sarah Burch, Sonia Talwar, Meg O'Shea, Mike Walsh
Institute for Resources, Environment and Sustainability, University of British Columbia, 428-2202 Main Mall, Vancouver, BC, Canada V6T 1Z4
Environmental Change Institute, University of Oxford, Dyson Perrins Building, South Parks Road, Oxford, Oxfordshire OX1 3QY, UK
Natural Resources Canada, 625 Robson St, Vancouver, BC, Canada V6B 5J3
Envision Sustainability Tools, 1 Alexander Street, Vancouver, BC, Canada V6A 1B2

Designing backcasting scenarios for resilient energy futures
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College of Creative Studies, Niigata University, 8050 Ikarashi 2-no-cho, Nishi-Ku, Niigata, 9502181, Japan

Future User method

Personas and user-centered design: How can personas benefit product design processes?
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Universidade Nova de Lisboa, Campus de Campolide, 1099 032 Lisbon, Portugal
Kenneth A. Kozar, Leeds School of Business, UCB 419, University of Colorado, Boulder, CO 80309, USA

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