

Overview of the EU tourism sector – Challenges and Opportunities for upskilling and reskilling the workforce

EARLALL webinar on Tourism Skills Analysis

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Tourism matters!

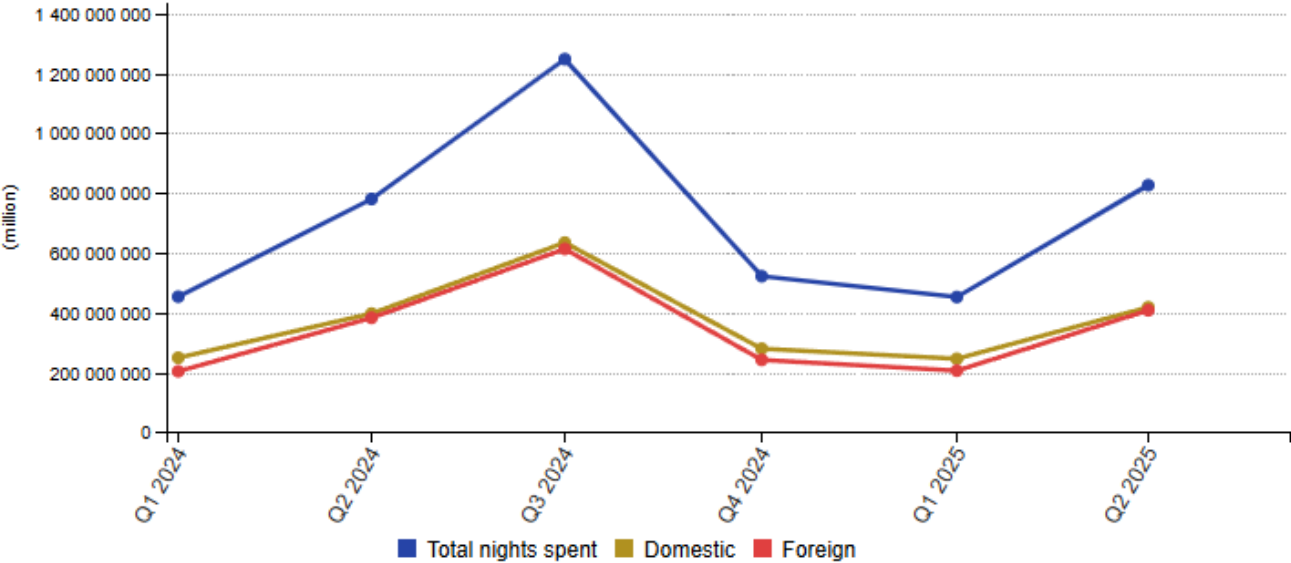
Some basic figures

- Over **4.5 million** enterprises (2024)
 - 99,9% are microenterprises and SMEs
- **Up to 20 million** employees (9.5% of EU employment) in all tourism and travel sub-sectors
 - Social Partners estimate that **10-20% of hospitality jobs remain unfilled** = 1.000.000 jobs 'missing' in the sector
- **7.1%** gross value added
- **Recovery** since pandemic is considered complete (apart from a few regions), and new records are being made!

Tourism is one of 14 EU **industrial ecosystems** in the 2021 EU Industrial Strategy

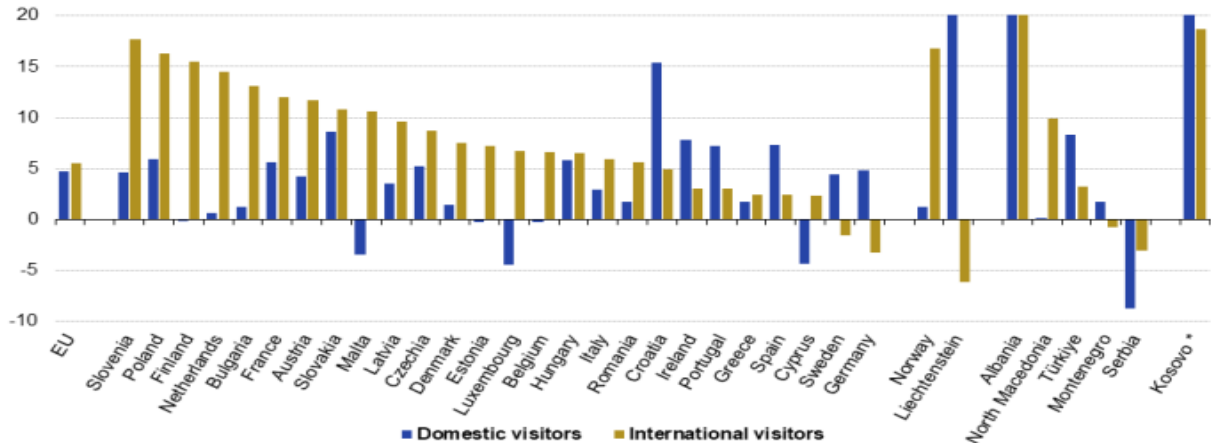
- Tourism was the first ecosystem to develop **a transition pathway** (2022) to support the green and digital transitions, ensuring the resilience of the ecosystem + [stocktaking reports](#)
- **EU Agenda for Tourism 2030** – Member States support to priority areas and actions
- **15 billion euros** allocated in different EU budget lines and programmes

Nights spent in tourist accommodation establishments 2024-2025



Source: Eurostat (online data code: tour_occ_nim)

Nights spent in tourist accommodation establishments, by origin of the guest, Q2 2025 compared with Q2 2024 (% change)

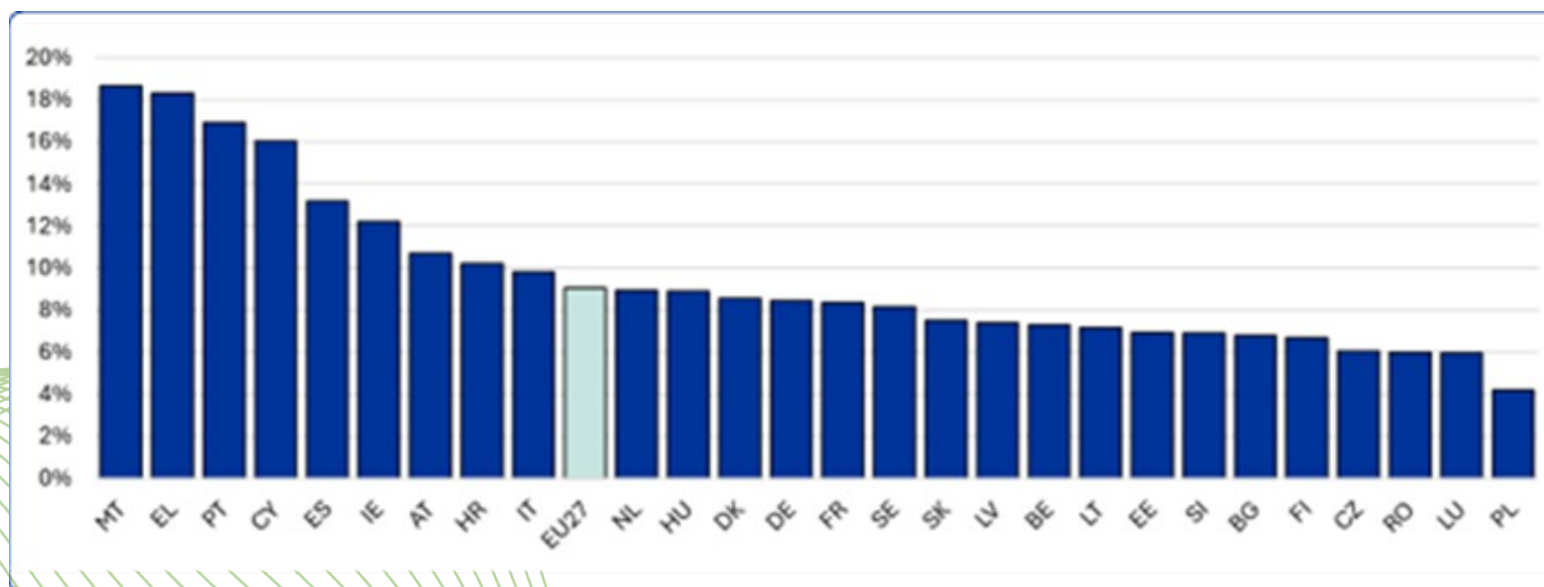


Note: data not available for Lithuania, Iceland and Switzerland.
* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo Declaration of Independence
Source: Eurostat (online data code: tour_occ_nim)

Tourism workforce

- In 2023, the tourism industries employed more **female workers** than male workers with the highest proportions in travel agencies and tour operators and in accommodation.
- In 2023, 11 % of people employed in the tourism industries were **young workers** (15-24), while this share was 9 % in services and in the non-financial economy.
- In 2024, the number of people employed in the EU tourism industry was over **20 million**.

Share of employment in the tourism ecosystem (%)



Positions to be filled - Countries

Abstract



Skills initiatives in the EU

- EU Pact for Skills and large-scale partnership for tourism since 2022
- European Year of Skills 2023-2024 and Union of Skills 2025+
- Commission Action Plan on labour and skills shortages in the EU (March 2024)
- EU Jobs and Skills in tourism awareness-raising campaign 2024 (summer and winter seasons)
- Various Erasmus+-funded projects in tourism skills ongoing or completed
 - Next Tourism Generation Alliance (NTG) and PANTOUR (Blueprint projects)
 - Tour-X
 - Pact for Tourism Skills Forward Alliance (PacTS4All)
 - New Erasmus + Blueprint project from Q3 2025 (FuTourAlliance)



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What are the challenges facing European tourism?



EU Strategy for Sustainable Tourism Consultation

ENVIRONMENTAL
SUSTAINABILITY AND
CLIMATE ACTION

SOCIAL SUSTAINABILITY

DMO RESILIENCE

DIGITAL
TRANSFORMATION

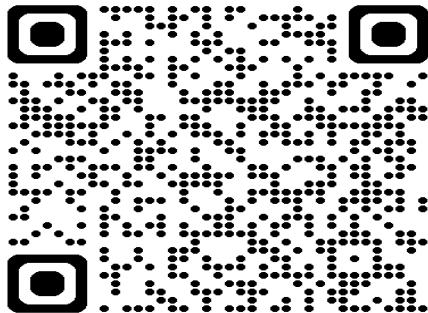
SMART TOURISM

SKILLS, SUPPORT TO
WORKFORCE

COMPETITIVENESS,
SUPPORT TO MSMEs AND
START-UPS

ACCESSIBILITY AND
SOCIAL INCLUSION

MODES OF TRANSPORT



A SHARED BRAND FOR
EUROPE

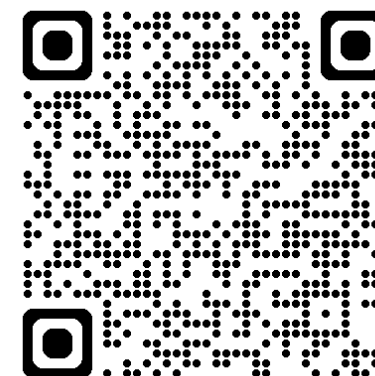
EU Tourism Platform

Photo by David Marcu

Single platform for the EU Tourism Transition Pathway

Discover actionable insights and strategies on the Transition Pathway Stakeholder Support Platform for EU Tourism ecosystem to drive sustainable growth and innovation in your tourism business.

Join the pathway >



Access updated information through resources (articles, studies, guidelines, reports....)

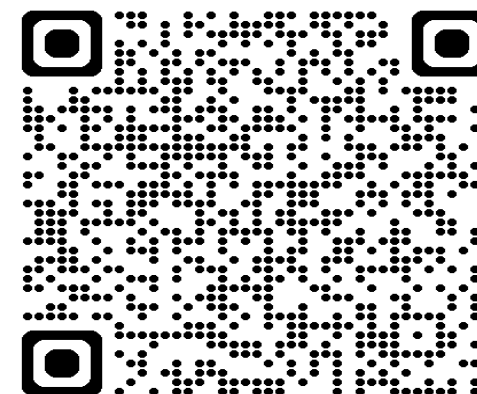
Discover stakeholder pledges & best practices

Explore events, courses, support and funding opportunities

Connect with members from around the world using the interactive map

[EU Tourism Platform](#) | [EU Tourism Platform](#)

EU Guide on Funding:



Key take-aways

➤ **Tourism matters!**

- Important for regions, cities, local sites and attractions
- Collaboration at all levels is key (local, regional, national and EU)

➤ **Jobs and skills matter!**

- [EU Pact for Skills](#), research on skills gaps/new occupational profiles via Erasmus+ projects
- New EU Sustainable tourism strategy will include initiatives on skills, how to continue [raising the attractiveness of tourism jobs](#)
- Integration of tourism-related jobs into EU Talent Pool and Talent Partnerships

➤ **Join our community!**

- [EU Tourism Platform](#)
- Stakeholder events



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Contact us

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