

FACT SHEET - Tourism sector skills challenges and opportunities

Webinar | Understanding skills challenges and opportunities in the tourism sector across European regions



 **WEBINAR**

TOURISM SECTOR SKILLS ANALYSIS
Understanding skills challenges and opportunities in the tourism sector across European regions

18 September 2025
10-11.30 (Brussels time)
Online

 Webinar promoted by EARLALL's Working Group on Skills and Labour Market     | www.earlall.eu

The information and data included in this fact sheet was shared during **EARLALL's webinar on "Tourism Sector Skills Analysis: Understanding Skills Challenges and Opportunities in the Tourism Sector Across European Regions"**, which took place on 17 September 2025. This initiative was promoted by EARLALL'S Working Group on Skills and Labour Market.

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The webinar presentations and the recording are available on **EARLALL's website**



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Tourism is a people-driven industry that depends on a wide range of professions—from hospitality and transport services to cultural heritage, nature-based experiences, and digital innovation.



FACTS & FIGURES

- Tourism represents 9.5% of total employment in the EU—nearly 23 million jobs (Eurostat), many within local SMEs.
- In 2024, the number of people employed in the EU tourism industry was over **20 million** (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
- **Tourism is one of 14 EU industrial ecosystems** in the 2021 EU Industrial Strategy.
- In 2023, **11% of people employed in the tourism industry were young workers** (15-24).

MAIN CHALLENGES

- **Skills Development:** Address skills gaps, including language proficiency, intercultural competence, and digital skills.
- **Recruitment and Retention Challenges:** Overcome limitations of part-time or seasonal employment that restrict career growth in the sector.
- **Balancing Visitors and Residents:** Address demographic challenges in remote and rural areas while maintaining a healthy balance between tourism and local communities.
- **Sustainability and Commercial Success:** Ensure destinations remain economically viable while protecting natural, cultural, and social resources.
- **Personalised Tourist Experiences:** Adapt services to meet the evolving needs of tourists and tourism professionals, supported by relevant education and training programs.
- **Innovative and Lesser-Known Destinations:** Promote creativity in destination offerings and encourage visits to less-explored areas.
- **Climate Awareness:** Consider the impacts of climate change and extreme weather events on tourism planning and resilience.



Have your say:



- EU Strategy for Sustainable Tourism focuses on making Europe a more resilient, competitive, and sustainable tourism destination by addressing issues like overcrowding, climate change, and digital transformation.
- An open for public consultation until 25 September 2025 (deadline extended), including fields such as:
 - Skills support to the workforce.
 - Accessibility and Social Inclusion.

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FACTS AND FIGURES FROM EARLALL MEMBER REGIONS



PROVINCIA AUTONOMA DI TRENTO

Trentino Tourism Workforce Solutions

Trentino stands out from other seasonal destinations, as it thrives equally in the snowy winter months and the sunny summer season.

Job Market in Trentino (2023):

- Positive Trends: Employment is rising.
- Sector Growth: Service sector +3%, hospitality (bars & restaurants) driving a third of the increase.
- Employment Highlights: 18,000 in hospitality—the highest in 5 years.
- Contracts: Permanent contracts are growing, but fixed-term contracts are still dominant.
- Labour Shortage: 75% of companies face skilled worker gaps.
- Tourism Demand: 33,000 employees needed; 30% unskilled positions.

Good practice: “Trentino tourism is looking for you” campaign - Match job seekers with tourism sector positions (summer & winter seasons)



Good practice: project - Working in Paganella:

- The [Visit Paganella](#) area was chosen to pilot “Work in Trentino Tourism”, a campaign matching seasonal tourism jobs with workers.
- The project also offers training, more stable contracts, and community benefits to make seasonal work a real opportunity.

Lessons learned:

- Integrating seasonal workers remains a challenge
- Summer recruitment is especially hard in alpine areas due to competition from seaside destinations.
- Family-run businesses struggle to plan and move beyond the traditional seasonal model.
- Adopting a season-free approach is a key direction for the future.



Junta de
Castilla y León

Castilla y León Tourism Overview

Castilla y León is the fifth most visited autonomous community in Spain, attracting approximately 17.4 million tourists.

Workforce and Economic Data:

- 106,716 active workers in the tourism sector.
- Record high of over 9 million visitors in 2025 and more than 15 million overnight stays in 2024.
- Tourism contributed 13.5% of the regional GDP in 2024.
- Total employment in tourism: 84,000 jobs, representing 7.4% of regional employment.

Opportunities:

- Ensure destination sustainability and commercial success with increased overnight stays.
- Offer personalised experiences and innovative destinations, supported by education and training.

Good practice - Viña Work

- A chatbot called Viña, developed through the Iulia Empresa program, provides tourists with information on the Ribera del Duero region, including wine tourism and local history.



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Agri-Hospitality Initiatives

Canton Graubünden:

- In Canton Graubünden (2022/23), tourism and agriculture are major sectors (tourism: 31.3%).
- Both face shared sustainability challenges and opportunities.
- However, there is no formal cooperation or dialogue, leading to missed opportunities for more sustainable tourism

Innovative Solution:

- A collaboration between EHL Swiss School of Tourism and Hospitality and Plantahof Agricultural School offers a sustainable, educational, and innovative approach.



Mind the Gap: Sustainability in Tourism Education:

- **Curriculum challenges:** Teaching sustainability is limited, fragmented, and lacks systematic strategies for complex “wicked problems.”
- **Educator engagement:** Teachers’ values are often overlooked, and low training/institutional support reduces involvement.
- **Industry collaboration:** Partnerships between universities and the tourism sector are rare and understudied.

Challenges in agri-hospitality:

- Need for shared problem definition and structured collaboration.
- Valorisation of the whole animal and integration of local ingredients.
- Seasonal supply fluctuations; limited ready-to-eat products.



Mechelen's Cultural and Tourism Initiatives

Mechelen – Heart of Flanders:

- Located between Brussels and Antwerp.
- Over 272,000 overnight stays in 2024.
- Most attractions are within walking distance.
- Strong public support for tourism (74%)?

Challenges:

- Seasonal fluctuations cause unstable staffing.
- Skills gaps in languages, intercultural, and digital competencies.
- Difficulties in recruitment and staff retention.

Opportunities:

- Rising demand for local guides and cultural ambassadors.
- Investment in sustainable and inclusive tourism.
- Alignment with global trends: female empowerment and social inclusion.

Good practice: Mechelen Tourism Ambassador Program:

- City Ambassador of Mechelen program, which consists of two modules focusing on heritage and the present city, and includes practical training and local exploration.
- The program also offers a city guide training course and has produced initiatives like a historical exhibition and a Living Library project.



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EU INITIATIVES FOR THE DEVELOPMENT OF SKILLS FOR THE TOURISM SECTOR

- EU Pact for Skills and large-scale partnership for tourism: The partnership of businesses, European organisations, social partners, VET providers, and local authorities outlines a roadmap for skills transformation and post-COVID recovery, improving workforce qualifications, reducing job insecurity, and enhancing working conditions in tourism.
- EU Jobs and Skills in tourism awareness-raising campaign 2024 (summer and winter seasons).
- Various Erasmus+-funded projects in tourism skills.
- EU Tourism Platform | EU Tourism Platform: Stakeholder Support Platform for the EU Tourism ecosystem to drive sustainable growth and innovation in your tourism business.



KEY INSIGHTS

- Summer recruitment in alpine areas is challenging due to competition from seaside destinations.
- Tourists rely heavily on technology throughout their trips.
- Personalised experiences and targeted education/training are essential to meet evolving industry needs.
- Engage local communities in tourism development.
- Invest in sustainable and inclusive tourism practices.
- Curriculum challenges: Teaching sustainability is limited, fragmented, and lacks systematic strategies for complex “wicked problems.”
- Ambassador programmes that combine training, local exploration, and community initiatives can effectively turn residents into cultural ambassadors, enhancing the visitor experience and fostering local pride.

