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RESKILL PROJECT - TOURISM EMPLOYMENT STATUS SURVEY

NATIONAL REPORT GERMANY

TOURISM EMPLOYMENT RESILIENCE AND SKILLS TRANSFORMATION POST-PANDEMIC

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Introduction

The objective of the Europe-wide survey *"Tourism Employment Resilience and Skills Transformation Post-Pandemic"* is to thoroughly examine the current employment landscape and future perspectives of micro, small and medium-sized enterprises in the tourism sector following the pandemic. This involves assessing the existing employment situation to understand how the workforce has been affected and what trends are emerging. A key focus of the survey is to identify skills gaps and anticipate future competency requirements, especially concerning digital advancements and green transitions that are increasingly shaping the industry. The survey also aims to map the challenges tourism businesses face in recruitment and retention of staff, giving insight into the factors contributing to workplace attraction and sustainability. Ultimately, the insights gained from this survey are intended to guide the development of targeted training programmes that facilitate reskilling and upskilling. This will equip workers with the necessary skills to adapt to rapidly changing industry demands, ensuring both individual career progression and broader sector resilience.

The report presents the results of the national German survey, conducted between August and September 2025. Due to specific logistical considerations, the survey was limited to the tourism industry in the federal state of Schleswig-Holstein. This decision was made to ensure a focused and manageable scope. In 2024, the population of the federal state of Schleswig-Holstein was approximately 2.96 million.[1] Tourism is a fundamental economic factor for Schleswig-Holstein and a driver of income, jobs, prosperity and quality of life; approximately 160,000 people work in the regional tourism industry.[2] Schleswig-Holstein offers a distinctive landscape within Germany, characterised by its coastal tourism, cultural heritage sites, and rural attractions. This makes it an ideal pilot area for assessing the recovery of tourism businesses in the post-pandemic era and the ongoing challenges they face. Narrowing the geographical focus enabled the survey to ensure comprehensive data collection and analysis. Additionally, the region's combination of urban and rural tourism enterprises provides a representative cross-section of the broader industry, allowing for potentially applicable findings that could inform strategies in similar regions both within Germany and in other European contexts. Furthermore, the insights gained from this study could inform future nationwide surveys with broader scopes.

The author would like to thank DeHoGa Schleswig-Holstein e.V., Tourismusverband Schleswig-Holstein e.V., IHK zu Kiel, Conny Matthiesen and all participating businesses for their support of the survey.

[1] https://de.statista.com/statistik/daten/studie/155171/umfrage/entwicklung-der-bevoelkerung-von-schleswig-holstein-seit-1961/.

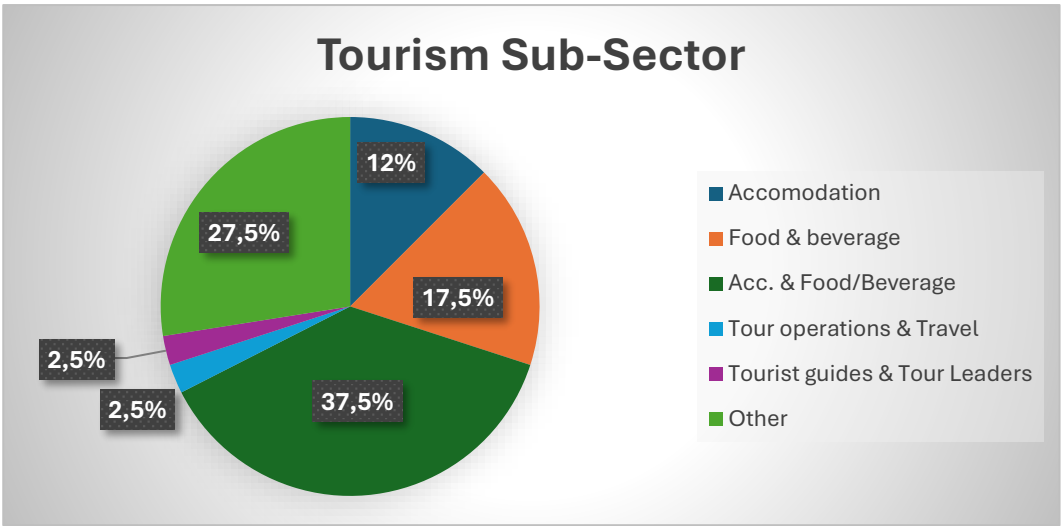
[2] www.tvsh.de/Tourismuspolitik/tourismuspolitik-des-landes.

1. Sample Description

Business Profile Analysis

Of the total of 40 German survey respondents, over two thirds (67.5%) belonged to the accommodation and/or food and beverage sub-sector. This suggests that these areas play a pivotal role in the region's service industry landscape. The convergence of these subsectors within the sample reflects the integrated nature of hospitality services, where accommodations are often complemented by culinary offerings.

Figure 1: Distribution by tourism sub-sector



In total numbers, the sample consists of 12 micro businesses, 19 small businesses, and 9 medium businesses, making up a total of 40 businesses. The composition reveals a structure mostly dominated by small enterprises, which constitute 47.5 % of the sample. This significant proportion highlights the influential role small businesses play within Schleswig-Holstein. Following closely are micro enterprises, accounting for 30.0 % of the sample. In contrast, medium enterprises make up only 9.0%, suggesting a lesser representation of larger-scale operations within this particular sample. This distribution emphasises the contribution of smaller-scale enterprises in driving industry dynamics and innovation in the region.

Figure 2: Distribution by business size

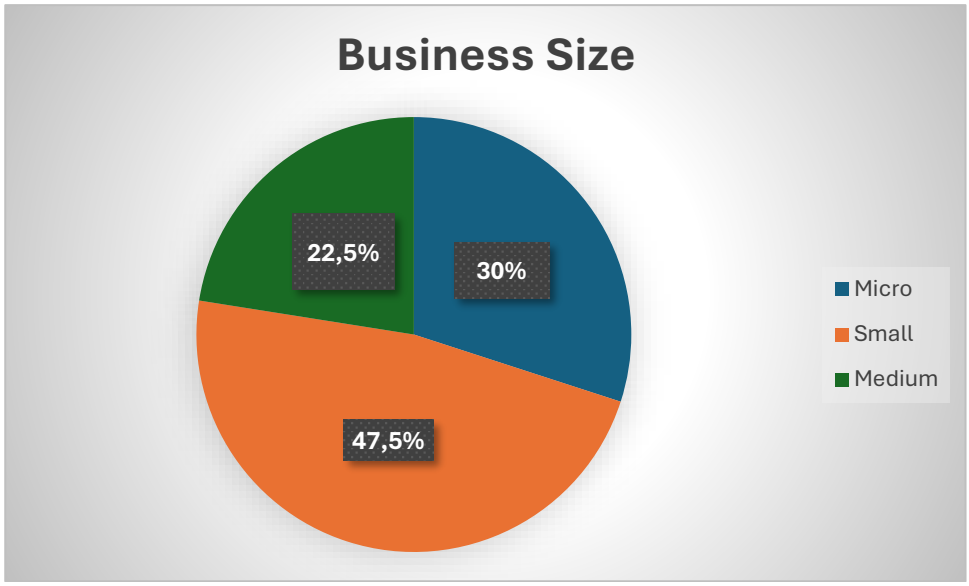
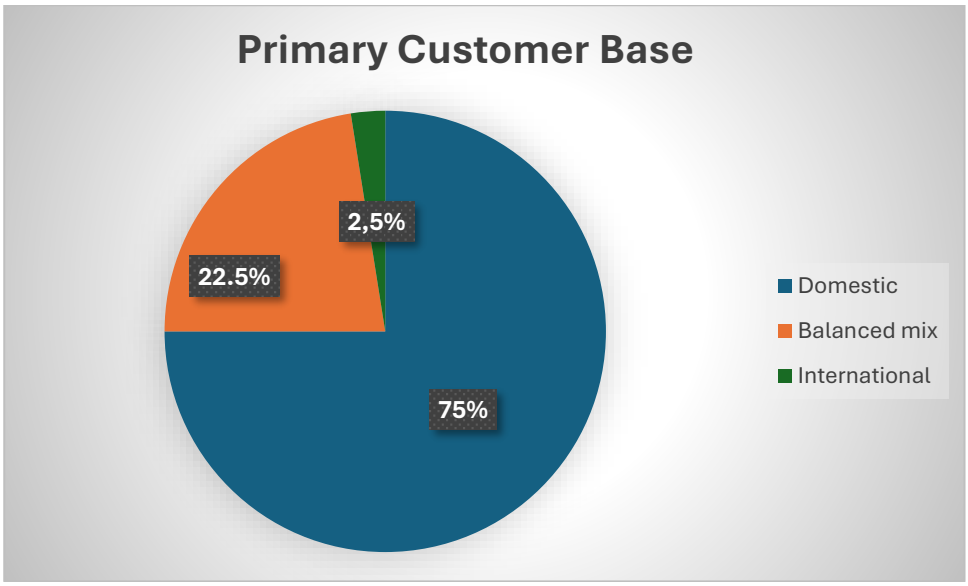


Figure 3: Distribution by primary customer base composition

The chart provides insightful data regarding the market orientation of the participating businesses, highlighting how they cater to different tourist demographics. An overwhelming majority, 75.0% of the businesses, primarily serve domestic tourists indicating a strong focus on appealing to local markets and preferences. Conversely, only a small fraction, 2.5%, of businesses are oriented towards serving international tourists, which is likely to suggest limitations in global outreach. Meanwhile, 22.5% of the businesses maintain a balanced mix, serving both domestic and international tourists.



In summary, the German business profile sample predominantly represents small businesses in the accommodation and/or food and beverage sub-sectors, which are primarily visited by domestic tourists.

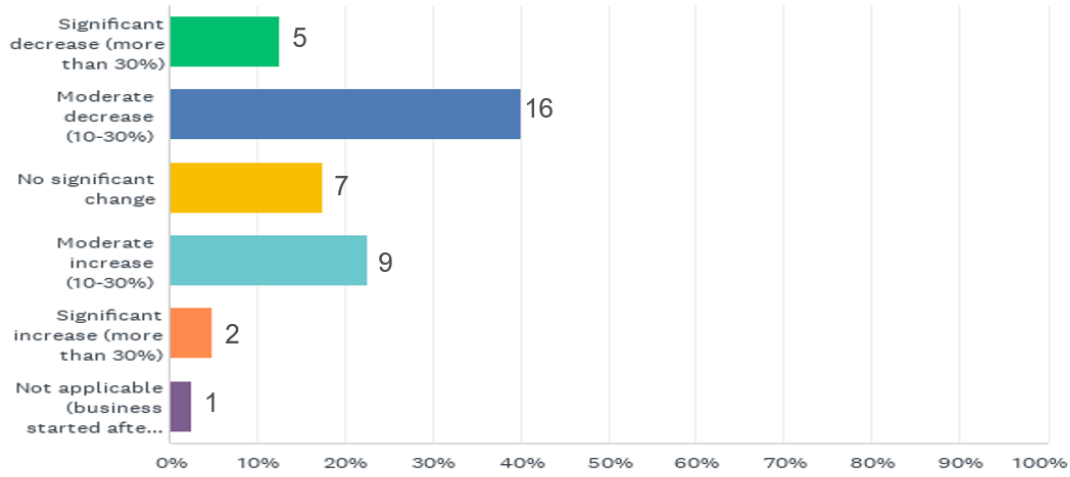
2. Current Employment Situation and Recovery Status

The repercussions of the Corona pandemic have been instrumental in prompting alterations in the size of workforces among the tourist industry. This section shows how businesses have been affected by the pandemic and their current workforce situation.

2.1 Workforce Changes and Structure

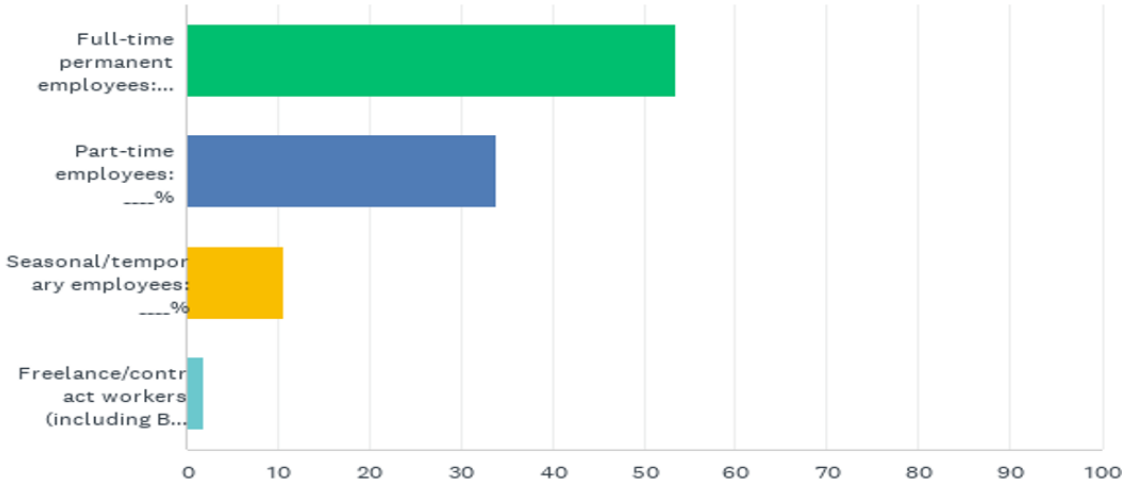
The chart reveals that 12.5% of businesses (n= 5) experienced a significant decrease in their workforce, while a notable 40.0% (n= 16) reported a moderate decrease, thereby highlighting the substantial impact on employment levels. Conversely, 17.5% (n= 7) of businesses maintained their workforce size, indicating stability. With regard to growth, 22.5% (n= 9) of businesses experienced moderate increases in their workforce, while a mere 5.0% (n= 2) achieved significant expansion. A key finding is that 52.5% (n= 21) of businesses have reduced their workforce since 2019, compared to 27.5% (n= 11) that have increased theirs. The data indicates the prevailing economic challenges businesses face due to the Corona pandemic, leading to employment reductions, while only a very small proportion have been able to increase their personnel significantly.

Figure 4: Workforce changes Since 2019



On average, businesses employ a workforce comprising 54.0% full-time permanent staff, 34.0% part-time employees, 11.0% seasonal workers, and only 2.0% freelancers. This distribution reveals the reliance on stable, long-term employment structures, particularly within the full-time permanent category, reflecting a commitment to sustained workforce engagement. Part-time employment also plays a significant role, suggesting a flexible approach to staffing needs or working time preferences of the staff. The pattern underscores a preference for more consistent and reliable labour arrangements in Schleswig-Holstein's tourist industry.

Figure 5: Employment structure



2.2 Foreign Workers Integration

A significant 72.5% of businesses employ foreign workers, indicating a prevalent reliance on international labour, while 27.5% do not employ any foreign workers. No distinction is to be made between specific sub-sectors. Among the employed foreign workforce, the most common origins are from EU countries, comprising 42.5%, followed by 20% from Eastern and Southeastern Europe, and 15.0% from not further specified countries. Of the 11 companies that do not employ foreign workers, 7 (63.6%) belong predominantly to the unspecified sub-sector „Other“, three (27,3%) to „Food & Beverage“ and one (9,1%) to „Accommodation/Food & Beverage“.

Figure 6: Foreign workers presence

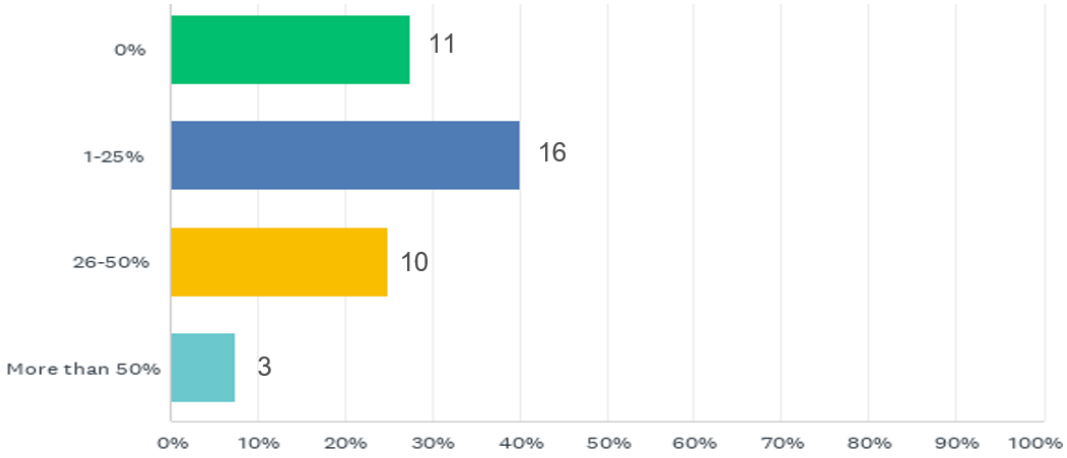
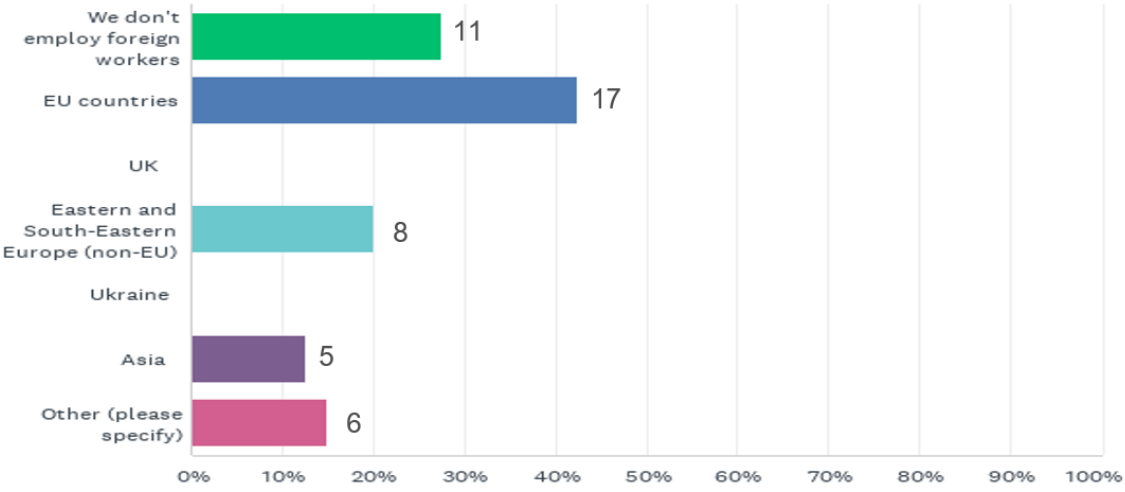


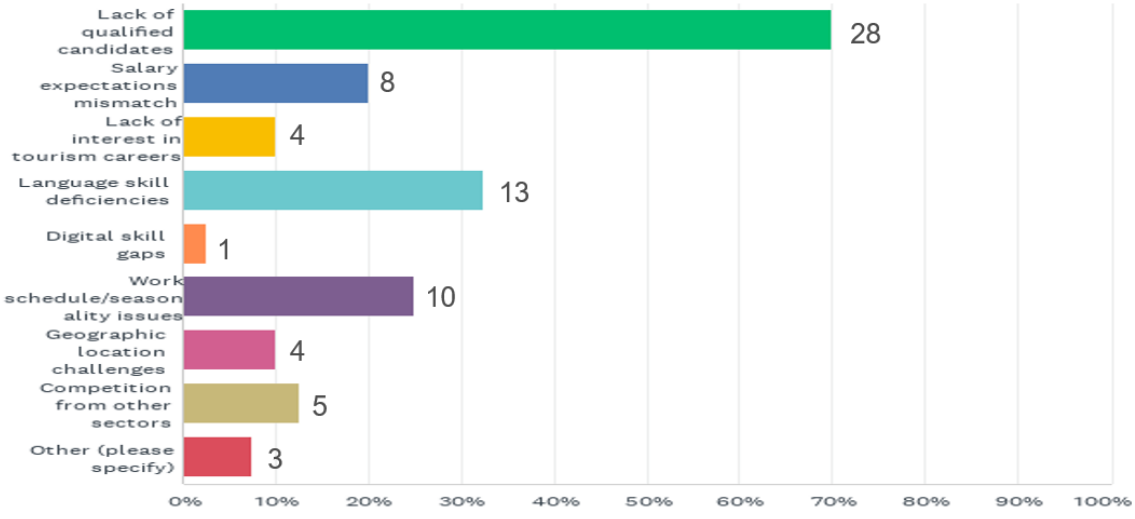
Figure 7: Primary origin of foreign workers



2.3 Recruitment Challenges

The top recruitment challenges faced by businesses, ranked by frequency, are as follows: 1. a shortage of qualified candidates (70.0%), 2. deficiencies in language skills (32.5%), 3. seasonal issues (25.0%), 4. a mismatch in salary expectations (20.0%), and 5. competition from other sectors (12.5%). The most common challenge is therefore the shortage of qualified candidates, affecting 70.0% of businesses.

Figure 8: Main recruitment problems



Recruitment difficulty by position

The mean difficulty scores on the 1 to 5 scale (1 = easy to recruit, 5 = very difficult to recruit, N/A = Not applicable to our business) for various position types indicate the challenges encountered in recruitment. The most significant challenge in the region of Schleswig-Holstein is posed by kitchen/catering staff, with an average difficulty score of 4.13, rendering them the most arduous

positions to recruit. The subsequent categories are IT/digital specialists (3.86) and management/ supervisory (3.82). In contrast, front of house staff and housekeeping/cleaning positions both have a score of 3.59, with tour guides having a slightly lower average score of 3.50. Hence, the most challenging group to recruit is that of kitchen/catering staff. In contrast, front-of-house staff, as well as housekeeping/cleaning and tour guides, are more readily available. Overall, recruitment is rather difficult.

Table 1: Difficulty of recruiting positions

	1	2	3	4	5	N/A	TOTAL	WEIGHTED AVERAGE
Management/supervisory roles	2.50% 1	7.50% 3	20.00% 8	10.00% 4	30.00% 12	30.00% 12	40	3.82
Front-of-house staff	0.00% 0	7.50% 3	27.50% 11	25.00% 10	12.50% 5	27.50% 11	40	3.59
Kitchen/catering staff	0.00% 0	5.00% 2	15.00% 6	22.50% 9	35.00% 14	22.50% 9	40	4.13
Housekeeping/cleaning	2.50% 1	12.50% 5	17.50% 7	20.00% 8	20.00% 8	27.50% 11	40	3.59
IT/digital specialists	2.50% 1	2.50% 1	12.50% 5	20.00% 8	17.50% 7	45.00% 18	40	3.86
Tour guides	2.50% 1	0.00% 0	10.00% 4	15.00% 6	2.50% 1	70.00% 28	40	3.50

3. Skills Assessment and Future Needs

One of the key concerns of the survey is to evaluate the importance of green, digital and soft skills for the future of tourism, as these skills are vital for promoting sustainable growth and improving customer experiences. Green skills allow businesses to implement environmentally friendly practices and meet the growing demand for sustainable travel. Digital skills, such as proficiency in social media and e-commerce, are vital for successful marketing campaigns, reaching a wider audience and streamlining the booking process. Soft skills, such as communication and cultural awareness, are vital for providing excellent customer service and enriching interactions with a diverse range of visitors. Together, these skills enable the industry to adapt to evolving consumer preferences, leverage technological progress and promote sustainable tourism.

3.1 Green skills for sustainable tourism

Table 2: Assessment of the importance of GREEN SKILLS for sustainable tourism

Green skill		Weighted Average (1-5)
1.	Resource efficiency and waste management	4.10
2.	Environmental awareness	4.03
3.	Renewable energy usage in hospitality	3.77
4.	Nature-based tour planning	3.67

5.	Sustainable event management	3.67
6.	Ecological impact assessment	3.63
7.	Circular economy practices in tourism	3.58
8.	Sustainable transport coordination	3.40
9.	Carbon footprint monitoring	3.23
10.	Knowledge of green certificate standards	3.20

The top five important green skills in the German sample are: 1. Resource efficiency and waste management (4.10/5), 2. Environmental awareness (4.03/5), 3. Renewable energy usage in hospitality (3.77/5), 4. Nature-based tour planning (3.67/5) and 5. Sustainable event management (3.67/5). While „Resource efficiency and waste management“ ranks highest (4.10/5), „Knowledge of green certificate standards“ ranks lowest (3.20/5). „Resource efficiency and waste management“ and „Environmental awareness“ are the only skills that score above 4.0. However, as all the other green skills scored above 3.0, there are no significant differences in how important they are perceived by German respondents. Most ratings are in the middle range.

3.2 Digital Skills for Tourism Innovation

Table 3: Assessment of the importance of DIGITAL SKILLS for tourism innovation

Digital skill		Weighted Average (1-5)
1.	E-commerce and online booking systems	4.40
2.	Digital marketing and SEO for destinations	4.08
3.	Social media management and analytics	4.08
4.	Online reputation and review management	4.05
5.	Cybersecurity awareness in tourism business	3.98
6.	Mobile app use and development	3.83
7.	Data analysis and interpretation	3.83
8.	Customer Relationship Management (CRS) systems	3.77
9.	Digital storytelling for tourism promotion	3.58
10.	Chatbots and AI applications for customer service	3.45
11.	GIS and geolocation technologies in tourism	3.33
12.	Use of augmented and virtual reality (AR/VR)	2.85

The top five important digital skills in the German sample are:1. E-commerce and online booking systems (4.40/5), 2. Digital marketing and SEO for destinations (4.08/5), 3. Social media management and analytics (4.08/5), 4. Online reputation and review management (4.05/5) and 5. Cybersecurity awareness in tourism business (3.98/5). Only one of the digital skill scores below 3.0. While „E-commerce and online booking systems“ scored highest with 4.40/5, “Use of augmented and virtual reality (AR/VR)” scored lowest with 2.85/5. Once again, the majority of ratings fall within the middle range.

3.3 Soft skills for service excellence

Table 4: Assessment of the importance of SOFT SKILLS for service excellence

Soft skill		Weighted Average (1-5)
1.	Adaptability to change	4.40
2.	Conflict resolution and complaint handling	4.40
3.	Creativity and innovation	4.35
4.	Empathy and emotional intelligence	4.30
5.	Cross-cultural communication	4.13
6.	Storytelling and narrative development	3.90
7.	Networking and stakeholder cooperation	3.88
8.	Multilingual proficiency	3.85
9.	Leadership in multicultural teams	3.83
10.	Service design thinking	3.83
11.	Inclusive service delivery	3.80
12.	Co-creation and participatory planning	3.52
13.	Ethical decision-making in tourism	3.50

The top five important soft skills in the German sample are: 1. Adaptability to change (4.40/5), 2. Conflict resolution and complaint handling (4.40/5), 3. Creativity and innovation (4.35/5), 4. Cross-cultural communication (4.13/5), and 5. Storytelling and narrative development (3.90/5). The first five skills, all of which score above 4.0, are particularly considered essential. The skill with the highest score is „Adaptability to change“ with 65.0 % of respondents rating it as 5/5, compared to the second most important skill, „Conflict resolution and complaint handling'“ which also scores 4.40/5, but with only 52.5 % of respondents rating it as 5/5. As before, most ratings fall within the middle range. With a score of 3.50/5 „ Ethical decision-making in tourism“ ranks lowest.

A comparison of the three skill categories shows that eleven skills received scores above 4.0, which is considered very important. Soft skills received the highest scores, compared to digital and green skills. Five of the soft and four of the digital skills scored above 4.0, whereas only two of the green skills did so. Therefore, green skills are considered less important than soft and digital skills.

Table 5: Skills scoring above 4.0

Skill		Weighted Average (1-5)
1.	Adaptability to change (s)	4.40
2.	E-commerce and online booking systems (d)	4.40
3.	Conflict resolution and complaint handling (s)	4.40
4.	Creativity and innovation (s)	4.35
5.	Empathy and emotional intelligence (s)	4.30
6.	Cross-cultural communication (s)	4.13
7.	Resource efficiency and waste management (g)	4.10
8.	Digital marketing and SEO for destinations (d)	4.08
9.	Social media management and analytics (d)	4.08

10.	Online reputation and review management (d)	4.05
11.	Environmental awareness (g)	4.03

Table 6: Comparison of skills categories

Skills category	Average score (1-5)	No. of essential Skills (>4.0)	No. of low priority Skills (<3.0)
Soft	3.98	5	0
Digital	3.77	4	1
Green	3,62	2	0

A skills assessment of German hotel and restaurant enterprises highlights the relative importance of green, digital and soft skills. Although resource efficiency and environmental awareness are the top green skills, they have lower overall scores compared to digital and soft skills, suggesting that they are perceived as less important. E-commerce and online booking systems are prioritised among digital skills, reflecting the need for technological integration in tourism. Soft skills, particularly adaptability to change and conflict resolution, are highly valued, emphasising the importance of human interaction and flexibility. Across all categories, most skills are rated in the middle range, but soft skills consistently receive the highest ratings, highlighting their importance in the industry.

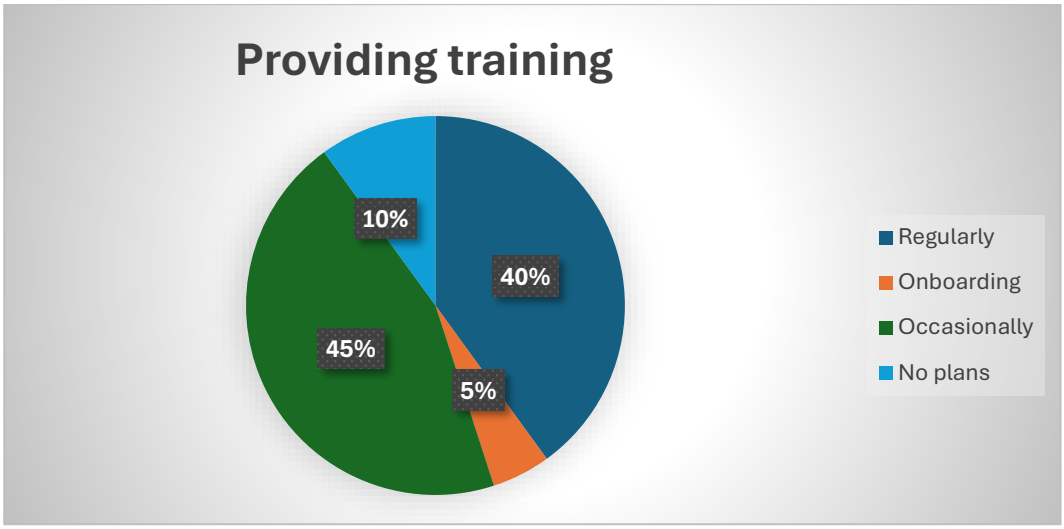
4. Training and Development Practices

This section examines current corporate training practices for employees and identifies barriers to the provision of training opportunities.

Current Training Provision

The pie chart illustrating the distribution of training opportunities for employees reveals some patterns in workplace development strategies. 40.0% of businesses are committed to providing regular training, underscoring the priority they place on continuous skill enhancement and professional growth. In contrast, 10.0% of businesses have no training plans, which could signify a reliance on existing staff competencies to meet business needs. A simple comparison highlights that a few more businesses adopt a flexible training approach, choosing to train occasionally when needed, rather than committing to year-round training. This might indicate a preference for addressing specific skill gaps as they arise, balancing between operational demands and workforce development.

Figure 9: Current training provision



With regard to business size, medium-sized businesses more frequently provide regular training throughout the year compared to small and micro businesses (44.4% vs. 42.1% vs. 36.4%), as well as training occasionally when needed (55.5% vs. 47.4% vs. 36.4%). At 27.3%, it is mostly micro businesses that state they have no training planned, due to costs and insufficient funding as well as lack of time.

Table 7: Business size and type of training provision

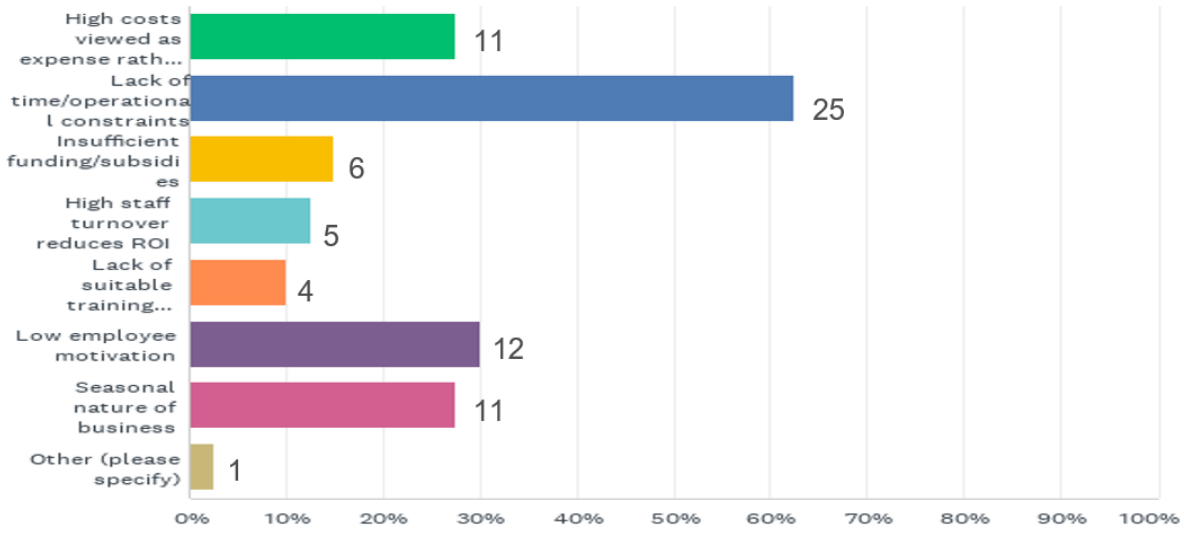
Business size/ training provision	regularly	occasionally	during onboarding	no plans	n
Micro	36,4% (4)	36,4% (4)	9,1% (1)	27,3% (3)	12
Small	42,1% (8)	47,4% (9)	5,3% (1)	5,3% (1)	19
Medium	44,4% (4)	55,5% (5)	0	0	9
n	16	18	2	4	40

Training Barriers Analysis

The bar chart shows the results of the Training Barriers Analysis, which ranks the top obstacles businesses face when trying to provide training programmes for their employees. The most cited barrier is a lack of time, affecting 62.5% of businesses. This suggests that businesses often struggle to allocate time for training amid their day-to-day operations and demands. Following this, low employee motivation is mentioned by 30.0% of businesses, indicating a challenge in engaging staff to participate in training initiatives willingly. The seasonal nature of business operations, highlighted by 27.5% of respondents, further complicates consistent training efforts, as fluctuating workloads make it difficult to schedule regular training sessions. Financial constraints also play a role, with 15.0% citing insufficient funding or subsidies as a barrier, suggesting that the cost of training is a consideration for some businesses. Additionally, staff turnover at 12.5% indicates that frequent changes in personnel can disrupt training continuity and effectiveness. Moreover, 10.0% of businesses highlight a lack of suitable training providers, pointing to potential gaps in available resources that meet their specific training needs. Lastly, unspecified other causes are noted by 2.5%

of businesses. In conclusion, lack of time (62.5%) and low employee motivation (30.0%) are the main barriers to training in businesses in Schleswig-Holstein, followed immediately by costs (27,5%).

Figure 10: Main barriers to providing training



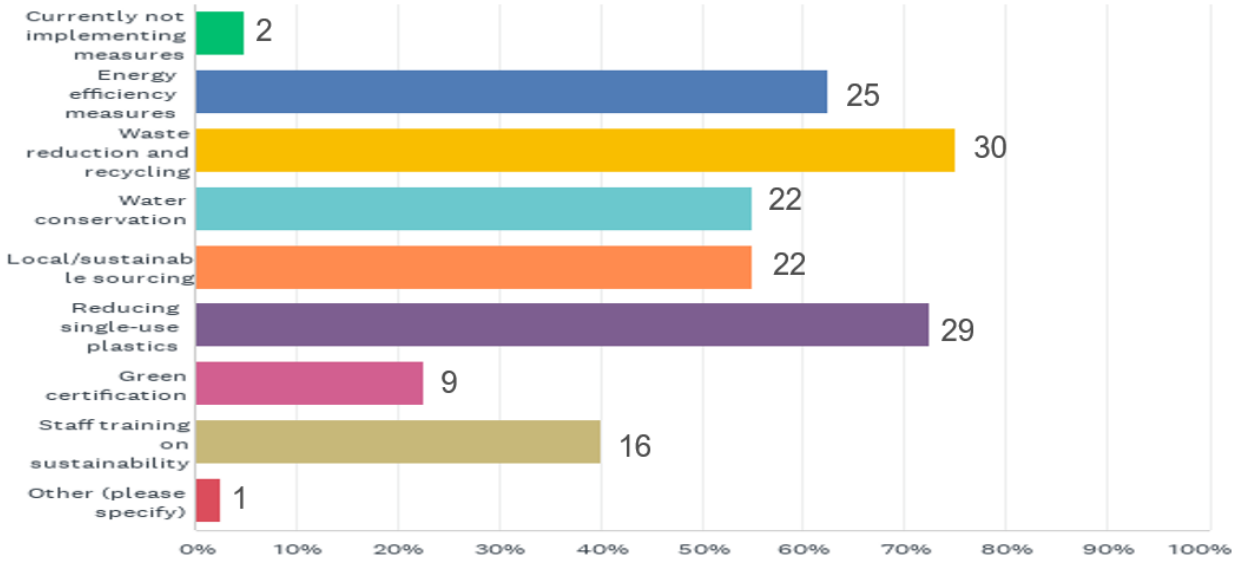
5. Workplace Sustainability and Attractiveness

This section shows how businesses are trying to make their workplaces more sustainable and attractive.

Environmental Sustainability Measures

Leading the list and the two most common practices how businesses address environmental sustainability are „Waste reduction and recycling“, adopted by 75.0% of businesses, followed closely by „Reducing single-use plastics“ at 72.5%. These practices reflect a strong commitment to minimising environmental impact and managing waste responsibly. Further down the list, energy efficiency measures are implemented by 62.5% of businesses, showcasing ongoing efforts to reduce energy consumption. Water conservation and local/sustainable sourcing are both prioritised by 55.0%, indicating a balanced approach to resource management and supply chain sustainability. Staff training on sustainability is undertaken by 40.0% of businesses, highlighting a growing recognition of the importance of educating employees on sustainable practices. Green certification is adopted by 22.5%, reflecting a moderate level of formal recognition for sustainability efforts. Other unspecified practices are noted by a small 2.5% of businesses, suggesting niche or unique strategies. Impressively, only 5.0% of businesses are „currently not implementing measures“.

Figure 11: Environmentally sustainability measures

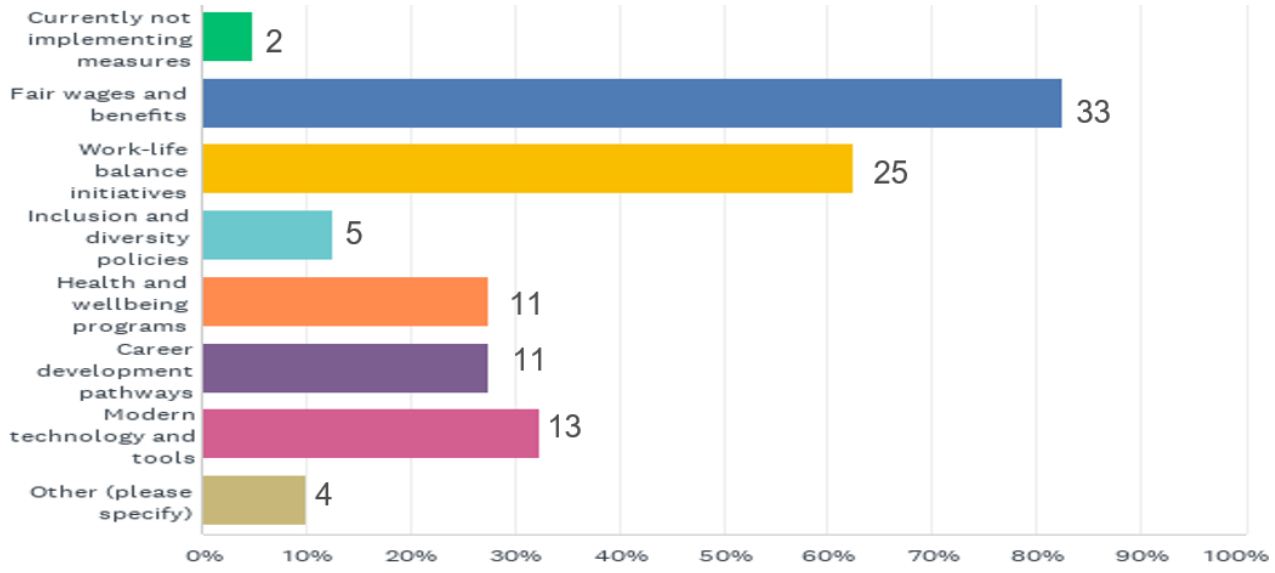


Workplace Attractiveness Initiatives

The bar chart illustrating how businesses enhance workplace attractiveness highlights several key initiatives. Leading the efforts, "Fair wages and benefits" are offered by 82.5% of businesses, signifying a widespread commitment to providing competitive and equitable compensation as a foundation for employee satisfaction and retention, closely followed by "Work-life balance initiatives", adopted by 62.5% of businesses, reflecting a significant focus on supporting employees' well-being and ensuring a healthy work-life integration. "Modern technology and tools" rank as the third most common initiative, implemented by 32.5% of businesses. This adoption indicates an effort to create dynamic and efficient work environments that appeal to employees by leveraging the latest technological advancements. A notable finding is that only 5.0% of businesses are "currently not implementing any measures.

The data indicates that 90.0% of businesses have adopted both sustainability and workplace attractiveness measures, suggesting a strong commitment to enhancing both their environmental impact and employee satisfaction. Nevertheless, these businesses encounter challenges that are strikingly similar: The predominant issue is the lack of suitably qualified candidates, a situation which has the potential to impede companies' capacity to fill essential roles with skilled personnel. Furthermore, deficiencies in language skills have the potential to engender communication barriers. Seasonality issues also persist, affecting workforce stability and requiring businesses to manage fluctuations in labour demand. It is interesting to note that only two businesses (5.0%) reported not implementing measures to make the workplace more attractive, suggesting that the focus on improving workplace environments is nearly ubiquitous.

Figure 12: Workplace attractiveness initiatives



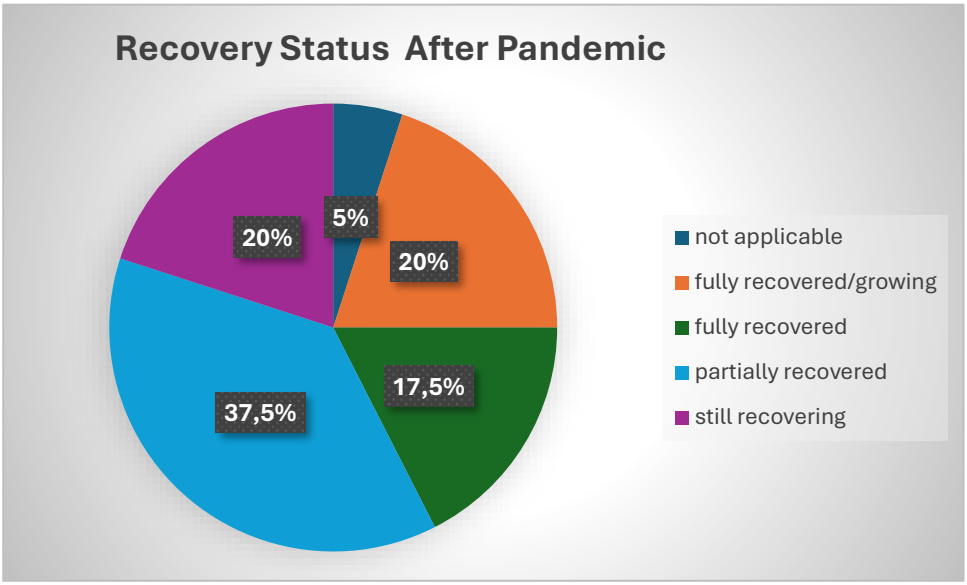
6. Business Recovery and Future Outlook

This section captures how businesses have recovered from the effects of the corona pandemic and their future plans.

6.1 Recovery Status and Hiring Plans

The pie chart on the recovery levels of businesses reveals reveals a nuanced picture of their post-pandemic status. According to the data, 37.5% of businesses have fully recovered, indicating a return to stability and normal operational capacity, with 20.0% even surpassing their pre-pandemic growth levels. However, the largest proportion (37.5%) comprises businesses that have only partially recovered, suggesting that they are still facing challenges and trying to restore their pre-pandemic performance. Furthermore, 20% of businesses are still in the recovery phase, reflecting their ongoing struggle to fully recover. This distribution underscores the varied impact of the pandemic across the sector and points to a need for targeted strategies to assist those businesses still on the path to recovery, particularly those that are partially recovered or still in the process of recuperating.

Figure 13: Business recovery status after pandemic



Taking into account the size of the business, the following picture emerges: Among the 15 businesses that have fully recovered, 40.0% (n= 6) are classified as micro, 46.7% (n= 7) as small, and 13.3% (n= 2) as medium-sized. Interestingly, more than half of these businesses (53.3%, or n= 8) are planning a moderate expansion, with the goal of increasing their workforce by 10-25%. This group includes four micro, three small, and one medium-sized business.

Examining the overall sample across different business sizes and recovery status, it is noticeable that, although 50.0% of all micro businesses have fully recovered, 41.7% are still in the process of recovery. Among all small businesses, 38,9% have fully recovered, while the majority of 44.4% have only partially recovered, with 16.7% still recovering. Among all medium-sized businesses, 25.0% have fully recovered, while the majority of 62.5% have only partially recovered and 12.5% are still recovering. This indicates that, comparatively, micro businesses have weathered the pandemic most effectively.

Table 8: Business size and recovery status

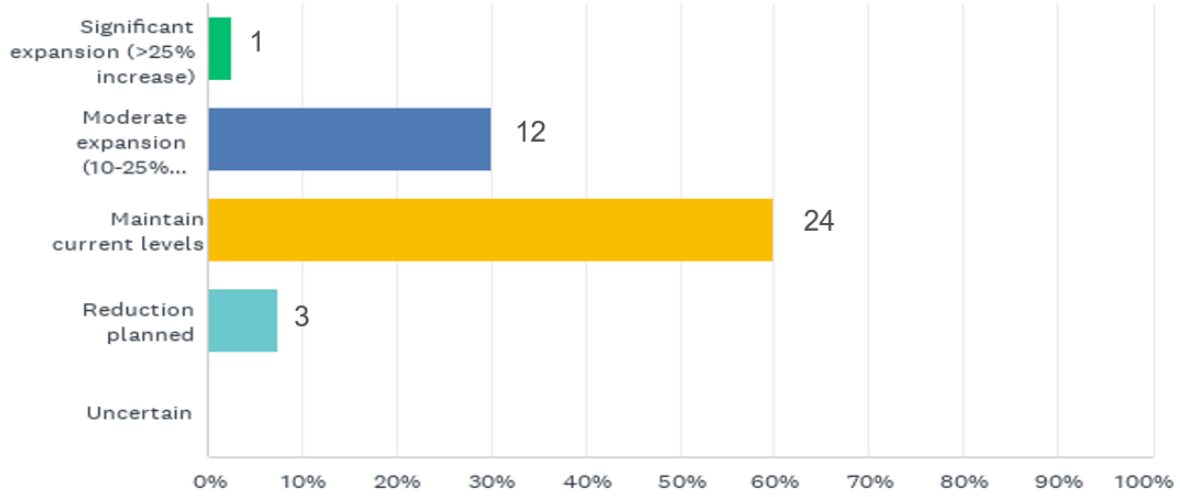
Business size/ recovery status	fully recovered & growing	fully recovered at pre-pandemic levels	partially recovered	still recovering	n
Micro	33,3% (4)	16,7% (2)	8,3% (1)	41,7% (5)	12
Small	16,7% (3)	22,2% (4)	44,4% (8)	16,7% (3)	18
Medium	12,5% (1)	12,5% (1)	62,5% (5)	12,5% (1)	8
n	8	7	14	9	38

Future Hiring Intentions

The bar chart illustrating the hiring plans for the next 12 months reveals that 32.5% of businesses plan to expand their workforce, while a significant 60.0% intend to maintain their current levels of

employment. This data highlights a cautious approach within the business community, with the majority opting for stability rather than growth.

Figure 14: Hiring plans for the next 12 months



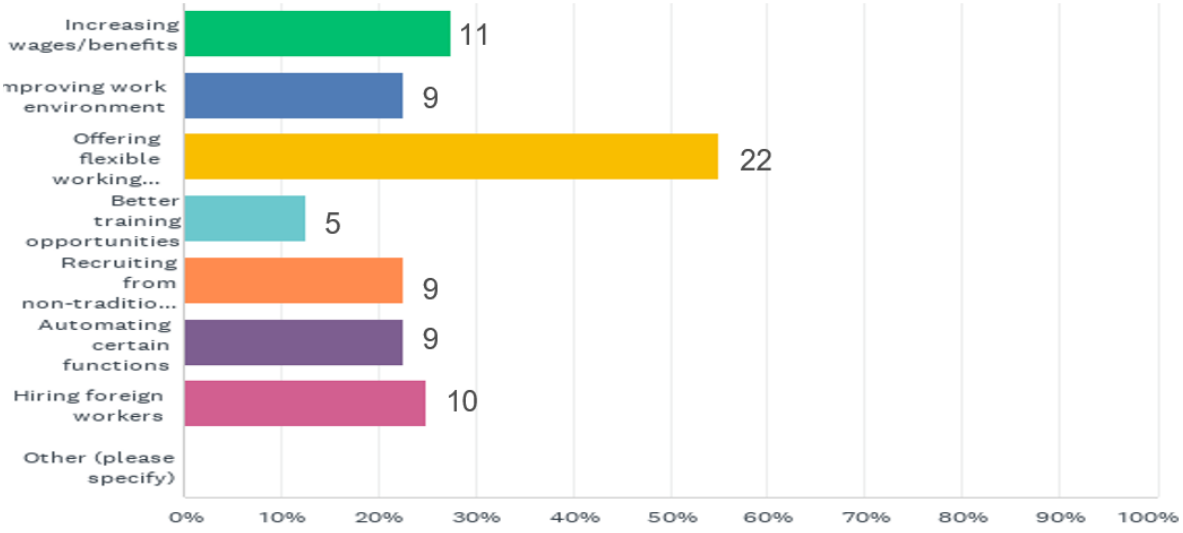
Nevertheless, it is not possible to establish a direct correlation between this trend and full recovery status from the recent economic challenges posed by the Corona pandemic. Among businesses planning to expand, 30.8% (n=4) have fully recovered, whereas this is also true for 45.8% (n=11) of those intending to maintain their current workforce levels.

6.2 Strategic Responses to Workforce Challenges

Top Staffing Strategies

The ranking of strategies employed by businesses to address staffing challenges reveals a clear preference for the provision of flexible working conditions, which were selected by 55.0% of respondents as their primary approach. This strategy has been shown to significantly outpace other methods, thus highlighting a strong trend towards accommodating employee work-life balance. The second most prevalent tactic is the increase of wages and benefits, a strategy selected by 27.5% of respondents. This approach mirrors the conventional method of leveraging financial incentives to attract and retain talent. Hiring foreign workers follows closely at 25.0%, indicating an openness to diversifying the workforce to meet staffing needs. Meanwhile, improving the work environment, recruiting from non-traditional talent pools, and automating certain functions each garnered 22.5%, showing that businesses are equally considering these innovative and technological solutions. Lastly, enhancing training opportunities was chosen by 12.5% of respondents, suggesting that while it remains important, it is not the primary focus for most.

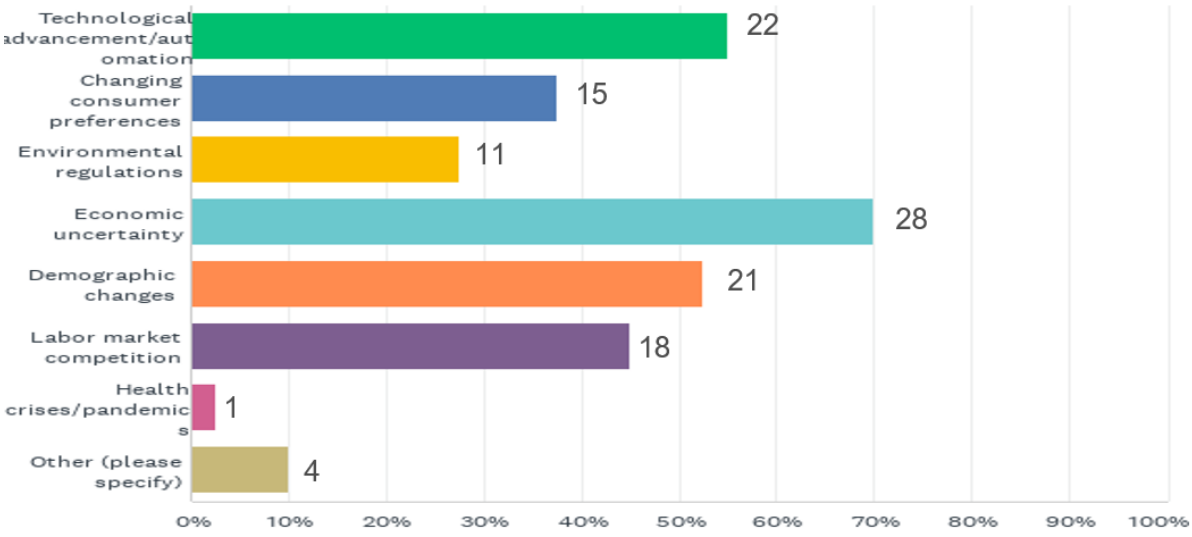
Figure 15: Top strategies to address staffing challenges



6.3 Future Perspectives and Impact Factors

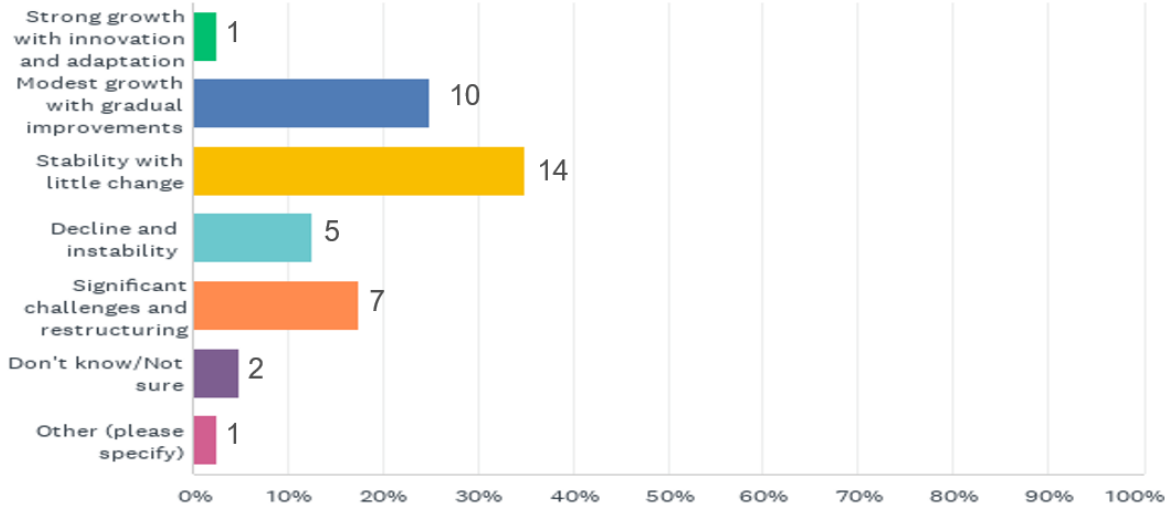
Looking ahead to the next five years, businesses have identified the top five factors anticipated to most significantly impact the workforce. The predominant concern, cited by 70.0% of respondents, pertains to economic uncertainty, signifying apprehensions regarding the volatility of markets and global economic stability, which have the potential to impact workforce planning and job security. Technological advancements/automation was identified as the second most significant factor, with 55.0% of respondents citing it as a key concern. This suggests that businesses are acutely aware of the need to adapt to rapid technological changes that could reshape job roles and necessitate upskilling. Demographic changes are noted by 52.5% of respondents, highlighting shifts in population age and workforce composition as significant factors. Labour market competition is another considerable factor, cited by 45.0%, suggesting that businesses are alert to the pressures of attracting and retaining personnel in a competitive landscape. Lastly, changing consumer preferences, mentioned by 37.5%, illustrate the need for businesses to remain agile and responsive to evolving customer demands. The key insight is that economic uncertainty and technological advancements/automation are perceived as the predominant challenges, underscoring the necessity for businesses to strategise flexibly and innovatively to navigate these dynamic influences on the workforce.

Figure 16: Workforce impact factors in the next 5 years



The percentage distribution of outlook responses regarding the evolution of tourism in the region over the next five years reveals a variety of perspectives. A stability with little change is anticipated by 35.0% of respondents, while 25.0% predict modest growth with gradual improvements. Significant challenges and restructuring are expected by 17.5%, while 12.5% foresee decline and instability. Meanwhile, 5.0% are uncertain, and 2.5% each foresee strong growth with innovation and adaptation or other unspecified trends. Overall, 62.5% are optimistic about the future of tourism, anticipating modest growth. However, 30.0% expect challenges. Nevertheless, the majority of businesses are optimistic about the future of tourism in the region.

Figure 17: Tourism evolving over the next 5 years



7. The Profile of the "Resilient Tourism Business" - Cross-Analysis

This section identifies patterns among different types of businesses.

7.1 Business Characteristics and Performance

Recovery Success by Business Type

As described in section 6.1, 15 companies (37,5%) recovered fully. Micro businesses have demonstrated a notably higher success rate in post-crisis recovery compared to their larger counterparts. Whereas 33.3% of micro businesses fully recovered *and* were growing, only 12.5% of medium businesses experienced the same. The majority of both medium (62.5%) and small businesses (44.4%) only partially recovered. In terms of sub-sector, 46.7% (n= 7) of the 15 recovered businesses belonged to the "Accommodation and/or Food & Beverage" category, while the remainder belonged to the "Other" category.

Recovery vs. Workforce Strategies

A large majority of companies (95.0%) offer various incentives to make jobs attractive, such as fair pay, work-life balance, health programmes and modern technologies. This also applies to companies that are "still recovering". Only two of these nine companies offer just one incentive (fair pay/benefits). This suggests a broad understanding across the sector of the value that comprehensive incentive strategies bring in fostering a supportive and motivating work environment, which is crucial for both sustaining operations and paving the way for future growth.

7.2 Innovation and Skills Integration

High-Skills Priority Businesses

Slightly over one-third of businesses (35% or n = 14) rated digital skills as a high priority, with an average score of over 4.0. Of this group, medium-sized businesses were more likely to provide regular training throughout the year than small or micro businesses (60% vs. 40% and 20%, respectively). In terms of recruitment challenges, difficulties with IT recruitment were not applicable as it was only mentioned once.

Table 9: High skills priority businesses and type of training provision

Business size/ providing training	regularly	occassionally	during onboarding	n
Micro	1 (25%)	2	1	4
Small	2 (40%)	2	1	5
Medium	3 (60%)	2	0	5
n	6	6	2	14

7.3 Sustainability and Workforce Strategies

Sustainability Leaders Profile

17 companies implemented more than four sustainability measures. 82.0% (n= 14) of these were from the “Accommodation” and/or “Food & Beverage” sub-sectors. Such initiatives encompass a range of strategies, including, but not limited to, waste reduction and recycling, water conversation, the promotion of sustainable sourcing, or reducing single-use plastics. Of these environmentally conscious companies, six are micro businesses, representing 50.0% of all micro businesses in the sample (n= 12). This indicates a substantial level of engagement in sustainability efforts within even the smallest enterprises. Additionally, seven of these 17 companies are small businesses, representing 36.8% of all small businesses surveyed (n=19). This suggests a growing awareness of sustainability within this sector. Furthermore, four medium-sized businesses have embraced these practices, constituting 44.4% of all medium-sized businesses (n= 9), highlighting a significant commitment to sustainability within this category as well. The data suggests that businesses across all sizes are increasingly recognising the value of sustainability, with varying degrees of implementation based on their resources and strategic priorities.

However, it cannot be concluded that these companies have implemented an above-average number of measures to make their jobs attractive. Overall, most companies strive to make their jobs attractive by offering fair wages and often in addition a good work-life balance.

Key Business Profiles to Highlight:

The **„Recovery Champions“** business profile spotlights enterprises within the „Accommodation and/or Food & Beverage“ and „Other“ sub-sectors that have adeptly navigated recent economic hurdles. According to the data, micro businesses distinctly emerge as leaders in recovery. Despite their smaller scale and potentially constrained resources, an impressive 50.0% of micro businesses have fully rebounded, outpacing both small and medium-sized enterprises in recovery rates. This indicates that micro businesses have demonstrated remarkable resilience or have adapted more swiftly to the challenges encountered. In contrast, only 27.8% of small businesses and 25% of medium-sized enterprises have achieved full recovery. The majority remain in a state of partial recovery, suggesting that these businesses may be grappling with more prolonged structural or operational challenges that require additional time to overcome.

The **„Skills Leader“** business profile highlights a distinguished group of eight companies (20.0%) known for their consistently high scores(average score ≥ 4.0) across all three key skill sets. Among them, four companies operate within the "Accommodation" and "Food & Beverage" sub-sectors, with another two specialising separately in either "Accommodation" or "Food & Beverage." One company falls under "Other," and one chose not to provide information regarding its sector. In terms of size, four of these enterprises are medium-sized, while two are classified as small and two as micro-sized. Notably, only two companies (one medium-sized and one small) are lauded for their proactive approach in offering continuous training throughout the year. This strategy reflects a profound commitment to fostering a culture of learning and development, ensuring their workforce remains agile and attuned to industry advancements. Conversely, one company focuses its training efforts primarily during the onboarding process, while four others apply training on an as-needed basis,

allowing for significant flexibility and ensuring specific skill gaps are promptly addressed. Regarding workplace measures, there is considerable variation among the "Skills Leaders." Three companies (two medium-sized and one small) implement a comprehensive package of three measures, incorporating elements such as fair wages, work-life balance, health and well-being programmes, inclusion and diversity policies, career development opportunities, and modern workplace technology. This reflects a strong emphasis on employee satisfaction. Among the remaining companies, three apply two measures, while two utilise just one workplace measure. This variation indicates a diverse array of strategies tailored to the unique needs and contexts of each company, aimed at enhancing the overall work environment.

The **„Sustainable Pioneers“** business profile showcases companies that are at the forefront of integrating sustainability with employee wellbeing, setting an industry benchmark for excellence. This profile comprises 17 companies (42.5%), with 82.0% hailing from the „Accommodation“ and/or „Food & Beverage“ sub-sectors. These companies are distinguished by their firm commitment to sustainability, evidenced by their implementation of at least five significant measures addressing environmental responsibility. Additionally, eight companies (20.0%) are dedicated to enhancing workplace appeal, employing a minimum of four strategic measures. These typically include fair wages, work-life balance, health and wellbeing programmes, inclusion and diversity policies, and career development opportunities, all contributing to a supportive and motivating work environment. Notably, four companies (10.0%), consisting of two small and two micro-sized enterprises, stand out for their dual commitment to sustainability and workplace attractiveness. By implementing a comprehensive range of measures across both domains, these companies exemplify a holistic approach to business. This strategy acknowledges the potential connection between sustainability practices and employee satisfaction, thus fostering a balanced and progressive organisational ethos.

8. Qualitative Insights and Best Practices

This section analyses responses to the open questions in the survey to identify common themes and practical examples.

Specific Digital Skills Needs

In response to the open-ended question, „*Which specific digital skills do you need most in your employees? Please provide concrete examples of digital tasks or tools your staff need to master“* (n= 21 or 52,5%), the most frequent answers highlighted the importance of proficiency in various software programs and general PC skills, with 33.3% (n=7) mentions each. Additionally, 23.1% (n=5) of respondents emphasised the necessity for skills in using booking and other online portals. The ability to operate a Property Management System (PMS) was identified by 19.0% (n=4) of respondents as crucial. Skills in utilising cash register systems and artificial intelligence tools were each highlighted by 14.3% (n=3) of respondents, while 9.5% (n=2) mentioned the need for familiarity with apps. These responses reflect a broad demand for a diverse range of digital competencies within the workforce. The answers were very brief, as for examples: *„Word, Excel, hotel programmes, cash register systems“, „PMS hotel reservation systems“,* or *„Using different apps“*.

Green Competency Gaps

The question *„How are sustainability and green practices changing the required skill sets in your business, and which specific green competencies do you struggle to find?“* was also answered only in very brief statements, which were not always clear in terms of what exactly was meant in the context of the question. At 35.0% (n= 14), only a good third of respondents answered the question at all. Of these, several statements (n= 8) had a rather sceptical tone*: “The green concept is not paid for by the guest and costs working time and profit“*. One answer stood out positively: *„New projects, infrastructure and events, that’s good“*. Thematically, there were three references to „packaging“ *(“well-functioning, environmentally friendly disposable packaging“*) as well as to the fact that certain employees are unfamiliar with the concept of green skills: *“Teaching green skills is difficult in our company because we work with employees from very different cultural backgrounds, where sustainability is often not a familiar concept.“*

In light of these brief and sometimes not very comprehensible responses, it seems that training programmes on green skills should emphasise raising awareness and motivation, and highlight the importance of sustainable practices throughout the business. It is also advisable to tailor green skills education to accommodate cultural diversity, for example by using culturally relevant examples or employing multilingual trainers, to enhance understanding and engagement across the workforce.

Soft Skills for Resilient Workplaces

The question "*Which soft skills are most valuable for creating sustainable and resilient workplaces in tourism, and how could training programmes better develop these?"* was answered by more than half of the sample, with 55.0% (n=22) providing responses. The soft skills identified as essential reflect a broad category of „Interpersonal and Adaptive Skills“. These include communication (n= 2) and intercultural communication skills (n= 2), teamwork (n= 2) and cooperation (n= 2), problem-solving (n= 2), creativity (n= 2) and innovation (n= 1), stress (n= 1) and self-management (n= 1), motivation (n= 1), adaptability (n= 1), dealing with uncertainty (n= 1), social skills (n=1), and resilience in order to deal with rude customers (n= 1).

Training recommendations suggested by businesses referred to language courses (n= 2), hospitality and service quality (n= 2), dealing with the new work ethic (n= 1). Highlighting language courses reflects the importance of effective communication in a diverse and multicultural sector. Providing employees with language skills not only improves customer service but also fosters better interactions within multinational teams. Additionally, training in hospitality and service quality underscores the need for excellence in customer service. Furthermore, addressing the new work ethic was suggested as a training focus, acknowledging the evolving expectations of both employees and employers in a rapidly changing work environment. This includes understanding generational shifts, work-life balance, and emerging trends in the workplace.

Best practices mentioned by three respondents underscore the importance of considering both organisational needs and employee well-being to create resilient and adaptable workplaces: One practice is prioritising adaptability within the company, coupled with the employee’s willingness to integrate, by considering cultural fit right from the recruitment stage (*„Adaptability within the*

company and the employee's willingness to integrate – consider cultural fit right from the recruitment stage"). This approach ensures that new hires are able to seamlessly blend into the existing organisational culture. Another viewpoint suggested that maintaining good working conditions and offering competitive pay can mitigate the need for developing soft skills, as these factors contribute significantly to employee satisfaction and retention (*„Good working conditions, good pay, then soft skills are not necessary")*. Furthermore, implementing flexible workplaces, which are discussed with employees and adapted to their needs, was emphasised as a key practice (*„Flexible workplaces that have been discussed with employees and adapted accordingly"*). This involves designing work environments that consider the preferences of employees, thereby improving morale and productivity.

Best Practices Identification

The identification of best practices in recruitment strategies highlights that offering flexible working conditions, as chosen by the respondents, is the most effective approach. This strategy significantly supports work-life balance and attracts talent. Increasing wages and benefits is another widely adopted strategy, providing financial incentives to attract and retain quality staff. Hiring foreign workers demonstrates a proactive strategy to diversify the workforce. Meanwhile, improving the work environment and recruiting from non-traditional talent pools, along with the adoption of automation for routine tasks, reflect a commitment to innovative solutions.

To replicate these successful strategies within the tourism sector, other businesses could begin by implementing flexible work arrangements. This might include offering seasonal employees more flexible shift patterns or enabling remote work opportunities for that do not require a constant on-site presence. Such flexibility can enhance job satisfaction and retention rates by accommodating the diverse personal needs of employees. Competitive compensation packages in tourism can be structured to include not just competitive wages but also benefits such as travel discounts, health and wellness programmes, and opportunities for career advancement. Diversifying recruitment efforts by actively seeking out foreign workers and individuals from non-traditional talent pools can bring new perspectives and skills to tourism businesses. Foreign workers, in particular, can offer language skills and cultural insights that enhance guest experiences, while non-traditional recruits may bring innovative approaches to problem-solving and service delivery. Improving workplace conditions within tourism settings, such as hotels or travel agencies, can include investing in ergonomic workspaces, providing employee lounges, and ensuring access to amenities that promote a positive workplace culture. Incorporating automation in routine tasks like booking management, customer enquiries, or inventory control can streamline operations, freeing up staff to engage more meaningfully with guests and personalise their service.

9. Conclusions and Recommendations

This section summarises key findings and provides actionable recommendations.

Key Findings Summary

Top 3 most important findings:

- Since 2019, 52.5% of businesses have experienced a decrease in their workforce, in contrast to 27.5% that have seen an increase.
- An overwhelming 70.0% of businesses identify the shortage of suitably qualified candidates as their most pressing issue.
- To enhance workplace attractiveness, 82.5% of businesses rely on a strategy centred around fair wages and benefits.

The survey reveals **skills gaps** in digital, green, and soft skills highlighting areas where targeted training could make a substantial impact. For *digital skills*, the primary needs include proficiency in various software programs and general PC skills. Additionally, there is a demand for skills in using booking systems, online portals, and operating Property Management Systems (PMS). The need for competencies in cash register systems and artificial intelligence tools also emerged, indicating a broad requirement for diverse digital abilities. In terms of *green skills*, a lack of awareness and familiarity with green practices became evident, suggesting that training should focus on raising awareness, motivation, and culturally tailored education to enhance understanding and engagement.With regard to *soft skills*, the majority of respondents identified essential interpersonal and adaptive skills such as communication, teamwork, problem-solving, and adaptability. Training in language skills, hospitality, and the evolving work ethic were recommended to improve customer service and foster better workplace interactions.

The main **workforce challenges affecting Schleswig-Holstein's** tourism sector are largely defined by recruitment difficulties. The primary recruitment obstacles that companies encounter, organised by frequency, are as follows: Firstly, 70.0% of businesses report a lack of suitably qualified candidates as their biggest challenge. Secondly, 32.5% of businesses report shortages of employees with the right language skills. Thirdly, 25.0% of businesses struggle with seasonal fluctuations. Fourthly, 20.0% of businesses report an issue with disparity in salary expectations. Finally, 12.5% of businesses find competition from other sectors challenging. Securing skilled kitchen and catering staff is the toughest challenge, with an average recruitment difficulty score of 4.13.

The **recovery status** of companies in Schleswig-Holstein presents a diverse landscape of post-pandemic recovery. The data shows that 37.5% of businesses have fully recovered, with some even exceeding their pre-pandemic growth levels, indicating a strong return to stability. However, an equal proportion of 37.5% represents those that have only partially recovered, highlighting ongoing challenges in regaining their former performance. Additionally, 20.0% of businesses remain in the recovery phase, continuing to struggle towards full recuperation. This distribution highlights the heterogeneous impact of the pandemic, suggesting a critical need for targeted strategies to support businesses, particularly those that have partially recovered or are still in the process of recovering.

Skills Priorities for Your Country

Priority skills for training programs

Tourist businesses in Schleswig-Holstein have identified specific priorities in green, digital, and soft skills to be incorporated into training programmes. Under green skills, the focus is on resource efficiency and waste management (4.10), followed by environmental awareness (4.03), promoting renewable energy usage in hospitality (3.77), as well as integrating nature-based tour planning and sustainable event management (both 3.67). For digital skills, businesses emphasise the need for proficiency in e-commerce and online booking systems (4.40), alongside digital marketing and SEO (4.08), social media management and analytics (also 4.08), online reputation management (4.05), and cybersecurity awareness (3.98). In the realm of soft skills, adaptability to change (4.40) and conflict resolution (4.40) top the list, with creativity, innovation (4.35), empathy, emotional intelligence (4.30), and cross-cultural communication (4.13) also highlighted.

In contrast to the identified priorities in skills development, certain areas have been given less emphasis by tourist businesses in Schleswig-Holstein: Ethical decision-making in tourism, while still important, is given the lowest priority (3.50) compared to other soft skills. Similarly, knowledge of green certificate standards, rated at 3.20, is not seen as an immediate necessity in enhancing green skills. Additionally, the use of augmented and virtual reality (AR/VR) in digital skills, receiving the lowest overall score of 2.85 among all skills, reflects a lack of interest in these technologies.

Country-specific patterns

In conclusion of the survey results, the tourism sector in Schleswig-Holstein predominantly serves a domestic customer base, with 75.0% of tourists coming from within Germany. The sector has been notably impacted by workforce changes since 2019, with 52.5% of businesses experiencing a decrease in staff compared to only 27.5% reporting an increase. Recovery from the pandemic has been uneven, as 37.5% of businesses have fully recovered to pre-pandemic levels, another 37.5% have partially recovered, and 20.0% are still in the recovery phase. Micro businesses emerged as the recovery champions. Looking ahead, 60.0% of businesses plan to maintain their current staffing levels, while 32.5% aim to expand either significantly or moderately; only a small fraction, 7.5%, anticipate reducing their staff. The workforce in Schleswig-Holstein's tourism sector is diverse, with 72.5% of businesses employing foreign workers, primarily from other EU countries. However, recruitment remains a significant challenge, with 70.0% citing a lack of qualified candidates as the main issue, followed by language skills deficiencies at 32.5%. To attract and retain staff, businesses most frequently emphasise fair wages and benefits (82.5%), as well as work-life balance initiatives (62.5%). Furthermore, offering flexible working conditions remains the leading strategy to address staffing challenges, highlighted by 55.0% of respondents. Training is a priority, with 90.0% of businesses providing opportunities for skill development either regularly, occasionally, or during onboarding. Within green skills, there is a strong focus on resource efficiency and waste management, while proficiency in e-commerce and online booking systems leads the digital skills agenda. In terms of soft skills, adaptability to change and conflict resolution are highly prized, reflecting the sector's need for resilience and effective problem-solving capabilities in a dynamic environment.

Recommendations for Training Programs

Target audiences: While medium-sized businesses are more likely to offer regular training throughout the year or as needed compared to small and micro businesses, there remains a significant opportunity for an online training platform to support micro and small businesses. On the other hand, given that a substantial number of small and medium-sized businesses have only partially recovered from the pandemic, targeted training could play a crucial in accelerating their recovery and enhancing their workforce‘s skills. Thus, the online training platform could serve as a valuable resource for all business sizes.

Training format recommendations: Based on the identified barriers to providing training programmes, several practical training approaches could be recommended. To address the prominent barrier of time constraints, affecting 62.5% of businesses, implementing flexible training formats such as e-learning modules or on-demand webinars allow employees to engage with the content at their own pace and outside of regular working hours.
→ *RESKILL has taken this into account by developing the online learning platform.*

To tackle the issue of low employee motivation, cited by 30.0% of businesses, it may be beneficial to incorporate interactive and engaging elements into training programmes, such as gamification, incentives, or rewards for completion. This can increase engagement and encourage staff to participate actively in training initiatives.
→ *RESKILL should take this recommendation into account when developing modules.*

Given the seasonal nature of business operations affecting 27.5% of respondents, it would be wise to schedule training during quieter periods, ensuring that workforce fluctuations do not hinder participation. Alternatively, provider of training courses could offer condensed or modular training sessions that can be completed over time.
→ *RESKILL should take this recommendation into account.*

For the 15.0% of businesses facing financial constraints, seeking subsidies or partnerships with local training providers or industry groups could be a strategy to help offset costs. Additionally, businesses could explore shared training resources or consortiums with similar companies to share expenses.
→ *The training courses on the RESKILL platform are free of charge.*

To combat staff turnover‘s impact on training continuity, which affects 12.5% of businesses, developing an easily accessible repository of training materials can ensure that new staff members can quickly catch up on essential skills and knowledge.
→ *Easy access to RESKILL training materials is planned.*

Lastly, for the 10.0% of businesses citing a lack of suitable training providers, conducting a needs assessment to clearly identify the specific training gaps and leveraging online platforms or specialised trainers could help find tailored solutions.
→ *RESKILL conducts various studies in collaboration with companies and stakeholders of the tourism industry in order to provide offers that are relevant to practical needs.*

Content priorities: Based on the survey responses, training in digital skills should be prioritised, focusing on proficiency in various software programs and general PC capabilities, as these were the most frequently mentioned needs. Following this, training should address skills in using booking systems and online portals, as well as the ability to operate a Property Management System (PMS), given their significant importance. For green competencies, initial training should concentrate on raising awareness about sustainability. It should also address the challenges of teaching these skills to employees from diverse cultural backgrounds, perhaps by integrating culturally relevant examples and using multilingual trainers to enhance engagement and understanding. In the sphere of soft skills, training ought to focus primarily on interpersonal and adaptive abilities, such as communication, teamwork, problem-solving, creativity, and adaptability. Furthermore, language courses should be highlighted to enhance effective communication.