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**COUNTRY  
SKILLS  
PROFILE  
REPORT**



**HUNGARY**



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# EXECUTIVE SUMMARY

The objectives of the Country Skills Profile Report are the following:

- To provide a comprehensive overview of the Hungarian tourism in general, the tourism employment and the digital, green and social skills needed by the tourism sector
- To summarise the current situation regarding the delivery of digital, green and social skills training.



*By 2030, a generation will grow up where environmental awareness will be essential.*

- To analyse the online survey results held among tourism professionals, HR managers and decision makers about the gap between current levels of green, social, digital skills in the tourism and hospitality sector and the future skills needed in 2030.

- To overview the future of Hungarian tourism, of the tourism employment, the gaps between current levels of skills in the tourism industry and the projected future skills needed in 2030, by conducting interviews with key officials from the tourism industry
- To give an inventory of Best Practices in relation to upskilling, reskilling

### *Key Findings*

According to Statista ([Statista](#), 2025) tourism is one of the largest sectors of the national economy, accounting for 10% of GDP (based on 2024 data), including direct and indirect (multiplier) effects, and providing employment for roughly 500,000 people (12% of the national employment). The contribution of the tourism sectors (including hospitality) to GDP is 6.4% and the number of people employed in these sectors exceeds 420 thousand (9.5% of the national employment). Among the sectors specific to tourism, hospitality employs the largest number of people, about one third of the tourism employment, approximately 300 thousand people.

The National Tourism Development Strategy 2030 highlights the issue of sustainability as a strategic direction, in accordance with international standards. It is important that tourism should be realized in harmonious coexistence with the natural environment and local communities.

In Hungary the skills of lifelong learning, openness, positive attitude, empathy, and language skills are mandatory in the tourism and hospitality training programs at different levels.

### *Findings from Interviews*

According to interviewees, the technological development of the 21st century is becoming a huge challenge for tourism. It should be recognised that in order to make tourism more attractive, more efficient and economically, socially and environmentally sustainable, it is essential to use the solutions offered by the internet, location-based services, artificial intelligence, augmented and virtual reality. Among the digital skills that will be essential in the future of hospitality, interviewees mentioned programming, algorithm production.

An open mind, intelligence and ability to adapt to the IT world will be required. It is clear that developing digital skills will be a business interest for the sector.

By 2030, a generation will grow up where environmental awareness will be essential. Young people are starting to understand the importance of environmental protection. Potential changes will take the form of grassroots initiatives.

Among the skills related to environmental protection, the use of renewable energy sources by service providers and in office work, as well as the demand for eco-friendly transportation methods, is expected to increase within the next 10 years. The adoption of e-buses and e-bikes is seen as a strengthening trend, and at events, reusable equipment will be used. City tour buses will be electrically powered.

According to the interviewees, among social skills, guest orientation, commitment, team-spirit, problem-solving, empathy, acceptance, tolerance are among the most important skills in the future. The most crucial aspect of guest care, in the guest-company relationship, is the ability to deal with customers from diverse cultural and religious backgrounds, and with disabilities.

All the interviewees stressed the need for lifelong learning, i.e. they expect their employees to constantly expand their knowledge and develop their skills in line with tourism trends.

### *Conclusion*

The findings highlight the need for significant improvements in the abovementioned skills and the existence of relevant skills gaps that need to be addressed. This could be addressed, for example, through on-the-job training and upskilling, or even mentoring schemes. Cooperation between policymakers, educators and businesses is needed to close these gaps and prepare the workforce for future challenges.

# INTRODUCTION

The Erasmus+ PANTOUR Project is a European partnership for improving a collaborative and productive relationship between education and industry. PANTOUR is the follow-up project of the NTG project (Next Tourism Generation Skills Alliance; 2018-2022). The PANTOUR project aims specifically at designing innovative solutions to address skills needs in tourism.

With the exploitation of its outputs, PANTOUR seeks to benefit job seekers, employed and unemployed workers from the tourism industry, employers, SMEs, sector associations and policy makers. Therefore, it has dedicated special attention to the reskilling and upskilling of the generic workforce on future skills needs. To be able to achieve this goal, research has been conducted in every country of the project consortium, to investigate the future of tourism, skills gaps between current levels of skills in the tourism industry and the future skills needed in the future.

As a start, up to date information is needed. This will be covered with this Country Skills Profile Report: a comprehensive document, covering one country that provides an in-depth analysis of the general tourism and skills landscape, gaps, needs and workforce capabilities within a particular country. It serves as a valuable resource for policymakers, government officials, employers/employees, and educational institutions to understand the current state of skills and make informed decisions regarding workforce development strategies.

The purpose of this Country Skills Profile Report is to provide on the basis a comprehensive overview of general information of each country in the PANTOUR consortium regarding tourism and tourism employment, i.e., tourism facts & figures and a summary of the current situation regarding the delivery of Digital, Green and Social Skills training provision for the main types of suppliers of education/training.

The original publication from 2024 consists of an online survey and results within each country in the PANTOUR consortium, held among tourism professionals, HR managers and decision makers as well as an inventory of Best Practices The document can be found in the PANTOUR publications.

The publication at hand, consists of updated information as well as results from interviews held in late 2025 for tourism professionals offering an overview of contemporary developments in tourism, trends in tourism employability, and the existing gaps between current levels of skills in the tourism industry and the projected future skills needed towards 2030.

# 1. GENERAL TOURISM CHARACTERISTICS, FACTS & FIGURES OF HUNGARY

The primary aim of this chapter of this Country Skills Profile report is to elaborate on general information and give a summary of the tourism situation in the country. This is conducted by collecting and analysing data from country sources and summarising these. The analysis is built upon existing online sources, course content, reports, existing research results, articles, books.

## 1.1 TOURISM FACTS & FIGURES

### *Tourism globally*

The tourism industry is a vast and complex sector that encompasses many industries, including accommodation, transport, attractions, travel companies, and more. According to the international statistics portal Statista (2025 [1]), the total contribution of travel and tourism to the global economy was approximately \$11 trillion in 2024 (Statista, 2025), making up a 10% share of the total global GDP.

The same source (Statista, 2025) reports that the number of international tourist arrivals worldwide was 1.47 billion in 2024.

Prior to the pandemic, Travel & Tourism was one of the largest sectors in the world and accounted for 1 in 4 jobs. Growth is expected at 5.8% annually between 2022 and 2032, outpacing the general economy.

According to the latest report from the World Travel and Tourism Council ([WTTC](#), 2024), the sector will support nearly 348 million jobs worldwide by 2024, a significant increase of 13.6 million jobs compared to 2019, which was the last record year before the COVID-19 pandemic. This highlights the sector's immense contribution to global employment.

### 1.1.1 Contribution of travel & tourism to GDP in Hungary

In Hungary, tourism has played a significant role in the economy for decades. Its direct contribution to GDP in the last year of the pre-Covid period, in 2019, was 8.3%. It decreased to 4% in 2020, and then from 2021, it started to rise and reached 7.42% in 2024 ([Statista](#), 2025), and is expected to increase over the upcoming years.

### 1.1.2 Size and relevance of the subsectors

According to data from the Hungarian Central Statistical Office (KSH), the number of commercial accommodation units (hotels, boarding houses, tourist hostels, youth hostels, holiday homes, campsites) was 3,475 in 2019. During the Covid period, this number decreased significantly by 17% due to forced closures, so that in 2020 only 2,891 units were operating. A further decrease occurred in 2021, but this resulted in a drop of less than 3% compared to the previous year. The number of operating units rise in the upcoming years, in 2024 it was 3015, not far from the number in 2019 ([KSH](#), 2025).

<sup>1</sup>Hungarian Tourism Agency (MTÜ)

<sup>2</sup>Hungarian Central Statistical Office (KSH)

According to KSH data, the number of catering establishments in 2019 was 51,329. As a result of Covid, there was a 3% decrease in 2020 (50,190 units). Further closures took place in the upcoming years, and the number of catering establishments was 43,600 by the end of 2024 ([Zerényi, 2025](#)).

According to the data of the Tourism Destination Management (TDM) Association, a total of 94 registered member organisations operated in Hungary in 2019. Their number has not changed in the past period ([TDM Szövetség, n.d.](#))<sup>3</sup>.

According to the KSH, the number of tour-operators /travel agencies in the examined period was 1,028 in 2019, and this decreased to 1,006 in 2020. Further closures took place in so that in 2021 only 968 companies were operating, and in 2023 the number was only 885 ([KSH, 2024](#)).

The range of attractions is so broad that aggregated data is not available. The most important attractions in Hungary are: spas, natural spas, museums, tourist transportation, adventure parks, zoos, amusement parks, protected natural areas, music and dance events.

In summary, it can be concluded that the closures will continue in 2022, and the economic difficulties will intensify in 2023, primarily due to the drastic increase in energy costs. After these hard years, the industry showed a significant increase in the number of visitors and nights spent in the country.

Health tourism is a special boundary between tourism and health; it is necessary to build up a workforce that sees through both at the same time characteristics of the field, professional problems. According to NTS Strategy2030 special courses should be developed as further training for professionals and employees who are working in the health tourism.

<sup>3</sup>Tourism Destination Management Association (TDM Szövetség)

The courses should focus on three areas: tourism, healthcare and foreign language skills. Further training areas can be, for example, guest orientation, conflict management, sales basics, introduction of regional offerings, etc.;

Starting and maintaining basic health training, mainly for workers in the tourism sector.

As a result, employees (e.g. receptionists, tourist organisers) receive comprehensive knowledge about the effects and application techniques of the services they offer;

Providing foreign language learning opportunities for health tourism workers based on the primary sending markets. Communication with foreign guests improves, which is reflected in customer satisfaction;

Starting training and health tourism treatments related to burnout and stress management for all employees. This can reduce employee attrition.

The biggest and most comprehensive development of the Hungarian tourism industry so far is the National Tourist Information Center (NTAK), which started operating in 2019. Based on the current legislation, all accommodations of all domestic accommodation providers must be registered with NTAK. From November 1, 2021, the registration obligation extends to catering businesses and tourist attractions, and their obligation to provide data starts from 1st July, 2023. With this, NTAK will have data on the performance of all key players in the tourism sector ([NTAK](#), n.d.).

### **1.1.3 Incoming and outgoing tourists**

According to KSH ([KSH](#), 2025), Hungary has also experienced negative phenomena related to tourism: the most visited destinations (Budapest, Balaton) sometimes struggled with overtourism. In 2021, the number of incoming travels to our country increased by 16% to 36.7 million trips compared to the previous year, but it was significantly lower than in 2019, by 40%. This number significantly rose to 51,1 million trips by 2024, very close to the number of 2019. One-day visits increased by 19% and multi-day trips by 6.9%. Compared to 2019 data, one-day trips decreased by 35%, and multi-day trips by more than

half. In 2021, Hungarian citizens travelled abroad 13.3 million times, 4.2% more than in the period affected by the epidemic a year earlier. However, compared to 2019, the number of trips fell by 47%.

In 2022, the number of incoming travels to our country increased by 26% to 46,3 million trips compared to the previous year, but it was significantly lower than in 2019, by 25%. One-day visits increased by 17% (in 2022 compared to 2021) and multi-day trips by 60% (in 2022 compared to 2021). Compared to 2019 data, one-day trips decreased by 24% (in 2022), and multi-day trips by more than a quarter (25,4% - in 2022) ([KSH](#), 2022d). Table1 and table2 show the distribution of foreigners visiting Hungary and the number of guest nights they spent by country.

In 2024, Hungarian citizens travelled abroad 22 million times, 35,9% more than in the period affected by the epidemic. Compared to 2019, the number of trips was just 12% lower, which is a good sign of tourism sector recovering ([KSH](#), 2025).

*Table 1. International visitor arrivals by countries (2019-2024) ([KSH](#), 2025)*

	2019	2022	2024
Romania	22,4%	18,4%	18,4%
Slovakia	18%	21,8%	20,8%
Austria	15%	16,3%	15,2%
Serbia/Montenegro	6,7%	6,9%	6,8%
Germany	5,7%	6,9%	6,5%
Ukraine	4,1%	2,2%	3,6%
Poland	4%	3,9%	3,9%
<b>Total</b>	<b>61.397.000</b>	<b>46.343.000</b>	<b>51.176.000</b>

*Table 2. International guest nights by countries (2019-2023) (KSH, 2023)*

	2019	2021	2022	2023 (January-June)
Germany	12,8%	15,3%	12,1%	11,5%
UK	7%	3,3%	6,2%	6,9%
Czeck Rep.	6,2%	8,7%	8,2%	7,0%
USA	5,5%	N/A	N/A	N/A
Austria	5,2%	6,2%	5,8%	6,3%
Poland	4,9%	5,2%	5%	4,2%
Italy	4,4%	3,7%	3,6%	4,7%
Romania	4,2%	6,7%	6,1%	5,8%
Israel	3,3%	N/A	N/A	N/A
<b>Total</b>	<b>15.753.000</b>	<b>5.499.000</b>	<b>12.364.000</b>	<b>5.683.000</b>

#### 1.1.4 Share of different transportation modes (plane, car, train) in tourism

The distribution of tourism in Hungary according to means of transport is a consequence of the special geographical situation. The country is located at the junction of international routes, its lowland location makes transportation predictable. Consequently, it provides a good connection between the Eastern and Western, as well as the Northern and Southern countries of Europe. In tourism, road transport dominates with a value approaching 90%, air transport is around 10%. Water transport accounts for less than 1%, rail 1-2% (KSH, 2023a).

#### 1.1.5 Arrivals of international versus national tourists

Although the confinement caused by the epidemic and the limited possibility of travelling abroad have reduced tourism to an unprecedented extent, the domestic demand of the Hungarian population has increased significantly. This process continues to this day. According to the Hungarian National Statistic Office, the 2021 numbers of domestic tourism significantly exceeded the results of 2020 in almost all respects and approached the 2019 level. After the growth in the countryside, tourism began to increase also in Budapest. 9.4 million guests and 28.8 million guest nights were registered in commercial and private

accommodations. Three quarters of the guests came from the country, the average length of stay was 3.1 days ([KSH, 2023a](#)). In 2024, the number of foreign visits exceeded 50 million, the average length of stay was 2,2 days ([KSH, 2025](#)).

### 1.1.6 Type of travel: business travel, consumers/leisure travel

The most important types of tourism in Hungary are the following:

- Leisure, entertainment, health care
- VFR
- Shopping
- Health care
- Additional private trips (education, religion, hunting, other private trips)
- Business, conferences

### 1.1.7 Company sizes

The number of gastronomic enterprises were just under 47,000 by the end of 2022 (around 1000 less than in 2021 and around 4400 less than in 2019). Among the commercial catering establishments, the number of beverage outlets and music venues decreased the most, by more than 3000 outlets (compared to 2019 and 760 less than the previous year). At the end of 2024, there were 43,600 catering establishments in Hungary, which is 7,800 fewer than in the previous year. There were 1,000 commercial catering establishments and 328 workplace catering establishments, compared to the previous year. The turnover of catering establishments increased by 5.0% compared to 2023 ([KSH, 2025](#)).

As of 1 January 2021, all catering establishments must be registered in one of the types of catering establishments defined in Government Decree 210/2009.

The number of catering establishments decreased by more than 3,700 between 2010 and 2019. By the end of 2021, the coronavirus epidemic had reduced the number of catering establishments by almost the same amount, to more than 3,400 fewer than two years earlier.

In 2022, this number has further decreased to nearly 4400 compared to 2019 ([KSH, 2023](#)).

In 2021, the hospitality sector was home to 12.1 thousand self-employed and 13.7 thousand partnerships. 61% of the self-employed worked in restaurants and mobile catering and 31% in beverage service activities the food service sector. In 2024, the share was 62% for restaurants and mobile food service activities and 30% for beverage service activities ([Zerényi, 2025](#)). Almost all (99.9%) of the 26,1 thousand catering partnerships and self-employed persons were in the SME sector. The share of SMEs in the hospitality sector was 89% for micro enterprises, 10.3% for small enterprises and 0.6% for medium-sized enterprises in 2024 ([Zerényi, 2025](#)).

*Table 3. Number of active enterprises in 2020 ([KSH, 2023b](#); [Zerényi, 2023](#))*

Period	TEÁOR08	Category	Total category of enterprise	Self-employed	Partnership	Non-profit organisation
2020	56=Catering	Total	25624	12315	13298	11
		of which SMEs	25614	12315	13288	11
	561=Restaurant and mobile catering	Total	17267	7295	9970	0
		of which SMEs	17264	7223	9967	0
	563=Beverage service	Total	6226	3985	2240	0
		of which SMEs	6226	3985	2240	0
	562=Event catering and other food service activities	Total	2198	1067	1123	8
		of which SMEs	2190	1067	1116	8
	5621 Event catering	Total	453	298	154	0
		of which SMEs	453	298	154	0
	5629 Other food service activities	Total	1745	769	969	7
		of which SMEs	1737	769	962	7

Table 4. Number of active enterprises in 2021 (KSH,2023b ; Zerényi, 2023)

Period	TEÁOR08 <sup>4</sup>	Category	Total category of enterprise	Self-employed	Partnership	Non-profit organisation
2021	56=Catering	Total	25810	12055	13742	13
		of which SMEs	25800	12055	13732	13
	561=Restaurant and mobile catering	Total	17823	7343	10478	2
		of which SMEs	17819	7343	10474	2
	563=Beverage service	Total	5875	3684	2190	1
		of which SMEs	5875	3684	2190	1
	562=Event catering and other food service activities	Total	2112	1028	1074	10
		of which SMEs	2106	1028	1068	10
	5621 Event catering	Total	411	274	136	1
		of which SMEs	411	274	136	1
	5629 Other food service activities	Total	1701	754	938	9
		of which SMEs	1695	754	932	9

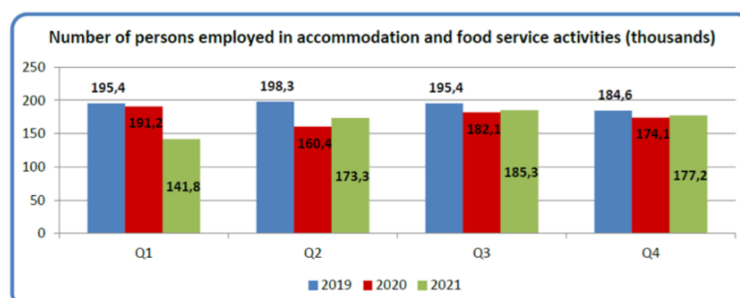
<sup>4</sup>TEÁOR08 - Standard industrial classification of economic activities (Gazdasági tevékenységek egységes ágazati osztályozási rendszere): The Standard Industrial Classification of Economic Activities is the Hungarian version of the EU's classification of economic activities, NACE Rev.2. Based on Regulation (EC) No 1893/2006, TEÁOR'08 will be used from 1 January 2008 to define the main activity of enterprises, to calculate economic and social indicators and to publish statistical data.

## 1.2 TRAVEL AND TOURISM'S CONTRIBUTION TO EMPLOYMENT

Tourism is one of the largest sectors of the national economy, accounting for 10% of GDP (based on 2019 data), including direct and indirect (multiplier) effects, and providing employment for roughly 400,000 people (12% of the employed). The contribution of the tourism sectors (including hospitality) to GDP is 6.4% and the number of people employed in these sectors exceeds 420 thousand (9.5% of the employed). Among the sectors specific to tourism, hospitality employs the largest number of people, about one third of the tourism employment, approximately 140 thousand people. In 2020, the year hit by the COVID-19, preliminary data show that the direct contribution of the tourism sector to GDP fell to 5.1% and the multiplier contribution to 8.1% (KSH, 2024).

Figure 1 shows the development of the number of employees in the accommodation and hospitality sector between 2019-2021. In the accommodation and food service activities (I) sector, 170 thousand persons were employed in 2021 (75% of them in hotels and restaurants), which accounted for 3.7% of the national economy as a whole. In 2021, the number of persons employed in industry (I) was 4.3% lower than in the previous year (177 thousand) and 12.4% lower than in 2019 (193 thousand) due to the negative impact of the coronavirus epidemic. The number of people employed in the national economy as a whole increased by nearly 1% compared to 2020 (Zerényi, 2023).

*Figure 1. Number of persons employed in accommodation and food service activities (2019-2021) (KSH, 2023a; Zerényi, 2023)*



## 1.3 DIRECT AND TOTAL CONTRIBUTION TO EMPLOYMENT IN TOURISM IN 10 YEARS' TIME

The Hungarian government adopted the National Tourism Development Strategy in 2017, which defined the framework in which the state and the market jointly think about the future of tourism in Hungary until 2030. As a result of Covid-19, the strategy was reviewed. The time frame of the Tourism 2.0 document, as well as its goals, remain unchanged. It sets out the necessary development and sector management tasks until 2030, in order to increase the direct and indirect contribution of Hungarian tourism to GDP to 16 percent by 2030 ([MTÜ, 2021](#)).

According to the Hungarian Tourism Agency the total contribution of tourism to the GDP was 12% in 2022. 2024 was a new record year for Hungarian tourism, as the contribution to the GDP was almost 13% ([MTÜ, 2025](#)).

## 1.4 DIRECT AND TOTAL CONTRIBUTION TO EMPLOYMENT IN TOURISM IN 10 YEARS' TIME

The labour market data of the tourism sector is currently incomplete and heavily distorted by the “grey” economy. According to the *National Tourism Strategy 2030*, in 2017 the number of jobs in the tourism sector was 428,000, 10.0% of the jobs were directly generated by tourism, and tourism accounts for 13.2% of employment in the national economy when the direct and indirect effects are combined. In 2019, 419,000 people were employed in the tourism and hospitality sector, which was 9.5% of total employment.

After the COVID-19 pandemic, the number of employed people decreased significantly: in the subsectors of accommodation and catering, 193.4 thousand people were employed in 2019, 177 thousand in 2020, and 169.4 thousand in 2021.

indirect contribution of Hungarian tourism to GDP to 16 percent by 2030. Based on this, the workforce required in 2030 can be estimated at 600,000 ([MTÜ, 2021](#)).

From the data, it can be concluded that the proportion of vacant positions in the accommodation service and hospitality sector is still significant, i.e. even after the reopening after the pandemic, a labour shortage must be expected in the sector ([KSH, 2023a](#)).

One of the goals of NTS 2030 and Tourism 2.0 is to increase the direct and indirect contribution of Hungarian tourism to GDP to 16 percent by 2030. Based on this, the workforce required in 2030 can be estimated at 600,000 (MTÜ, 2021).

## 1.5 MAIN FOCUS POINTS OF NATIONAL STRATEGY FOR TOURISM

With the revision of the National Tourism Development Strategy 2030, the Hungarian Tourism Agency developed the *Tourism 2.0* document. The purpose of *Tourism 2.0* is to present the intervention points identified during the review of the National Tourism Development Strategy 2030, new sectoral approaches, and opportunities to increase the competitiveness of Hungarian tourism. The document presents the development opportunities in relation to the current situation of tourism and hospitality through 12 guidelines and takes a series of actions related to them. Tourism 2.0 also focuses on the areas of Hospitality, MICE, Health Tourism, Religious Tourism, and Sales, which areas have significant development reserves.

The horizontal goals of NTS2030 remained and have been expanded: the demand orientation, the ecosystem-level cooperation, the family-friendly approach and digitization appear in a comprehensive way in the Strategy. The formation and structured development of sector-specific digital competences and capabilities must fit the new into its concept.

NTAK's functions and user base are continuous expansion necessitates the system-related continuation of training courses. In conducting this effectively the Hungarian Tourism Agency wants to rely more and more on for distance learning webinars and online forums widely used as a result of the epidemic crisis,

organising them around practical questions, combined with a live demonstration of online solutions.

The Hungarian Tourist Association Foundation founded in 2019 the CheckINN, which is an umbrella brand and innovation hub having been extended with the creation of the "CheckINN DIGITAL" application and prize. The purpose of the annual competition is to recognize successfully implemented projects of those tourism enterprises that are at the forefront of sector digitization and encourage the innovative thinking.

The Tourism 2.0 Strategy highlighted the issue of sustainability as a strategic direction, in accordance with international standards. It is important that tourism should be realised in harmonious coexistence with the natural environment and local communities.

## 1.6 COUNTRY-SPECIFIC CHALLENGES AND DEVELOPMENTS IN TOURISM

The *Tourism 2.0 Strategy* - the national tourism development strategy until 2030- defines the following goals:

The most important types of tourism in Hungary are the following:

- Destination products design
- Digital development of the sector
- Extensive sustainability
- Visitor-oriented developments
- Dedicated, well trained professionals

The following sub-goals are formulated in relation to workforce development:

Implementation of a comprehensive Strategic Resource Planning covering the entire sector, which takes into account the workforce related to its quantity and quality current and future needs.

The development of practical training is justified in tourism-related vocational

In order to raise the standard of higher education, Hungarian Tourism Agency takes a more active role in dual courses and in the improvement the quality of tourism higher education.

To ensure the continuing education for those working in tourism by widening the opportunities and providing quality training to the workforce

Increasing the attractiveness of a tourism career is also an essential step for stabilising the labour market.

## 2. UPDATED EXPERT INTERVIEWS

In this chapter, the results are presented of the semi-structured interviews that have been held with experts in tourism in HUNGARY. With these interviews, we are seeking more detailed knowledge and fresh insights regarding trends in tourism, in tourism employment and in the development of Digital, Green, Social and Cultural skills in tourism. Semi-structured interviews are an appropriate tool for this purpose, since they allow for new understandings and thoughts to surface during such interviews, which further facilitate participants' responses and elaborations.

### 2.1 Founder and CEO of Digital Tourism Ltd. and Digital Tourism Agency

International travel is experiencing a golden age again, but tourism players must not forget that domestic travel continues to account for the largest share of the global market, accounting for 75 percent of travel expenditures. This is no different in Hungary, with the exception of Budapest, domestic guests and guest nights dominate the country. Domestic bookings and travel recovered faster after the pandemic than international travel, which is typical after economic downturns. Although the so-called revenge travel phenomenon has recently been observed, where travelers prefer international trips postponed due to the pandemic, the pre-Covid trend is expected to return by 2030. The future of the sector is influenced not only by the tourist mix, but also by the strengthening of digitalisation, including the spread of artificial intelligence (AI).

In his opinion, it is essential to examine the consumer habits and culture of the generation in order to provide relevant answers. However, before separating generations, it is worth defining the most relevant uses of technological areas: Virtual reality (VR) and augmented reality (AR) technologies allow travelers to discover destinations in advance, take virtual tours, get interactive information about locations, and more. In many ways, it supports the actual closing of the reservation, i.e. it encourages a purchase or even saves the consumer from an "expensive disappointment" who has a different image of the planned destination according to their own idea, but after experiencing it in the virtual space, their desire and motivation have already disappeared. In many cases, augmented reality also appears in museums and experience centers for educational purposes, so it is not only spectacular, but also provides useful additional value for visitors and the local community.

Sustainability, cost reduction, automated human resource-free solutions or technological solutions that focus on public hygiene aspects – these are all long-term foundations of the tourism of the future. Especially in the younger generations, it can be felt that they travel according to different principles, orient themselves and collect information differently. If they can't connect to the social network, it fills them with frustration and makes them feel restricted. Yet travel is about freedom and desire, and this requires an infrastructure adapted to the consumer culture.

In tourism, digitalization is both a customer experience, an infrastructure for data collection and analysis, and automation. He finds it extremely exciting when, for example, on a tropical island, we can learn and orient ourselves about the local flora and fauna by just holding the camera of our phone or smart device there, and artificial intelligence recognizes and presents what we are seeing through the camera. A modern-day virtual guide will tell you the history and key features of the island on a similar principle. Learning playfully while relaxing is not only a relaxation for children.

A survey was conducted in 2018 that examined the digital maturity of Hungarian businesses, breaking down the market participants participating in the research into sectors and sub-sectors.

At that time, out of all the areas examined, tourism companies finished at the end of the line, only two of them were considered digitally advanced on a sample of 100. This is far from a good ratio, in fact.

What is much more important, however, is what has happened in previous years, what dynamics characterize the digital transition. We can say that the most important step has been taken this year, the tourism sector is characterized by data-driven sectoral management, the National Tourism Data Supply Centre (NTDSC) is functioning and is constantly being expanded with new functions, and the evangelism and education channels available to market players have also been present for years. Well-targeted, well-paced government investments and the involvement of market players in transparent data reporting are already putting us at the forefront of Europe, and in the coming years we will witness much faster development than most people expect. One of the basic conditions for this is the development of personal and entrepreneurial digital competence sets in micro, small and medium-sized enterprises. If we can make significant progress in this area in the coming years, the comprehensive digital maturity of domestic tourism can serve as a model for other countries as well.

Finally, he noted that in the next five years, the tourism industry is expected to become even more digital, expanding with new solutions that improve the travel experience, increase efficiency, and support sustainability. Responding quickly to changes in travel habits and needs will be key to staying competitive.

We can state that:

**"Those who are left behind in the processes of the international digital transition will become irrelevant in the long run in the market competition. If we look at Hungary, we can be big winners in this process."**

## 2.2 Representative of Visit Hungary

The representative of Visit Hungary emphasized that the competitiveness of tourism is now unimaginable without data-driven decisions and digitization. "The NTDSC is the basis for obtaining an accurate picture of the real performance of tourism at national and regional level. This is the only way we can allocate resources well, address guests at the right time and with the right message. Regular and accurate data provision is therefore in our fundamental common interest, and this is the key to successful cooperation," he said.

He emphasized that 70% of marketers already use AI, and the tool results in an average of 2.5 hours less work per day for them in content production.

He emphasized that digitalization has not only transformed marketing, but has also completely changed the guest experience. A visitor comes into contact with up to 14-15 partners during their trip, and understanding the entire chain is key to ensuring a positive experience.

In his opinion, AI should be treated as a junior colleague: it can work independently, but it needs a precise brief – not only about the tasks, but also about the processes, expectations and rules, otherwise it will give too general, empty, mediocre answers.

Regarding AI capabilities, he also gave specific examples from tourism:

- Writing personalized value propositions for different target groups (American retired couple, Spanish backpacker, Chinese family);
- Production of multi-channel content from a blog post (Facebook post, Instagram story, TikTok video, newsletter);
- Creating data visualization and dashboards of hotel revenue and occupancy;
- Generation of images and videos (Budapest's thermal baths, ruin pubs, Danube Bend experiences).

"AI takes the burden of routine work off our shoulders, leaving us with more time for strategy and creativity," he concluded. Digitalisation and artificial intelligence are no longer distant trends, but part of everyday life, which fundamentally transform the operation of tourism.

## 2.3 President of the Hungarian Tourism Agency

This year may bring a new record in Hungarian tourism. As a result of the peace processes, inbound traffic may continue to increase, but the possible termination of the Sziget Festival would not pose a particular problem for the sector, he highlighted in an interview with Index.

The performance of Hungarian tourism continues to be on an upward trajectory. By October 2025, accommodation establishments had a turnover of HUF 1000 billion, which is an 11 percent increase compared to last year. The turnover of catering establishments is close to HUF 2000 billion, which means an 8 percent increase.

Budapest's tourism indicators are strong even in European comparison: the capital has now overtaken Prague, Bratislava and Warsaw, and is performing steadily close to Vienna. The autumn traffic of Lake Balaton is also increasing, which is an important step towards four-season operation. The goal is for the region not only to build on the six-week summer season, but to remain attractive for tourists throughout the year. The impact of the festival is far from as great as many people think. According to the data, compared to Budapest's 8 million tourists a year, the number of people camping at Sziget or staying in Budapest and its surroundings during the festival does not even reach one percent.

The president of the NGO emphasized that the international situation has a direct impact on tourism. Due to the war conflicts, Hungary has lost about one million Russian guest nights and significant Israeli turnover, but with the arrival of peace, guest traffic from these countries can quickly recover.

"After the conclusion of peace in the Middle East, the Israeli ambassador indicated that 17 tour operators want to visit Hungary, which means that inbound tourism from that region will soon switch to a higher gear."

### **Conclusion of the interviews**

According to interviewees, among the digital skills that will be essential in the future of hospitality, interviewees mentioned programming, algorithm production, and for small problems, creating their own content. An open mind, intelligence and ability to adapt to the IT world (dare to touch parts of the programme) will be required. It is clear that developing digital skills will be a business interest for the sector.

By 2030, a generation will grow up where environmental awareness will be essential. Young people are starting to understand the importance of environmental protection. Potential changes will take the form of grassroots initiatives.

According to the interviewees, among social skills, guest orientation, commitment, team-spirit, problem-solving, empathy, acceptance, tolerance are among the most important skills in the future. All the interviewees stressed the need for lifelong learning, i.e., they expect their employees to constantly expand their knowledge and develop their skills in line with tourism trends.

# SKILLS SYNTHESIS

**a skilled workforce is essential for the sustainable growth competitiveness of the tourism sector**



The findings presented in this report serve as a roadmap for policymakers, educators, and industry stakeholders to collaborate effectively in shaping the future of tourism workforce development.

In essence, the PANTOUR Country Skills Profile Reports serve as a call to action, urging stakeholders to prioritize skill enhancement initiatives and embrace innovative practices to ensure the continued success and resilience of the tourism industry in the years to come.


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