

02/26

**COUNTRY
SKILLS
PROFILE
REPORT**



SPAIN



Co-funded by the
Erasmus+ Programme
of the European Union

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor the granting authority can be held responsible for them.

TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	3
INTRODUCTION	5
1. GENERAL TOURISM CHARACTERISTICS, FACTS & FIGURES OF SPAIN	6
1.1 TOURISM FACTS & FIGURES	6
1.2 TRAVEL AND TOURISM’S CONTRIBUTION TO EMPLOYMENT	11
1.3 DIRECT AND TOTAL CONTRIBUTION OF TOURISM TO GDP IN 10 YEARS’ TIME	11
1.4 DIRECT AND INDIRECT CONTRIBUTION OF TOURISM TO GDP IN 10 YEARS.....	12
1.5 MAIN FOCUS POINTS OF NATIONAL STRATEGY FOR TOURISM.....	13
1.6 COUNTRY-SPECIFIC CHALLENGES AND DEVELOPMENTS IN TOURISM	14
2. CURRENT SKILLS TRAINING DELIVERY IN SPAIN	17
2.1 DIGITAL SKILLS	20
2.2 GREEN SKILLS	22
2.3 SOCIAL SKILLS.....	22
4. EXPERT INTERVIEW RESULTS	24
4.1 THE FUTURE OF TOURISM AND TOURISM EMPLOYMENT	25
4.2 DIGITAL SKILLS	30
4.3 ENVIRONMENTAL/GREEN SKILLS.....	36
4.3 SOCIAL-CULTURAL SKILLS.....	44
REFERENCES.....	52



EXECUTIVE SUMMARY

The objective of this report is to inform about the current situation regarding the competences needed by the Spanish tourism sector in three areas: digital, environmental and social. These competences are acquired through training in these areas, the situation of which is also reflected in this report.

Based on primary and secondary research, conclusions are drawn

It is expected that the tourism sector will continue to move towards a model of sustainability.

on the situation of the Spanish tourism sector, which is one of the main economic pillars of the country.

Skills training in Spain is highly privatised, although there is a wide variety of courses, especially at the digital level. There are not many specialised courses in AI or

robotics as we are a long way from the idea from the idea of implementing of implementing these technologies in general terms. Looking to the future, special emphasis should be placed on the acquisition of basic notions of digitalisation, as 35.8% of the Spanish population lacks basic digital skills according to the report "Impact of the digital transformation in Spain: 1998-2023" developed by Fundación Orange and the consultancy firm Nae (Fundación Orange, 2023a).

It is expected that the tourism sector will continue to move towards a model of sustainability, both socially, economically and environmentally. Companies will be concerned with designing an increasingly sustainable model and destinations will be concerned with taking care of the negative impact of tourism. In addition, care for biodiversity will be an important aspect on which to train teams.

In the social field, continuous training in skills such as communication, empathy and adaptability will be important. The latter will be necessary to cope with all the changes that will arise, especially at the digital level, in our sector.

Finally, the success stories analysed in the report follow a similar pattern, always opting for employee well-being. The trend of putting the employee before the customer is highlighted, so that it is the employee who can deliver quality service in a quality environment. In an increasingly digitalised society, it is important to take care of the people who make up our companies.

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 SPAIN

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, the total contribution of travel and tourism to the global economy was \$ 7.71 trillion in 2022 (Statista, 2022), a 7.6% share of the total global GDP, remaining 5% below pre-pandemic levels.

Prior to the pandemic, Travel & Tourism was one of the largest sectors in the world and accounted for 1 in 4 jobs. In 2024, the sector supported a total of 357 million jobs globally, which is approximately 1 in 10 jobs. Growth is expected at 5.8% annually between 2022 and 2032, outpacing the general economy.

In 2024, international arrivals worldwide experienced a strong recovery, reaching approximately 1.4 billion tourists, representing 99% of pre-pandemic levels and an 11% increase over 2023. (World Tourism Organization, 2025).

In 2024, The World Travel and Tourism Council (WTTC) estimates that employment in the sector grew by 6.2% compared to 2023, reaching 357 million workers. It is expected that by 2025, there will be more than 371 million jobs, an increase of 4% over the previous year. (Hosteltur, 2024; World Travel & Tourism Council, 2024).

1.1.1 Contribution of travel & tourism to GDP in Spain

According to the latest statistics from the National Statistics Institute (INE), tourism activity reached 184,002 million euros in 2023, 12.3% of GDP, which was 0.9 points more than in 2022. The characteristic branches of tourism generated more than 2.5 million jobs, 11.6% of total employment. (Instituto Nacional de Estadística, 2024; World Travel & Tourism Council, 2024).

According to WTTC data, during 2024 the Spanish tourism sector experienced its best year since 2019. Its contribution to GDP rose by nearly 8% to €248.7 billion, or 15.6% of the economy. It also employed 3 million people, nearly 14% of the country's jobs (World Travel & Tourism Council, 2024).

1.1.2 Size and relevance of the subsectors

In Spain the 3 main tourism subsectors in terms of employment are accommodation, food and beverage, and activities provided by travel agencies and tour operators.

If we talk about the accommodation sub-sector, it is important to analyse the number of establishments open in Spain as of 2024. The average figures were 14,526 hotels, 831 campsites, 132,162 flats, 16,921 rural tourism accommodations and 1,203 hostels opened in 2023 (Instituto Nacional de Estadística, 2024).

The travel agency and tour operator sector closed 2024 with 67,420 members, representing 3,119 more workers than in the same month of the previous year and an increase of 4.8%. The sector thus closes a positive year in terms of employment. Compared to 2019, the figures remain above previous records (Agenttravel, 2025).

In 2024, sales in the restaurant sector grew by approximately 2.1% compared to 2023, exceeding €42.5 billion. As a result, the industry's revenues are even higher than pre-pandemic levels (Statista, 2024). As of January 1, 2024, Spain had 233,543 restaurant sector companies. When looking at food service establishments, the total sector comprised 266,837 premises as of January 2024; 61.4% of these were beverage establishments (bars, cafés), while about 83,714 were restaurants and food stalls. (Statista, 2024).

1.1.3 Size and relevance of the subsectors

The main source countries for arrivals into Spain in 2024 were the United Kingdom (20%), France (14%) and Germany (13%). In 2024, international tourist expenditure was 107.1 billion euros (up 10.9% year-on-year), while domestic expenditure reached 82.9 billion euros, up 2.2% on 2023. These segments accounted for 56.4% and 43.6% of total expenditure, respectively. Leisure travel accounted for 88.3% of total expenditure, compared to 11.7% for business travel expenditure. The main outbound countries to Spain in 2024 were the United Kingdom (20%), France (14%) and Germany (13%). (World Travel & Tourism Council, 2024). These results are not usual, as the pandemic crisis in 2020 led to a variation in these percentages.

Over 2020 and 2021, British tourists encountered challenges traveling to Spain as a result of restrictions.

Meanwhile, French tourists faced fewer complications, leading to a reversal of the rankings for both countries. Focusing on outbound departures from Spain in 2021, France accounts for the highest percentage with 37%, followed by Italy and Portugal with 11% each.

The most up to date data from the Instituto Nacional de Estadística reports that the number of tourists visiting Spain in 2024 was a total of 93.8 million tourists (Instituto Nacional de Estadística, 2025).

Meanwhile, a total of 21,623,478 outbound trips were recorded for Spanish residents. (Instituto Nacional de Estadística, 2025).

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

According to INE, the primary mode of travel for the majority of tourists visiting Spain is through air transportation. In 2024, 77.119,787 tourists arrived via air travel, succeeded by car transportation, with 14.256,274 tourists. These are followed by port transport, with 2.104,091 tourists and then train transport, with 279.145 tourists (Instituto Nacional de Estadística, 2025).

1.1.5 Arrivals of international versus national tourists

In 2024, a total of 184.4 million domestic trips were recorded within Spain. This figure almost double the total number of international tourists visiting Spain in 2024, which totalled 93.8 as mentioned in point 1.1.3 above (Instituto Nacional de Estadística, 2025).

We can also analyze spending patterns among different types of visitors. In 2024, according to WTTC domestic tourism spent less than international tourism, following the typical trend observed in the tourism industry, where international spending usually exceeds domestic spending. Domestic visitors spent US\$ 5.3 trillion, growing 5.4% over the 2023 level. At the same time, spending by international visitors increased 11.6% annually to reach US\$ 1.9 trillion (World Travel & Tourism Council, 2024).

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

Leisure or consumer travellers in Spain generally have higher spending than their business counterparts. In 2024, leisure expenditures would represent 88.3% of total tourist spending, with the remaining 11.7% reserved for corporate expenses (World Travel & Tourism Council, 2024).

1.1.6 Company sizes

At first sight, the tourism companies in Spain can be classified into 4 sub-sectors based on the services they provide: accommodation, food and beverage, tourist intermediation, and complementary services.

A more recent study shows that in Spain, the hospitality sector is mainly made up of small businesses, most of which are self-employed or have fewer than five employees. At the end of 2024, there were nearly 319,000 hospitality establishments, including bars, restaurants, cafes, and accommodation. This sector is a fundamental economic pillar, with a turnover of more than €122 billion and a significant weight in the national GDP, as well as steady growth in employment, according to data from the end of 2024 (Statista, 2025).

In terms of microenterprises, EXCELTUR (EXCELTUR, 2018) states that looking at the food and beverage sector, 95% of it is made up of companies of this size. However, there are other segments of the tourism sector where the size of enterprises is larger. In the hotel industry, for instance, 21% of enterprises employ more than 10 staff members. If we consider the transport industry, we can observe that companies having over 10 employees can be found in 47% of the air transport sector and 15% of the maritime transport sector. Lastly, in the leisure sector, 12% of enterprises have this size.

1.2 TRAVEL AND TOURISM'S CONTRIBUTION TO EMPLOYMENT

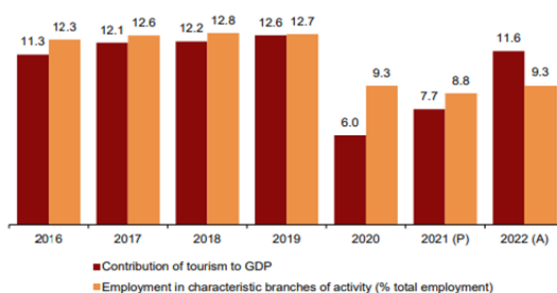
The characteristic tourism branches generated more than 2.5 million jobs, representing 11.6% of total employment (Instituto Nacional de Estadística, 2024). The contribution of tourism to employment in Spain has been very linear in recent years. In the third quarter of 2024, the tourism sector had 3,285,271 active workers, 2.3% more than last year in the same period, according to the Spanish Labour Force Survey data (TURESPAÑA, 2024).

In December 2024, affiliates linked to tourism activities increased year-on-year in absolute terms by 98,387 registered workers. The variation in enrolment was positive in all branches of tourism. In hotels and restaurants the increase was 50,805 (15,886 in accommodation services and 34,919 in food and beverage services) while in travel agencies the increase was 3,159 workers. In other tourism activities the increase was 44,423 workers (TURESPAÑA, 2025).

1.3 DIRECT AND TOTAL CONTRIBUTION OF TOURISM TO GDP IN 10 YEARS' TIME

In 2024, the Spanish tourism sector experienced its best year since 2019. Its contribution to GDP rose by almost 8% to €248.7 billion, or 15.6% of the economy. It also employed 3 million people, accounting for nearly 14% of the country's jobs (World Travel & Tourism Council, 2024).

Contribution of tourism activity to GDP and employment
Percentage



(P) Provisional estimate, (A) Preview estimate

Spanish Tourism
Satellite Account.
2016-2022 Series. INE
(2023)

Based on the most recent data from the National Institute of Statistics of Spain (INE), tourism activity reached 184,002 million euros in 2023, accounting for 12.3% of GDP. This value was 0.9 percentage points higher than in 2022. Furthermore, tourism-related branches generated over 2.5 million jobs, representing 11.6% of total employment (Instituto Nacional de Estadística, 2024).

According to WTTC's Economic Impact Report, by 2025, it is expected to contribute USD 11.7 trillion to global GDP, representing 10.3% of global GDP. Jobs will amount to 371 million, equivalent to 10.9% of global employment (4% more than in 2024). International visitors will spend USD 2.07 trillion while domestic visitor spending is estimated at USD 5.57 trillion.

WTTC's forecast for 2035 is 11.5% of global GDP, equivalent to a contribution of USD 16.5 trillion. 12.5% of global employment, which would be 461.6 million jobs, meaning 90.6 million new jobs compared to 2025.

International visitor expenditure is estimated at USD 2.9 trillion and domestic visitor expenditure at USD 7.72 trillion (Ladevi, 2024; World Travel & Tourism Council, 2025). However, these projections are subject to a number of factors, including global economic conditions, travel restrictions, and the ongoing impact of the COVID-19 pandemic. Therefore, any long-term forecast should be interpreted with caution.

1.4 DIRECT AND INDIRECT CONTRIBUTION OF TOURISM TO GDP IN 10 YEARS

As it happens with GDP, the tourism authorities do not state any forecast for the development of tourism employment in the coming years, but if we take into account the latest results and its evolution, we can predict that it will continue its growth.

1.5 MAIN FOCUS POINTS OF NATIONAL STRATEGY FOR TOURISM

One of the main points to be discussed is the role of sustainability. Although it also has a social and digital impact, there is a national agenda in Spain that seeks to address medium- and long-term challenges, focusing on socio- economic, environmental, and territorial sustainability. The project is called [Directrices Generales de la Estrategia de Turismo Sostenible de España 2030](#) (Secretaría de Estado de Turismo, 2019), and it is in line with the United Nations Sustainable Development Goals (SDGs). The new model of sustainable tourism is based on five strategic pillars:

- Collaborative governance: the main objective would be to bring together the conflicting interests of public and private stakeholders in the country's tourism sector. It would also be interesting to work on the Spanish influence in the international field.
- Sustainable growth: this would be related to the United Nations 2030 SDG (Sustainable Development Goals) agenda.
- Competitive transformation: the aim is to increase tourism GDP. Technology and digitalization will be essential to achieving this.
- Tourist areas, businesses, and people: the value and quality of the tourist offer are sought, from the responsible consumption of all stakeholders to the improvement of the quality of employment.
- Product, marketing, and tourism intelligence: the aim is to maintain our leadership in sun and beach tourism but also to study the needs of tourists with higher quality and purchasing power to adapt our offer and attract them.

Another important point is the impact of the COVID-19 pandemic. As stated in the [2021 Annual Report of the Spanish Confederation of Hotels and Tourist Accommodation](#) (Confederación Española de Hoteles y Alojamientos Turísticos [CEHAT], 2021), we can define 2021 as a year of "partial recovery".

According to the data released each year, the number of tourists travelling to Spain has risen from 31 million in 2021 to 93.8 million in 2024, exceeding the number of people who crossed our borders in the pre-COVID era (Instituto Nacional de Estadística, 2025).

1.6 COUNTRY-SPECIFIC CHALLENGES AND DEVELOPMENTS IN TOURISM

Tourism is one of the most important sectors of the Spanish economy. However, the Spanish tourism industry faces a number of challenges. (Ministerio de Industria y Turismo, 2023). One of the main problems is the lack of coordination in tourism policy. This is due to the fact that each region has its own regulations, which makes it difficult to organise tourism from a national perspective.

This can lead to duplication and inefficiency. To avoid this, the Spanish government should work with regional governments to develop a national tourism strategy that is coordinated and efficient.

This would help to address the challenges of seasonality, saturation and disparities in innovation across the sector. (Organisation for Economic Cooperation and Development [OECD], 2020a)

Another important challenge is the seasonal nature of tourism in Spain. Tourism is highly concentrated in the summer months, which can lead to overtourism, social tension related to tourism activity and environmental problems in the most popular destinations. Some examples of this are destinations such as Barcelona or the Balearic Islands, where the number of tourists is extremely high, leading to a negative experience for tourists and residents alike.

To address this situation, the Spanish government should invest in promoting tourism outside of the summer months. This could be done through marketing campaigns, financial incentives for tourists and investment in tourism infrastructure in less popular destinations. It should also work with local authorities to develop sustainable tourism management plans for popular destinations. These plans should aim to reduce the negative impacts of tourism on the environment and local communities. (Ministerio de Industria Comercio y Turismo [MICT], 2022).

It is also important to mention that a lack of innovation is a major challenge. The Spanish tourism industry has been slow to adopt new technologies and practices. This makes it difficult to compete with other countries that are more innovative in their tourism offerings. Jorge Marichal, president of Confederación Española de Hoteles y Alojamientos Turísticos (CEHAT, 2023), affirms that the Spanish government should encourage the tourism industry to adopt new technologies and practices, for which a public budget should also be earmarked.

This could be done through tax breaks, research and development grants and training programmes for tourism workers. (Marischal J., personal communication, 2023a).

Another of the challenges that Jorge Marichal refers to is the need for good connectivity, especially in terms of air transport, being the main access route to Spain as mentioned in point 1.1.4. (Marischal J., personal communication, 2023b).

To meet the current challenges, it is essential to keep improving tourism education and training programmes. The introduction of specialised and updated courses focusing on sustainable tourism management, product diversification and strategic marketing could equip professionals with the necessary skills to navigate the complexities of the industry.

Promoting cross-regional collaboration through joint training programmes and workshops would also foster a more coherent understanding of the national tourism landscape, thereby facilitating a more synchronised approach to the challenges facing the sector.

Given the current trend, the Spanish national government could introduce specific certifications to support these objectives. Certifications that would assess the accessibility standards of different tourism facilities and services, thereby encouraging businesses to invest in infrastructure modifications that ensures inclusivity. In addition, sustainable tourism certification could encourage businesses to adopt environmentally friendly practices, promoting environmental stewardship while enhancing the overall tourism experience.

By promoting a comprehensive educational framework and offering targeted certifications, Spain can bridge the gap between existing challenges and the sustainable development of its tourism sector, ensuring a more harmonious and inclusive approach to managing the diverse needs of visitors while preserving its rich cultural heritage.

2. CURRENT SKILLS TRAINING DELIVERY IN SPAIN

In this chapter, you will find an overview of the training delivery of digital, green and social skills sets in Spain. This is conducted by collecting and analysing data from country sources and summarising these.

As we have seen, tourism is a key sector of the Spanish economy, contributing significantly to employment and GDP. As a result, the Spanish government has invested heavily in developing a wide range of programmes and initiatives. Training provision emphasises a blend of traditional education and modern skills development, catering to both aspiring professionals and those already working in the sector.

In Spain, the major institutions involved in providing training and education for the tourism sector include universities, vocational education and training (VET) institutions, and specialised hospitality and tourism schools.

The training programmes available range from VET courses, undergraduate and postgraduate degrees in tourism management, hospitality, and related

Tourism is a key sector of the Spanish economy, contributing significantly to employment and GDP .

fields, to diplomas, certificates, and specialised courses focusing on specific aspects of the tourism industry.

Several national and international accreditation systems are used to accredit tourism training and education programmes, ensuring their quality and relevance in the industry. These accreditation systems play a significant role in maintaining standardised educational practices and fostering trust among students, employers, and other stakeholders. Some of the prominent accreditation systems used in Spain for accrediting tourism training and education include:

- [National Agency for the Evaluation of Quality and Accreditation](#) [ANECA], 2022: ANECA is a national agency that is responsible for ensuring the quality of higher education in Spain. It evaluates and accredits various academic programs, including those related to tourism and hospitality, based on established standards and guidelines.
- [Spanish Tourism Quality Institute](#) [ICTE], 2022: The ICTE has a crucial role in accrediting tourism-related services, including educational institutions and programs that meet the quality standards set by the institute. It emphasizes the importance of maintaining high-quality standards within the tourism sector, ensuring that accredited programs meet industry requirements and expectations.

These accreditation systems contribute to maintaining the high standards of tourism education in Spain, ensuring that programs are aligned with industry demands, best practices, and international benchmarks. They also facilitate the recognition of Spanish qualifications and degrees within the European Higher Education Area, promoting mobility and fostering collaboration between institutions at a global level.

Continuing professional development opportunities are easily available to those already employed in the tourism industry. Various industry associations, such as the Spanish Confederation of Hotels and Tourist Accommodations (CEHAT), the Spanish Confederation of Travel Agencies (CEAV), and the Spanish Hospitality Business Confederation (CEHE), provide training workshops, seminars, and certification programmes to facilitate the upskilling of professionals in the sector.

The Spanish government has also implemented various initiatives, policies, and support mechanisms to promote and improve the training provision in the tourism sector. Some of these key initiatives include:

- [Tourism Sustainability Plan 2030](#): The aim of this plan is to promote sustainability and competitiveness in Spain's tourism sector through sustainable tourism education and training for professionals. (Ministerio de Industria y Turismo, n.d).
- [Anfitriones Programme](#): This initiative, offered by the Secretary of State for Tourism, provides online courses for tourism professionals on a variety of topics, including Spanish culture, history, and gastronomy. (Ministerio de Industria y Turismo, 2022)

Overall, the Spanish government is committed to promoting and improving training provision in the tourism sector. The implemented initiatives and support mechanisms aid in equipping tourism professionals with the necessary skills and knowledge to succeed in the global tourism industry.

New developments have recently been implemented in relation to training in the field of tourism. Some universities have updated their degree programmes in Tourism with new curricula that incorporate modern skills compared to previous programmes (greater emphasis on technology, languages, sustainability,

digitalisation, new specialisations -smart destinations, marketing, SMEs, urban/international tourism-, destination management, etc.).

University of Seville, University of Oviedo and Polytechnic University of Cartagena are some examples (Universidad de Sevilla, 2024; Universidad de Oviedo, 2024; Universidad Politécnica de Cartagena, 2024).

2.1 DIGITAL SKILLS

Digital skills training in Spain encompasses an increasingly diverse range of courses delivered by universities, vocational training centers, public administrations, and private entities. As digitization becomes ever more essential, numerous opportunities are available for acquiring digital skills. Nevertheless, despite the widespread presence of digitalization, a significant share of the population continues to lack basic digital competencies.

According to the Digital Skills 2023 report by the National Observatory of Technology and Society (ONTSI), based on data from INE and Eurostat, approximately 66.2% of individuals aged 16 to 74 possessed basic or higher digital skills in 2023, representing an increase of nearly two percentage points compared to 2021 (Instituto Nacional de Estadística, 2023; European Commission, 2024). Spain also ranks above the European Union average for this indicator, with the EU average standing at approximately 55.6%.

The official offer of free courses includes initiatives such as Elements of AI, promoted by the Spanish government, which seeks to familiarize all citizens with the fundamentals and applications of artificial intelligence.

In addition, vocational training courses specializing in Artificial Intelligence and Big Data have been launched, enabling students to acquire both theoretical knowledge of AI techniques and practical applications within companies.

There has also been a marked shift towards distance and blended vocational training (FP), in response to the growing demand for these modalities in recent years.

Digitization of Micro and Small Tourism Businesses

According to a study conducted by the Secretary of State for Tourism (Ministerio de Industria y Turismo, 2024, 26 de noviembre), the level of digitization of micro and small businesses in the tourism sector increased by 50% within a single year, rising from 31.2% in the first report to 47.6% in the second report published in 2024.

Of the eight areas analyzed, staff talent (54.2%) registered the highest level of digitization among tourism SMEs, followed by marketing and sales (52.5%), business vision (52.7%), customer experience (47.6%), digital systems (46.8%), innovative products (45.9%), and business operations and administrative processes (40.5%). In all areas, progress has been significant compared with the first report.

At the subsector level, travel agencies are identified as the most digitized (52.6%), followed by car rental companies (50.8%), tourism activities (50.2%), road passenger transport (48.7%), accommodation (44.5%), and restaurants (38.9%).

Public Investment in Digitization

To date, the Spanish government has invested more than €225 million in the digitization of tourist destinations and businesses. This includes: Intelligent Destination Platform (connecting over 500 destinations and 25,000 SMEs), Last Mile projects, Tourism Intelligence System (Big Data), Open Innovation Platform and Smart Tourism Destinations Network.

In his address at the IV “A Whole Country of Tourism” Forum, the Minister of Industry and Tourism, Jordi Hereu (2023), emphasized that Spain’s tourism sector is at the forefront of digital transformation, positioning the country as an increasingly competitive, sustainable, and high-quality destination.

2.2 GREEN SKILLS

The incorporation of green skills into vocational training in hospitality and tourism has made significant progress in recent years, but there are still areas which need to be consolidated. The starting point is to ensure that this content is integrated consistently across different programmes and does not depend exclusively on specific initiatives of certain centres. It is also necessary to strengthen the continuous training of teachers so that they have up-to-date tools and can transfer practices aligned with the real sustainability of the sector to the classroom. Added to this is the need for specific teaching resources and learning environments that allow the content to be linked to the reality of industry. Finally, one of the most important challenges is to consolidate collaboration among administrations, vocational training centres and the business community, so that student training responds directly to market demands and contributes to an effective transition towards more sustainable tourism.

Some centres are already implementing specific measures that exemplify this change. In Aragon, the Centre for Gastronomic Innovation (CIGA) has signed an agreement with the Huesca Hospitality Association to promote culinary innovation, healthy eating and sustainability projects in hospitality and gastronomy courses, introducing students to new practices with a real impact on the sector (Cadena SER, 2025). In Castilla-La Mancha, the IES Profesor Emilio Lledó has included in its 2024/2025 curriculum the acquisition of 'basic skills in green economy, sustainability and environmental impact' within the area of Hospitality and Tourism, ensuring that these contents become part of formal training and are not limited to complementary activities (IES Profesor Emilio Lledó, 2024).

2.3 SOCIAL SKILLS

Most of the training in social and cultural skills continues to be provided by private entities, although since 2023 public administrations have strengthened their involvement in this area through programmes supported by European funds (PRTR and ESF+), with the aim of ensuring broader and more equitable access.

These initiatives seek not only to promote employability, but also to foster more inclusive and respectful work environments that are adapted to new social realities (Boletín Oficial del Estado, 2023)

Within the range of social skills training on offer, modules focusing on emotional management and well-being at work stand out. These topics have been expanded in recent years in response to the increase in psychosocial risks and the rise of mental health policies in the workplace. Courses on emotion regulation, stress management and resilience are becoming increasingly common and have contributed to a positive impact on improving the working environment and on both professional and personal performance. Courses on emotion regulation, stress management and resilience are becoming increasingly common and have been shown to have a positive impact on improving the working environment and on both professional and personal performance. An example of this is the programmes run by Femxa in collaboration with Nebrija University, which in 2023 updated its conflict resolution and mediation courses to bring them into line with the latest regulations on equal treatment and non-discrimination.

Other training areas experiencing significant growth include equal opportunities and diversity in organisations, particularly with regard to gender equality, the inclusion of vulnerable groups, and the management of generational and cultural diversity in teams.

Finally, training related to universal accessibility and inclusive tourism has become particularly relevant, in line with the European Disability Strategy 2021-2030. Courses such as those offered by the Innovtur Virtual Tourism Training Centre have updated their content to train students in the detection of barriers, the application of practical solutions and customer service in accessible tourist destinations. This approach not only contributes to improving the user experience, but also strengthens the competitiveness of tourism companies that adopt inclusive and sustainable practices (Innovtur, 2024).

4. EXPERT INTERVIEW

RESULTS

This chapter presents the results of the semi-structured interviews conducted with tourism experts in Spain as part of the current update of the Country Skills Profile. The interviews aim to capture in-depth, practice-based perspectives on recent developments in the tourism sector, with a particular focus on tourism employment and the evolving relevance of digital, environmental (green), social and cultural skills.

This qualitative analysis is aligned with the methodological framework of the Sector Skills Intelligence Monitoring System (SSIM) developed within the project and published on the Next Tourism Generation website (<https://nexttourismgeneration.eu/sector-skills-intelligence-monitoring-system/>).

For this updated version of the Country Skills Profile, primary data collection relies exclusively on semi-structured expert interviews, following the SSIM framework. Semi-structured interviews were selected as the primary qualitative method due to their flexibility and capacity to elicit nuanced insights. This approach allows interviewees to elaborate freely on their experiences, perceptions and concerns, while also enabling the emergence of new themes that may not be fully captured through structured instruments. As a result, the interviews provide rich qualitative evidence grounded in real operational and managerial contexts.

A total of ten interviews were carried out, evenly distributed across five key tourism subsectors: travel agents and tour operators, destination management organisations, visitor attractions, accommodation providers, and food and beverage providers. Interviewees held senior or decision-making positions within their organisations, including general managers, department heads, human

resources managers, company owners and entrepreneurs. Their roles provide a strategic as well as operational view of skills-related challenges and developments within the sector.

Within each subsector, the interviews were designed to reflect a diversity of organisational contexts. The sample includes both larger corporate structures and smaller, owner-managed or independent businesses. This diversity contributes to a broader qualitative understanding of how skills needs, workforce challenges and organisational responses are perceived across different types of tourism organisations, without introducing size-based categorisations as an analytical variable.

The findings presented in the following sections are based exclusively on the perspectives shared during the interviews. They reflect aggregated patterns, common concerns and shared expectations expressed by interviewees across subsectors. The analysis does not aim to generalise statistically, but rather to provide a grounded and nuanced overview of current and emerging skills-related issues as experienced by tourism professionals operating in Spain.

4.1 THE FUTURE OF TOURISM AND TOURISM EMPLOYMENT

4.1.1 INTRODUCTION

The future of tourism and tourism employment is being shaped by a combination of economic, technological, social and organisational changes that are already affecting day-to-day operations across the sector. Interviewees describe a context marked by continuous adaptation, increasing pressure on business models, evolving customer expectations and persistent challenges related to workforce availability, skills and working conditions.

Rather than referring to abstract or distant developments, the interviews reflect changes that are already being experienced within tourism organisations. These include the growing impact of digitalisation on tasks and roles, the

reconfiguration of service models, shifts in demand patterns, rising operational costs, and changing expectations among workers, particularly in relation to work–life balance, flexibility and career progression. Interviewees also refer to the ongoing effects of recent crises and structural transformations, which continue to influence employment stability, recruitment and retention across different subsectors.

Employment in tourism continues to be characterised by specific working conditions, such as irregular schedules, weekend and holiday work, seasonal fluctuations and a wide variety of contractual arrangements. These features remain central to discussions about the attractiveness of the sector and its capacity to respond to future workforce needs. Interviewees highlight the need to rethink how tasks are organised and how roles are defined in order to maintain service quality while adapting to new operational realities.

This section aims to provide an overview of interviewees' perspectives on how the tourism sector and tourism employment may evolve over the coming years, both at sector level and within their own organisations. Particular attention is paid to perceived changes in job profiles, the transformation of tasks, and the types of skills and professional backgrounds that may become more relevant in the medium term.

To explore these issues, interview participants were asked to reflect on the following questions:

- What will the tourism sector and their organisation look like in the coming years, and which changes are most likely to affect their business?
- What impact do recent economic, social and organisational developments have on employment, and how are organisations responding to these challenges?
- What types of workers are expected to be employed in the future, and are significant changes anticipated in workforce size or composition?

- How are existing tasks being transformed into new or evolving job profiles within organisations?
- How have changes in the organisation of work, such as greater flexibility or new working arrangements, affected recruitment and employment practices?
- How do organisations address issues related to diversity, inclusion and flexibility within their workforce?
- Which new job profiles are expected to emerge in the coming years, and what factors are driving their development?

4.1.2 RESULTS FROM THE INTERVIEWS

Across the interviews, a shared perception emerges that the tourism sector is difficult to “predict” in fixed terms, not because changes are absent, but because change has become a constant feature of day-to-day operations. Interviewees describe a context of continuous adjustment, where organisations are already responding to shifting demand patterns, rising operational costs, evolving customer expectations and rapid technological uptake. Rather than expecting a single disruptive turning point, several respondents foresee a future shaped by incremental but persistent transformations that gradually reshape business models and employment structures.

From an employment perspective, interviewees repeatedly highlight recruitment and retention as a central challenge. While tourism continues to generate job opportunities, many respondents note that the sector struggles to compete with other industries on working conditions, schedules and perceived career stability. This challenge is often linked to changing expectations among younger workers, who are described as placing stronger emphasis on work–life balance, flexibility and personal fulfilment. At the same time, interviewees recognise that the sector can offer fast progression in certain roles, but they stress that career pathways need to be clearer and working environments more attractive in order to reduce turnover and sustain service quality.

Several interviewees also point to a persistent mismatch between the pace of change in the sector and the speed at which formal education and training systems adapt. Respondents describe training provision as lagging behind operational and managerial needs, which leads many organisations to rely more heavily on internal learning, on-the-job upskilling and continuous adaptation. Looking ahead, interviewees anticipate that employability will depend less on rigid job descriptions and more on flexible professional profiles combining technical knowledge with transversal competences such as critical thinking, problem-solving and the capacity to learn quickly.

Technological development is consistently described as an established driver of sectoral change. Interviewees do not present digitalisation as optional; instead, they describe it as embedded in everyday work and increasingly influential in how tasks are organised and how services are delivered. In corporate travel, respondents foresee continued structural shifts linked to remote and hybrid working patterns, with fewer but longer trips and rising expectations of personalisation and traveller wellbeing. In leisure travel agencies, interviewees expect further automation through digital booking systems, virtual assistants and AI-supported tools, while also stressing that trust, proximity and professional advice are likely to remain decisive for complex or high-value travel decisions. Overall, respondents anticipate that roles will evolve rather than disappear, with a growing need for hybrid profiles combining client-facing competences with strong digital capabilities.

In **accommodation**, interviewees describe sustained post-pandemic growth in some urban areas, accompanied by concerns about long-term sustainability of continuous expansion, particularly in pricing. They highlight the strong influence of large events on demand and note that high room rates, while commercially necessary, can affect domestic demand during quieter periods. In parallel, interviewees anticipate that operational roles will increasingly be complemented by stronger social competences, as administrative tasks become more automated and service differentiation relies more on empathy, communication and the ability to personalise interactions.

In **visitor attractions**, interviewees describe ongoing growth combined with concern about sustainable development and community impact. Respondents foresee further professionalisation and increasing regulatory and administrative requirements, including digital invoicing and verification processes. At the same time, several interviewees link employment difficulties to seasonality and structural constraints, describing recruitment challenges for seasonal roles and rising demand for foreign language skills due to growing international clientele beyond peak season. Some respondents also highlight housing availability and affordability as a practical barrier affecting recruitment, particularly in destinations where employers need to support staff accommodation.

For **destination management organisations**, interviewees anticipate a future increasingly driven by digital channels and rapidly evolving visitor behaviour. Respondents expect that traditional tourist information offices will play a more limited role, remaining relevant mainly for specific groups while needing to reinvent themselves through more experiential and value-adding functions. At the same time, interviewees emphasise that a significant part of destination promotion remains strongly dependent on face-to-face interaction, including fairs, workshops and professional hosting, which they view as difficult to replace fully through digital solutions. Several respondents also anticipate greater diversity in visitor profiles and travel motivations, reinforcing the importance of flexibility and inclusive approaches in destination management.

Food and beverage interviewees describe a future scenario shaped by economic pressure, staffing constraints and progressive operational adjustments. Respondents foresee rising prices and a possible reduction in opening hours, alongside concerns about a gradual decline in personalised service due to workforce availability, cost containment and increasing automation. At the same time, interviewees stress that core operational roles remain essential and that hospitality continues to rely fundamentally on the human experience delivered to clients, even as back-office and commercial processes become leaner and more digitally supported. Some respondents

also expect that international client management will increasingly take place remotely through videoconferencing, digital contracting and virtual coordination, reducing the need for repeated face-to-face negotiation while maintaining high expectations for service delivery on-site.

Overall, the interviews point to a future in which tourism employment is likely to be shaped by ongoing restructuring rather than by abrupt disruption. Across subsectors, interviewees anticipate that organisations will need to combine technological adoption with stronger people-centred competences, while addressing long-standing workforce challenges related to recruitment, retention and working conditions. Taken together, respondents describe a sector that will continue to evolve through gradual adjustments in roles, tasks and service models, with adaptability and continuous learning emerging as essential conditions for employability in the medium term.

4.2 DIGITAL SKILLS

4.2.1 INTRODUCTION

Digital skills have become a central element in the organisation of work across the tourism sector. Interviewees consistently refer to digitalisation not as a future challenge, but as a reality that already shapes everyday tasks, decision-making processes and interactions with clients, suppliers and partners. The interviews reflect a sector in which digital tools, platforms and systems are increasingly embedded in both operational and strategic activities, while also generating new demands in terms of skills, adaptability and continuous learning.

Rather than focusing exclusively on advanced or emerging technologies, interviewees describe a broad spectrum of digital competences. These range from the use of basic digital tools for administration, communication and coordination, to more complex applications related to data management, online sales, digital

marketing, automation and artificial intelligence. Across subsectors, respondents emphasise that digital skills are no longer confined to specialised roles, but are progressively required across a wide variety of positions.

At the same time, interviewees highlight that the pace of digital change creates significant challenges for both organisations and workers. Several respondents refer to difficulties in keeping skills up to date, particularly in smaller structures or in roles traditionally less exposed to technology. Digitalisation is often described as a continuous process rather than a one-off transition, requiring ongoing investment in training, internal support and adaptive mindsets.

This section aims to capture interviewees' perspectives on the role of digital skills in the present and future of tourism employment. It explores how digitalisation is affecting job profiles, task allocation and organisational processes, as well as the extent to which digital competences are perceived as essential for employability and professional development within the sector.

To address these issues, interview participants were asked to reflect on the following questions:

- Which digital skills are currently required in their organisation, and how have these requirements evolved in recent years?
- How is digitalisation affecting daily tasks, workflows and job profiles within the organisation?
- What role do technologies such as automation, data analysis or artificial intelligence play in current operations, and how are these expected to evolve?
- To what extent do employees have the necessary digital competences, and where are the main gaps identified?

- How do organisations address digital skills development, including training, upskilling and internal support mechanisms?
- What challenges do organisations face in adapting to rapid technological change, and how do these challenges differ across roles or functions?

4.2.2 RESULTS FROM THE INTERVIEWS

Interviewees from the **accommodation sector** describe digital skills as essential and transversal across the organisation. Digital transformation is not perceived as limited to specific tools or departments, but as a process that affects decision-making, internal communication, customer relations and daily workflows. Respondents highlight that digitalisation is increasingly embedded in both operational and managerial activities.

One interviewee refers to the implementation of an internal programme designed to familiarise staff with artificial intelligence tools and their practical applications. This initiative aims not only to improve technical knowledge but also to encourage a critical and informed use of AI, ensuring that employees understand both its potential and its limitations. AI-based tools are used to support content creation, data analysis and operational efficiency, but they are consistently framed as support mechanisms rather than substitutes for human judgement.

At the same time, interviewees underline that digital skills are unevenly distributed across the workforce. A generational divide is frequently mentioned, with younger employees demonstrating greater technological fluency, particularly in the use of AI tools and digital content creation, while staff from older generations or operational departments often lack basic digital competences, such as proficiency in office software. Frequent system updates and migrations are described as an additional challenge, especially in organisations without dedicated IT departments, where senior operational staff must absorb technical responsibilities. Cybersecurity and data protection are also highlighted as critical

areas, with continuous internal training considered essential to mitigate legal and operational risks.

Interviewees from **tour operators and travel agencies** describe digital skills as central to organisational performance and competitiveness. Respondents explain that digitalisation has reshaped how travel services are delivered, with online platforms, CRM systems, digital marketing tools and multichannel communication becoming integral to daily operations.

In corporate travel, interviewees describe a context of continuous technological change, marked by regular system migrations and updates to proprietary platforms. Structured onboarding and intensive internal training are therefore considered essential. Artificial intelligence is viewed as an enabling tool that supports data analysis, personalisation and operational efficiency, rather than as a threat to employment. Interviewees stress the importance of adaptability and effective change management, particularly in teams with diverse generational profiles.

In leisure travel agencies, digital skills related to online booking platforms, customer data analysis, social media management and digital marketing are described as increasingly decisive. While some organisations are relatively advanced in their digitalisation processes, interviewees also identify gaps in more technical areas, such as applied artificial intelligence, advanced automation and predictive data analysis. Looking ahead, respondents anticipate growing relevance of skills related to cybersecurity, online reputation management, audiovisual content creation and immersive technologies. Continuous, experience-based training and mentoring are considered the most effective approaches to developing digital competences in this rapidly evolving environment.

In **visitor attractions**, digital skills are considered important but not always

central to the core delivery of tourism activities. Interviewees describe the use of digital tools for managing reservations, payments, client information and staff coordination, often through mobile applications that allow real-time access to operational data. These systems are particularly valued in environments with limited connectivity, where simplicity and functionality are essential.

Respondents also highlight the use of digital tools for internal coordination, including time tracking, logistics management and GPS-based systems. At the same time, interviewees note that administrative complexity and regulatory requirements can sometimes undermine the efficiency of digital solutions, particularly when digital processes conflict with labour inspection rules or operational realities.

Artificial intelligence is perceived as having clear potential in areas such as marketing, commercialisation, product development and the enrichment of interpretative content. Interviewees describe informal use of AI tools to support content creation and product design, while emphasising the importance of maintaining critical judgement. Digital marketing and social media management are frequently outsourced, as interviewees consider it unrealistic for operational staff to combine service delivery with sustained content creation during peak periods.

Interviewees from **destination management organisations** describe digital skills as essential and transversal across all roles. Respondents explain that staff are encouraged to participate in a wide range of training activities related to digitalisation, artificial intelligence, sustainability and accessibility. Much of this learning is informal, based on conferences, short courses and international benchmarking rather than formal academic programmes.

A recurring concern relates to gaps in digital competences among students and new entrants. While many are familiar with social media as users, interviewees

note that they often lack professional skills in content management, data-driven communication and strategic use of digital tools for destination promotion. Language skills are also highlighted as a key transversal competence that interviewees perceive as weakening within formal education, despite the international nature of tourism.

Interviewees point to cost barriers associated with professional digital platforms, noting that many tools required in the labour market are paid services and therefore inaccessible to students. Advanced technologies such as virtual or augmented reality are expected to be largely outsourced, with internal teams focusing on content, coordination and strategic use rather than technical development.

In the **food and beverage sector**, interviewees present more diverse perspectives on the role of digital skills. Some respondents describe digital competences as relatively unproblematic, particularly among younger employees who are highly familiar with point-of-sale systems, handheld devices and digital ordering tools. Basic technological tasks are generally learned quickly and do not constitute a major barrier to entry.

However, interviewees also point to an imbalance between digital proficiency and core hospitality skills. While staff may be comfortable using digital devices, they often lack essential service knowledge and professional hospitality competences. Technological developments that allow customers to order and pay via mobile devices are acknowledged for their efficiency gains, but respondents express concern that such systems may further depersonalise the sector and reduce the relational dimension of hospitality.

Other interviewees describe digital skills as unavoidable and increasingly decisive. Examples include the use of internal cloud-based systems that allow real-time coordination across departments, supporting logistics, service specifications and operational planning. From a recruitment perspective, digital confidence is increasingly valued, and organisations report investing actively in continuous

actively in continuous training related to social media management, web skills and digital tools, viewing this investment as a necessary means to improve productivity and optimise resources.

Overall, the interviews indicate that digital skills are becoming more deeply embedded across all tourism subsectors, although their centrality and expression vary depending on organisational context and activity type. Taken together, interviewees describe digitalisation and artificial intelligence as enabling forces that support efficiency and service quality, provided that organisations invest in training, critical judgement and responsible use of technology.

4.3 ENVIRONMENTAL/GREEN SKILLS

4.3.1 INTRODUCTION

Environmental and green skills are increasingly present in discussions about the future of tourism, not only in relation to environmental protection but also as part of broader organisational, operational and strategic decisions. The interviews reflect a shared understanding that sustainability is no longer limited to isolated environmental actions, but is progressively linked to how tourism activities are designed, managed and communicated, as well as to how organisations position themselves within their territories.

Interviewees describe green skills in practical and applied terms, closely connected to daily operations and real constraints. Rather than referring to abstract sustainability frameworks, respondents emphasise concrete issues such as resource efficiency, waste management, energy and water consumption, mobility, environmental impact of activities, and the relationship between tourism development and local communities. Several interviewees also refer to the challenges associated with managing growth, avoiding negative impacts on residents and natural environments, and balancing economic viability with long-term sustainability objectives.

The interviews also show that the relevance of environmental skills varies across subsectors and organisational contexts. In some cases, sustainability is strongly embedded in the core business model, while in others it is shaped by regulatory requirements, client expectations or destination-level strategies. Interviewees frequently highlight that environmental skills are becoming more important over time, although they also point to differences between formal commitments and actual implementation, as well as to the need for practical knowledge that can be applied directly in operational settings.

This section aims to capture interviewees' perspectives on the role of environmental and green skills in tourism employment, both today and looking ahead to the coming years. It explores how interview participants define these skills, how they assess their current and future importance, and how organisations approach training, certification and external support in this field.

To address these issues, interview participants were asked to reflect on the following questions:

- What do they consider to be green or environmental management skills within the context of their organisation and activity?
- How important do they expect these skills to be in the coming years, and which areas are likely to gain relevance?
- Which environmental or green skills are currently important in their organisation?
- Do they anticipate changes in the need for staff with green skills between now and the coming years, and if so, what kind of changes?
- Does the organisation provide training or education related to environmental or green skills, and if so, what type of training is offered?
- Are external organisations involved in the development of environmental or green skills, and what role do they play?

- What are interviewees' views on green certifications, eco-labels or sustainability awards, and what value do they attribute to such schemes?

4.3.2 RESULTS FROM THE INTERVIEWS

Across the interviews, environmental and green skills are described as increasingly relevant in tourism, both as a matter of operational practice and as a strategic dimension linked to credibility, client expectations and long-term viability. Interviewees rarely frame sustainability as an abstract concept. Instead, they refer to it through concrete processes, organisational responsibilities, compliance requirements, measurement tools, and the practical difficulty of maintaining consistent environmental behaviour across staff, suppliers and visitors. A recurring element across subsectors is the importance of communication and awareness. Several respondents emphasise that sustainability only becomes meaningful when it is understood internally and conveyed externally in a coherent, traceable way.

Interviewees from accommodation describe environmental sustainability as an organisational priority that requires structure, leadership and continuous communication. In one case, sustainability is presented as embedded in company culture through a dedicated committee coordinating actions on environmental impact, social responsibility and governance. The interviewee links green skills not only to procedures and technical knowledge, but also to transparent communication of values and practices, ensuring coherence between what is done and what is communicated.

In the other case, green skills are framed in practical and measurable terms. Interviewees stress that effective waste management depends heavily on staff awareness and cultural commitment, and that progress is difficult without real engagement from leadership. Respondents describe the introduction of measurement tools, including carbon footprint tracking, as necessary to assess improvement. Environmental management is described as structured through

corporate sustainability frameworks and supported by energy and environmental management certifications. Reporting and continuous monitoring are integrated into daily practice through internal platforms that require regular input and follow-up on actions and consumption.

Corporate demand is also highlighted. Interviewees explain that corporate clients increasingly request environmental information when negotiating agreements or organising events, and that stronger reporting can support partnerships. Training is described as a mix of internal modules and external support, including waste management sessions and funded training, with digital safety and data awareness also treated as part of responsible organisational practice.

While environmental sustainability in accommodation is often structured through internal frameworks and certifications, perspectives from tour operators and travel agencies highlight a stronger link between sustainability, client expectations and operational decision-making.

In the **tour operators and travel agencies subsector**, interviewees present environmental competences as closely connected to operational coherence, client expectations and corporate responsibility. In corporate travel, respondents describe a set of measures implemented to reduce environmental footprint, including strict controls on printing, changes in mobility practices following increased remote work, and the integration of carbon footprint measurement tools into travel platforms. These tools are described as enabling both staff and clients to compare options and make more informed decisions, which creates a need for employees to understand the tools and communicate sustainability-related information clearly and accurately.

Environmental considerations are also described as integrated into event organisation and supplier decisions, including catering waste, transport emissions and procurement choices. Interviewees underline that sustainability has become

a stronger criterion for clients when selecting providers, positioning environmental competences as a strategic differentiator rather than a purely operational add-on.

In leisure travel, sustainability is framed as essential for the future viability of tourism. Interviewees describe practical steps such as reducing paper use through digital processes, selecting sustainable suppliers, and promoting responsible travel behaviour during client advisory. Certifications and eco-labels are viewed positively, as tools that support accountability and transparency. Looking ahead, the interviewee anticipates stronger demand for skills linked to carbon footprint measurement, energy efficiency, circular economy principles and the clear communication of sustainability practices to clients, while noting that formal training is still limited and needs strengthening.

For **visitor attractions**, environmental competences are described as fundamental because activities take place directly in natural environments. Interviewees emphasise the importance of practical knowledge, including awareness of protected areas, understanding different categories of environmental protection, basic familiarity with local flora and fauna, and responsible behaviour in sensitive settings. Respondents describe onboarding practices based on activity guidelines and operational sheets, as well as peer learning in which new staff are accompanied by experienced workers when time for training is limited, especially during peak season.

Several interviewees highlight that formal training can be difficult to implement due to seasonality and employment status. They point to structural barriers that limit access to training outside peak periods, particularly for discontinuous workers or self-employed professionals. Interviewees therefore call for more flexible training access, recognition of off-season learning, and content that is practical and location-specific rather than generic.

Environmental responsibility is also described through concrete operational measures. Interviewees mention strict waste management practices, plastic-free approaches, optimisation of transport logistics to reduce emissions, and coordination with local actors such as landowners or farmers. Certifications are mentioned in relation to quality and safety frameworks, but interviewees clearly differentiate between formal compliance and real environmental impact. They emphasise the need for continuous internal evaluation and traceability. Some interviewees also connect sustainability with circular economy principles and collaborations with local artisans and small businesses to generate shared value within the territory. Accessibility is framed within a broader sustainability approach that includes social dimensions, while respondents acknowledge that some improvements require investment and external support beyond training alone.

Beyond individual tourism businesses, interviewees from destination management organisations approach sustainability from a broader territorial and governance perspective.

In **destination management**, interviewees describe sustainability as a strategic and long-standing priority, strongly linked to structured methodologies, continuity and public communication. Respondents support certification frameworks and standardised models, not as an end in themselves, but as roadmaps for improvement. They also describe certifications as providing continuity beyond political cycles and reducing the risk of sustainability strategies being abandoned after leadership changes.

Interviewees stress the importance of networks and knowledge sharing between destinations, noting that shared methodologies allow comparison and transfer of good practices. Examples are given of advanced water management practices developed in response to past constraints and later positioned as transferable solutions.

A consistent theme is the role of communication. Interviewees emphasise the need to translate technical sustainability information into understandable and engaging content for visitors and stakeholders. Sustainability is described as encompassing environmental, social and urban management dimensions, including the importance of countering negative perceptions of tourism by explaining the infrastructure and systems required to manage destinations responsibly.

In another destination perspective, environmental skills are framed primarily as a communication and awareness challenge rather than a lack of basic knowledge. Interviewees support official certifications as reference frameworks that help avoid superficial approaches, while warning that some private labels may enable greenwashing if not well regulated. Respondents observe that sustainability principles are generally known, but are often relaxed in leisure contexts. For this reason, communication skills are described as essential to encourage responsible behaviour among tourists, even if measuring real behavioural impact remains complex.

In **food and beverage**, interviewees describe environmental skills through two complementary lenses: regulatory compliance and deeper organisational commitment. In one case, sustainability is framed primarily in terms of meeting legal obligations and maintaining consistent operational practice. Interviewees highlight the need for staff awareness of waste separation rules, recycling protocols, restrictions on single-use plastics and frequent regulatory changes, which are treated as basic professional standards. Environmental management is described as part of daily routine, alongside broader compliance requirements such as traceability documentation, temperature controls and food safety logs.

Training is described as largely channelled through sectoral associations that provide legislative updates and online courses. However, interviewees report that engagement often remains limited to mandatory requirements, with staff

completing courses without consistently internalising the learning. In this context, the interviewee also notes that customers rarely demand or question sustainability measures when dining, suggesting limited consumer pressure in day-to-day practice.

In the other case, environmental responsibility is presented as a core pillar of the company's identity and positioning. Interviewees describe obtaining an official ecological catering certification, following audits, as formal recognition of practices already implemented over several years. These practices include prioritising local and seasonal products, supporting animal welfare standards, applying reduction–reuse–recycling principles, managing water and waste responsibly, reducing energy use, and eliminating single-use plastics. Respondents also refer to investments in efficiency measures and low-emission vehicles, and they stress that sustainability is addressed across the supply chain, from sourcing and packaging to transport and distribution, while maintaining quality as a key criterion in supplier relationships.

International clients are described as an important driver of this evolution, with increasing demand for detailed information about sourcing, seasonality and ethical production. Interviewees note that this has opened new market niches and strengthened the company's position among environmentally conscious clients.

Taken together, the interview findings across subsectors reveal both shared challenges and context-specific approaches to environmental skills development.

Overall, the interviews point to sustainability as an area where practical implementation, organisational coherence and communication are tightly linked. Across subsectors, green skills are shaped by measurement and reporting, compliance and operational routines, and the ability to communicate sustainability credibly to clients, partners and visitors. Taken together, respondents stress that the challenge is less about defining

sustainability and more about embedding it consistently in daily practice and making it understandable in real tourism contexts.

4.4 SOCIAL-CULTURAL SKILLS

4.4.1 INTRODUCTION

Social and cultural skills emerge from the interviews as a central pillar of tourism employment, closely linked to service quality, organisational culture and the ability to respond to increasingly diverse visitor profiles. Interview participants consistently describe these skills in relation to everyday professional behaviour, interpersonal interaction and the capacity to manage human relationships in complex and often demanding working environments.

Rather than referring to social and cultural skills in abstract terms, interviewees emphasise practical competences such as empathy, communication, emotional intelligence, adaptability, respect, teamwork and the ability to understand and respond to different expectations, both among colleagues and clients. These skills are frequently associated with maintaining service quality in contexts where digitalisation and automation are advancing, reinforcing the idea that technological development must be balanced with the human dimension of tourism.

Several interviewees also link social and cultural skills to broader organisational and societal challenges. These include managing generational differences within teams, responding to increasing cultural diversity among both staff and visitors, ensuring inclusive and accessible tourism experiences, and addressing changing expectations regarding work–life balance, flexibility and personal wellbeing.

In this sense, social and cultural competences are not limited to front-of-house roles, but are considered relevant across all levels of organisations, including management and coordination functions.

Looking ahead, interview participants generally expect social and cultural skills to gain further importance. While specific technical requirements may evolve, respondents underline that attitudes, behaviours and interpersonal abilities will remain essential for sustaining trust, cooperation and meaningful experiences in tourism. Training in this area is therefore described as increasingly necessary, although interviewees note differences in how organisations approach the development of these skills and the extent to which formal training is complemented by learning through experience and daily practice.

This section provides an overview of the social and cultural skills that interview participants consider most relevant for the future of tourism employment, both in the present and looking towards the coming years. It explores how these skills are defined, how their importance is expected to evolve, and how organisations support their development through training and organisational practices.

To address these issues, interview participants were asked to reflect on the following questions:

- What they consider to be the most relevant and important social and cultural skills for people working in the tourism sector.
- How important these skills are expected to be in the coming years, and which ones are likely to become more significant.
- Whether additional or different social and cultural skills may be required in the future.
- What changes they expect in their organisation regarding the need for social and cultural skills compared to today.

- Whether their organisation provides training or education related to social and cultural skills, and in which areas.
- Whether external organisations are involved in supporting the development of social and cultural skills, and what kind of training they provide.
- What they consider to be the most effective methods for developing social and cultural skills among employees.

4.4.2 RESULTS FROM THE INTERVIEWS

Across all interviews, social and cultural skills are described as fundamental competences in tourism, underpinning service quality, organisational cohesion and the ability to operate in increasingly complex and demanding environments. Interviewees consistently emphasise that, while technological and operational requirements continue to evolve, the human dimension remains central to tourism activity. Empathy, communication, emotional intelligence, adaptability and the capacity to work with diverse people are repeatedly identified as key elements for sustaining meaningful interactions with clients, colleagues and communities.

In the **accommodation sector**, interviewees describe social and cultural skills as closely linked to organisational culture, employee wellbeing and long-term sustainability. One interviewee explains that fostering a healthy working environment based on trust, respect and open communication is essential for retaining talent and maintaining motivated teams. From this perspective, retention is associated less with financial incentives and more with a sense of belonging, professional development and shared values.

Skills such as empathy, teamwork, emotional intelligence and effective communication are considered essential for managing teams, interacting with guests and navigating periods of change. Interviewees highlight that these

competences have become increasingly important in a context marked by uncertainty and continuous transformation, where staff are required to adapt while maintaining service quality.

The other interviewees strongly reinforce this view, identifying social and cultural skills as the area of greatest conviction within their organisation. Communication in multiple languages is considered a basic requirement rather than a differentiating factor, given the international nature of the clientele. Empathy, active listening and emotional intelligence are highlighted as decisive for guest satisfaction, team dynamics and online reputation. Respondents emphasise that technology can reduce administrative workload but cannot replace human interaction, which remains the core value of the hotel experience.

Interviewees also acknowledge gaps in training related to inclusivity and accessibility, particularly in assisting guests with disabilities or understanding cultural and religious practices. These areas are identified as priorities for future development. Transversality and internal mobility across departments are viewed as effective ways of fostering empathy, collaboration and retention, while hospitality is repeatedly described as partly vocational, requiring genuine enjoyment of guest interaction.

In **tour operators and travel agencies**, social and cultural skills are described as core competences and a defining element of organisational identity. Interviewees highlight that coherence between declared corporate values and everyday practices is increasingly demanded by both employees and clients. Managing cultural diversity is particularly relevant in multinational contexts, where teams operate across countries and cultural frameworks.

Interpersonal skills such as empathy, adaptability in communication, active listening and the ability to personalise interactions are considered essential for both people management and client service. Interviewees also stress the growing importance of talent retention, noting that long-term loyalty can no

longer be assumed. Flexibility, purpose and shared values are described as central factors for attracting and retaining professionals.

In smaller travel agencies, social and cultural skills are framed as the essence of tourism professionalism. Interviewees emphasise that tourism is fundamentally based on human relationships and that emotional intelligence, intercultural competence and inclusive communication will become even more valuable as digital tools expand. Diversity and inclusion are actively promoted, including respect for gender equality, cultural and religious differences and accessibility for people with disabilities. Training in this area is developed through workshops, mentoring, experiential learning and role-play, which interviewees consider more effective than purely theoretical approaches.

In **visitor attractions** and active tourism, social and cultural skills are identified as critical competences due to the direct interaction with clients in dynamic and sometimes unpredictable environments. Interviewees highlight communication and public speaking skills as fundamental for explaining activities, safety procedures and environmental context. Foreign language skills, particularly English, are considered essential to serve international visitors.

Problem-solving and adaptability are described as key skills, given the changing conditions of outdoor activities and the frequency of unforeseen situations. These competences are closely linked to safety, service quality and visitor satisfaction. Interpretation of the natural environment is also viewed as an important value-added element of the experience.

Interviewees underline the growing relevance of accessibility and inclusive tourism. Collaborations with organisations working with people with disabilities are described, although operational constraints limit these activities during peak season. Training is considered insufficiently adapted to sector realities, and interviewees advocate for short, practical and modular learning formats that

reflect seasonal demand and real working conditions.

In **destination management**, social and cultural skills are considered fundamental for professional effectiveness. Interviewees identify communication skills, particularly public speaking, as an area where training is often lacking, despite frequent exposure to public and professional audiences. They also observe generational shifts in attitudes towards work, including different expectations regarding commitment, work–life balance and organisational identification.

Passion for the sector is described as a defining element of tourism and destination promotion, as emotional engagement and human interaction differentiate tourism from more automated activities. Interviewees stress the importance of fostering trust, shared purpose and organisational cohesion, especially in a context where broader societal narratives may position employers and employees as opposing sides.

Another interviewee frames social, cultural and emotional skills as the most critical area for future development. He highlights communication, reasoning, public speaking and interpersonal interaction as essential competences, noting that many young professionals struggle with face-to-face communication. These skills are seen as transferable across contexts, supporting both digital and non-digital work. Empathy, intercultural understanding and adaptability are also emphasised, particularly in destinations where tourism, culture and local community life intersect. Social and cultural skills are therefore described not as secondary or “soft”, but as core professional competences.

In the **food and beverage sector**, interviewees consistently identify social and cultural skills as both the most critical and the most deficient competences. Basic customer interaction skills, such as politeness, appropriate communication, respect and professional behaviour, are emphasised as fundamental to service quality. Interviewees observe that many young employees struggle with

face-to-face communication, having grown up with digital messaging as their primary mode of interaction.

Professional image, service standards and emotional regulation are highlighted as key factors influencing customer perception. Interviewees stress that hospitality workers frequently absorb clients' stress and personal pressures, making emotional intelligence, stress management and mental wellbeing essential competences. Training in these areas is considered as important as traditional occupational health and safety training.

Other interviewees place strong emphasis on attitude as the most decisive competence in hospitality. While technical knowledge and languages are important, willingness, engagement and a proactive mindset are viewed as the basis for meaningful client connection. Empathy and emotional intelligence are described as particularly relevant in high-pressure environments such as catering and events. Transversal experience across departments is seen as beneficial for team cohesion and service quality.

Regarding diversity, interviewees describe multicultural teams as a positive asset that enriches service and organisational culture. Talent retention is framed not as long-term attachment to a single employer, but as the result of involvement, recognition and participation in a shared project.

Overall, the interviews point to social and cultural skills as central pillars of tourism employment across all subsectors. Taken together, interviewees describe these competences as essential for managing diversity, sustaining service quality, supporting employee wellbeing and maintaining meaningful human interaction in a sector increasingly shaped by digitalisation, environmental constraints and changing social expectations.



 **PANTOUR**
PACT FOR NEXT TOURISM GENERATION SKILLS

<https://nexttourismgeneration.eu/pantour/>



Co-funded by the
Erasmus+ Programme
of the European Union

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor the granting authority can be held responsible for them.

REFERENCES

Accessible Madrid. Plataforma Representativa Estatal de Personas con Discapacidad Física [PREDIF] .*Predif: Cursos de Turismo Accesible y Atención al Cliente con Discapacidad*. <https://www.accessiblemadrid.com/es/blog/predif-cursos-de-turismo-accesible-y-atencion-al-cliente-con-discapacidad> Last accessed 13 February 2024

Agencia Nacional de Evaluación de la Calidad y Acreditación [ANECA] (2022). <https://www.aneca.es/aneca>

Agenttravel. (2025, 27 de enero). *Las agencias y operadores turísticos cierran 2024 sumando más de 3.000 nuevos trabajadores*. https://www.agenttravel.es/noticia-056889_Las-agencias-y-operadores-turisticos-cierran-2024-sumando-mas-de-3.000-nuevos....html

Boletín Oficial del Estado. (2023a, 1 de mayo). Real Decreto 289/2023, de 18 de abril, por el que se establecen determinados títulos de Formación Profesional. BOE-A-2023-10395. <https://www.boe.es/boe/dias/2023/05/01/pdfs/BOE-A-2023-10395.pdf>

Boletín Oficial del Estado. (2023b, 22 de julio). Real Decreto 659/2023, de 18 de julio, por el que se ordena el sistema de Formación Profesional. BOE-A-2023-16889. <https://www.boe.es/boe/dias/2023/07/22/pdfs/BOE-A-2023-16889.pdf>

Bureau Veritas Business School. *Curso La gestión de la diversidad y la igualdad en las organizaciones*. <https://www.bureauveritasformacion.com/la-gestion-de-la-diversidad-y-la-igualdad-en-las-organizaciones-2213.aspx>. Last accessed 13 February 2024

Cadena SER. (2025, 25 de febrero). *Educación y la Asociación de Hostelería de Huesca colaboran para fomentar la innovación gastronómica y su aplicación en FP*. Radio Huesca – Cadena SER. <https://cadenaser.com/aragon/2025/02/25/educacion-y-la-asociacion-de-hosteleria-de-huesca-colaboran-para-fomentar-la-innovacion-gastronomica-y-su-aplicacion-en-fp-radio-huesca>

CESAE Business & Tourism School. *Curso de Big data y Business Analytics en el Sector de Hostelería y turismo*. <https://www.cesae.es/curso-big-data-business-analytics-sector-hotelerero>. Last accessed 13 February 2024

Confederación Empresarial de Hostelería de España [CEHE] *Campus Hostelería*. <https://www.cehe.es/formacion-hosteleria.html> . Last accessed 13 February 2024

Confederación Española de Agencias de Viajes [CEAV] <https://ceav.info/formacion/> Last accessed 13 February 2024

Confederación Española de Hoteles y Alojamientos Turísticos [CEHAT] (2021). *Informe Anual 2021*. <https://cehat.com/wp-content/uploads/2020/08/Informe-Anual-Hotel-Monitor-2021-CEHAT-CAJAMAR.pdf>

Confederación Española de Organizaciones Empresariales [CEOE]. *Formación*. <https://www.ceoe.es/es/ceoe-news/formacion> Last accessed 13 February 2024

Cursos Femxa.es and Universidad de Nebrija. <https://www.cursosfemxa.es/> Last accessed 13 February 2024

Deusto Business Open Alumni [DBOA], (2023). *Breve análisis del sector Agencias de Viajes*. <https://www.deustobusinessopenalumni.es/s/colaboracion/breve-an-lisis-del-sector-agencias-de-viajes-MCWATZ5QJYZ5FOXNQFM55TUEMHMQ#:~:text=En%202022%2C%20el%20n%C3%BAmero%20de,20.000%20que%20hab%C3%ADa%20en%202008.>

Ladevi. (2024, 5 de junio). *WTTC: los números de la industria 2024 y previsiones 2025*. Ladevi. <https://espana.ladevi.info/actualidad/wttc-los-numeros-la-industria-2024-y-previsiones-2025-n81916>

Secretaría de Estado de Turismo [SET], (2019). *Directrices Generales de la Estrategia de Turismo Sostenible de España 2030*. <https://www.prodetur.es/prodetur/AlfrescoFileTransferServlet?action=download&ref=59dc339e-3911-4b6d-af8d-43b9b683a09c>

Escuela de Organización Industrial [EOI]. *Master en Gestión Medioambiental y Sostenibilidad* <https://www.eoi.es/es/cursos/91130/master-en-gestion-medioambiental-y-sostenibilidad-madrid> Last accessed 13 February 2024

EUROINNOVA. *International Online Education and Universidad Europea Miguel de Cervantes. Curso Agente de Igualdad Mujer*. <https://www.euroinnova.edu.es/curso-universitario-agente-igualdad-oportunidades-mujer> Last accessed 13 February 2024

European Commission. (2024). *Digital Decade Country Report: Spain 2024*. European Commission, DG CONNECT. <https://digital-strategy.ec.europa.eu/es/factpages/spain-2024-digital-decade-country-report>

España Digital. (2023). *Transformación digital de la educación*. Gobierno de España. <https://espanadigital.gob.es/medida/transformacion-digital-de-la-educacion>

Exceltur. (2018). *Estudio sobre el empleo en el sector turístico español*. <https://www.exceltur.org/wp-content/uploads/2018/04/ESTUDIO-EMPLEO-SECTOR-TURISTICO-EXCELTUR.pdf>

Femxa Formación. *Curso de Mediación y resolución de conflictos*
<https://www.cursosfemxa.es/mediacion-resolucion-conflictos-online-privado-curso> Last accessed 13 February 2024

Femxa Formación. *Curso Mejora tu comunicación en equipo.*
<https://www.cursosfemxa.es/mejora-comunicacion-equipo-online-privado-curso> Last accessed 13 February 2024

Fernández, R. (2024, January 4). *El sector de la restauración en España - Datos estadísticos.*[Statista]. <https://es.statista.com/temas/6557/la-restauracion-en-espana/#topicOverview>

Formación Alcalá. *Máster de Formación Permanente en Habilidades Sociales y Gestión Emocional.* Universidad Isabel I.
https://www.formacionalcala.com/es/enfermeria/masters-online/master-en-habilidades-sociales-y-gestion-emocional?_gl=1*d0ketm*_up*MQ..&qclid=Cj0KCQiA1NebBhDDARIsAANiDD137cBoUxQnIO94qZMwnlso-EVIMCtdTm_Jp04OHKmp9ShPzpkc2waAs7eEALw_wcB#certificacion Last accessed 13 February 2024

Formación Alcalá. Universidad Europea Miguel de Cervantes (2022b).
<https://www.formacionalcala.com/es/psicologia/cursos-online/habilidades-sociales#certificacion>

Fundación Orange (2023a). *Impacto de la transformación digital en España: 1998 – 2023.* <https://fundacionorange.es/25a/informe/Informe-25a.pdf>

Fundación Orange (2023b). *Impacto de la transformación digital en España: 1998 – 2023.* <https://fundacionorange.es/25a/informe/Informe-25a.pdf>

Gómez, Ana GA. (2022, February 09). *¿Cuál es el idioma más demandado por el sector turístico y hotelero?* [TecnoHotel.]
<https://tecnohotelnews.com/2022/02/idioma-mas-demandado-sector-turistico-hotelero/>

Google Activate (2022). *Curso Cloud Computing*
<https://skillshop.exceedlms.com/student/collection/786255-cloud-computing?locale=es>

HOSTELTUR Academy. *Curso Descarbonización y adaptación al Cambio Climático como oportunidad para destinos y empresas turísticas.*
<https://www.hosteltur.com/academy/cursos/sostenibilidad/curso-descarbonizacion-y-adaptacion-al-cambio-climatico-como-oportunidad-para-destinos-y-empresas-turisticas> Last accessed 13 February 2024

Hosteltur. (2024, 28 de mayo). WTTTC: el sector turístico romperá todos los récords en 2024. Hosteltur.

https://www.hosteltur.com/162767_wtttc-el-sector-turistico-rompera-todos-los-records-en-2024.html

IES Profesor Emilio Lledó. (2024). Programación didáctica de Hostelería y Turismo 2024/2025. Junta de Comunidades de Castilla-La Mancha. https://ies-profesoremiliolledo.centros.castillalamancha.es/sites/ies-profesoremiliolledo.centros.castillalamancha.es/files/descargas/programacion_hosteleria_y_turismo_24-25.pdf

IM Digital Business School. Master Trafficker Digital . <https://www.im.education/master-trafficker-digital/> Last accessed 13 February 2024

IMF Smart Education Universidad Católica de Ávila. *Máster en Medio Ambiente y Transición Ecológica*. <https://www.imf-formacion.com/masters-profesionales/master-en-gestion-del-medio-ambiente> Last accessed 13 February 2024

Innovtur Centro Virtual de Formación Turística. *Curso Turismo accesible e inclusivo*. <https://www.innovtur.com/curso-turismo-accesible-e-inclusivo-planificacion-y-gestion/> Last accessed 13 February 2024

Instituto Nacional de Estadística. (2024). Alojamientos turísticos: Hoteles, campings, apartamentos, alojamientos de turismo rural y albergues. Año 2023 [Tabla 72966]. INE. <https://www.ine.es/jaxi/Datos.htm?tpx=72966>

Instituto Nacional de Estadística. (2024, 14 de marzo). Cuenta Satélite del Turismo de España. Año 2023. INE. https://www.ine.es/prensa/cst_2023.pdf

Instituto Nacional de Estadística. (2025, 3 de febrero). Encuesta de movimientos turísticos en fronteras (FRONTUR). Diciembre 2024 y año 2024. INE. <https://www.ine.es/dyngs/Prensa/FRONTUR1224.htm>

Instituto Nacional de Estadística. (2025, 3 de marzo). Encuesta de Turismo de Residentes (ETR). Cuarto trimestre de 2024 y año 2024. INE. <https://www.ine.es/dyngs/Prensa/ETR4T24.htm>

Instituto Nacional de Estadística. (2023, 6 de diciembre). Encuesta sobre equipamiento y uso de tecnologías de información y comunicación en los hogares. Año 2023 (TICH 2023). INE. https://www.ine.es/prensa/tich_2023.pdf

Instituto Nacional de Estadística. (2025). Movimientos turísticos según vía de acceso. Año 2024 [Tabla FRONTUR]. INE. https://www.ine.es/jaxiT3/Datos.htm#_tabs-tabla

Instituto Nacional de Estadística [INE] (2022a). *Cuenta satélite del turismo de España. Accounting series 2016-2022. Statistical revisión 2019.* <https://www.ine.es/jaxi/Datos.htm?tpx=33431#!tabs-tabla>

Instituto Nacional de Estadística [INE] (2022b). *Tourism Satellite Account of Spain 2016-2021 Series.* https://ine.es/en/prensa/cst_2021_en.pdf

Instituto Nacional de Estadística [INE] (2023c). *Tourism Satellite Account of Spain. Year 2022.* https://ine.es/dyngs/INEbase/en/operacion.htm?c=estadistica_C&cid=1254736169169&menu=ultiDatos&idp=1254735576863

Instituto Nacional de Estadística [INE] (2023d). *Spanish Tourism Satellite Account 2016-2022 Series.* https://www.ine.es/en/prensa/cst_2022_en.pdf

Instituto Nacional de Estadística [INE] (2022e). *Movimientos Turísticos en Fronteras. Resultados nacionales. Número de turistas según país de residencia.* <https://www.ine.es/jaxiT3/Datos.htm?t=23984>

Instituto Nacional de Estadística [INE] (2023f). *Movimientos Turísticos en Fronteras. Resultados nacionales. Número de turistas según vía de acceso.* <https://www.ine.es/jaxiT3/Datos.htm?t=23982>

Instituto Nacional de Estadística [INE] (2023g). *Resultados nacionales. Viajes, pernoctaciones, duración media y gasto.* <https://www.ine.es/jaxiT3/Datos.htm?t=24919>

Instituto Nacional de Estadísticas [INE] (2020h). *Spanish Tourism Satellite's latest statistical review 2020.* https://www.ine.es/en/prensa/cst_2020_en.pdf

Instituto para la Calidad Turística Española [ICTE]. <https://www.calidadturistica.es/ESP/m/1/Inicio/Inicio> Last accessed 13 February 2024

Instituto Superior del Medio Ambiente. *Curso de Especialista en Turismo Sostenible: Gestión de alojamientos y actividades de Ecoturismo.* <https://www.ismedioambiente.com/programas-formativos/> Last accessed 13 February 2024

IT Institute. *Certified Ethical Hacker.* <https://es.it-institute.org/ceh-certified-ethical-hacker/> Last accessed 13 February 2024

Ministerio de Asuntos Económicos y Transformación Digital. (2021, 28 de abril). *Elementos de IA: el Gobierno lanza un curso gratuito para acercar la Inteligencia Artificial a la ciudadanía.* Gobierno de España. https://portal.mineco.gob.es/ca-es/comunicacion/Pagines/210428_np_Elementos.aspx

Ministerio de Educación y Formación Profesional. (2024). Ciclo formativo en Inteligencia Artificial y Big Data. TodoFP. <https://www.todofp.es/que-estudiar/familias-profesionales/informatica-comunicaciones/ce-inteligencia-artificial-bigdata.html>

Ministerio de Industria y Turismo (2022). *Anfitriones del Turismo Programme*. <https://www.turismo-formacion.com/>

Ministerio de Industria y Turismo. (2025, 5 de febrero). *El Gobierno invierte más de 225 millones de euros en digitalización de destinos y empresas turísticas con fondos europeos*. Gabinete de Prensa. <https://www.mintur.gob.es/es-es/gabineteprensa/notasprensa/2025/paginas/digitalizacion-ayudas-225-millones-turismo-fondos-europeos.aspx>

Ministerio de Industria y Turismo. (2024, 26 de noviembre). *La digitalización de las pymes turísticas crece un 50% en un año, según el II Informe SETUR*. Gabinete de Prensa. <https://www.mintur.gob.es/es-es/gabineteprensa/notasprensa/2024/paginas/digitalizacion-pymes-turisticas-crece-un-50-por-ciento-en-un-a%C3%B1o-informe-setur.aspx>

Ministerio de Industria y Turismo. (2024, 26 de noviembre). *II Informe sobre el nivel de digitalización de las pymes turísticas*. Secretaría de Estado de Turismo. <https://www.mintur.gob.es/es-es/gabineteprensa/notasprensa/2024/documents/20241126%202%ba%20informe%20nivel%20de%20digitalizaci%C3%B3n%20de%20las%20pymes%20tur%3%adsticcas.pdf>

Ministerio de Industria y Turismo. *Sustainable tourism strategy of Spain 2030*. <https://turismo.gob.es/en-us/estrategia-turismo-sostenible/Paginas/Index.aspx> Last accessed 13 February 2024

Ministerio de Industria, Comercio y Turismo (2022). *Estrategia de Sostenibilidad Turística en Destinos*. https://turismo.gob.es/es-es/estrategia/V2022_Estrategia_Sostenibilidad_Turistica_Destino.pdf

Organisation for Economic Cooperation and Development [OECD], (2020a). *Tourism Trends and Policies 2020. Spain* <https://www.oecd-ilibrary.org/sites/8ed5145b-en/index.html?itemId=/content/component/8ed5145b-en>

Organisation for Economic Cooperation and Development [OECD], (2022b). *Spain. Tourism in the economy and outlook for recovery*. <https://www.oecd-ilibrary.org/sites/fbfbf269-en/index.html?itemId=/content/component/fbfbf269-en>

Organización Mundial del Turismo. (2025, 29 de enero). *El turismo internacional se recupera en 2024 hasta los niveles anteriores a la pandemia*. UNWTO. <https://www.unwto.org/es/news/el-turismo-internacional-se-recupera-en-2024-hasta-los-niveles-anteriores-a-la-pandemia>

Sistema Integral de Calidad Turística Española en Destinos [SICTED]. *Cursos para empresas adheridas al SICTED*. <https://formacion.calidadendestino.org/topics/cursos-para-empresas-adheridas-al-sicted/> Last accessed 13 February 2024

Statista. (2024). *Número de empresas del sector de la restauración en España a 1 de enero de 2024, por actividad principal* [Gráfico]. Statista. <https://es.statista.com/estadisticas/644305/empresas-del-sector-de-la-restauracion-segun-actividad-principal-espana/>

Statista. (2025). *La restauración en España - Datos estadísticos* [Dossier de Statista]. Statista. <https://es.statista.com/temas/6557/la-restauracion-en-espana/#topicOverview>

Statista. (2024). *Restauración: evolución trimestral de las ventas en España desde el primer trimestre de 2014 hasta el segundo trimestre de 2024* [Gráfico]. Statista. <https://es.statista.com/estadisticas/645161/restauracion-evolucion-trimestral-de-las-ventas-en-espana/>

Tech España School of Business. <https://www.techtitute.com/escuela-de-negocios/> Last accessed 13 February 2024

Tokio. New Technology School. *Curso Online Robótica orientada a la Inteligencia Artificial*. https://enter.tokioschool.com/robotica-orientada-inteligencia-artificial/?MLL=6506&gclid=Cj0KCQiAsdKbBhDHARIsANJ6-jfMIbR_fPcIJknnVJYNloPLWfV19mgSABUEKa6nUXdqxD-Ozusgr8aAg3eEALw_wcB Last accessed 13 February 2024

TURESPAÑA. (2025, enero). *Afiliación a la Seguridad Social en actividades turísticas*. Diciembre 2024. Ministerio de Industria y Turismo. <https://conocimiento.tourspain.es/export/sites/conocimiento/.content/Informes/afiliacion/2024/afiliacionALaSS1224.pdf>

Turespaña (2023). *Empleo en turismo. Afiliación a la Seguridad Social* [Turespaña] (2023a). <https://conocimiento.tourspain.es/export/sites/conocimiento/.content/Informes/afiliacion/2023/empleo-turismo-afiliacion-ss-12-2023.pdf>

Turespaña (2023b). *Encuesta de Población Activa (EPA)*. <https://conocimiento.tourspain.es/export/sites/conocimiento/.content/Informes/epa/2023/epa3T23.pdf>

TURESPAÑA. (2024). *Encuesta de Población Activa (EPA). Tercer trimestre 2024: Empleo en el sector turístico*. Ministerio de Industria y Turismo. <https://conocimiento.tourspain.es/export/sites/conocimiento/.content/Informes/epa/2024/epa3T24.pdf>

Turespaña. (2022c). *SPAIN Specialist Program*. <https://www.spainspecialistprogram.com/en/>

UNIR. La Universidad de Internet. *Máster Universitario en Energías Renovables*. <https://estudiar.unir.net/es/es-esp-ma-ing-master-energias-renovables/> Last accessed 13 February 2024

Universidad Complutense de Madrid (2022). *Master Medio Ambiente: Dimensiones Humanas y Socioeconómicas*. <https://www.ucm.es/estudios/master-medioambiente>

Universidad de Sevilla. (2024). *Grado en Turismo 2024*. Universidad de Sevilla. <https://www.us.es/estudiar/que-estudiar/oferta-de-grados/grado-en-turismo-2024>

Universidad de Oviedo. (2024). *Grado en Turismo 2024 – Facultad de Comercio, Turismo y Ciencias Sociales Jovellanos*. Universidad de Oviedo. https://jovellanos.uniovi.es/infoacademica/grado/grado/-/asset_publisher/xN9W/content/grado-en-turismo-2024

Universidad Politécnica de Cartagena. (2024). *Grado en Turismo*. Facultad de Ciencias de la Empresa. <https://fce.upct.es/presentacion-estudio/5202>

Universidad de Valencia. *Postgrado y Formación Continua (2022). Experto Universitario en Digitalización Turística para la Sociedad 5.0*. https://postgrado.adeituv.es/es/cursos/%C3%81rea_jur%C3%ADdica_y_social-2/22223620/datos_generales.htm

Universidad Rey Juan Carlos (2022). *Máster de Formación Permanente en Ecommerce, Marketing Digital y Marketplaces ECOMMASTER*. <https://www.urjc.es/component/k2/796-master-en-e-commerce-y-marketing-digital-ecommaster>

World Travel & Tourism Council [WTTC] (2021a). *Travel & Tourism Economic Impact 2021 Report. Global Economic Impact & Trends 2021*. <https://wtcc.org/Portals/0/Documents/Reports/2021/Global%20Economic%20Impact%20and%20Trends%202021.pdf>

World Travel & Tourism Council [WTTC], (2022b). *Economic Impact Research*. <https://wtcc.org/research/economic-impact>

World Travel & Tourism Council. (2024). *Economic Impact Research (EIR) 2024 – Factsheet*. WTTC. <https://wtcc.org/research/economic-impact>

World Travel & Tourism Council. (2024, 14 de marzo). *El sector turístico de España podría superar los 260.000 millones de euros en 2025*. WTTC.

<https://wttc.org/news/el-sector-turistico-de-espana-podria-superar-los-260000-millones-de-euros-en-2025>

World Travel & Tourism Council. (2024, 14 de marzo). *Spain tourism sector could exceed €260 billion by 2025*. WTTC.

<https://wttc.org/news/spain-tourism-sector-could-exceed-260-billion-euros-by-2025>

World Travel & Tourism Council. (2024). *Travel & Tourism Economic Impact Research (EIR)*. WTTC. <https://wttc.org/research/economic-impact>