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**COUNTRY  
SKILLS  
PROFILE  
REPORT**



**GERMANY**



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# EXECUTIVE SUMMARY

This Country Skills Profile Report for Germany provides a comprehensive analysis of the tourism skills landscape, examining current workforce characteristics, skills training delivery, and best practices in upskilling and re-skilling within the German tourism and hospitality sector.



GERMANY IS ACTIVELY ENGAGED IN SKILLS DEVELOPMENT IN ALL THREE ATTENTION, I.E. DIGITAL, GREEN AND SOCIO-CULTURAL

This executive summary provides an overview of the field research (best practices analysis) conducted to explore the significance of digital, socio-cultural, and environmental/green skills development. Advanced skills such as robotics, digital applications and AI are currently considered less relevant industry but are expected to get more and more important.

### *Tourism context and employment*

Tourism accounts for around 11% of Germany's economic output. Estimates from industry associations suggest that around 3 million people work directly or indirectly in tourism, i.e. approximately 6–7% of the total workforce.

In 2025, the hospitality sector generated a turnover of €112 billion and recorded 496 million overnight stays – an indicator of high employment intensity.

In 2026, Germans are expected to spend approximately €86 billion on travel. These figures underscore that tourism remains a key growth driver and stabilising factor for the German economy (Destatis 2026).

### *Key challenges and strategic priorities*

**Digital capabilities** in the German tourism sector are developing. However, there are significant gaps. Destinations are making increasingly professional use of social media and digital tools, yet strategic foundations, expertise, resources and digital content remain key areas of weakness.

**Digitalisation is recognised.** However, not sufficiently embedded, i.e. digital literacy is described by tourism professionals as a key challenge for the future. Many destinations have working groups or internal digital teams, but no systematic training strategy. Professional development does take place – but on an ad hoc basis.

### *Skills Training Delivery*

**Upskilling and reskilling** in the German tourism sector are now key strategies for tackling the skills shortage, ensuring service quality and retaining staff in the long term. The sector is under significant pressure to transform – digitalisation, sustainability, changing guest expectations and labour shortages are significantly altering the demands placed on staff. The German tourism sector is increasingly investing in structured training programmes, digital learning resources and AI-powered tools to bridge skills gaps and equip employees to take on new tasks. The national tourism strategy sets out clear guidelines for digitalisation, climate protection and securing a skilled workforce.

**Green expertise** within the German tourism sector is currently evolving rapidly. Politicians, associations and businesses are actively driving forward the ecological transition, though much of this is still in its early stages. Progress is particularly evident in climate strategies, new centres of expertise, sustainable mobility and organisational transformation processes.

The direction is clear. With its Tourism Strategy 2030, the Federal Government is pursuing a clear focus on climate neutrality, digitalisation and fair working conditions

An expert workshop organised by the Kompetenzzentrum Tourismus (BMW, 2023) has identified four key areas of action directly linked to capacity building:

- a) a) Net-zero emissions, with carbon footprint assessment, energy management, and climate strategies as required skills.
- b) b) Circular economy, with sustainable procurement, waste management, and supply chain analysis as required skills.
- c) c) Biodiversity and regeneration, with nature-friendly destination development and ecological risk analyses as required skills.
- d) d) New forms of tourism mobility, with mobility concepts, infrastructure planning, and accessible service design as required skills.

Social skills in the German tourism industry are considered increasingly important, but structurally underdeveloped. Challenges arise primarily from more complex working conditions, digital transformation, rising expectations regarding social sustainability, and fragmented forms of employment.

### ***Best practices in upskilling and reskilling***

The best practice companies all show a very appreciative attitude towards their employees. Employees are seen as the company's most important resource. Effects are lower fluctuation, higher employee motivation and identification with the company, and a greater willingness to adopt new ways of organising and to continue training for the organisation.

The report presents five exemplary cases demonstrating innovative approaches to workforce development:

*Digital Skills, Green Skills and Sustainability Skills:* **COCONAT** is one of the first rural co-working spaces in Germany and certainly one of the best known. COCONAT is a social enterprise. It promotes sustainable initiatives, entrepreneurship and innovation in rural areas. The selection and treatment of COCONAT's staff is particularly noteworthy in terms of social sustainability. COCONAT also operates inclusively and deliberately offers support to people who join the company following life crises. The predominantly international backgrounds of the staff further enhance the diversity of rural society.

*Green Skills, Sustainability Skills and Social Skills:* As a climate-positive hotel, the **Hotel Luise** in Erlangen combines ecological innovation with social responsibility, setting new standards for sustainable construction and operations.

The 'Wall of Change' documents over 270 sustainability measures implemented and provides guests with a comprehensive overview of the hotel's ongoing development.

*Sustainability Skills, Green Skills and Digital Skills:* **AllerLiebe** specialises in producing high-quality, ready-to-eat organic meals. The company prioritises the circular economy wherever possible, minimises waste and uses 100 per cent green electricity. AllerLiebe places great emphasis on social sustainability. AllerLiebe drew up the first Common Good Balance Sheet, official audited external. Within the Economy for the Common Good, the company engage intensively with 20 thematic areas.

*Green Skills, Social Skills and Digital Skills:* **Biohotel Kenners Landlust** is a sustainable organic hotel with a homely atmosphere, close to nature and mindful of the resources available. Social responsibility also plays a central role. The hotel provides employment for people from migrant backgrounds and promotes an inclusive working environment. The Biohotel Kenners Landlust holds several sustainability certifications.

*Social Skills, Digital Skills and Sustainability Skills:* The strategy of **Schindlerhof Nuremberg** to take the ‘detour’ of employee focus to achieve high levels of customer enthusiasm, whilst it constantly demonstrates this core competence through prizes and awards. The Train-the-Trainer approach at Schindlerhof Nuremberg is one of the best-known and most effective staff development models in the German hotel and catering industry. It demonstrates how a medium-sized business systematically utilises internal knowledge to strengthen quality, motivation and a culture of learning in the long term.

### *Key findings*

In summary, it can be said that continuous learning and thus the development of digital, socio-cultural and ecological/green skills is important for the further development of the German tourism industry. Continuous learning, adaptation and skills development are crucial to meet the changing demands of the digital age but also the ever-growing environmental awareness and the desire for a healthier working world. The biggest gap is the adaptability to change and handle unexpected situations, followed by the ability to resolve conflicts. In all three attention fields (Digital/Green/Socio-cultural) German tourism is actively engaged in developing its Skills. Evaluating tourism demand and behaviour and using results to develop new study programmes is seen as very important.

Many organisations have recognized the importance of providing digital, socio-cultural and environmental/green skills training to their employees. Training methods vary widely and can be tailored to the needs of companies and their employees: some organisations offered online courses and tutorials, while others preferred in-house training or invited external training providers.

At the same time, lacks in systematic training programmes, clear social sustainability indicators, modern forms of social dialogue, and binding standards for fair working conditions. Social aspects (working conditions, human rights, local participation) are increasingly recognised as key, but are difficult to measure and are therefore less systematically embedded in many organisations.

# INTRODUCTION

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 best practice 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. in tourism.

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

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

The tourism industry is a vast and complex sector that encompasses many industries, including accommodation, transport, attractions, travel companies, and more. According to the date of the UN Tourism Barometer 2026, [freetour.com](https://www.freetour.com), Bundeszentrale für Politische Bildung, ADAC etc., the Global tourism generates several trillion US dollars annually, contributes around 10% to global GDP and creates hundreds of millions of jobs. Following the pandemic, the sector has recovered strongly and is once again approaching pre-crisis levels.

Global tourism generated around 1.4 trillion US dollars in 2023. This rose to 1.9 trillion US dollars in 2024, accounting for approximately 10% of global GDP. The tourism industry supports 348 million jobs worldwide, i.e. roughly one in ten jobs ([Freetour.com](https://www.freetour.com). ([Freetour.com](https://www.freetour.com), 2026), UN World Tourism Barometer (WTTC, 2026), bpb Bundeszentrale für Politische Bildung (bpb, n.d.)).

Global tourism is currently experiencing a period of **record-high demand**, but also **growing vulnerability**. The data points to a robust, broad-based global recovery. At the same time, there is growing pressure to make tourism more sustainable – both environmentally and socially.

Current trends point to strong growth and new records. In 2025, there were 1.52 billion international tourists – a new record in the post-pandemic era. The long-term trend shows a strong recovery following the pandemic-induced slump in 2020. By 2023, arrivals had already rebounded to around 1.3 billion. The regional winners are Africa and Asia. Africa recorded growth of +8% in 2025, with particularly strong increases in Morocco (+14%), South Africa (+19%) and Egypt (+20%). Asia-Pacific continues to grow (+6%). The region is thus continuing to catch up after being closed for the longest period due to the pandemic. Tourism revenue is rising faster than arrivals. Including passenger transport, total tourism exports stood at 2.2 trillion US dollars, a historic high. Europe remains the largest destination region – but with moderate growth. Europe welcomed 793 million tourists in 2025 (+4%). Of particular note are changes in travel behaviour and the overtourism debate. According to the 2025 ADAC study (Touristik aktuell, 27-01-2026 (Touristik aktuell, 2026), ADAC Tourismusstudie 2025 (ADAC, 2025)), overtourism plays an increasingly significant role in travellers' perceptions. Many holidaymakers are more sensitive to overcrowded destinations and are seeking alternatives. Sustainability, flexible bookings and greater price awareness are shaping behaviour more strongly than before the pandemic. In many countries, tourism contributes significantly to GDP and employment. In 2023, 55% of international arrivals were in developed countries, 45% in developing countries – a sign of growing global distribution (Statista).

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

Tourism accounts for around 11% of Germany's economic output. This is according to forecasts from the World Travel and Tourism Council (WTTC, 2026), which show that the travel and tourism sector is expected to increase its share of German GDP from €453.1 billion (2023) to €468.7 billion (2024).

This figure encompasses both direct effects (e.g. hotels, catering, tour operators) and indirect and induced effects (e.g. suppliers, transport, consumption by employees). This makes tourism one of Germany's most significant cross-sector industries.

Estimates from industry associations suggest that around 3 million people work directly or indirectly in tourism, i.e. approximately 6–7% of the total workforce (Touristik aktuell, 2026).

In 2025, the hospitality sector generated a turnover of €112 billion and recorded 496 million overnight stays – an indicator of high employment intensity. By February 2026, 27.7 million overnight stays (of which 5.1 million were international visitors) had already been recorded, an increase of 3.3% on the previous year.

In 2026, Germans are expected to spend approximately €86 billion on travel. These figures underscore that tourism remains a key growth driver and stabilising factor for the German economy (Stiftung Zukunftsfragen, 2026).<sup>42</sup>. Deutsche Tourismusanalyse 2026

**Conclusion:** Tourism in Germany is showing a steady recovery in 2026, with rising overnight stays and a strong desire to travel among the population. Despite global uncertainties, travel remains a central part of many Germans' lifestyles, with record spending and an increasing frequency of multiple trips.

### 1.1.2 Size and relevance of the subsectors

Tourism is one of Germany's largest service sectors. It is dominated by small and medium-sized enterprises and thus acts as a stabilising factor. Many regions (e.g. the Baltic Sea, the Alps, the Black Forest) are disproportionately dependent on tourism. The sector is labour-intensive. Any increase in demand therefore immediately creates direct and indirect jobs. Tourism-related spending (€392 billion) demonstrates the extent to which tourism has a knock-on effect on other sectors. German tourism is a multifaceted, highly significant economic sector whose subsectors are closely intertwined. Accommodation, catering, tour operators, transport and leisure/culture are particularly strong. With an economic output of over €420 billion and almost 3 million jobs, tourism is one of Germany's most important sectors and thus has a broad impact on other sectors (Statistisches Bundesamt).

Structure of tourism expenditure (percentages of 100% according to TSA categories, TSA Tourismus-Satelliten-Konto):

- Accommodation: 17–18%
- Catering: 20–21%
- Passenger transport: 26–28%
- Leisure, culture, sport: 12–14%
- Travel agencies/tour operators: 7–8%
- Retail (tourism-related): 15–16%

**Accommodation sector:** The accommodation sector set a new record with 497.5 million overnight stays in 2025. It plays a central role in domestic and city tourism, with Berlin, Munich and Hamburg leading the way. The accommodation sector accounts for a high proportion of employment and generates significant regional value added, for example in the coastal states, Bavaria and Berlin.

**Catering (restaurants, cafés, bars):** This sub-sector generated €112 billion turnover in 2025. It is closely linked to the accommodation and leisure sectors. Within the German tourism industry, the catering sector is the largest employer. The catering sector is characterised by a high proportion of small and medium-sized enterprises.

**Tour operators & travel agencies:** There are approximately 2,300 travel agencies in Germany. These travel agencies and tour operators accounted for €39.8 billion in turnover in the tourism market in 2024. Over 50% of package holidays are still booked through travel agencies. The work of travel agencies is characterised by a high level of advisory support. They play a key role in complex travel arrangements (long-haul trips, cruises).

**Transport & Mobility (rail, air, coach, car hire):** According to the ADV, airports are reporting steadily rising passenger numbers. Rail, long-distance coaches and car hire companies, with a 41.2% market share, are key players in the tourism market. They are important for the development of tourism as mobility is a fundamental prerequisite for tourism. They have a strong influence on sustainability debates.

***Leisure, cultural & event tourism:*** This sub-sector encompasses museums, theme parks, festivals, sporting events, theatres and concerts. It is characterised by high regional value creation, particularly in major cities and tourist hotspots. This sub-sector is regarded as a driver of city breaks. It contributes to extending the length of stay and increases per capita spending.

***Business travel & MICE (Meetings, Incentives, Conferences, Exhibitions):*** Germany is one of the world's leading trade fair and conference destinations. Business travel is a stable source of revenue for hotels and airlines. Business travel is associated with high expenditure per traveller. It is of great significance for cities such as Frankfurt, Munich and Berlin (DRV, 2025).

### 1.1.3 Incoming and outgoing tourists

The tourism industry in Germany set a new record in 2025 with 497.5 million guest nights. According to preliminary results released by the Federal Statistical Office (Destatis), accommodation establishments recorded 0.3% more guest nights than in the previous record year, 2024. The figures for the end of the year also contributed to this: in December 2025, establishments recorded 32.0 million overnight stays. This was 3.6% more than in December 2024 and thus the highest figure ever recorded in a December.

The number of overnight stays by domestic guests rose by 0.7% in 2025 compared with the previous year, to 413.7 million. By contrast, the number of overnight stays by foreign guests, at 83.8 million, was 1.8% lower than in 2024, when the European Football Championship in June and July had attracted many foreign visitors. The share of foreign guests in total guest numbers was thus 16.8% in 2025, having stood at 17.2% in 2024.

According to Destatis/Statista, Europe accounts for the largest share of countries of origin. Key source markets include the Netherlands, Switzerland and the USA. Destatis does not compile its own outgoing statistics on the travel behaviour of Germans. These are traditionally reported via Infas / Reiseanalyse and Eurostat.

The following figures are the most recent official or industry-validated figures available. In 2025, around 64% of Germans took at least one trip lasting 5+ days. Frequent travellers accounted for approximately 44% of this group (source: Reisanalyse / Industry Report, German Travel, Facts and Figures). The most popular destinations in Europe are Spain, Italy, Greece and France. For long-haul travel, the USA and Canada are once again on the rise. The average duration of a trip is 13 days per trip.

Germany is a **domestically driven tourism market**. Even though international tourism is growing strongly, **national tourism is more than four times larger** in terms of arrivals and nearly **five times larger** in overnight stays. The most recent official statistics available (Road Genius, German Tourism Statistics, published 2025, covering the tourism year 2024) underpin that domestic travellers remain Germany's largest guest segment, accounting for the majority of all arrivals, i.e. 152.3 million arrivals in 2024.

The International tourists inbound took a strong recovery after the pandemic, but is still far below domestic volume, i.e. **37.40 million international arrivals** in 2024.

The same picture is given for the overnight stays. Domestic overnight stays count **410.7 million** overnight stays in 2024; international overnight stays 85.3 million.

The following countries generated the highest number of overnight stays in 2024 in Germany:

- Netherlands – 11.9 million
- USA – 7.2 million,
- Switzerland – 6.9 million
- United Kingdom – 5.3 million
- Austria – 4.4 million
- Poland – 4.2 million
- France – 3.7 million
- Italy – 3.5 million
- Denmark – 3.0 million
- Spain – 2.7 million
- China – 1.8 million.

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

Germany is a leisure-driven tourism market, with domestic leisure travel forming the backbone of the industry. Business travel is important, especially due to Germany's strong trade fair sector. However, it represents a much smaller share compared to consumer leisure travel. The business travel has a strong recovery in 2024–2025 but still below pre-pandemic levels

Leisure travel is by far the dominant segment in Germany. German residents made 68.3 million holiday trips (5+ days) in 2024. Leisure travel accounts for the majority of all overnight stays in Germany. Domestic leisure tourism alone generated 410.7 million overnight stays in 2024. Germany is the destination for 23.6% of all German trips, i.e. leisure travel has a strong domestic focus. It is popular for nature, culture, city trips, wellness, and family holidays. Leisure trips are mostly booked via travel agencies or directly with providers

Business travel is smaller than leisure travel but still economically significant. Germany is a global leader in trade fairs and conventions. 7.1 million promotable business trips (conferences, fairs, incentives) to Germany from Europe were realised in 2024. Total business trips from Europe are divided as following: 40% traditional business (meetings, sales, corporate travel) and 40% traditional business (meetings, sales, corporate travel). The major business hubs are Frankfurt, Munich, Berlin, Düsseldorf, Hamburg. Generally, business travellers spend more per trip than leisure travellers (Der Deutsche Reisemarkt).

### 1.1.7 Company sizes

2025 sees the German tourism and hospitality sector at a scale rarely seen before with 223,000 hospitality businesses (DEHOGA, 2025), 52,000 accommodation establishments, 2.4–2.5 million employees and €112 billion turnover. Germany thus remains one of the largest tourism destinations in Europe, supported by an extremely diverse business landscape.

The *German accommodation sector* is heavily dominated by small and medium-sized enterprises. Ca. 90% of accommodation providers are privately run (family-run businesses, sole traders, small limited companies). Ca. 10% belong to hotel chains or brands (e.g. Accor, Marriott, IHG, B&B, Motel One).

According to DEHOGA, the *hospitality sector* consists predominantly of small, independent businesses. Approximately 95% are owner-managed establishments. Only 3–5% are accounted for by chain restaurants (McDonald's, L'Osteria, Vapiano, Burger King, etc.).

Among *tour operators and travel agencies*, the ownership structure is mixed. Tour operators: There are approximately 2,300 tour operators in Germany with the following ownership structures: large corporations (TUI, DER Touristik), many medium-sized specialist operators and small niche providers (outdoor, cultural, study trips).

*Camping and holiday apartments* are highly fragmented and predominantly privately owned. Camping sites comprise a mix of municipal, private and club-run establishments. Holiday apartments are largely privately owned. However, there is a growing role for professional providers (Novasol, Interhome, holiday apartment managers).

*Public bodies* play a role in health resort management, Spas, tourism organisations and, to some extent, in campsites and youth hostels (the DJH is a non-profit organisation).

## 1.2 TRAVEL AND TOURISM'S CONTRIBUTION TO EMPLOYMENT

Tourism in Germany is highly labour-intensive (catering, the hotel industry, leisure activities). In 2025, the tourism sector employed around 2.7 million people in Germany, accounting for approximately 6% of the total workforce – almost three and

a half times as many as in the automotive industry. The sector thus remained a key employer. In addition to the direct employment effects, it generates further jobs in upstream and downstream sectors, e.g. in food production, the construction industry, transport & mobility, the retail sector and the events industry. These indirect effects are significant, as tourism is a cross-sectoral industry that touches upon many value chains.

Employees' incomes create further jobs, for example in local retail or services. The higher the demand for tourism (e.g. records in overnight stays in 2025/2026), the stronger this effect on induced employment.

No central statistics on indirect and induced employment effects are kept in Germany.

Overall, the tourism industry is a positive driver of gross domestic product. It has overcome the enormous challenges of the COVID-19 pandemic and is almost back to pre-crisis levels in terms of both value-added and the number of employees.

However, alongside these positive developments, the following remains true: the hospitality sector continues to struggle with high energy and food prices as well as sharply rising staff costs, which has led to a decline in revenue compared with the years prior to the COVID-19 pandemic.

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

A 10-year forecast for 2025–2034 by the Federal Association of the German Tourism Industry (BDT, Bundesverband der Deutschen Tourismuswirtschaft e.V., 2024) is based on trend projections for the past 10 years, structural developments and data from 2024.

Based on structural developments (recovery following the pandemic, stable domestic demand, decline in business travel), the following direct contribution to GDP is expected for each of the subsequent annual periods:

- 2025–2026: Stabilisation at 3.7–4.0 %
- 2027–2030: A slight increase is possible if domestic tourism continues to grow
- 2031–2034: Trend towards 3.8–4.2%, depending on digitalisation, labour shortages, price levels

Based on this, the following projections are made for the total contribution of tourism in Germany to GDP:

- 2025–2026: 8–9 %
- 2027–2030: 8.5–10 %
- 2031–2034: 9–10%, possible if value chains continue to strengthen

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

Over the next ten years, tourism in Germany will remain a stable driver of job creation, accounting for around 6% of direct employment and having a macroeconomic impact on employment of 10–12% of all jobs.

The trend for the direct employment share is forecast as follows for the coming years, with the following rationale:

- 2025–2026: 6.0–6.2%, high demand, record overnight stays, stable domestic travel
- 2027–2030: 6.1–6.3%, digitalisation, productivity gains, but high staffing requirements
- 2031–2034: 6.0–6.2%, demographics slow down the labour market, tourism remains labour-intensive

With regard to the total contribution to employment (direct + indirect + induced), the following trends emerge:

- 2025–2026: 10–11%, strong value chains (catering, transport, retail)
- 2027–2030: 10–11%, stabilisation of supply chains, growing leisure sector
- 2031–2034: 10–11%, demographic bottlenecks, but robust demand

Based on these trends, tourism remains one of the largest cross-sectoral industries in Germany.

## 1.5 MAIN FOCUS POINTS OF NATIONAL STRATEGY FOR TOURISM

The National Tourism Strategy (adopted in 2026) aims to sustainably strengthen Germany's competitiveness as a tourism destination. For the first time, it brings together all tourism-related measures across government departments, focusing on the following key areas:

1. Reducing bureaucracy & easing the burden on businesses
2. Digitalisation and AI in tourism
3. Improving mobility and international connectivity
4. Labour market and recruitment of skilled workers
5. Sustainability and tourism balance
6. Strengthening international competitiveness
7. European and national networking

It is intended to future-proof the sector and, in particular, to strengthen small and medium-sized enterprises.

## 1.6 COUNTRY-SPECIFIC CHALLENGES AND DEVELOPMENTS IN TOURISM

German tourism is facing a profound transformation. Skills shortages, digitalisation, climate change and changing travel behaviour are the key drivers. At the

same time, enormous opportunities are emerging, particularly in nature, cultural and sustainable tourism.

Specifically, this means the following key areas:

***Labour shortages and demographic change:*** Tourism is a highly labour-intensive sector – and this is precisely where one of the greatest challenges lies, due to a decline in the available workforce caused by demographic trends, competition from other service sectors, rising wage costs and the difficulty of filling seasonal roles. Businesses are responding with automation (self-check-in), improved working conditions and international recruitment.

***Digitalisation and technological transformation:*** Many businesses, particularly SMEs, have some catching up to do in terms of digital booking systems, AI-supported guest communication, data management, online marketing, digital guest cards and mobility services. Consequently, the National Tourism Strategy places a strong emphasis on digitalisation as a competitive factor.

***Sustainability and climate change:*** Climate change is affecting Germany very differently across regions, e.g. the Alps with declining snow reliability, the coasts through erosion and storm surges, and the low mountain ranges with a decline in winter tourism. Destinations are therefore investing in year-round tourism, climate adaptation, sustainable mobility and resource-efficient infrastructure

***Changes in travel behaviour:*** Demand is shifting towards more short breaks rather than long holidays, with strong domestic tourism. There is a boom in nature, outdoor and health tourism and a decline in traditional business travel. Cities are focusing more on culture, events and MICE tourism; rural regions on nature experiences.

***Overtourism vs. under tourism:*** Germany is experiencing both simultaneously – overtourism in the hotspots (Berlin, Munich, Baltic Sea islands) and under tourism in structurally weak regions (parts of eastern Germany, rural areas). Possible developments include visitor management, regulation of holiday rentals and the promotion of lesser-known regions.

**Infrastructure and mobility:** Tourism in Germany is heavily dependent on accessibility. This includes, for example, overloaded rail lines, gaps in regional public transport, airport capacity, and traffic in tourist valleys (e.g. in the Alps). The federal and state governments are therefore investing in rail infrastructure, sustainable mobility options and digital traffic management.

**Economic uncertainties and rising costs:** Businesses are struggling with energy prices, modernisation costs, inflation and pressure to invest. Many businesses are therefore focusing on improving efficiency, collaboration and quality rather than quantity.

**Competitiveness in an international context:** Germany competes with European destinations that often offer a warmer climate, lower prices and more digitalised services. Germany is therefore positioning itself on the basis of quality, safety, culture and sustainability.

## 2. CURRENT SKILLS TRAINING DELIVERY IN GERMANY

In this section, you will find an overview of the training delivery of skills sets in Germany. The mainly state-funded, vocational and higher education institutions predominantly consist of public establishments. As a result, providers of tourism education and training also tend to be public entities, such as vocational colleges and universities of applied sciences. In Germany, a wide range of training opportunities are available, which include different educational paths in order to meet the needs and interests of the people.

One of the most unique types of educational paths in Germany is dual training or studies. This combines the imparting of theoretical knowledge in vocational school or university with practical approaches in a training company.

The Chamber of Industry and Commerce (IHK) IHK is the backbone of the dual system in many professions. It approves training companies, registers training contracts, organizes intermediate and final exams, ensures training quality and issues the official certificate. With uniform tests, it ensures that the level of the vocational schools imparts the necessary knowledge. The high level of training allows trainees a good start to their careers with high qualifications and also provides companies with advantages. Vocational schools also offer opportunities for training, without the dual component, a purely school-based vocational training. For practical experience and a deeper insight into the industry, many tourism companies offer internships and trainee programs. These allow trainees to develop practical skills and immerse themselves in different areas of the sector. If the profession is commercial, industrial, or service-oriented (like tourism), the IHK is the responsible body.

For those looking to pursue an academic career, there is a wide range of degree programs in tourism. Bachelor courses such as tourism management, hotel management, event management or tourism science offer a solid academic basis. There are specialised programs at master level, such as International Tourism Management or Sustainable Tourism Management.

For practical experience and a deeper insight into the industry, many tourism companies offer internships and trainee programs. These allow trainees to develop practical skills and immerse themselves in different areas of the sector. Universities of applied sciences are mainly regional higher education institutions whose activities highlight their connection to working life and regional development. They provide education for professional expert tasks that are based on the requirements of working life. Universities of applied sciences provide ***bachelor's and master's degrees***. Bachelor's degrees are mainly targeted to young people without higher education and master's degrees are targeted to adults who have already gained work experience and want to progress in their career. Both degrees are also offered for adults and can be studied while working with the blended learning model. (Ministry of Education and Culture, 2023b.)

In addition, tourism authorities are very active in skills development. As the tourism industry is dominated by micro and small size companies, it is essential to increase their skills to ensure profitability and competitiveness. For that, different institutions offer different extensive further training opportunities, which can be used after training or studies. These range from certificate courses to specialised seminars and workshops that focus on areas such as digital marketing in tourism, hotel management or event planning.

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**a) Academic training delivery in different degrees, training types and numbers**

In Germany in total there are 87 courses to get academic education at 33 different Universities of Applied Sciences and 3 academies. All 33 Universities of applied sciences offer Bachelor degrees, 12 of them also offer Master degrees and 3 offer additional certificate courses as further education for people already working in the tourism industry. Three academies also offer certificate courses for further education reasons to people in the tourism industry.

All certificate courses are offered as distance learning courses in order to enable the participants to develop professionally alongside their work.

Universities of applied sciences offer both, distance learning and on campus learning but are mainly still focused on campus learning / face-to-face teaching. Therefore, in Germany, most universities offer an extension of the study period and part-time studies so that students can take part in academic training alongside your job. A dual system has also been established in the academic field at some universities of applied sciences.

In dual studies, students alternate between three months at the university of applied sciences and three months at their training company. The dual study program is usually completed with a bachelor's degree. In the table below the dual studies are count in the On-Campus-Section as training is offered in presence.

All degree programs in Germany that lead to a bachelor's or master's degree must be accredited. The Accreditation Council Foundation, as an institution of the federal states, is jointly responsible for quality assurance and teaching at German universities. The students can therefore be sure that their degree is recognized nationally and internationally and that they can pursue further qualifications up to a Ph.D. empowered.

### **Innovative Academic Offering: “Future Tourism and Regenerative Living Spaces (M.Sc.)”**

German universities are already moving towards sustainable, smart and digitally integrated tourism education. For example:

The Master “Strategy and Innovation in Tourism” at Hochschule München (Hochschule München, Fakultät für Tourismus, Masterstudium Strategie und Innovation im Tourismus) focuses on smart, sustainable destination development and digital trends. The Master’s programme in Strategy and Innovation in Tourism develops problem-solving and design skills for the tourism industry across 14 modules, which are structured around the stages of the value chain and the key current challenges to success in tourism. Through practical projects with industry partners and by conducting their own academic analyses, students gain a shared understanding of current issues and the state of academic debate, whilst developing their ability to work independently, organise themselves and collaborate effectively within a team.

The new Master “Transformation and Sustainable Living Spaces – Reshape Tourism” is part of a cooperation between the Catholic University of Eichstätt-Ingolstadt (Katholische Universität Ingolstadt-Eichstätt, Master's program "Transformation and Sustainable Living Spaces - Reshape Tourism) and the Deggendorf, Kempten and Munich universities, all of which have a high level of tourism expertise, explicitly connects tourism, sustainability, and digitalization. A program that

trains students to design tourism not just as an economic sector, but as a driver of sustainable regional transformation, integrating regenerative tourism, digital ecosystems, climate-resilient mobility, community-centred development, living-space design, and innovation & entrepreneurship.

The Bachelor “Sustainable tourism management” in NRW (Fachhochschule Südwestfalen, Bachelorprogramm „Nachhaltiges Tourismusmanagement”) links tourism with regional development and economic promotion. The new Bachelor’s programme in ‘Sustainable Tourism Management’ at South Westphalia University of Applied Sciences systematically combines tourism with regional development and prepares its graduates to shape regions into places worth living in. They should learn to take an integrated approach to tourism management, regional development and business development, thereby creating living environments that offer a high quality of life not only for visitors, but also for local residents, businesses and their skilled workforce.

## **b) Vocational education in the dual System**

Vocational education in the dual system takes place both in companies and in schools. As a rule, trainees typically work three to four days a week in the training company and attend vocational school one to two days a week. Thus, the trainees receive practical training and professional experience in the training company and theoretical knowledge in the vocational school.

Typical apprenticeships in tourism include:

- Travel agent
- Hotel specialist
- Salesperson for tourism and leisure
- Event manager
- Aviation clerk
- Cook
- Restaurant specialist

Building on this vocational education training, various further training courses can be taken later in professional life. In Germany, these are offered both by state

further education institutions, in particular the IHKs, and by private further education providers as well as private and state universities of applied sciences. At the universities of applied sciences, these are usually certificate courses (see table above).

In some cases, after several years of professional experience in tourism and/or successfully completed further training, it is also possible to qualify for studying at a university of applied sciences to get a Bachelor's degree without having a high school diploma.

Since 2010, the Federal Institute for Vocational Training (BIBB, BILT „Bridging Innovation and Learning in TVET“ Bericht 2024 (BIBB, 2024)) and the Institute for Labour Market and Vocational Research (IAB), in collaboration with the Society for Economic Structural Research (GWS), have been producing a basic projection every two years on the long-term development of labour demand and supply according to qualifications and occupations ([www.QuBe-Projekt.de](http://www.QuBe-Projekt.de)). Tourism professions are summarised in the main professional group “tourism, hotel and restaurant professions”. A main occupational group combines occupations based on the similarity of the activities, knowledge and skills that characterise them. The main professional group “tourism, hotel and restaurant professions” includes the following professional groups:

- Tourism and sports
- Hotel industry
- Gastronomy
- Event service and management

The BIBB/IAB QuBe basic projection survey shows the expected development of tourism jobs in these professional groups until 2040. The diagram clearly shows once again that most jobs in tourism are carried out in the hotel and catering industry. This once again illustrates the great importance of quality standards for vocational training and non-academic further training.

Fig.1: Tourism Labour Demand vs Qualification Level (Germany 2020–2040, Forecast)  
Source: Authors' own visualisation based on BIBB/IAB QuBe projections (BIBB, 2024)

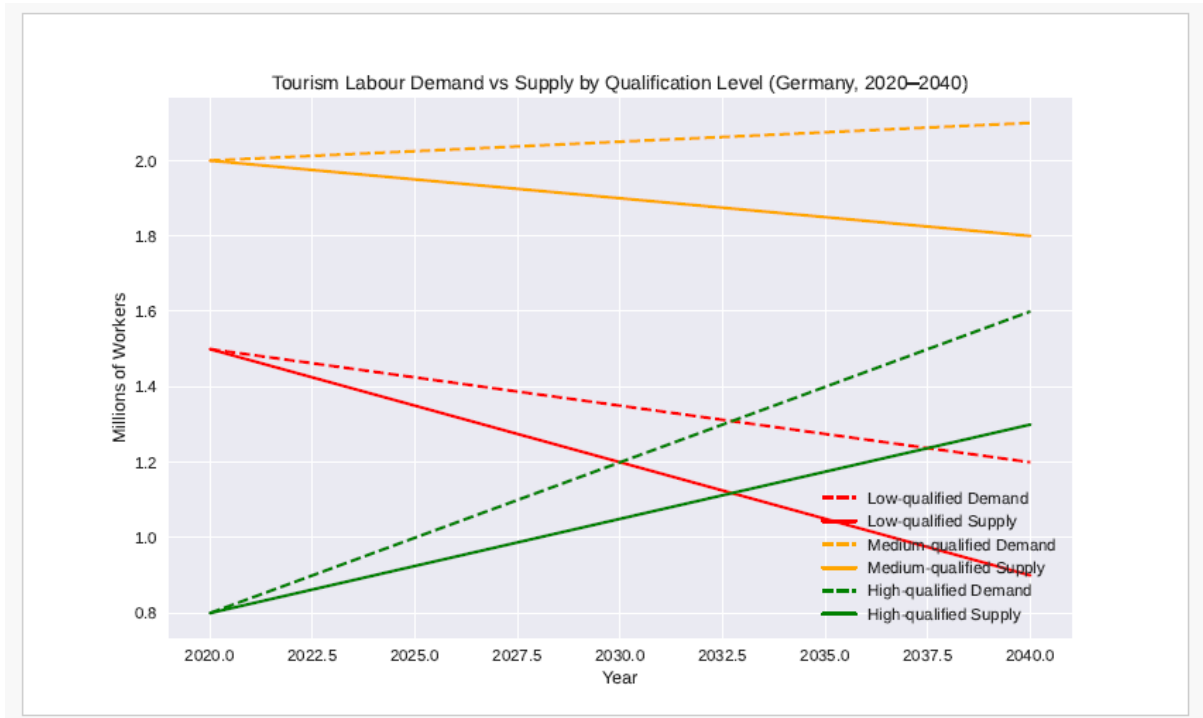
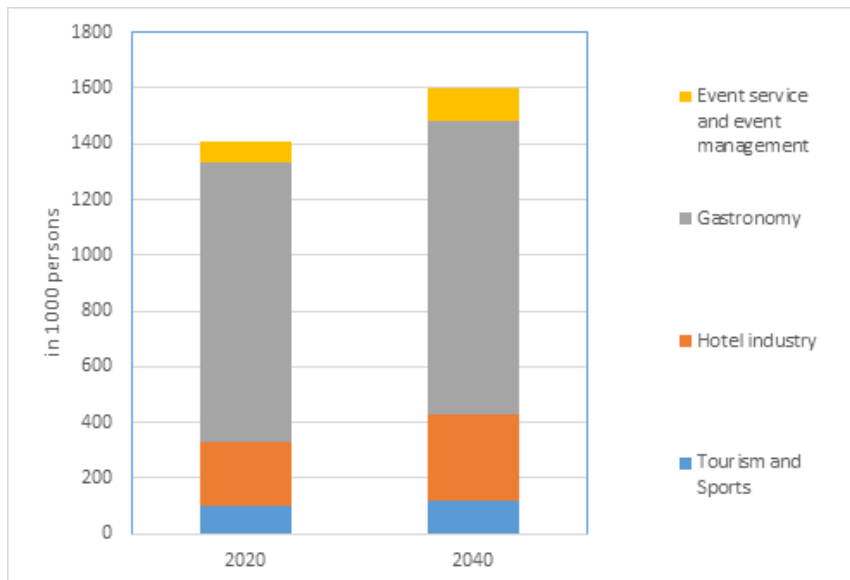


Fig.2: Long-term development of labour demand and supply by qualifications and occupations  
Source: QuBe-Projekt & Statistisches Bundesamt (2024)



## 2.1 DIGITAL SKILLS

Digital capabilities in the German tourism sector are developing – but there are significant gaps. Destinations are making increasingly professional use of social media and digital tools, yet strategic foundations, expertise, resources and digital content remain key areas of weakness. The data from the DMO DigitalMonitor 2025 (Tourismusnetzwerk Brandenburg, 2025) clearly shows that digitalisation is recognised, but not consistently implemented.

Germany is advancing its digital capabilities in tourism but has not yet reached its full potential in this area. The need for digital transformation has been recognised, but it has not yet been fully integrated into corporate strategy. Germany is on the path to becoming a leading player in digital tourism, but has not yet reached its full potential. The need for digital transformation has been widely recognised across the sector; however, it has not yet been systematically integrated into corporate strategy, a gap that is particularly striking given the competitive pressure from more digitally advanced European destinations.

- Digital strategies are often lacking, even though they are seen as necessary.
- Digital content and data quality are the biggest operational bottlenecks.
- Resources and expertise remain the key limiting factors.

The studies reveal several clear trends:

- Digitalisation is becoming more professional, but remains unevenly distributed across regions and organisational levels.
- Data-driven decisions are becoming increasingly important.
- AI is becoming a game-changer, but there is a lack of expertise and the courage to implement it.
- Digital content (text, images, videos, POI data) remains the biggest bottleneck.
- Working groups for digital topics exist in 67% of organisations – a sign of increasing structuring.

The current state of digitalisation in the German tourism sector is characterised as follows, based on the results of the DMO Digital Monitor 2025 ((Tourismusnetzwerk Brandenburg, 2025), Tourismusnetzwerk Brandenburg, Erste Ergebnisse zur Digitalisierung in Tourismusdestinationen 2025).

When it comes to the use of digital tools and systems, it is clear that Facebook and Instagram are used by 96% of destinations. TikTok, however, is currently used by only 12 %. The use of sensor technology to measure visitor flows is set to rise sharply from 19 % (2021) to 67 % (2025).

AI is seen as a key technology of the future, but there is uncertainty about its specific applications. Currently, 27.7% of organisations use generative AI tools such as ChatGPT. Only around a third of commercial businesses can be booked directly online.

According to the DMO DigitalMonitor 2025, the key challenges and barriers to digitalisation in the German tourism sector are:

- Lack of financial resources (66%)
- Other priorities in day-to-day business (56%)
- Lack of strategic foundations (45%)
- Staff resources and lack of expertise (44%)
- A need to catch up on digital content (47 %)
- Lack of digital self-awareness (41 %)

### **Why is this a problem for tourism in Germany?**

Destinations lacking digital expertise are losing visibility and innovative strength in international comparison. Poor data quality (POIs, opening hours, images) is one of the biggest operational problems – and is directly linked to a lack of expertise. Without the necessary expertise, AI, automation, open data and digital services are not utilised, even though they offer enormous potential.

The DMO Digital Monitor 2025 is also highlighting clear areas of expertise, which should be considered when it is about qualifying staff members working in the

tourism industry. The focus under the topic *basic digital skills* should be laid down on content management, data maintenance and data quality, working with booking systems and, social media skills as well. *Technological skills* should cover understanding of AI applications, working with sensor technology and data analysis, use of CRM and DMS systems and, digital guest communication (chatbots, automation). *Strategic skills* should include beside others development of digital strategies, change management, digital process optimisation and, digital accessibility.

Collaborative skills take care of working in digital networks, exchange between DMOs, service providers and regions and, the use of shared data platforms. Germany has many dedicated stakeholders in the tourism sector, but no nationwide training framework. The main problems are a shortage of skilled workers, a lack of systematic further training, a lack of resources and, a lack of digital culture.

### **Current status of initial and continuing professional development**

Based on the DMO DigitalMonitor 2023/2025 (Tourismusnetzwerk Brandenburg, 2025) and the BIBB/BILT (BIBB, 2024) publications, the following is the current picture of the state of skills development in the tourism sector, specifically in the area of digital skills. Digitalisation is recognised, but not sufficiently embedded, i.e. digital literacy is described by tourism professionals as a key challenge for the future. Many destinations have working groups or internal digital teams, but no systematic training strategy. Professional development does take place, but on an ad hoc basis. Typical professional development formats are social media training, open data workshops, content and CMS training, analytics workshops and, introductory workshops on digitalisation. However, these programmes are not available across the board and are often project-based. International Perspective (BIBB/UNESCO BILT): Digitalisation is changing skills profiles in the tourism sector worldwide. There is a lack of modern curricula that integrate digital, sustainable and international skills. The publication emphasises the need for systematic skills development in vocational education and training.

Actually, the German tourism industry has to face the following key issues and challenges in the matter of digitalisation. Generally, the DigitalMonitor states: “Digital specialists don’t just fall from the sky”. There is a shortage of qualified staff capable of driving digital initiatives both strategically and operationally. Further training relies heavily on individual projects, funding programmes or committed individuals, as there are no nationwide uniform standards for digital tourism skills. Also, should be marked lack of time in day-to-day operations, budget constraints for training and staff shortages in many DMOs. These factors severely hinder participation in further training. Digital transformation is often seen as an additional task rather than a core task. Many employees feel uncertain about using digital tools, more precisely, they lack a digital mindset. Although digital tools for knowledge transfer exist, they are underused.

### **Which digital skills are particularly lacking?**

- Operational skills, including content creation and data maintenance, working with DMS/CRM systems, social media and community management, digital booking and channel management.
- Strategic skills, covering planning digital transformation, change management, data-driven decision-making, AI expertise (evaluation, implementation, risks).
- Technological skills, focused on open data, data analysis and sensor technology, AI tools (e.g. ChatGPT, image AI), automation and digital guest communication.

It becomes clear that, despite all the problems that climate change also brings for incoming tourism in Germany, there are ways of dealing with the situation. Ultimately, however, this only means that a dilemma can be dealt with as well as possible, but that this approach cannot last for long as climate change progresses. Climate protection and the associated skills must be a major priority for tourism, as it has been noticeable in recent years what a fragile and incredibly valuable asset the climate is for tourism.

Digital developments can also play their part in improving environmental awareness. Things like saving paper by using digital cards are already well accepted by consumers. Interest in virtual alternatives to real experiences is also increasing. These offers can contribute to environmental protection if, for example, sensitive ecosystems can be better protected. Against this backdrop, climate change is one of the greatest challenges for sustainable tourism and has an impact on all areas of this study. It is precisely these challenges that are dealt with intensively in the above-mentioned study programmes in order to develop and promote green skills for the future.

## 2.2 GREEN SKILLS

In Germany, sustainability and environmentally friendly travel have long played a role in tourism education.

*Green expertise* within the German tourism sector is currently evolving rapidly. Politicians, associations and businesses are actively driving forward the ecological transition – though much of this is still in its early stages. Progress is particularly evident in climate strategies, new centres of expertise, sustainable mobility and organisational transformation processes. The industry is currently in a phase of systematic skills development, supported by policymakers, industry associations and new knowledge frameworks.

The direction is clear:

With its Tourism Strategy 2030 (Bundeswirtschaftsministerium, Nationale Tourismusstrategie), the Federal Government is pursuing a clear focus on climate neutrality, digitalisation and fair working conditions. The aim is to achieve ecologically, socially and economically sustainable tourism by 2030. The strategy strengthens both inbound tourism (Germany as a sustainable destination) and outbound tourism (e.g. CO<sub>2</sub> transparency, promotion of climate-friendly rail travel).

The implications for green skills are clear: tourism stakeholders must increasingly develop competencies in carbon accounting, sustainable product design, digital transparency and social sustainability.

Since 2024, a dedicated centre of excellence has been pooling knowledge, disseminating best practices and supporting the industry in its transformation. It serves as an information hub for associations, chambers and regional organisations and supports funding programmes such as LIFT. Significance: The centre professionalises the industry's knowledge base and strengthens expertise in consultancy, strategic direction and sustainable innovation.

An expert workshop organised by the Kompetenzzentrum Tourismus (BMW, 2023) identified four key areas of action directly linked to capacity building:

- e) a) Net-zero emissions, with carbon footprint assessment, energy management, and climate strategies as required skills.
- f) b) Circular economy, with sustainable procurement, waste management, and supply chain analysis as required skills.
- g) c) Biodiversity and regeneration, with nature-friendly destination development and ecological risk analyses as required skills.
- h) d) New forms of tourism mobility, with mobility concepts, infrastructure planning, and accessible service design as required skills.

The German Travel Association (DRV, 2025; ITB, 2026) reaffirms its commitment to climate protection and sustainable transformation. The key priorities are long-term emissions reduction, decarbonised mobility, transparent communication, and investment in sustainable infrastructure.

The *actual challenges* in the matter of green competences are variations in the level of implementation across regions and types of business, High investment requirements, particularly for SMEs, Skills shortages hinder the development of expertise and binding standards for 'green skills' are still lacking.

Training and further education in green skills within the German tourism sector currently takes place primarily in three areas:

1. National centres of excellence and workshops,
2. Vocational training and higher education institutions,
3. Practical further training programmes offered by associations and projects.

The most important new institution is the Centre of Excellence for the Green Transformation of Tourism, which offers studies, workshops and knowledge transfer.

4.

Since 2024 the Centre of Excellence for the “Green Transformation of Tourism” (BMWK) is active and acting as an information and training hub. It offers workshops, studies, best-practice collections and consultancy services for associations, chambers and tourism organisations. The main objective of this Centre of Excellence is to equip the sector with the skills needed for climate-friendly, socially just and innovative business models. Project offices are located in Ingolstadt (scientific management) and Salzgitter site (project team).

The Federal Institute for Vocational Education and Training (BIBB) is working internationally on new competence profiles for green, digital and sustainable vocational training in tourism and hospitality. The BILT initiative demonstrates how sustainability and digitalisation are being integrated into training regulations and further training programmes.

That means in practice, that apprenticeship trades such as hotel management, tourism management and event management are increasingly incorporating content on climate protection, resource management, sustainable mobility and social responsibility. Vocational schools and chambers are using the BIBB’s guidance to develop new curricula and additional qualifications.

Particularly in the field of academic education, there are study programmes that deal intensively with this, such as Sustainable Tourism Management in Eberswalde, the international Applied Leisure Science degree programme in Bremen and the Tourism Future degree programme in Kempten. Overall, the

teaching of green skills is integrated into almost all tourism training and study programmes.

Universities such as the Catholic University of Eichstätt-Ingolstadt (School of Transformation and Sustainability) are developing courses, workshops and research projects on the green transition.

State-wide networks (e.g. in Hesse) disseminate knowledge, offer training and embed the outcomes of national programmes such as LIFT.

Many associations offer training courses on sustainability management, certification schemes, sustainable communication and energy efficiency.

Chambers of Commerce and Industry are increasingly incorporating sustainability modules into further training programmes for tourism specialists and destination managers.

## 2.3 SOCIAL SKILLS

Soft skills training for employees is in great demand in all customer-oriented industries and is now part of the training standard, including in vocational trainings on the tourism sector.

Social skills in the German tourism industry are considered increasingly important, but structurally underdeveloped. Challenges arise primarily from more complex working conditions, digital transformation, rising expectations regarding social sustainability, and fragmented forms of employment (DI Tourismusforschung, 2024; Tourism Watch, 2025).

The tourism industry in Germany is facing a structural transformation in which social skills, ranging from empathy and intercultural sensitivity to digital communication skills, are becoming key factors for success.

At the same time, lacks in systematic training programmes, clear social sustainability indicators, modern forms of social dialogue, and binding standards for fair working conditions.

Social aspects (working conditions, human rights, local participation) are increasingly recognised as key, but are difficult to measure and are therefore less systematically embedded in many organisations. The focus remains more strongly on environmental sustainability indicators, as these are easier to communicate.

Tourism is a highly complex system involving a wide range of relationships between visitors, employees, local communities and service providers. This places greater demands on empathy, conflict resolution, intercultural competence and participatory communication.

The German government emphasises the importance of social responsibility and human rights in tourism (e.g. the Global Code of Ethics for Tourism). The rights of workers and fair working conditions are highlighted as key elements of sustainable tourism development.

### **Key challenges to tackle with under the point “Social skills”**

Platform work, algorithmic management and flexible working models make it difficult to establish stable social relationships and traditional staff development. Precarious workers are often not reached by traditional co-determination structures. New forms of social dialogue are needed that take digital working realities into account.

Tour operators frequently work with outsourced service providers, which makes it difficult to monitor working conditions Human rights risks (e.g. fair wages, protection of vulnerable groups) are difficult to monitor. Projects such as the Human Rights Impact Assessment show that social risks along tourist routes can be significant.

Guests increasingly expect authentic, respectful and socially sustainable experiences. This requires strong communication skills and sensitivity to diversity,

gender issues and accessibility. Research shows that stereotypical offerings or a lack of accessibility remain widespread.

Overtourism leads to tensions between guests and local communities. Staff require skills in conflict management, visitor management and participatory communication.

Digital experiences and online customer communication require new skills in using digital tools and personalised communication. At the same time, new areas of conflict are emerging (e.g. algorithmic work management).

In addition, awareness of inclusion is increasing, which offers great opportunities for employers and employees, especially in the tourism and hospitality industries. However, vocational schools and training providers must adapt their curricula to the new situation and enable inclusive learning. The Federal Participation Act stipulates throughout Germany that people with disabilities must be given access to education and training. Schools and other training centres have become increasingly better prepared for this in recent years.

In German social legislation, ... a distinction is made between offers for “people with disabilities” (SGB IX § 2) and offers for “young people in need of support” (SGB III, § 78). This distinction means that young people have different vocational training options and support services available at different learning locations. Young people with learning disabilities and social disadvantages who are likely to have difficulty completing vocational training are considered to be in need of support. This group of people is also summarised under the term “disadvantaged young people”: young people who, due to social, individual and structural disadvantages, do not have access to training or need support to complete it.

Offers for people with disadvantages:

- Vocational training in external institutions (BaE) (SGB III, §76)
- Assisted training flexible (AsA flex) (SGB III, §§ 74 – 75a)
- Youth social work (SGB VIII, § 13)

Offers for people with disabilities:

- Dual vocational training on the basis of the Vocational Training Act (§64 - §66) and the Crafts Code (§42k - §42n)
- Benefits for participation in working life (SGB IX, § 49)
- Budget for work (SGB IX, § 61)
- Budget for training (SGB IX, § 61a)
- Accompanied in-company training (SGB III, §117)

Additional organisational and financial support options are provided for the companies. There are also other offers that offer young people long-term support in the transition to working life, for example interlinked training with vocational training centres, voluntary advice and support services (e.g. job sponsorship model). In addition, a variety of other offers are anchored at the municipal level.

## 3. BEST PRACTICES UP- SKILLING AND RESKILLING

In each country that is represented in the PANTOUR consortium, partners have each selected, analysed and interviewed **5 best practices** in upskilling, reskilling, attracting/retaining staff in the five tourism sub sectors, accommodation, transportation. Food and beverage, recreation/attraction and travel services. The goal of the analysis is to have an inventory of innovative initiatives, projects, programs, philosophies, tools, methods, ideas, solutions, and concepts in relation to upskilling, reskilling, attracting, and retaining staff in order to improve the knowledge on digital, social, and green skills development in tourism.

In short, a Best Practice in upskilling, reskilling, attracting staff has all or many of these characteristics:

- 1** It has a clear goal.
- 2** It purposely addresses the bridging of existing skills gaps and future skills needs in tourism.
- 3** The organisation and individual staff members have a set of core values that strengthen their dedication, morale, and resolve a shared sense of purpose for the work.
- 4** It looks at urgent skills development challenges and human capital in their context – on macro level (sustainable/digital transition in tourism), sector/subsector level or skills level (digital, social, green skills).
- 5** It targets the underlying causes in addition to the challenge in upskilling and reskilling, attracting/retaining.

The GITNUXREPORT 2026 “Upskilling and Reskilling in The Tourism Industry Statistics” (GITNUX, 2026) states clearly, that the tourism industry urgently needs widespread training in digital and sustainable skills.

As key takeaways, the report noted par example:

- Globally, 52% of tourism workers lack basic data analytics training, hindering personalized customer experiences
- Average age of tourism workforce is 42 years, with 60% over 40 needing digital reskilling
- Women comprise 54% of tourism jobs but only 38% in tech-upskilled roles
- 82% of upskilled tourism workers report higher job satisfaction scores
- Upskilling investments rose 25% YoY in tourism, yielding 15% productivity gains
- Reskilled workers increased revenue per employee by 19% in hotels
- Digital upskilling reduced operational costs by 12% in travel agencies
- By 2025, upskilling to drive 50% of tourism GDP growth in Asia
- 75% of tourism jobs will require digital reskilling by 2030
- AI integration demands 40% workforce reskilling annually post-2025

What Germany does particularly well in the matter of upskilling and reskilling (u.a. Projekt Weiterbildungsnavigator-Tourismus):

- Digital and green transformation is actively promoted (e.g. Capacity2Transform, LIFT programmes).
- The national tourism strategy sets out clear guidelines for digitalisation, climate protection and securing a skilled workforce.

In the following sections, a short overview and analysis will be provided of each of the Best Practices investigated in the frame of the PANTOUR project.

*COCONAT: one of the first  
rural co-working spaces in  
Germany*



## 3.1 BEST PRACTICE: COCONAT - A Workcation

### Retreat

#### 3.1.1 Background information

##### *The project*

COCONAT stands for Community and Concentrated work in Nature – a new space for focused work in the countryside. There are both indoor and outdoor workspaces, but from the desk you're also right in the heart of nature. Opportunities for relaxation are immediately available, because sustainable productivity requires healthy breaks. For overnight stays, the historic estate and park offer unusual and cosy accommodation options across all price ranges. Visitors can also stay right in the heart of nature: glamorous camping in large glamping tents, in a circus wagon or caravan, or high up in the air in suspended tents. For food and drink, there is a café and an open lunch menu for all visitors; for a short while now, there has also been a very popular pizzeria in the courtyard, where the village mingles with international visitors.

*“COCONAT is one of the first rural co-working spaces in Germany and certainly one of the best known. What makes it a place of the future, however, is its strong commitment to the common good at a local political level; through initiatives such as the Smart Village Programme, it has helped bring greater digitalisation and entrepreneurship to the entire region.”*

COCONAT, a country estate in Klein Glien in the Brandenburg countryside, offers coworkation spaces combined with accommodation for both individuals and teams. Best Practice helped introduce this concept as ‘coworkation’ in German-speaking countries and has realised it as a place for non-hierarchical exchange on an equal footing. This applies both to interactions amongst guests and to the interaction between guests and staff.

### 3.1.2 Analysis and overview

#### *Key principles*

COCONAT is a business model for the green transformation of tourism. The team’s own objectives for this and other projects they are implementing can be summed up in three concise words:

- Inspire
- Invite
- Invent

The training on-site is organised as learning-by-doing and focused on the following four topics:

#### **Economic sustainability**

- Absorption of harvest peaks from the region
- Predominant use and purchase of second-hand items (upcycling)
- No-Waste philosophy in the kitchen

#### **Ecological Sustainability**

- Climate protection through procurement and material procurement
- Mindset communicate and disseminate (multiplier)
- Launch of sustainable projects in the region (e.g. mobility campus)

## **Biodiversity**

- Avoiding chemicals in the garden "cultivating" regional plants (e.g. fruit trees)
- Let nature letting without human intervention

## **Social sustainability**

- Sales platform for producers from the region
- Safe space for staff at an equal footing
- Inclusion: hirer various people who had problems on their previous jobs (bullying, burnout life crises)
- Flexibility to promote employees

## ***Examples and case studies***

### **Community Spirit**

COCONAT is a social enterprise. It promotes sustainable initiatives, entrepreneurship and innovation in rural areas and is committed to fostering a diverse and modern village life. The project aims to combine tradition with digitalisation, seeks to be a place for both long-standing residents and newcomers, and aspires to bring the village and the wider world together. It is a village community centre, café, co-living space, volunteer fire station, polling station, start-up incubator and much more. But above all, it is good for the future of the neighbourhood because young people are staying in the region and new people are moving here because of COCONAT.

### **Working locally**

COCONAT is a co-working space with accommodation. New ways of working are at the forefront of all COCONAT's activities. There is space for around 50 digital and knowledge workers. Here, local co-workers meet Berlin start-ups, and workationers meet digital nomads who have made Klein Glien their temporary base. COCONAT promotes the regional economy.

The selection and treatment of COCONAT's staff is particularly noteworthy in terms of social sustainability: The estate provides them with a safe space in which

they can try out new things and develop their skills. COCONAT also operates inclusively and deliberately offers support to people who join the company following life crises such as burnout, experiences of bullying, or precarious employment situations. The predominantly international backgrounds of the staff further enhance the diversity of rural society.

### ***Potential pitfalls and challenges***

Limited networking within the tourism sector, but stronger within the coworking community.

### ***Benefits and outcomes***

***Productivity through community.*** Studies show that 90% of people work better in a collaborative environment. COCONAT therefore offers not only peace and quiet and a focused atmosphere, but also an inspiring community with valuable business and social contacts. COCONAT is the ideal place to drive projects forward, meet like-minded people, and enjoy nature and have fun whilst doing so. Their cosy and functionally designed spaces, as well as the estate park, offer perfect conditions for both individual workers and for workshops, meetings or other events for small and larger groups.

***Responsibility.*** Profit maximization is not the focus of Best Practice; rather, rural development and helping the various people.

***Transparency.*** Corporate philosophy and sustainability are communicated via the company's website, as well as on-site by staff and founding team. It's a study on embedding the company in the circular economy.

### ***Measuring success***

The company was awarded the German Tourism Prize back in 2019 and the European Famigro Award. As a coworkation pioneer, COCONAT also advises numerous similar initiatives in rural areas.

Together with the two neighbouring municipalities and other stakeholders, they founded Smart Village e.V. and are involved in a wide range of projects, for example in the fields of citizen journalism, app development and mobility. Furthermore, COCONAT has many regional partners acting as service providers or producers.

COCONAT has developed follow-up projects like Makerspace and Mobility Campus Tiny Glien (12 tiny houses) par exemple.

The scalability is assured with the right partners by shared values.

### ***Responsibility and accountability***

COCONAT is a social enterprise. It promotes sustainable initiatives, entrepreneurship and innovation in rural areas and is committed to fostering a diverse and modern village life. The individual consideration of needs in connection with different working conditions is seen as a socio-cultural task. In human resources work at CVOCONAT, they have learned that sustainable productivity requires healthy breaks. Par exemple, enjoy the outdoors, go for a swim or a walk, and just take a deep breath, sauna, yoga, treetop walk, hiking, cycling, culinary experiences, etc.

The selection and treatment of COCONAT's staff is particularly noteworthy in terms of social sustainability: The estate provides them with a safe space in which they can try out new things and develop their skills. COCONAT also operates inclusively and deliberately offers support to people who join the company following life crises such as burnout, experiences of bullying, or precarious employment situations. The predominantly international backgrounds of the staff further enhance the diversity of rural society.

### ***References and external resources***

- Mona Bassyouny, Maximiliane Wilkesmann: Going on workation – Is tourism research ready to take off? Exploring an emerging phenomenon of hybrid tourism, *Tourism Management Perspectives*, Volume 46, 2023.
- Wissensplattform Zukunftsorte: <https://wissen.zukunftsorte.land/orte/coconat>



Digital Skills

Green Skills

Sustainability Skills

### *Conclusion*

COCONAT stands for Community and Concentrated work in Nature. In summary, COCONAT is a social enterprise. It promotes sustainable initiatives, entrepreneurship and innovation in rural areas and is committed to fostering a diverse and modern village life. The team's own objectives for this and other projects they are implementing can be summed up in three concise words: **Inspire, Invite, Invent.**

*Hotel Luise: Best practice in  
the green transformation of  
tourism*



## 3.2 BEST PRACTICE: Hotel Luise - Eco instead of ego

### 3.2.1 Background information

#### *The project*

As a climate-positive hotel, the Hotel Luise in Erlangen combines ecological innovation with social responsibility, setting new standards for sustainable construction and operations. Through the consistent application of the cradle-to-cradle principle, the hotel conserves natural resources both in its construction and in its day-to-day operations. A micro-forest on the premises promotes biodiversity and illustrates how even small green spaces in urban settings can make a valuable contribution to ecological sustainability.

Support for sustainable mobility is fostered through close collaboration with regional suppliers. Guests are offered a climate-friendly stay that sequesters more CO<sub>2</sub> than is generated. The 'Wall of Change', which showcases over 270 implemented sustainability measures and was awarded third place in the German Tourism Prize at the end of 2024, invites guests to experience and emulate the hotel's environmentally friendly initiatives.

As a climate-positive hotel with a clear focus on environmental and social responsibility, the Hotel Luise in Erlangen sets standards in the sustainable hospitality

industry. The design of renewable hotel rooms based on the cradle-to-cradle principle enables the use of fully recyclable or biodegradable materials, such as carpets made from recycled fishing nets and formaldehyde-free wooden ceilings. This concept is complemented by water-saving technologies such as NASA showers, which significantly reduce resource consumption and environmental impact. The hotel supports biodiversity on its grounds through a micro-forest, which improves air quality and creates habitat for various plants and animals. This micro-forest demonstrates how even small areas can contribute to ecological sustainability. To promote sustainable mobility, the hotel offers its guests charging points for electric vehicles and charging stations for e-bikes.

For the hotel's operations, Hotel Luise works closely with regional suppliers and local tradespeople. This collaboration shortens transport routes, reduces CO<sub>2</sub> emissions and strengthens the local economy. Furthermore, the hotel offers a climate-friendly stay, during which more CO<sub>2</sub> is sequestered than is generated. The breakfast concept focuses on regional, organic and fair-trade products and minimises waste. Free water stations help reduce plastic waste and contribute to the conservation of resources.

### 3.2.2 Analysis and overview

#### *Key principles*

Hotel Luise serves as a model for the green transformation of tourism and demonstrates in an inspiring way how change can be shaped innovatively. The outstanding diversity of individual measures, brought together under the motto '**Eco instead of Ego**', offers plenty of scope for sustainable ideas for tourism providers of all kinds and actively encourages others to follow suit.

Hotel Luise (Die Luise) has been committed to environmentally responsible travel since the late 1980s. Running and aligning the business in an environmentally, socially and sustainably responsible manner is the top priority.

*The aim is to become a 'circular hotel', thereby bringing people, nature and resources into harmony.*

The 'Wall of Change' documents over 270 sustainability measures implemented and provides guests with a comprehensive overview of the hotel's ongoing development. The wall makes the hotel's commitment transparent and invites guests and other hotels to understand and emulate the measures implemented.

This best practice has been a flagship project for the tourism industry for decades, distinguished by its unique commitment to sustainability across all areas.

The training on-site is organised as learning-by-doing and focused on the following three topics:

### **Economic sustainability**

- Smart energy concept
- Use of circular economy-certified products, such as tiles from Mosa
- Car-sharing car park with electric charging point
- Recycling and reuse of old items from the hotel
- Reduction of office waste through the use of memo mail

### **Environmental sustainability**

- Integration of the SDGs into the corporate philosophy
- Consistent focus on the circular economy,
- Renewable', 100% recyclable hotel rooms

### **Social sustainability**

- Taking responsibility for the local community, e.g. shopping for at-risk patients during the pandemic

### ***Examples and case studies***

#### **Areas of action**

Areas of action for the green transformation of tourism:

- Biodiversity
- Social sustainability
- Urban climate protection
- Circular economy
- Water use

- Waste management
- Networking

### Micro-Forest

A micro-forest now stands where there used to be an unused raised bed and an unused section of the garden. To achieve this, more than 200 tree seedlings were planted in a very small space using Dr Akira Miyawaki's method. This method can create (micro) forests that, after 10 years, have the characteristics of a 100-year-old forest.

In addition, a rainwater retention system was installed and a rain barrel irrigation system with recycled hoses was set up. All trees were planted together with hotel staff.

### Wall of Change

The Wall of Change is a unique communication project to promote sustainable tourism/hotels. The wall motivates guests and colleagues to act more sustainably in a special way. It represents the more than 270 sustainability measures Hotel Luise have implemented based on psychological principles and an unusual design. The high transparency and simple and clear descriptions make it easy to copy, scale and imitate the measures. It consists of a digital version on [luise.eco](https://www.luise.eco) and an analogue version in the hotel.

### The "Circular Hotel"

But not only the practical, but also the emotional aspect is an important pillar of the "Circular Hotel" concept in order to pick up the guests at the right point: Today's guests, and even more so those of tomorrow, no longer define their hotel stay in terms of purely material values, but in terms of emotions and worlds of experience that unfold for him.

### ***Potential pitfalls and challenges***

The “Wall of Change” is also intended to make small measures visible that would otherwise go unnoticed. However, it is precisely these that can be imitated more easily than the large-scale projects that are often advertised. By bundling measures up to the overall concept “Circular Hotel”, can establish resource efficiency as a model for success. By involving all target groups, the Hotel Luise positions as a place where sustainable corporate management can be experienced and uses the marketing of their personal philosophy to prove to others that their corporate concept is a successful model for the future.

### ***Benefits and Outcomes***

Worlds of experience should make the cycle concept as a hotel, tangible and couple it with emotional values for the guests. Based on existing concepts such as the three pillars of sustainability, the cradle-to-cradle principle and the economy for the common good, the idea of the “circular hotel” is about the basic principles of a self-sustaining ecosystem: The “circular hotel” knows no waste, it only knows resources.

*The “circular hotel” knows no waste, it only knows resources.*

The Hotel Luise is member of the following initiatives: Climate Protection Companies, Green Chefs and Climate Hotels.

### ***Measuring Success, Responsibilities and Accountability***

The circular hotel is a unique concept to date. As far as know, the Hotel Luise is the first hotel ever to try to combine a technical concept (cradle-to-cradle) with the principles of sustainability and environmental psychology. All individual measures and sub-projects are placed in a holistic context on this basis. The development of the worlds of experience for guests is also based on the principle of holism. This relies on psychological concepts such as biophilic design, nudging and reciprocity.

The SDGs (Sustainable Development Goals of the UN) clarify the impact of the 270 projects on the corresponding fields of action. And of course, a short description of the most important challenges or building blocks.

Co-development of new monitoring tools, such as the Environmental Footprint for Hotel Accommodation. Close monitoring of their own emissions and consumption.

#### *References and external resources*

- <https://hotel-luise.de/>
- Wall of Change: <https://luise.eco/>
- Kompetenzzentrum-Tourismus: <https://kompetenzzentrum-tourismus.de/information/best-practices/hotel-luise/>



Green Skills

Sustainability Skills

Social Skills

### *Conclusion*

The “circular hotel” knows no resource consumption, it only knows resource use. It wasn’t just the “circular hotel rooms”, which were developed entirely according to the cradle-to-cradle principle, that got on this path. This defines a **consistent circular economy in product design**, which requires that all materials that make up a product can be returned to nature or reused to manu-

AllerLiebe: Pure delight - A fresh, sustainable take on high-convenience products



## 3.3 BEST PRACTICE: AllerLiebe: Purer Genuss

### 3.3.1 Background information

#### *The project*

AllerLiebe specialises in producing high-quality, ready-to-eat organic meals. These meals are not only healthy and delicious, but also quick and easy to prepare – they simply need to be reheated. AllerLiebe is particularly distinguished by its commitment to transformation, which is deeply embedded in its corporate DNA: the company prioritises the circular economy wherever possible, minimises waste and uses 100 per cent green electricity.

Through reusable packaging, fair working conditions and the promotion of biodiversity, AllerLiebe demonstrates that enjoyment, responsibility and environmental protection can go hand in hand. The company caters to a wide range of catering businesses: on the one hand, it supplies companies for which a fully equipped canteen is not cost-effective.

From a tourism perspective, hotels and professional holiday let providers are among the target groups. Finally, there are several shops in Germany that sell AllerLiebe products to private customers, such as Eatlikeapro GbR, run by former world swimming champion Mark Warnecke and team chef for Werder Bremen. This further underscores the high quality of AllerLiebe's products.

In its production of high-convenience organic meals, AllerLiebe relies on a variety of sustainable measures that have positive effects from an ecological, social and economic perspective. A central element of this is the circular economy. As a Bioland partner and member of the German Federal Association for Sustainable Economy (BNW), AllerLiebe is committed to high standards in organic production and the conservation of resources. Species and landscape conservation are therefore an integral part of this. This is also evident in the minimisation of waste: most waste arises from meals that are not fully consumed, rather than from the production process itself, which points to efficient and demand-driven manufacturing.

The company's energy management is also designed with sustainability in mind. Unused equipment is switched off, which reduces energy consumption. The heat recovery system further contributes to efficiency by making good use of surplus energy. AllerLiebe also uses exclusively 100 per cent green electricity, which significantly reduces CO2 emissions.

Through its membership of Bioland, the company promotes biodiversity by actively supporting organic farming. This not only has a positive impact on the environment but also strengthens the position of smaller farmers, whose products are refined by AllerLiebe and made accessible to a wider consumer base. The use of reusable boxes for packaging the meals underlines the commitment to conserving resources and reducing the carbon footprint.

Regional integration and cooperation with local producers strengthen rural areas and boosts the regional economy. At the same time, AllerLiebe also places great emphasis on social sustainability: employees are, of course, paid fairly and appropriately.

Overall, it is clear that AllerLiebe not only promotes environmental sustainability but also takes social and economic aspects into account in equal measure. The implementation of these measures contributes to a holistic sustainable business approach that places both the environment and people at the centre.

### 3.3.2 Analysis and overview

#### *Key principles*

AllerLiebe is not a destination, nor has it ever been. AllerLiebe is a journey, and for that doesn't necessarily mean the shortest route between two points.

AllerLiebe operates according to the following core principles:

**Purpose beyond profit:** AllerLiebe's primary mission is not profit maximisation but the production of healthy, high-quality organic food that contributes to the common good.

**Customer involvement:** Customers can rate products and participate in developing personalised meal plans. Many of AllerLiebe's product innovations are a direct result of customer input, reflecting a co-creation approach to product development.

**Industry transformation:** AllerLiebe aims to supply and reshape the food preparation industry by demonstrating that high-convenience products can meet rigorous standards of ecological and social sustainability.

**Knowledge sharing:** Management actively shares expertise and experience with external partners, industry peers, and the broader circular economy network.

**Transparent communication:** AllerLiebe communicates its sustainability commitments through its website, social media channels, and participation in trade fairs and industry events.

**Measurable accountability:** From 2025 onwards, sustainability performance is assessed and publicly reported through a Common Good Balance Sheet, certified by an accredited Economy for the Common Good auditor.

The training on-site is organised as learning-by-doing and focused on the following three topics:

### **Economic sustainability**

- Circular economy plays a central role (Bioland partner and BNW member)
- Hardly any waste is produced; what is produced is mostly due to meals not being fully consumed
- Energy management by switching off unnecessary equipment
- Use of a heat recovery system
- Use of 100% green electricity

### **Ecological Sustainability**

- Promotion of biodiversity through membership of Bioland
- Reduction of the carbon footprint through the reuse of materials, such as reusable containers

### **Social Sustainability**

- Regional links that strengthen rural areas
- Value-adding of products for small-scale farmers
- Fair and appropriate remuneration for employees
- Operates according to the principles of the Economy for the Common Good

### ***Examples and case studies***

#### **“Good things, well packaged”**

AllerLiebe is the patron of the “Good things, well packaged” initiative. Together with many pioneers in the circular economy and the reusable packaging sector, AllerLiebe connects the various players and needs within a value chain. This is achieved through its own events and within the framework of other events and conferences.

#### **Respectful use of resources**

The guiding principle of Allerliebe’s initiative: the respectful use of its resources is a mission for us all. That is why AllerLiebe produces high-quality organic food, ensures diverse crop rotations and is committed to preserving biodiversity. Because

these issues are central to its mission, AllerLiebe believes it is time for a literal shift in the way Allerliebe package its products: the circular economy. Part of this involves sustainable reusable systems. Because here, every end of a packaging cycle holds the promise of a new beginning.

### ALLERLIEBE is recognised as a best practice among the Circular Hubs

The German Federal Association for Sustainable Economy (BNW) is creating, through the [circular hubs](#), learning centres and venues for circular #WERTschaffen. Funded by the [German Federal Environmental Foundation \(DBU\)](#), these regional networks serve as hubs for knowledge exchange and collaboration by, with and for SMEs. who care deeply about food production.

### Charitable share of AllerLiebe's products

With every product, AllerLiebe collectively contributes to the common good. Across its three divisions, these amounts are set aside and were distributed for the first time at the end of 2023.

| Delicacies        | À la carte         | Grain Culture                       |
|-------------------|--------------------|-------------------------------------|
| 3 cent per glass, | 2 cent per portion | 1 cent per roll and 3 cent per loaf |

### *Potential pitfalls and challenges*

This best practice is characterised by its integration into the circular economy, in particular through

- Indirect species and landscape conservation
- Through the use of Bioland products
- Energy management
- Waste prevention
- Strengthening rural areas

This best practice is already in use in other sectors outside the food industry and could, for example, be extended to care homes, schools and other institutions.

### ***Benefits and Outcomes***

This best practice promotes the transition to a more sustainable tourism industry overall by providing sustainable meals and use of reusable containers in a previously waste-intensive part of the tourism value chain. This best practice is itself an innovation project by Biohotel WildLand. The project acts as a supplier of ready-to-serve meals and, through sustainable production, can contribute to the transformation of the industry. This best practice has all requirements for a good scalability.

### ***Measuring Success, Responsibilities and Accountability***

This best practice is characterised by its integration into the circular economy, in particular through

- Indirect species and landscape conservation through the use of Bioland products
- Energy management
- Waste prevention
- Strengthening rural areas

This best practice serves as a model for the sector in terms of more sustainable tourism industry overall, food quality and preparation, as well as the use of reusable containers in a previously waste-intensive part of the tourism value chain.

### **Common Good Matrix 5.0**

Since 2024, AllerLiebe drew up the first Common Good Balance Sheet. This balance sheet is subject to certification by an accredited external auditor appointed through the Economy for the Common Good network (Gemeinwohl-Ökonomie e.V.). Within the Economy for the Common Good, AllerLiebe engages intensively with these 20 thematic areas:

| VALUE ENGAGEMENT GROUP | HUMAN DIGNITY                        | SOLIDARITY & JUSTICE      | ECOLOGICAL SUSTAINABILITY       | TRANSPARENCY AND CO-DECISION-MAKING |
|------------------------|--------------------------------------|---------------------------|---------------------------------|-------------------------------------|
| A: SUPPLIERS           | A1 Human dignity in the supply chain | A2 Solidarity and justice | A3 Environmental sustainability | A4 Transparency and co-             |

|                                  |   |  |  |  |
|----------------------------------|---|--|--|--|
|                                  |   | in the supply chain                                  | in the supply chain  | determination in the supply chain                |
| B: OWNERS & FINANCIAL PARTNERS   | B1 Ethical approach to the handling of funds          | B2 Social approach to the handling of funds          | B3 Socio-ecological investments and use of funds                         | B4 Ownership and co-decision-making              |
| C: EMPLOYEES                     | C1 Human dignity in the workplace                     | C2 Structure of employment contracts                 | C3 Promoting environmentally friendly behaviour among employees          | C4 Internal co-determination and transparency    |
| D: CUSTOMERS & BUSINESS PARTNERS | D1 Ethical customer relations                         | D2 Cooperation and solidarity with partner companies | D3 Environmental impact of the use and disposal of products and services | D4 Customer involvement and product transparency |
| E: SOCIAL ENVIRONMENT            | E1 Purpose and social impact of products and services | E2 Contribution to the community                     | E3 Reduction of environmental impact                                     | E4 Transparency and public participation         |

### References and external resources

- <https://www.allerliebe.bio/home/>
- <https://www.eatlikeapro.eu>
- Ergebnisbericht „Mehrweglösungen für regionale Erzeugnisse aus dem Glas“, HNE Eberswalde, [https://www.allerliebe.bio/files/allerliebe/news/presse/2023/Ergebnisbericht\\_BVVB\\_InfoVeranstaltung\\_230907\\_v1.pdf](https://www.allerliebe.bio/files/allerliebe/news/presse/2023/Ergebnisbericht_BVVB_InfoVeranstaltung_230907_v1.pdf)
- <https://kompetenzzentrum-tourismus.de/information/best-practices/allerliebe/>



Sustainability Skills

Green Skills

Digital Skills

### *Conclusion*

This best practice promotes the transition to a more sustainable tourism industry overall by providing sustainable meals and use of reusable containers in a previously waste-intensive part of the tourism value chain. This best practice is already in use in other sectors outside the food industry and could, for example, be extended to care homes, schools and other institutions.

*Kenners Landlust: Abseits  
des Mainstreams / Away  
from the mainstream*



## 3.4 BEST PRACTICE: Kenners Landlust: Abseits des Mainstreams / Away from the mainstream

### 3.4.1 Background information

#### *The project*

The Biohotel Kenners Landlust in Göhrde, Lower Saxony, offers a nature-oriented retreat in an ecologically designed setting, with a particular focus on unique accommodation experiences. Alongside the country-style rooms, the tree houses are among the hotel's highlights. These are fully integrated into a naturally grown forest and, thanks to their location and design, allow guests to experience nature in a particularly immersive way.

The offering includes a predominantly vegetarian organic wholefood cuisine featuring regional produce, nature experiences such as guided wolf walks, and the 'Waldzeit' programme, which fosters environmental awareness among younger guests. Wellness facilities, readings and events in a dedicated documentation centre focusing on the local wolf population complement the concept and round off the offering.

With the tree houses as a unique selling point and its commitment to the wolf conservation programme, Kenners LandLust demonstrates that sustainable

tourism can combine innovative accommodation concepts with nature conservation initiatives. The business is thus setting new standards and serves as a practical role model for the tourism industry, demonstrating how the green transition can be achieved, particularly with regard to the protection of biodiversity.

### 3.4.2 Analysis and overview

#### *Key Principles*

A sustainable organic hotel with a homely atmosphere, close to nature and mindful of the resources available. To offer guests a sustainable and nature-oriented holiday where environmental awareness and well-being go hand in hand.

Another outstanding feature of the eco-hotel is its commitment to nature conservation, particularly in relation to native wildlife such as the wolf.

The hotel's commitment to environmental sustainability is also evident in its energy supply. An on-site combined heat and power plant, fuelled by biomass and combined with a heat recovery system, reduces energy consumption and helps to cut CO<sub>2</sub> emissions.

The hotel prioritises regional and sustainable materials. Furniture, mattresses and other fittings are made from durable, natural raw materials, preferably sourced locally. Parts of the décor, such as chairs or curtains, are complemented by up-cycled products.

Social responsibility also plays a central role. The hotel provides employment for people from migrant backgrounds and promotes an inclusive working environment. Working hours are adjusted where possible so that single parents can also find their place. Educational programmes such as 'Waldzeit' for children raise awareness of environmental and nature conservation issues among both guests and the local community.

Through transparent communication, guests are actively involved in the hotel's sustainability concept.

The on-site training is organised as learning-by-doing and focuses on the following three topics:

### **Economic sustainability**

- Electric vehicle charging station; energy supply via own CHP plant, that generates electricity from biomass
- Heat recovery
- Sustainable financing through its own funds

### **Environmental sustainability**

- Construction of tree houses with green roofs
- Biodiversity through nature-friendly gardens
- Use of sustainable products, preferably certified organic, including mattresses and pillows
- Use of available resources for furniture, e.g. an old tree from a friend's garden, upcycling
- Development of its own systems to reduce its carbon footprint
- Unavoidable emissions are offset

### **Social sustainability**

- High authenticity thanks to the historic building and the owners' way of life and convictions
- Sale of regional products in the own shop
- Recommendation of sustainable activities and projects in the region to guests
- Inclusion of staff with a migrant background

### ***Examples and case studies***

#### **Spend the night high up in the treetops**

In the organic treehouse village, staying overnight gives the experience of a whole new way as a romantic adventure. Towering above the treetops, modern and bathed in light, with unique architecture, double rooms, accessible suites and

cosy lofts are available. Staying in a treehouse makes a childhood dream come true.

Here, nature, comfort and architectural sophistication blend to create an unforgettable stay in a unique treehouse hotel, ideal for getaways, families or small groups seeking both tranquillity and adventure. A treehouse hotel of a special kind at the BIO-Hotel Kenners Landlust, with all its possibilities.

### **The culinary philosophy Organic Cuisine**

The cuisine is called wholesome fusion cuisine. The cuisine works closely with local farmers and use only the vegetables that are fresh, in season, and readily available. The kitchen team is free to decide creatively which dishes to create as a result in a constant stream of new creations on the buffets. The cuisine team brings together different culinary styles and nationalities, ensuring the guests can always enjoy new and varied dishes. Sometimes the focus is on an Arabic recipe; at other times they use special seasonal produce sourced directly from their suppliers.

### ***Potential pitfalls and challenges***

Areas of action for the green transformation of tourism:

- Net-zero emissions: circular economy, biodiversity and regeneration management
- By advising other tourism businesses, Best Practice contributes to the sustainability of the tourism sector

### ***Benefits and Outcomes***

Sustainability is not just a business model; the founders have been living by this principle for decades.

Management addresses current issues, such as the 'sponge city' concept, and strives to contribute.

Management is also committed to integration and social sustainability outside the company

### ***Measuring Success, Responsibilities and Accountability***

The Biohotel Kenners Landlust holds several sustainability certifications: organic certification from GfRS, a carbon footprint assessment from Viabono & CO2OL, Viabono certification, the DEHOGA Gold Environmental Award, and the 'Blaue Schale' certificate from Anderswo .

### ***References and external resources***

- <https://www.kenners-landlust.de/>
- <https://kompetenzzentrum-tourismus.de/information/best-practices/kenners-landlust/>



Green Skills

Social Skills

Digital Skills

### **Conclusion**

A sustainable organic hotel with a homely atmosphere, close to nature and mindful of the resources available.

The business is thus setting new standards and serves as a practical role model for the tourism industry, demonstrating how the green transition can be achieved, particularly with regard to the protection of biodiversity.

*Schindlerhof Nuremberg –  
one of the best-known and  
most effective staff develop-  
ment models in the German  
hotel and catering*



## 3.5 BEST PRACTICE: Schindlerhof Nuremberg – Train-the-Trainer

### 3.5.1 Background information

#### *The project*

The Schindlerhof is more than just a conference venue – it is a place that fosters creativity, productivity and interaction at the highest level. Nestled in the idyllic Franconian countryside, its individually designed rooms create an atmosphere that inspires learning, thinking and creativity.

The **DenkArt philosophy** provides clear visual stimuli: contemporary artworks create a unique ambience that helps you discover new perspectives, break through old patterns of thought and unleash your creative potential. Every room, equipped with state-of-the-art technology, offers the ideal setting for small meetings, large conferences or interactive workshops.

The Schindlerhof was founded in 1984 by Renate and Klaus Kobjoll and has been at the heart of the Kobjoll family ever since. With their daughter Nicole Kobjoll at the helm, the second generation is now steering the company.

### 3.5.2 Analysis and overview

#### *Key principles*

The Schindlerhof remains a place that stands for warmth, innovation and the highest standards of quality. At the Schindlerhof, sustainability is central – not as a trend, but as a principle the Schindlerhof lives by. With responsibility and foresight, it focuses on environmentally friendly solutions, regional partnerships and resource-efficient working methods to offer their guests a sustainable experience.

Sustainability at the Schindlerhof means taking responsibility for people and nature – today and for future generations. Experience a hotel that combines hospitality, environmental awareness and sustainability.

At the Schindlerhof, hospitality stands not only for quality, but also for absolute fairness. The vision: a breeding ground for talent and, at the same time, a place of pilgrimage for genuine warmth!

The values that matter to Schindlerhof

- 'Joy in what we do',
- Freedom at work,
- Harmony in interactions,
- Trust in living and working together,
- Curiosity as a fountain of youth and passion as a driving force

The strategy: Taking the 'detour' of employee focus to achieve high levels of customer enthusiasm, whilst it constantly demonstrates this core competence through prizes and awards: Bavarian Start-up Award 2006, German Gastronomy Award 2010, Great Place to Work 2018, Top Service Germany 2020–2023, Germany's Best Conference Hotel 2025, EFQM, Economy for the Common Good, audited company with external audit.

The Schindlerhof remains a place that stands for warmth, innovation and the highest standards of quality.

## *Examples and Case Studies*

### Sharing Best Practice:

In addition to his work at the Schindlerhof, Klaus Kobjoll now devotes his time to his second company, Glow & Tingle, and inspires audiences as a speaker with lectures and seminars on topics such as customer and employee focus, Total Quality Management and 'Enthusiasm is Contagious'. With over 150,000 participants in Germany and internationally, he has demonstrated his expertise across a wide range of industries and his practical approach.

### In-house trainers

Schindlerhof trains its own staff to become internal trainers. They pass on their knowledge to colleagues in short, practical modules – ranging from service procedures to the basics of leadership.

The aim: knowledge stays within the company, and learning processes become faster, more cost-effective and more sustainable. No external trainers are needed. The expertise comes from within the team. Employees feel valued when they pass on their knowledge. New staff learn directly from colleagues who are familiar with the processes. Learning becomes part of everyday life, rather than a rare occurrence. This is a huge advantage, particularly in the hospitality industry where staff turnover is high.

### Example from the Schindlerhof

Training: "The perfect check-in in 7 steps" Trainer: Receptionist with 3 years' experience, Duration: 15 minutes.

#### Procedure:

- Demonstration
- Role-play with colleagues,
- Feedback session
- Documentation in the knowledge management system

**Result:**

- Consistent check-in standard
- Fewer errors
- Higher guest satisfaction

**Knowledge documentation**

Each training session is documented in a knowledge database, including the procedure, learning objectives, checklists and short videos. This ensures that knowledge is retained even in the event of staff turnover. Regular trainer meetings are organised to discuss training sessions, improve content and identify new learning needs.

**Skills taught**

Professional competence, communication, service quality, leadership skills and teamwork.

***Potential pitfalls and challenges***

The *Train-the-Trainer approach at Schindlerhof Nuremberg* is one of the best-known and most effective staff development models in the German hotel and catering industry. It demonstrates how a medium-sized business systematically utilises internal knowledge to strengthen quality, motivation and a culture of learning in the long term.

***Benefits and outcomes***

No external trainers are required. The expertise comes from within the team. Staff feel valued when they pass on their knowledge. New staff learn directly from colleagues who are familiar with the processes. Learning becomes part of everyday life, not a rare event. This is a huge advantage, particularly in the catering sector where staff turnover is high.

***Measuring Success, Responsibilities and Accountability***

The Schindlerhof's core competence is constantly demonstrated by prizes and awards: Bavarian Start-up Award 2006, German Gastronomy Award 2010, Great Place to Work 2018, Top Service Germany 2020–2023, Germany's Best Conference

Hotel 2025, EFQM, Economy for the Common Good, audited company with external audit.

The Schindlerhof was, is and remains a place that stands for warmth, innovation and the highest standards of quality.

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Social Skills

Digital Skills

Sustainability Skills

### *Conclusion*

The Train-the-Trainer approach at Schindlerhof Nuremberg is one of the best-known and most effective staff development models in the German hotel and catering industry. It demonstrates how a medium-sized business systematically utilises internal knowledge to strengthen quality, motivation and a culture of learning in the long term.

# SKILLS SYNTHESIS

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




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

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

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 [facebook.com/nexttourismgeneration/](https://facebook.com/nexttourismgeneration/)

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 [linkedin.com/company/pantour-pact-for-next-tourism-generation-skills/](https://linkedin.com/company/pantour-pact-for-next-tourism-generation-skills/)

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*The research design for this report was approved by the Ethics Board of Breda University of Applied Sciences (NL) with reference number BUas-RERB-23-03-Pantour-Application-v1.*



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# Appendix 1. Examples of Digital training providers

|   |
|---|
| <p><b>Training provider name:</b><br/>Kompetenzzentrum Tourismus des Bundes</p>   |
| <p><b>Website:</b><br/><a href="https://kompetenzzentrum-tourismus.de">https://kompetenzzentrum-tourismus.de</a></p>  |
| <p><b>Type of provider:</b><br/>NGOs financed by Bundesministerium für Wirtschaft und Klimaschutz / Federal Ministry of Economics and Climate Protection</p>  |
| <p><b>Covered skills types:</b></p> <ul style="list-style-type: none"> <li>• Habitats and Tourism Acceptance</li> <li>• Climate protection and sustainability</li> <li>• human factor</li> <li>• digitization and change</li> </ul> |
| <p><b>Methods of delivery:</b></p> <ul style="list-style-type: none"> <li>• Online courses</li> <li>• F2f seminars/workshops</li> <li>• Moduls with certification</li> <li>• Partner platform for workshops</li> </ul>              |

|   |
|---|
| <p><b>Training provider name:</b><br/>Kompetenzzentrum 4.0</p>  |
| <p><b>Website:</b><br/><a href="https://www.kompetenzzentrum-rostock.digital/">https://www.kompetenzzentrum-rostock.digital/</a></p>  |
| <p><b>Type of provider:</b><br/>Universitätsmedizin Rostock, legal entity, university</p>   |
| <p><b>Covered skills types:</b></p> <ul style="list-style-type: none"> <li>• Human health / human health tourism / health management</li> <li>• tourism</li> <li>• medical technology</li> <li>• digital craft</li> <li>• manufacturing</li> </ul> <p>The Mittelstand 4.0 competence center in Rostock is part of Mittelstand-Digital. The Federal Ministry of Economics and Climate Protection enables the free use of all offers from Mittelstand-Digital. More information at <a href="http://www.mittelstand-digital.de/">www.mittelstand-digital.de/</a></p> |

**Methods of delivery:**

Online: (i.e., online/class; modules/courses/trainings, certification)

**Training provider name:**

Mittelstand Digital

**Website:**

<https://www.mittelstand-digital.de/MD/Navigation/DE/Home/home.html/>

**Type of provider:**

Bundesministerium für Wirtschaft und Klimaschutz/Federal institution for Economic Affairs and Climate Action

**Covered skills types:**

- Digital skills

**Methods of delivery:**

- Online: (i.e., online/class; modules/courses/trainings, certification)

**Training provider name:**

Die Fernakademie für Tourismus und Hospitality

**Website:**

<https://www.tourismus-fernakademie.de/weiterbildungen/>

**Type of provider:**

- Private training provider

**Covered skills types:**

- Tourism
- Tourisms Marketing
- Event Marketing
- Social Media
- Inclusion
- Digital Skills
- Resilience and Spa
- KI Seminars

**Methods of delivery:**

- Distance learning courses, i.e., online/class; modules/courses/trainings, digital and/or hard copy certification

**Training provider name:**

Deutscher Tourismusverband e.V.

**Website:**

<https://www.deutschertourismusverband.de/veranstaltungen/weiterbildungen>

**Type of provider:**

- German Tourism Association

**Covered skills types:**

- Sustainability

**Methods of delivery:**

- Online seminars
- Exclusive seminars
- Training courses on DTV classification
- Seminars for ServiceQualität Deutschland

**Training provider name:**

TourComm Germany GmbH & Co. KG

**Website:**

<https://elearning.tourcomm-germany.com>

**Type of provider:**

- Private provider

**Covered skills types:**

- E-learning platforms in tourism, basic skills, advanced courses

**Methods of delivery:**

- E-learning

## Appendix 2. Examples of ‘Green’ training providers

|   |
|---|
| <b>Training provider name:</b><br>Hochschule für Nachhaltige Entwicklung Eberswalde   |
| <b>Website:</b><br><a href="https://www.hnee.de/de/Startseite/HNEEberswalde-Startseite-E9875.htm/">https://www.hnee.de/de/Startseite/HNEEberswalde-Startseite-E9875.htm/</a>  |
| <b>Type of provider:</b><br>University of applied Science   |
| <b>Covered skills types:</b> <ul style="list-style-type: none"> <li>• Academic education</li> <li>• Green skills</li> <li>• Socio cultural skills</li> <li>• Economic skills for a sustainable development</li> </ul> |
| <b>Methods of delivery:</b> <ul style="list-style-type: none"> <li>• Presence learning and blended learning</li> </ul>  |

|  |
|--|
| <b>Training provider name:</b><br>Greensign Academy  |
| <b>Website:</b><br><a href="https://www.greensign.de/academy/">https://www.greensign.de/academy/</a>   |
| <b>Type of provider:</b> <ul style="list-style-type: none"> <li>• Private provider of further training for sustainability in tourism</li> </ul>  |
| <b>Covered skills types:</b> <ul style="list-style-type: none"> <li>• Green skills such as sustainable gastronomy concepts and diversity management</li> <li>• Socio cultural skills</li> <li>• Economic skills for a sustainable development</li> </ul> |
| <b>Methods of delivery:</b> <ul style="list-style-type: none"> <li>• Workshops, seminars and outdoor trainings</li> </ul>  |

|  |
|--|
| <b>Training provider name:</b><br>Kompetenzzentrum Grüne Transformation des Tourismus/ Centre of Excellence for the Green Transformation of Tourism, <b>Bundesministerium für Wirtschaft und Klimaschutz (BMWK)</b><br>Ostfalia-Hochschule für angewandte Wissenschaften in Salzgitter<br>Katholische Universität Ingolstadt |
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|---|
| <b>Website:</b><br><a href="https://www.ku.de/news/kompetenzzentrum-gruene-transformation-des-tourismus">https://www.ku.de/news/kompetenzzentrum-gruene-transformation-des-tourismus</a>                        |
| <b>Type of provider:</b> <ul style="list-style-type: none"> <li>• University</li> </ul>   |
| <b>Covered skills types:</b> <ul style="list-style-type: none"> <li>• Green transformation</li> <li>• Carbon neutrality</li> <li>• Reducing the ecological footprint</li> </ul>                                 |
| <b>Methods of delivery:</b> <ul style="list-style-type: none"> <li>• Online courses</li> <li>• F2f seminars/workshops</li> <li>• Moduls with certification</li> <li>• Partner platform for workshops</li> </ul> |

|   |
|---|
| <b>Training provider name:</b><br>Netzeckbüro Bildung in der Lausitz, kobra.net, Kooperation in Brandenburg, gemeinnützige GmbH   |
| <b>Website:</b> <ul style="list-style-type: none"> <li>• <a href="https://bildung-lausitz.de/">https://bildung-lausitz.de/</a></li> </ul>   |
| <b>Type of provider:</b> <ul style="list-style-type: none"> <li>• gGmbH</li> </ul>  |
| <b>Covered skills types:</b> <ul style="list-style-type: none"> <li>• Education in a changing landscape</li> <li>• Centre of Excellence for Education in Structural Change</li> </ul> |
| <b>Methods of delivery:</b> <ul style="list-style-type: none"> <li>• Regional Network Management</li> <li>• Regional Education Monitoring</li> </ul>                                  |

## Appendix 3. Examples of Social / Cultural training providers

|   |
|---|
| <b>Training provider name:</b><br>Haufe Akademie  |
| <b>Website:</b><br><a href="https://www.haufe-akademie.de/hierarchy/persoенliche+und+soziale+kompetenz/">https://www.haufe-akademie.de/hierarchy/persoенliche+und+soziale+kompetenz/</a>                              |
| <b>Type of provider:</b> <ul style="list-style-type: none"> <li>• Private provider of professional training and seminars. Further vocational training can be funded by the state under certain conditions.</li> </ul> |
| <b>Covered skills types:</b> <ul style="list-style-type: none"> <li>• Social skills</li> <li>• Communication skills</li> <li>• Socio-psychological skills</li> </ul>  |
| <b>Methods of delivery:</b> <ul style="list-style-type: none"> <li>• Presence, live-online and digital training</li> </ul>  |

|   |
|---|
| <b>Training provider name:</b><br>International Motivation Training Deutschland   |
| <b>Website:</b><br><a href="https://internationalmotivation.com/">https://internationalmotivation.com/</a>  |
| <b>Type of provider:</b> <ul style="list-style-type: none"> <li>• Private provider for training, coaching and seminars</li> </ul>   |
| <b>Covered skills types:</b> <ul style="list-style-type: none"> <li>• Social skills</li> <li>• Resilience</li> <li>• Intercultural communication</li> </ul>   |
| <b>Methods of delivery:</b> <ul style="list-style-type: none"> <li>• Online training in combination with presence training</li> <li>• Online training in combination with practical training and internships</li> </ul> |