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O'Connor, Mary-Jane and Yılmaz, Barış and Borgers, Nicholas and Fedotova, Zoya

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ABSTRACT

Tourism is a major contributor to European employment, yet the sector is characterized by part-time work, seasonal fluctuations, informal employment, and gender disparities. This paper synthesizes recent empirical evidence and numerical data from Eurostat, OECD, and national case studies in Poland, Greece, and Italy to examine post-pandemic tourism labour market trends. Findings show that while tourism creates substantial employment—including spillover jobs in retail and transport—vulnerabilities persist, particularly for informal and female workers. For example, in Greece, 12–15% of tourism jobs are informal, while in Poland, employment dropped 28% during the COVID-19 pandemic, later recovering to ~90% of pre-pandemic levels. The analysis also highlights the role of labour market regulations, workforce sustainability, and skills development in shaping employment outcomes. Policy recommendations focus on balancing flexibility with security, promoting gender equity, supporting workforce development, and utilizing data-driven monitoring. The paper concludes that tourism employment can evolve from a source of vulnerability into a resilient, inclusive, and sustainable sector, provided that regulatory, social, and training interventions are effectively implemented.

Keywords: Tourism employment; labour market dynamics; informal work; gender disparities; post-pandemic recovery

Introduction

Tourism remains one of the world's most significant sources of employment, contributing both directly and indirectly to local and national economies. In Europe alone, tourism-related industries employed approximately 11.3 million people in 2024, with women representing nearly 60% of the workforce and part-time positions accounting for 45% of total employment (Eurostat, 2024). These figures underscore the sector's labour-intensive nature and its importance for inclusive growth. However, tourism employment is highly sensitive to global shocks, as illustrated by the COVID-19 pandemic, which caused substantial disruptions in workforce dynamics across multiple countries (Parzych, 2025; OECD, 2024). The pandemic highlighted the vulnerabilities inherent in tourism labour markets, including high levels of informality, seasonal employment, and regional disparities in recovery trajectories.

In Poland, for example, tourism employment dropped by approximately 28% during the pandemic, from a pre-COVID level of ~350,000 employees in hospitality and related services, before gradually recovering to ~90% of pre-pandemic employment by 2023 (Parzych, 2025). Similarly, in Greece, formal tourism employment accounts for approximately 450,000 jobs, yet 12–15% of the sector remains informal or uninsured, a situation that is strongly influenced

by labour market regulations (Hatzimarinakis & Hackl, 2025; Gazilas, 2024). These numbers illustrate not only the scale of tourism employment but also the structural challenges faced by labour markets that are heavily reliant on this sector.

The importance of tourism extends beyond sheer employment numbers. Research demonstrates significant spillover effects into related service sectors, including retail, transport, and hospitality support services. Conti, Francesconi, Papini, and Serafinelli (2025) estimate that in Italy, every 1,000 additional tourists generates approximately 12–15 new jobs in local service industries. This multiplier effect highlights tourism's capacity to stimulate broader local labour markets, reinforcing its economic relevance. However, such growth is contingent upon institutional frameworks, regulatory quality, and workforce adaptability, as labour market dynamics vary across regions and policy contexts (Mamatzakis, Pegkas, & Staikouras, 2023).

Gender distribution and employment structure are central dimensions of the tourism labour market. Women dominate employment in the sector across the European Union, yet they are disproportionately represented in part-time and lower-paid positions (Eurostat, 2024). Seasonal fluctuations further exacerbate precarity, creating challenges for workforce stability and long-term career development. These patterns highlight the dual nature of tourism employment: while the sector can advance economic opportunities, it can simultaneously perpetuate inequalities if structural vulnerabilities remain unaddressed (Solís & Gil, 2024).

Another critical issue is the influence of labour market regulations on employment patterns. In Greece, stricter regulations have been shown to reduce informal and uninsured work, yet they may also limit flexibility for employers and affect the overall number of positions available (Gazilas, 2024; Mamatzakis et al., 2023). Similar dynamics are observed across other European contexts, suggesting that policy design plays a crucial role in balancing employment quantity with job quality, sustainability, and inclusivity.

This paper aims to synthesize numerical evidence from recent studies and statistical sources to provide a comprehensive overview of tourism employment patterns and labour market dynamics in post-pandemic Europe. By integrating empirical data from Eurostat, OECD, and national case studies—including Poland, Greece, and Italy—this study examines trends in employment levels, gender distribution, informality, and sectoral spillovers. The analysis also considers how labour market regulations, workforce development, and institutional frameworks shape employment outcomes. Ultimately, this paper contributes to a deeper understanding of the structural characteristics of tourism labour markets, highlighting both opportunities and challenges for achieving sustainable, equitable, and resilient employment in a sector that remains central to Europe's economic recovery.

Tourism Employment Trends in Europe

Tourism remains a key driver of employment across Europe, yet patterns of labour market participation exhibit considerable heterogeneity across countries, gender, and employment types. According to Eurostat (2024), the European Union's tourism-related industries employed approximately 11.3 million people in 2024, representing a substantial proportion of the region's service-sector workforce. Women constitute nearly 60% of these employees, highlighting the sector's critical role in female labour force participation. Part-time work

accounts for roughly 45% of total tourism employment, reflecting both the sector's flexibility and the persistent challenge of job precarity.

The COVID-19 pandemic created unprecedented shocks to tourism employment, with sharp contractions observed across multiple EU economies. In Poland, Parzych (2025) reports that pre-pandemic employment in hospitality and tourism services was approximately 350,000, which fell by 28% during the pandemic. By 2023, employment had recovered to roughly 90% of pre-COVID levels, indicating resilience but also highlighting ongoing vulnerabilities in the labour market. Seasonal and part-time employment, which are prominent features of the sector, exacerbated the impact, as many casual and temporary workers were disproportionately affected.

Similarly, Greece illustrates the duality of formal and informal employment in tourism. Hatzimarinakis and Hackl (2025) estimate that formal tourism employment totals about 450,000 jobs, while 12–15% of tourism workers remain uninsured or employed informally (Gazilas, 2024). The persistence of informal employment is linked to gaps in regulatory enforcement and the flexibility requirements of tourism businesses. Despite recovery in the formal sector, informal labour remains a structural feature of Greek tourism employment, which has implications for social protection, job security, and workforce sustainability.

Tourism employment is not confined to hospitality alone; it generates spillover effects in related service industries. Conti, Francesconi, Papini, and Serafinelli (2025) quantify this effect in Italy, showing that every 1,000 additional tourists generates approximately 12–15 new jobs in local service industries. These positions occur predominantly in retail, transport, and other supporting services, underscoring tourism's capacity to stimulate broader local labour markets. Similarly, Erzsebet (2024) highlights that small and medium-sized tourism enterprises in the EU account for a significant share of employment, indicating that micro-level business dynamics are central to regional labour market outcomes.

Women's predominance in European tourism employment raises important equity considerations. Eurostat (2024) finds that 60% of the tourism workforce are female, but many occupy part-time or seasonal roles, limiting access to benefits, career progression, and income stability. Solís and Gil (2024) document similar patterns in Barcelona, where female workers dominate lower-wage positions in hospitality and related services. These disparities suggest that while tourism offers opportunities for labour force participation, it may simultaneously reinforce gendered inequalities unless policy interventions address structural imbalances.

Labour market regulations significantly shape tourism employment outcomes. In Greece, stricter enforcement of labour laws has been shown to reduce informal employment, yet it can also limit workforce flexibility and temporarily suppress overall employment growth (Gazilas, 2024; Mamatzakis, Pegkas, & Staikouras, 2023). These findings highlight the delicate balance policymakers must achieve between promoting formal, secure employment and maintaining sufficient flexibility to support seasonal and fluctuating demand in tourism. Xiǎngxiàng and Meeprasert (2024) further argue that in developing economies, weak institutional frameworks exacerbate informality, suggesting that regulatory capacity is a key determinant of tourism labour market structure.

Overall, tourism employment in Europe is both substantial and heterogeneous. Numerical data indicate strong female participation, significant part-time work, and notable informal

employment, with variations across countries. Recovery from COVID-19 has been uneven but generally positive, reflecting resilience in formal employment while exposing persistent vulnerabilities. Sectoral spillovers, gender disparities, and regulatory impacts remain central concerns, suggesting that employment patterns are shaped by a combination of demand-side factors, institutional structures, and policy interventions. This quantitative perspective provides a foundation for further analysis of labour market dynamics, workforce sustainability, and policy design in the European tourism sector.

Labour Market Dynamics

Tourism employment in Europe exhibits complex labour market dynamics shaped by institutional frameworks, regulatory policies, workforce characteristics, and sector-specific features. While the quantitative trends outlined in the previous section demonstrate tourism's role in job creation, a closer examination of employment types, gender distribution, informality, and regulatory influences reveals structural vulnerabilities and opportunities for policy intervention.

Informal employment remains a persistent challenge in European tourism. In Greece, for instance, 12–15% of tourism jobs are uninsured or informal, despite formal employment accounting for approximately 450,000 positions (Hatzimarinakis & Hackl, 2025; Gazilas, 2024). Informality is particularly prevalent among seasonal and low-skilled workers, reflecting both economic pressures on businesses and regulatory gaps. Similarly, Xiăngxiàng and Meeprasert (2024) note that developing economies with weak labour institutions exhibit even higher levels of informal tourism employment, contributing to job insecurity and limiting access to social protection.

Informal work not only affects employees' economic security but also undermines the measurement of true employment levels, complicating policy evaluation and workforce planning. Parzych (2025) highlights that during the COVID-19 pandemic, informal workers in Poland faced disproportionate job losses due to limited access to social safety nets, reinforcing the vulnerability of this segment of the workforce. The persistence of informal employment underscores the need for regulatory enforcement combined with incentives that encourage formalization without reducing sector flexibility.

Women constitute a dominant share of the European tourism workforce—approximately 60% according to Eurostat (2024)—yet they are disproportionately represented in part-time, seasonal, and lower-paid positions. Solís and Gil (2024) document that in Barcelona, female employees are concentrated in housekeeping, catering, and customer service roles, often with limited opportunities for career progression. This gendered segmentation of employment reflects broader patterns of occupational inequality, which are exacerbated by seasonal fluctuations and informal employment.

Policy interventions aimed at addressing gender disparities include promoting full-time, secure positions for women, improving access to training and professional development, and ensuring equitable pay structures. Conti et al. (2025) argue that targeted workforce development programs can enhance inclusivity by equipping female employees with skills for managerial and technical roles, thereby reducing occupational segregation.

Part-time and seasonal employment constitute a substantial proportion of tourism jobs across Europe. Eurostat (2024) reports that nearly 45% of tourism workers are employed part-time, reflecting both the flexible nature of the sector and the prevalence of short-term contracts. While this flexibility allows firms to adjust to fluctuating demand, it can also create instability for workers, limiting access to benefits such as health insurance, pensions, and career development opportunities.

Seasonal employment patterns were particularly visible during the COVID-19 pandemic. Parzych (2025) shows that in Poland, short-term contract workers in tourism faced a 28% reduction in employment, compared to smaller declines among permanent staff. These dynamics illustrate the trade-off between operational flexibility for businesses and economic security for employees.

Labour market regulations play a decisive role in shaping tourism employment. Mamatzakis, Pegkas, and Staikouras (2023) demonstrate that stricter regulatory frameworks in Greece reduce informal work and enhance compliance, yet they may slightly constrain overall employment growth due to increased operational costs. In contrast, less regulated labour markets exhibit higher employment flexibility but also higher prevalence of informal work and job precarity (Gazilas, 2024).

The relationship between regulation and employment quality highlights the need for a balanced approach that combines:

1. Enforcement of formal labour standards to protect workers,
2. Incentives for firms to formalize employment,
3. Flexibility mechanisms to accommodate seasonal fluctuations and tourist demand.

Comparative analysis across countries suggests that effective labour regulation is closely linked to institutional capacity and social protection systems. For example, countries with comprehensive social safety nets and labour inspection mechanisms tend to achieve lower informality rates without significantly compromising employment levels.

Workforce sustainability in tourism extends beyond regulatory compliance. Mooney, Robinson, Solnet, and Baum (2024) emphasize that sustainable employment encompasses economic security, career development, and well-being. Petrovič et al. (2025) highlight the growing importance of skills development to address technological adoption, customer experience innovation, and sustainability practices. The combination of formal regulations, workforce training, and targeted policies can help transform tourism employment from a flexible but precarious labour source into a sustainable and resilient sector capable of supporting long-term economic recovery.

In sum, labour market dynamics in European tourism are shaped by the interplay of informality, gender disparities, part-time and seasonal employment, and labour regulations. Informal work persists, particularly among low-skilled and seasonal employees, while women dominate lower-paid and part-time positions. Regulatory frameworks can mitigate informality and enhance job quality, but they must balance flexibility and security to support sectoral needs. Workforce sustainability and skills development emerge as critical complements to regulation, ensuring that tourism employment contributes not only to economic growth but also to resilient, equitable, and inclusive labour markets.

Policy Implications and Recommendations

The numerical and structural patterns observed in European tourism labour markets suggest several critical implications for policymakers, businesses, and other stakeholders. Tourism remains a major source of employment, with approximately 11.3 million workers in the EU and women representing 60% of the workforce (Eurostat, 2024). However, high levels of part-time work (45%) and persistent informal employment (12–15% in Greece) indicate that job quality remains uneven. Addressing these challenges requires a multifaceted approach that balances flexibility, security, and inclusivity while fostering sectoral resilience.

The evidence indicates that effective labour market regulations can reduce informal employment and improve job security without excessively constraining sector growth. In Greece, stricter regulatory enforcement has helped lower informal employment rates, although it may slightly reduce employment flexibility (Gazilas, 2024; Mamatzakis, Pegkas, & Staikouras, 2023). Policymakers should consider targeted regulatory mechanisms that combine formalization incentives with operational flexibility for seasonal and small-scale tourism enterprises. Such measures may include tax benefits for formal employment, subsidized social security contributions, or streamlined registration processes for seasonal workers.

Sustainability of employment extends beyond formal regulation. Mooney, Robinson, Solnet, and Baum (2024) emphasize that sustainable tourism employment requires attention to economic security, professional development, and worker well-being. Governments and industry stakeholders can facilitate workforce sustainability by:

Investing in skills development programs that address digital literacy, customer service excellence, and environmental practices (Petrovič et al., 2025), Implementing occupational health and safety standards across the sector, and Encouraging employee retention strategies, such as career advancement opportunities, fair scheduling, and benefits for part-time or seasonal workers. Such measures enhance resilience by equipping the workforce to adapt to post-pandemic labour market demands and technological shifts.

High levels of part-time and seasonal employment (45% of total tourism jobs, Eurostat, 2024) present both flexibility and vulnerability. Policy measures should aim to stabilize employment patterns without undermining business responsiveness. Examples include:

1. Offering pro-rated benefits for part-time workers,
2. Encouraging multi-season contracts to reduce turnover, and
3. Promoting flexible training programs that upskill seasonal employees for higher-value roles.
4. These strategies address the dual goals of workforce stability and sector adaptability.
5. Enhancing Data-Driven Policy and Monitoring

Effective labour market management requires robust data collection and analysis. The observed discrepancies between formal and informal employment (Hatzimarinakis & Hackl, 2025) underscore the need for timely, disaggregated data on employment levels, gender, contract type, and sectoral spillovers. Policymakers should integrate national statistics with

tourism-specific metrics, enabling evidence-based interventions and better monitoring of recovery and workforce sustainability.

Finally, tourism labour market policies should recognize regional heterogeneity. Recovery trends differ across Poland, Greece, and Italy (Parzych, 2025; Conti et al., 2025; Hatzimarinakis & Hackl, 2025), reflecting variations in tourism demand, regulatory environments, and institutional capacity. Comparative analyses can help identify best practices and guide localized policy adaptations, ensuring that interventions are both context-sensitive and scalable across diverse European regions.

In summary, the numerical and structural evidence from European tourism labour markets points to several key policy priorities:

1. Strengthen regulations to reduce informal employment while preserving flexibility,
2. Promote gender equity and inclusive career opportunities,
3. Enhance workforce sustainability through skills development and well-being initiatives,
4. Address vulnerabilities in part-time and seasonal employment, and
5. Utilize robust data and regional comparisons to inform policy design.

Implementing these strategies can transform tourism employment from a sector characterized by precarity and informality into a source of resilient, equitable, and sustainable livelihoods, supporting broader economic recovery and social development in post-pandemic Europe.

Conclusion

Tourism continues to be a cornerstone of European employment, with approximately 11.3 million people employed in tourism-related industries and women representing nearly 60% of the workforce (Eurostat, 2024). The sector's contribution to economic recovery and local development is undeniable, yet the employment landscape is characterized by a mix of part-time work (45%), seasonal fluctuations, and persistent informal employment (12–15% in Greece) (Parzych, 2025; Gazilas, 2024). These patterns reveal both the opportunities and structural vulnerabilities inherent in tourism labour markets.

The review of numerical evidence and empirical studies demonstrates several key dynamics. First, tourism employment provides substantial job creation, including notable spillover effects in service industries, such as retail and transport, where every 1,000 additional tourists generates approximately 12–15 new jobs locally (Conti et al., 2025). Second, employment quality is uneven, with gender disparities and part-time work dominating the sector. Women are disproportionately concentrated in lower-paid and seasonal positions, limiting career progression and economic security (Solís & Gil, 2024; Eurostat, 2024). Third, informal employment remains a persistent feature, particularly in countries like Greece, highlighting gaps in regulatory enforcement and institutional capacity (Gazilas, 2024).

The COVID-19 pandemic underscored the fragility of tourism employment. Poland experienced a 28% decline in hospitality and tourism jobs during the pandemic, with partial recovery reaching ~90% of pre-pandemic employment by 2023 (Parzych, 2025). Similar patterns in Greece and Italy illustrate that while formal employment has rebounded, informal

work, gender disparities, and seasonal vulnerabilities persist, limiting full labour market resilience.

Policy implications emerging from these findings emphasize the need for a balanced, multi-dimensional approach. Strengthening labour market regulations can reduce informal employment while preserving necessary flexibility, particularly for seasonal and small-scale enterprises. Promoting gender equity through secure full-time positions, training programs, and fair pay is crucial. Enhancing workforce sustainability requires investment in skills development, occupational well-being, and retention strategies, ensuring that tourism employment contributes to long-term economic resilience (Mooney et al., 2024; Petrovič et al., 2025). Finally, data-driven monitoring and regional comparative analyses can guide context-sensitive interventions, improving the effectiveness of policy design.

In conclusion, tourism in Europe represents both a source of opportunity and structural challenge for labour markets. Numerical evidence highlights its capacity for substantial job creation, yet also underscores the prevalence of part-time, seasonal, and informal employment, alongside gender disparities. Moving forward, sustainable and equitable labour market outcomes will require coordinated efforts from policymakers, industry stakeholders, and educators. By integrating regulatory oversight, skills development, and inclusive strategies, tourism employment can evolve from a sector of vulnerability into a foundation for resilient, inclusive, and sustainable livelihoods in post-pandemic Europe.

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