

Focus on Local Economies

Tourism and Skills in the Triveneto Region: Challenges and Solutions

The Italian tourism sector continues to grow, but hospitality businesses are reporting increasing difficulties in recruiting suitable staff, both for skilled roles involving customer contact and facility management, and for basic operational tasks. To understand the skills most in demand today and the strategies adopted by businesses to bridge the gaps, the research is based on focus groups in the main tourist destinations of Veneto and Trentino-Alto Adige: mountain resorts, seaside resorts, cities of art and spa resorts. The analysis reveals specific factors linked to the destination, seasonality, length of stay, characteristics of the establishments and the availability of catering services, as well as cross-cutting issues: difficulties in attracting candidates to seasonal roles and those involving working on public holidays; the need to enhance the social recognition of work in the hospitality sector; and the central importance of accommodation, now an almost indispensable benefit but one that is not always sustainable for businesses. Among the skills hardest to find, language skills stand out, particularly German, which is important in destinations frequented by tourists from the DACH region (Germany, Austria and Switzerland). To attract and retain staff, businesses rely on internal and external training, job and shift rotation, listening to personal needs, initiatives to improve the working environment, and benefits and welfare schemes. Graduates account for only a small proportion of the workforce and are concentrated in administration, bookings and marketing; looking ahead, these areas will require more advanced profiles, including digital skills, partly due to the accelerated use of Artificial Intelligence in customer relations.

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Research Department

Industry & Local Economies
Research

Anna Maria Moressa
Economist

Serena Fumagalli
Economist

Giovanni Foresti
Head of Regional Research

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Introduction and research objective

This paper addresses the issue of the growing difficulty faced by Italian tourism businesses in recruiting skilled labour, against the backdrop of the strong growth in the sector witnessed since the Covid-19 pandemic: in terms of tourist numbers, Italy recorded over 466 million visitor arrivals in 2024, representing a 6.7% increase on 2019¹, with the sector generating an added value of 104.8 EUR Bn and turnover in the 'Hotels and Restaurants' sector up by 34.8% compared with 2019². In certain regions with a strong focus on tourism and a high degree of internationalisation of tourist flows, such as Veneto and Trentino-Alto Adige, **the lack of staff with adequate language skills and professional qualifications may act as a constraint on the sector's further development** and on the destinations' ability to remain competitive.

The literature shows, first and foremost, that tourism is a labour- and human capital-intensive sector, in which the issue of skills must be considered alongside the growth in tourist demand and the transformation of supply models. The growth in tourist flows and the increase in the economic value generated by the sector highlight the need for adequate, stable and qualified staff.

In this same vein, SRM, in its Report (SRM, 2025)³, links the competitiveness of destinations to the quality of business organisation, the capacity to innovate services and the availability of human resources consistent with the evolution of demand. A recent survey, carried out in collaboration with the University of Bari on Italian hotel businesses, indicates that, in terms of the quality of employment, businesses tend to prioritise a highly cross-functional skills profile, linked to personal characteristics and the ability to cope with the pace and complexity of the service. Among the skills currently identified as most essential, particular emphasis is placed on problem-solving and communication skills, both scoring high on average (on a scale of 1 to 5, 4.24 and 4.23 respectively), followed by flexibility and adaptability (4.21) and the ability to work in a team (4.20). More 'specialist' skills – linguistic, digital, economic and financial, and marketing – are, on average, considered less of a priority by companies, although they remain relevant depending on the role and organisational structure. The recruitment of staff is assessed overall as having a *medium to medium-high* level of complexity, with scores ranging from 3.3 to 3.5 out of 5. The greatest difficulties in recruitment are concentrated in operational roles within the *food and beverage* sector: front-of-house staff (3.47), bar staff (3.46) and kitchen staff (3.46). Close behind are housekeeping staff and maintenance staff/skilled workers, confirming a dual challenge in the labour market: on the one hand, a shortage of experienced and reliable staff in customer-facing and service delivery roles; on the other, the difficulty in finding the technical and operational skills essential for ensuring high standards and prompt service. As regards the areas requiring action at both the company level and in terms of sector-wide governance, hoteliers clearly agree on the central importance of pay and, more generally, on the economic and social sustainability of employment in tourism. The areas considered most relevant for action relate, in fact, to tax and social security incentive policies for employment (3.90) and pay policies (3.88). These are followed by support measures for specific categories of workers (e.g. seasonal workers) to encourage entry into the sector (3.77), the *upskilling* and *reskilling* of existing staff (3.75) and corporate welfare schemes (3.74). Overall, businesses report that the sector's competitiveness depends not only on the ability to attract new entrants, but also on creating more stable and 'sustainable' working conditions throughout the entire employment lifecycle. The demand for skills is shifting towards a mix of *soft skills* (interpersonal skills, communication and problem-solving) and technical and operational 'trade-specific' skills, whilst recruitment challenges are concentrated primarily in

SRM's national survey on skills in the hospitality sector

¹ ISTAT – Guest numbers in accommodation establishments by type of establishment, annual data 2019–2024

² SRM (2025) Preview of SRM's Third Annual Report on TOURISM & TERRITORY. Trends, impacts and business dynamics.

³ SRM, Annual Report, Tourism & Territory. Trends, impacts and business dynamics. 2025. The survey was conducted amongst 1,000 hotel businesses, 247 of which are located in Southern Italy.

departments where service quality and operational continuity are most exposed to customer evaluation (catering, bars, front-of-house) and where staff turnover is highest.

The recent Excelsior survey on professional and training needs in tourism (Unioncamere, Ministry of Labour and Social Policies, 2025)⁴ confirms that labour demand in the tourism sector is not confined to technical job-specific skills but increasingly encompasses a broader set of aptitudes: customer focus, the ability to work in complex organisational contexts, a willingness to engage in continuous learning, operational autonomy and relationship management. In the future, candidates will be required to combine communication skills and aptitude with digital skills, eco-friendly behaviour and environmental awareness (Unioncamere, 2026)⁵. The Excelsior surveys also highlight the difficulty in matching supply with demand, particularly for operational roles in catering, hospitality, room service and maintenance, as well as for experienced staff. The problem stems not only from a shortage of candidates, but also from a mismatch between the skills required, actual experience, willingness to work in seasonal settings, and expectations regarding job stability and quality.

Excelsior survey on skills needs in the tourism sector

The difficulties in recruiting professional staff are not just an Italian problem, but one faced by all countries with a strong tourism sector, which must contend with staff shortages, high staff turnover, difficulties in attracting young people, and the need to improve the quality of work, training programmes and the ability to retain staff (OECD, 2024b)⁶.

OECD: recruitment difficulties in tourist destinations in general

The digital and sustainable transition also impacts tourism, creating a need to strengthen digital, green and managerial skills within the European tourism sector: these are not merely supplementary skills, but dimensions that redefine the professional content of roles and require more continuous and structured training programmes. The European Commission (European Travel Commission, University of Surrey, 2024c)⁷, in fact, promotes upskilling and reskilling programmes across the entire sector. UNESCO (UNESCO-UNEVOC, Wettstein, F. 2024)⁸, through its training centre, focuses on the role of technical and vocational education in updating curricula to incorporate environmental skills, the use of technology, efficient resource management, communication on sustainability and adaptation to new digital tools. Finally, UN Tourism⁹ confirms that digitalisation affects bookings, data management, customer relations, online communication, process automation and the personalisation of the tourism experience.

Digital and sustainable tourism in Europe requires appropriate training

A further issue concerns the transferability of skills and the attractiveness of jobs in the tourism sector: a European Commission study¹⁰ highlights how many skills developed in tourism — intercultural communication, customer management, problem-solving, adaptability, teamwork and organisational skills — are also transferable to other sectors. This transferability represents an asset, but also a competitive factor: if the tourism sector fails to offer clear career paths, sustainable working conditions and opportunities for growth, the skills acquired within the sector may quickly be absorbed by other sectors. The quality of work organisation is an integral part of

The appeal of working in tourism compared to other sectors

⁴ Unioncamere, Ministry of Labour and Social Policies (2025), Excelsior Information System, Tourism Businesses. Professional and training needs. 2025 Survey, Rome.

⁵ Unioncamere (2026), Excelsiorienta, Tourism: the labour market seeks skills in hospitality, digital technology and sustainability, 2026.

⁶ OECD (2024b), 'Strengthening the tourism workforce', in OECD Tourism Trends and Policies 2024, OECD Publishing, Paris.

⁷ European Travel Commission, University of Surrey (2024c), Transferable Skills in Tourism: Boosting Workforce Mobility and Addressing Labour Shortages, 2024.

⁸ UNESCO-UNEVOC, Wettstein, F. (2024), Green and Digital Skills for Hospitality and Tourism: From Industry Trends to Competencies within TVET, UNESCO, 2024.

⁹ UN Tourism, Digital Transformation in Tourism, online thematic section.

¹⁰ European Travel Commission, University of Surrey, Transferable skills in tourism: Boosting workforce mobility and addressing labour shortages, 2024.

the ability to attract and retain staff: by improving employment conditions and strengthening continuous professional development, it is possible to clarify career paths and support working models that are better suited to people's needs. In this context, the issue of working hours and shifts should not be viewed as a purely managerial matter, but as a component of the quality of work: greater predictability of shifts, a fairer distribution of workloads during peak periods, work-life balance, the option of part-time work or more flexible arrangements, and financial compensation for the most demanding shifts are levers that can influence staff retention in the sector and reduce staff turnover.

In order to fully understand and gain a more in-depth insight into the difficulties faced by business owners, five different focus groups were organised, involving 28 hospitality business owners (hoteliers, owners of non-hotel accommodation, holiday villages and campsites) from the Triveneto region, categorised by mountain resorts, cities of art, seaside resorts and spa towns. During these sessions, five different topics for discussion were addressed:

- **the challenges** encountered when recruiting staff,
- **the skills** that are difficult to find,
- **the younger generations** and seasonal and shift work,
- **the role of graduates** and **women** in tourism,
- the **strategies and measures** business owners are adopting to find suitable staff.

Characteristics of the tourism establishments participating in the various focus groups

Overall, **the focus groups involved 28 participants, selected to represent the main regional and typological aspects of the Triveneto region's tourism offering¹¹**. The composition of the groups presents a varied picture by destination and accommodation type: 8 participants took part in the focus group dedicated to the Province of Trento, 6 in that for the Province of Bolzano, both covering both mountain destinations and their respective provincial capitals; 4 participants represented the cities of art; a further 4 represented the seaside and spa segment, with reference to the Upper Adriatic and the Euganean Basin; finally, 6 participants contributed to the focus on the open-air sector of the Upper Adriatic. The result is a comprehensive qualitative sample, capable of covering the main forms of regional tourism — mountain, cities of art, seaside, spa and open-air accommodation — and of comparing contexts characterised by different seasonal patterns, business size, service intensity and professional requirements.

From this territorial and typological breakdown, a common theme emerges: **despite the diversity of the establishments involved, the quality of the experience 'offered' to the customer depends on human capital** and therefore, to a decisive extent, on the ability of businesses to organise, train and retain their staff. **Staff management** therefore emerges as a **key competitive lever**, no less significant than the location or physical facilities of the establishment. Across the various contexts observed, there is also **a strong need for flexibility**, linked to seasonality or peaks in demand, which translates into extensive use of temporary contracts and, particularly in operational departments, workers from other regions or abroad. **Logistical and housing constraints** also have a widespread impact on this picture: the cost and scarcity of accommodation, difficulties with transport links and competition from other sectors reduce the

¹¹ Special thanks go to Ezio Guzzetti for his invaluable support in processing the audio recordings, and to all the business owners who, through their willingness to participate and their testimonies, have contributed to the development of this work.

attractiveness of the positions on offer and have a tangible effect on businesses' ability to staff shifts and ensure continuity of service.

Skills sought, roles to be filled and recruitment challenges

This section summarises the most in-demand professional profiles and the main areas where vacancies remain unfilled, highlighting the needs that recur across the various focus groups and which prove most difficult to meet in the local labour market.

Across the board, labour demand centres on two sets of skills that are closely intertwined. On the one hand, **establishments report difficulties in recruiting technical and professional staff for the kitchen and front of house** — chefs, sous-chefs, maître d's and service staff — for whom there is a growing demand **for language skills**: English is now considered a basic requirement, whilst **German** is particularly important in destinations with a predominantly DACH clientele (Germany, Austria and Switzerland). On the other hand, in almost all departments, the **interpersonal aspect of the job** is considered crucial; this includes customer focus, empathy, communication skills, the ability to work in a team and the capacity to remain composed during periods of peak activity. A recurring theme in the focus groups is the view that, particularly for younger candidates, technical skills can be developed gradually through training and mentoring, whilst a service-oriented attitude and reliability are already key factors at the selection stage.

As for **the roles that are most difficult to fill**, the challenge **posed by housekeeping** emerges particularly frequently: cleaning is a highly visible aspect of the guest experience and has a direct impact on reviews and satisfaction scores, but the pool of Italian candidates is limited, and many businesses resort to outsourcing or hybrid models, in which in-house staff oversee the coordination and supervision of the service. A second cross-cutting issue concerns **maintenance**, both for minor repairs and basic manual tasks, and for more specialised technical roles. Securing such skills is challenging, and the speed of response becomes essential to avoid compromising service standards; in smaller establishments, where it is not viable to employ a dedicated maintenance technician, the problem is exacerbated and requires organised arrangements — shift work, on-call arrangements and the use of external suppliers — which are often costly for businesses.

Challenges in candidate selection and visibility initiatives: the specific characteristics of young people and graduates

The third area addressed in the focus groups concerns the most frequent challenges along the recruitment and selection process, with particular attention to groups of candidates with recurring characteristics (young people and graduates) and to factors that may reduce the sector's appeal, as in the case of women, who are often faced with the need to balance their private and professional lives.

In the various focus groups, **recruitment difficulties were not attributable solely to a shortage of candidates, but to a combination of expectations and constraints that make it harder to match supply with demand**. A recurring theme concerns the organisation of **working hours**: evening and public holiday shifts, high workload during peak periods and the need for flexibility are often the primary criteria by which candidates — particularly younger ones — assess a job opportunity, requesting exemptions or specific conditions and demonstrating a strong focus on work-life balance. Added to this is a **frequent mismatch between stated and actual skills** (particularly in the kitchen and front of house), which requires businesses to provide on-the-job training and prolongs the induction period. Furthermore, in many contexts, **certain tasks are unattractive** to Italian residents (cleaning and more physically demanding work), leading to an increased reliance on foreign workers and/or external suppliers.

With regard to the specific circumstances of young people, graduates and women, the discussions paint a broadly consistent picture. **Final-year undergraduates and graduates**, particularly those with a background in languages, are mainly employed in reception, booking, marketing and administration roles; however, these positions are often perceived as **temporary**

or transitional **roles**, except in cases where the company is able to offer clear pathways for growth, increased responsibility and professional development. This situation is influenced by the small average size of accommodation establishments in the Triveneto region – in line with what is generally observed in the Italian hotel sector¹² – and the fact that these businesses are frequently family-run, which may limit the adoption of more managerial approaches to human capital management compared to large hotel chains. At the same time, the focus groups also revealed innovative practices aimed at fostering a positive working environment, listening to staff and promoting organisational wellbeing, in line with the latest approaches to corporate welfare and quality of working life.

For **young** people, in addition to the demand for shift arrangements that better support a work-life balance, **a greater propensity for professional and geographical mobility is becoming increasingly significant**. Moving to another establishment or a different location after one or two years is becoming more common and, in some cases, businesses report very early terminations of employment, as early as the recruitment stage or within the first few weeks of joining. However, this mobility should not be interpreted solely as a sign of disaffection with the sector: for some young people, it reflects a **genuine desire for professional growth within the hospitality industry**, through experience in different contexts – including international ones – and in more organised establishments or those belonging to large hotel chains, which can enhance their CVs and make their career path more recognisable. For others, however, this change reflects **a search for working conditions perceived as more stable**, both in terms of working hours and the continuity of employment, as is often the case in other industrial and service sectors. In this sense, young people's mobility takes on an ambivalent character: it can represent an opportunity to consolidate skills and achieve progressive professional qualification within the tourism sector, but it can also signal growing competition from sectors offering greater organisational and employment predictability.

At the same time, several focus groups highlighted **the issue of the reputation of jobs in tourism**, which is still frequently associated with seasonality, instability and limited social recognition, and is therefore less competitive compared to alternatives perceived as more continuous and predictable. **In this context, the availability of accommodation becomes a key factor in attracting staff from other regions**: staff accommodation is now considered an almost indispensable benefit, but workers' expectations are also rising in terms of quality, with increasingly frequent requests for single rooms and, at times, accommodation suitable for families.

Measures implemented by businesses to overcome recruitment difficulties

The **organisational responses implemented by companies** to alleviate recruitment difficulties and improve staff retention capacity follow several approaches that are common across the regional contexts analysed.

A first area concerns **strengthening entry routes into the sector**, through partnerships with schools, technical colleges and universities, career guidance initiatives – including experiential learning – company visits, talent days, work placements and apprenticeships. These tools are designed **to engage young people** before they enter the labour market on a permanent basis, but also to **make careers in the hospitality sector more visible and understandable**, countering an often simplistic or unattractive portrayal of work in the tourism industry. Once young people have joined their accommodation establishments, business owners offer them **continuous training** through structured programmes, which can act as a key attraction: these range **from on-the-job mentoring, to a more carefully designed induction programme (onboarding), to the updating of**

¹² The average number of rooms per hotel ranges from 22 in Trentino-Alto Adige and 27 in Friuli-Venezia Giulia to 35 in Veneto, slightly higher than the Italian average of 33; Source: Istat 2025

language, digital and operational skills, and to the strengthening of service standards and internal procedures (particularly regarding the level of thoroughness in cleaning). Particular importance is also attached to the **training of department heads**, who are called upon not only to oversee the technical quality of the work but also to manage teams, recognise any signs of distress and facilitate the integration of new recruits.

A second area of focus concerns **internal organisation** and the **value proposition** offered to staff. Companies emphasise **the need to communicate the corporate mission and the significance of customer service more clearly**, whilst also addressing **the practical conditions that influence staff retention**: the quality of the working environment, listening to individual needs, conflict management, opportunities for socialising and team-building, and greater flexibility in the scheduling of shifts, holidays and rest days. At the same time, there is growing focus on welfare and benefits, which include accommodation and meals, reimbursements, discounts on the establishment's services, welfare platforms and reward schemes. In more structured organisations, these measures are accompanied by investment in innovation and the digitalisation of processes — booking systems, CRM, revenue management, and internal tools and applications — used both as drivers of organisational efficiency and as attractions for more highly qualified candidates. Overall, the focus groups paint a picture of a response that cannot be attributed to a single measure, but rather to a coherent set of initiatives aimed at making work in the tourism sector more sustainable, recognisable and capable of offering prospects for professional growth.

Focus group on the Province of Trento

In the Autonomous Province of Trento, the number of employees in the tourism sector, calculated as an annual average, is projected to reach 23,240 in 2025, corresponding to 1.7% of the national total (Federalberghi, FiPE, 2025)¹³. The qualitative evidence gathered in the focus group provides a detailed picture of the provincial accommodation sector, based on discussions with at least eight operators from both the hotel and non-hotel sectors. The **experiences represented include family-run hotels, multi-property establishments, guesthouses, holiday residences and holiday flats, located across a diverse range of destinations**: Molveno, Arco and the Upper Garda area, Levico Terme, Monte Bondone, Borgo Valsugana and Lower Valsugana, as well as the urban area of Trento. This geographical diversity makes it possible to identify common challenges and strategies, even within organisational and tourism models that are quite different from one another. The establishments are predominantly small or small-to-medium in size: alongside hotels with around 30 rooms and micro-accommodation with 15 rooms, the study includes holiday residences with 22 flats and 44 rooms, hotels with 56 rooms and 134 beds, and groups comprising multiple establishments with a combined workforce exceeding 100 employees. **The size of the Trentino hotels included in the focus group is around 50–60 rooms**, which is no longer perceived as large in an industrial sense, but is nonetheless significant in a context still strongly characterised by family-run businesses and small operational units; in the non-hotel sector, the average scale is even smaller and is more often associated with family-run or simplified management models, with more limited reliance on permanent in-house staff.

The **key issue that emerged from the discussion concerns the growing difficulty in recruiting staff**, which is not limited to a mere **shortage of candidates** but also affects **the quality of the skills available and the organisational sustainability of the work**. The roles that are most difficult to fill are those in the catering sector, particularly in the kitchen and front of house, including qualified roles such as chefs, maître d's and station managers, as well as operational roles in housekeeping, routine maintenance, concierge services and, in some cases, specific roles such as lifeguards or support staff for ancillary services. The shortage of candidates is often accompanied by a

¹³ Federalberghi, FIPE (2025) Tourism Labour Market Observatory – 16th Report 2025, as reported in the SRM 2025 regional factsheets.

perceived lack of preparation, with weak technical skills, limited experience and little familiarity with the standards required by the tourism sector. In terms of skills, language proficiency – particularly German, in line with the composition of tourist demand – is becoming increasingly important, alongside soft skills: customer focus, reliability, the ability to work in a team, adaptability and the ability to cope during periods of peak workload. In many cases, industry operators emphasise that **technical skills can be developed through mentoring and on-the-job training, whilst a service-oriented attitude and a willingness to integrate into a complex organisation are decisive factors right from the selection stage. The weakness of the school-to-work pathway** – perceived as not always aligned with the practical needs of businesses – and the **persistent social devaluation** of hospitality professions contribute to widening the gap between labour supply and demand.

The difficulties in attracting and retaining staff are also closely linked to working conditions and geographical constraints that limit the possibility of providing accommodation for employees. Evening and public holiday shifts, the intensity of seasonal peaks, the demand for overtime and the perception that work in the tourism sector receives limited social recognition all reduce the sector's appeal, particularly amongst younger candidates, who are now more attentive to work-life balance, the quality of the organisational culture and the availability of transparent career progression pathways. Against this backdrop, the **issue of housing emerges as one of the main bottlenecks**. In areas under the greatest tourist pressure, particularly in the Upper Garda region, the rise in short-term lettings and the increase in residential rents are reducing the supply of affordable accommodation for seasonal workers and staff coming from other areas. Accommodation is thus becoming a **de facto essential benefit, yet** one that is **costly and not always feasible for businesses**; at the same time, workers' expectations have risen, with a reduced willingness to share a room and a greater demand for self-contained accommodation. For residents living at least 20 km from the workplace, some organisations have devised different shift arrangements, with continuous working hours to reduce the need for two separate journeys between home and work; where accommodation is not required, they have introduced facilities such as the use of a company car.

Faced with these challenges, companies in Trentino are adopting predominantly pragmatic strategies, tailored to the size of the business. **Word of mouth remains the most widely used recruitment channel**, often considered more effective than online adverts and specialist portals because it allows for an initial informal screening of candidates. Many hospitality establishments assess candidates based on **aptitude**, the ability to work in a team and **motivation**, leaving the development of **skills to in-house training**, mentoring and on-the-job learning programmes. In more organised businesses, **more structured measures** are also observed, **such as offering permanent contracts to staff**, extending the season, reorganising shifts, creating shared shift patterns across multiple sites, providing or arranging accommodation, and promoting foreign workers into front-of-house and managerial roles. Some businesses also tend to extend contracts to cover up to 10 months out of 12, effectively subsidising an additional month beyond the operational period, with the aim of strengthening staff retention; others point out that management is more efficient in larger establishments, which, however, have a more limited number of rooms in Trentino compared to South Tyrol (the average number of rooms is just over 60 per establishment, with town planning restrictions limiting expansion). In the non-hotel accommodation sector, which is particularly widespread in Trentino, management appears more streamlined but is also more exposed to operational emergencies: the number of overnight stays in non-hotel accommodation is just under half that of hotels, with 5.5 million overnight stays compared to 12.4 million in the hotel sector; up to three flats, a VAT registration is not required, whilst above this threshold the activity is classified as a business. In this segment, staffing needs are concentrated primarily on cleaning, an area where recruitment is particularly challenging and where, according to operators, the arrival of Ukrainian workers has provided significant support. Overall, the **focus group findings paint a picture of a tourism sector experiencing growth on the demand side, but one whose supply capacity is increasingly influenced** by the availability

of human capital, the quality of skills, the affordability of housing, and the organisational capacity of businesses to make tourism jobs more stable, recognisable and sustainable.

Tab. 1 – Trento focus group: skills sought, roles to be filled and recruitment difficulties in the hotel sector

Skilled workers:	■ Highest demand in establishments rated 4 stars and above ■ Young applicants have few qualifications (1 in 2) and little experience, although they demonstrate greater adaptability than older staff ■ The selection of young people must be based on aptitude: skills are developed directly in the workplace (on-the-job training, as is common in the manufacturing sector)
Challenges of the generational shift	■ Many 60-year-old employees approaching retirement and few young people ■ The coexistence of multiple generations requires attention to maintain a good working atmosphere
Skills for the kitchen and front of house	■ Vocational and hospitality schools are a good source of talent, but not sufficient ■ Cross-functional skills are also required for kitchen staff: all aspects – from supplies and stock management to cost-effectiveness, menu planning and quality – must be balanced ■ Difficulties with language skills: German is on the wane in Trentino, and candidates' English is not particularly strong. Young Albanians stand out, as they excel both in English and in language learning ■ Difficulties in finding candidates who already possess the skills required for maître d's, chefs and lifeguards at establishments on Lake Garda ■ Recruitment for kitchen staff is the most critical: there are few candidates, and the towns where the hotels are located are unattractive places to live, particularly for young people, as they are small towns with few opportunities for leisure and activities outside work
Difficulties with young people	■ Work in tourism is seen as 'temporary', lacking in prestige, and less attractive than other permanent job offers in industry or the service sector. ■ Work in the hospitality sector is perceived as 'monotonous', apart from a few specific roles (for example, at reception or in administration) ■ During the Covid pandemic, there was a migration of workers from tourism to other sectors (retail and manufacturing) ■ Reluctance to work overtime ■ Working hours and shift flexibility are the primary considerations for young candidates ■ Pay is considered low, as the value of accommodation provided by the hotel itself is not taken into account: on average, a single room is worth around 500–600 euros per month.
Candidates' expectations	■ In the kitchen and at reception, candidates do have expectations of career progression and a possible 'pathway' (in the kitchen, the aim is to become a chef; at reception, the aim is to become head of reception) ■ Young people are looking for a stress-free job and a less hierarchical management style
Accommodation difficulties	■ In tourist resorts, short-term lettings drive up rental prices and reduce availability for hospitality workers (accommodation problems also affect residents; even hoteliers' own children are emigrating, drawn by better job opportunities abroad, including in other sectors) ■ Those coming from outside the area have to 'adapt' to sharing a room: young people are reluctant to do so ■ Local residents, living at least 20 km from their home, are supported by organising a double shift at work, which then allows them to return home just once ■ When accommodation is not required, employees are assisted with a company car
Summer apprenticeships on the decline	■ Following a downward trend in recent years, there have been signs of recovery since last season
Shortages of services for families with children	■ During the summer season, there are insufficient services provided by local authorities to support families (mothers) with childcare services ■ In tourist towns, there is a need for personalised welfare support, for example in relation to employees' work shifts
Possible solutions for periods of closure	■ Promote synergies between hotels in different destinations with opposite peak seasons: for example, in winter, seaside establishments could provide support staff to mountain resorts experiencing their peak season

Source: Intesa Sanpaolo analysis – Tourism Focus Group, Province of Trento

Tab. 2 – Trento focus group: what measures have been implemented in the hotel sector? Training, motivation, recruitment and seasonality management

In-house and external training:	■ Training is provided on the job and is tailored to the role the candidate will be expected to fulfil ■ External courses 'offered free of charge' to employees (one per season on a voluntary basis), but take-up is low and skilled workers tend to avoid the courses
Recruitment channels	■ Word of mouth is the most commonly used method
Creation of a 'rotating' role	■ A balance must be struck between salary and free time: hoteliers who own multiple properties have introduced a role where staff cover the shifts of colleagues on leave; consequently, more people are employed than are required on a daily basis (5 out of 7 salaried staff are on duty), thereby creating a 'pool of staff' who are deployed across the various properties as needed
To retain staff, it is essential to motivate them	■ Job satisfaction is key to retaining staff: in terms of personal recognition, particularly during generational transitions ■ Initiatives that accommodate staff through flexible working hours increase their loyalty and, consequently, that of the customers themselves, who return to the facility to be served by the same staff ■ Extending the season is crucial: summer seasonal workers have four months' work; if you count one month for induction, there is little time left
Making pay more attractive and work in hotels more rewarding	■ Welfare vouchers are not enough; bonuses must also be made tax-free. Training is provided on the job and is tailored to the role the candidate will be expected to fulfil ■ Kitchen roles (chefs) command high salaries: even the head of dining room staff earns around 2,500 euros net ■ We need to recognise the value of hotel work through quality and merit-based certifications ■ We need to change the perception of the work amongst young people and their families
Stabilising employment contracts as 'permanent'	■ There is a tendency to extend the employment contract to 10 months out of 12: taking into account the closing month, an extra month's pay is provided to retain the employee ■ NASpl is not enough for Italians, whilst foreign workers cope better with the suspension because they return home
Optimising management through larger premises	■ Better performance and more effective management of staff and working hours are possible if the number of rooms/beds increases; however, there are town planning obstacles preventing expansion

Source: Intesa Sanpaolo analysis – Tourism Focus Group, Province of Trento

Tab. 3 — Trento focus group: characteristics of the non-hotel sector

Small to medium size facilitates management:	■ The provision of non-hotel accommodation on a commercial basis is very widespread in Trentino: so much so that overnight stays in the non-hotel sector account for just under half of those in the hotel sector: 5.5 million overnight stays in the non-hotel sector compared with 12.4 million in the hotel sector. The average size of non-hotel accommodation makes management easier but, at the same time, makes dealing with emergencies more difficult. A VAT number is not required for up to three flats; with more than three, it becomes a business ■ Staff are required only for cleaning: there is great difficulty in finding cleaning staff. The arrival of Ukrainian women has been a godsend for the management of these properties ■ It is difficult to network within the non-hotel accommodation sector: there are cultural barriers, mistrust and a fear of competition
Sustainability is a necessary choice:	■ Only tourist accommodation that is sustainable – both in terms of governance (compliance with tax and safety regulations) and environmental impact – will survive

Source: Intesa Sanpaolo analysis – Tourism Focus Group, Province of Trento

Focus group on the Province of Bolzano

In the Autonomous Province of Bolzano, the number of employees in the tourism sector, calculated as an annual average, stands at 40,067, corresponding to 2.9% of the national total¹⁴. The qualitative evidence gathered in the focus group paints a complex picture, in which the structure of the labour market is strongly influenced by seasonality, the generally small size of businesses and the varied nature of the destinations represented. **The establishments involved, all with fewer than 50 employees, are predominantly small to medium-sized**, with between 25 and 55 rooms; the exception is the city centre hotel in Bolzano, which has over 100 rooms. This profile fits within a regional context characterised by an average of 22 rooms per hotel, significantly lower than the national average of 69.1 rooms recorded in 2022. The focus group included establishments belonging to various categories — ranging from 3-star to 4-star, 4-star superior and 5-star luxury — and offering different service models: from city centres open all year round, catering to guests on short stays, to urban establishments open for 10 and a half months and characterised by longer average stays and wellness services—including those with a medical focus—right through to hotels in the valleys, open for 10 months or more, geared towards mountain holidays, hiking, mountain biking and winter sports.

In all the establishments considered, **seasonality is a structural feature**: the proportion of seasonal contracts exceeds 75% and reaches peaks of close to 85% in the valleys, whilst in city-centre establishments it stands at more modest levels, just over 56%. **The presence of foreign workers is significant and accounts for around half of seasonal staff**, with workers coming mainly from Eastern Europe — Bosnia and Herzegovina, Albania, Croatia, Hungary, Romania and the Czech Republic — and, to a lesser extent, from non-EU countries, including India, Pakistan, Tunisia, Colombia and Iraq. According to operators, fixed-term contracts are often requested by the foreign workers themselves, who wish to return to their home countries during the off-season and then come back the following season. In urban establishments, the presence of employees from other Italian regions is also significant, particularly from the South but also from Veneto and Piedmont: in one case they account for around a quarter of the workforce, in another for over half. The exception is certain valley areas, where the workforce is almost entirely local.

The average age of employees is reported to be between 36 and 40. Compared with the past, when it was not uncommon for staff to remain at the same establishment for over 10 years, hoteliers now observe **greater professional mobility, particularly in the early stages of a career**: specifically in kitchen roles, changing hotels every two years is reported as an increasingly common practice. Young people are mainly employed in roles involving direct contact with guests, ranging from the front office to bookings and marketing, right through to catering. Women make up the majority of the workforce, with figures reaching as high as 60%, and are concentrated mainly in administration and finance, bookings, marketing, reception, wellness and entertainment, as well as in housekeeping – a department which, in some cases, is staffed entirely by women. **Housekeeping**, in particular, whilst often perceived as a less skilled role, **plays a central role in the perceived quality of the hotel experience**: cleanliness is one of the first aspects mentioned in customer reviews and therefore requires careful attention, particularly in high-end establishments. In terms of employment, the most significant departments are, in fact, housekeeping and catering.

Employees with a university degree are in the minority and are mainly employed in administration, accounting and finance; the exception is certain facilities specialising in wellness and wellbeing, where the provision of services – some of which are medical in nature – requires more highly qualified staff. In terms of skills, **knowledge of languages** is particularly important, **primarily German** in areas with a high proportion of customers from the DACH region; alongside

¹⁴ see note 5: Tourism Labour Market Observatory

this requirement, there is a growing need for digital, managerial and ESG-related skills, particularly in reception and management roles. **Across the board, customer-facing skills remain central**, understood as the ability to **be welcoming, empathetic and communicative**. A distinctive feature of the South Tyrolean focus, however, is the lesser emphasis placed by employers on issues relating to candidates' motivation, aptitude and adaptability, compared with a greater focus on welfare policies, the balance between shifts and private life, remuneration and the quality of the working environment. In particular, **strong emphasis is placed on employee-centred staff policy**, aimed at promoting a more sustainable work-life balance in a sector where activity peaks may generate stress and increase the risk of workers leaving the industry.

In this context, **the availability of staff accommodation represents a structural constraint**. The limited size of the facilities restricts the number of rooms available for employees, and workers' expectations have changed, with a growing demand for single rooms with en-suite bathrooms. Furthermore, in areas with high tourist pressure, rental costs and building regulations further reduce the possibility of finding suitable accommodation, with negative effects not only on the recruitment of seasonal staff but also on the management of work placements and international exchanges. The result is a situation in which the competitiveness of South Tyrolean hotel businesses increasingly depends on their ability to integrate pay, welfare, organisational quality, workplace atmosphere and housing availability into a coherent and sustainable employment package.

Tab. 4 – Bolzano focus group: skills sought, roles to be filled and recruitment difficulties in the hospitality sector

General shortage of candidates	■ Greater problems in certain locations, either because they are too isolated with few residents and few young people, or because they are in centres offering alternative sectors of employment with better prospects for job security and pay
Skilled staff:	■ Language skills (German in particular): in the valleys, the proportion of German-speaking guests (from Germany, Austria and Switzerland) reaches 80%. Everyone, from front-of-house staff to spa staff, must be able to communicate in German ■ Management skills, ESG implementation, digital skills: these are required particularly at reception and in management roles; for these aspects, appropriate education is necessary, though this also makes other jobs in manufacturing and advanced services particularly attractive in cities and more industrialised areas. ■ All staff must possess a aptitude for customer relations, empathy and interpersonal skills ■ Young people are more open to sustainability and digitalisation ■ Digital skills in AI: the sector lends itself very well to language applications and translation, and will see ever-increasing applications in the future
Hoteliers' associations support the introduction of ESG principles and digitalisation	■ The Hotel Vita Alpina Association (35 hotels in the province of Bolzano) runs training courses for staff on water and energy consumption ■ HGV Association: sustainability is a key issue; everyone must apply it and all have realised its importance; having the 'sustainable hotel' label makes a difference; on the subject of digitalisation and the application of AI – including for translation – the association provides training support, with solutions for bookings and brochures
Skills for the kitchen and front-of-house	■ There is fierce competition amongst hoteliers for staff in these departments: generally speaking, this is the area where it is hardest to find qualified staff, including for front-of-house roles such as maître d's and waiters ■ Working hours (South Tyrolean workers want weekends off) and high salaries (sometimes unsustainable): risk of staff leaving the sector; risk of hotels converting to B&Bs, but then the problem of on-site catering remains; restaurants face the same issue – after 6.00 pm it is difficult to manage the kitchen ■ Recruitment is difficult: applicants often lack the necessary skills
Accommodation difficulties	■ The establishments are small and can only allocate a limited number of rooms for staff: needs have changed and staff would like their own single room with an en-suite bathroom ■ The problem with planning regulations, which even in small towns do not permit new buildings to be used as accommodation ■ Rents in South Tyrol's main resorts are prohibitive for staff: this also creates problems for interns coming from outside the region; it also hinders both national and international exchanges ■ South Tyrolean hoteliers would like tax incentives for staff accommodation, following the example of Austria, where there are incentives for small accommodation units near workplaces (see the section on accommodation) for both establishments and employees, which boost their competitiveness when recruiting against hotels across the border. ■ There is a call for legislation to convert barracks or provide incentives for 'staff housing': in fact, a step forward has been taken in the Province of Bolzano with the 'Abitare 2025' Reform, which has opened up the possibility of creating temporary accommodation for staff across all economic sectors, including in certain industrial areas. (On the subject of accommodation for staff: challenges, funding and initiatives for staff housing in the tourism sector, as outlined in the dedicated in-depth analysis in this report) ■ Problems faced by seasonal employees in accessing credit for property purchases: the possibility of 'supply chain' support for employees who are 'suppliers' of services to hotels and, despite having a fixed-term employment contract, are permanently employed as their contract offers stability through renewal over the years
Difficulties with fixed-term contracts	■ To encourage the transition to permanent contracts, tax relief would be needed for the months when businesses are closed
Difficulties in embracing the 'spirit' of hospitality	■ There is a lack of a 'culture' of service: investment is needed in this area to enhance the value of work in the sector; being at the customer's disposal with excellent service and a 'smile' is the essence of the profession and also provides immediate feedback on the quality of one's work, building customer loyalty, which often results in personal and sometimes explicit rewards (such as a tip...). If you enjoy your work, you can cope better with periods of high stress; it is important to feel the support of the team and to feel involved in the hospitality 'project'

Source: Intesa Sanpaolo analysis – Tourism Focus Group, Province of Bolzano

Tab. 5 – Bolzano focus group: what measures are being implemented in the hotel sector? Training, motivation, recruitment and seasonality management

In-house and external training	■ Employees, even if unqualified, are trained in-house, but must demonstrate empathy ■ Training for department managers (kitchen, reception, dining room, wellness centre) on how to onboard new recruits and how to manage signs of distress within their team (particularly in the kitchen). Over the last five years, many have left due to language issues as well; for example, the chef speaks the local German dialect and may not be understood by staff from the south, who misinterpret communications and feel mocked. ■ Internal initiatives to boost digital skills: for example, the development of an app for table allocation ■ In higher-category hotels, training is provided for all staff, from housekeeping to sommelier courses. In fact, housekeeping staff are mainly foreign nationals, often with different cultural backgrounds and cleaning practices. ■ External training with the provincial HGV association: course days are counted as working days
Recruitment channels	■ Social media/Instagram ■ Online platforms (Indeed) and recruitment agencies and firms are rarely used as they are not very effective: they produce an overly broad shortlist with CVs that subsequently prove to be poorly matched to the characteristics of the candidate interviewed ■ Word of mouth is the best method: it sometimes acts as a 'pool' of support during peak periods; there are also 'refer-a-colleague' schemes with incentives if the referred person stays on ■ Communication and contacts through vocational schools: for example, at the Kaiserhof Professional Hotel School in Merano or the Beltrame Vocational School in Vittorio Veneto, from which seasonal interns are taken on. There is a noticeable difference in the approach of South Tyrolean students, who are less inclined to make sacrifices regarding shifts and the internship timetable (40 hours), most likely due to the standard of living achieved in the province. ■ Listening to candidates' needs: we look for ways to accommodate them; if a good seasonal worker returns, that is much better; they ask about career prospects as well as a good salary ■ The team into which the candidate will be placed also takes part in the selection process: particularly in the dining room and the kitchen
Quality of the working environment to retain staff	■ Employees and new recruits are at the heart of the process: projects are shared with them so they feel an integral part of the team, and they are given visibility within the organisation right from the start; ■ In the kitchen, leaders are chosen to look after the team; if there is a sense of camaraderie within the team, the work improves ■ The family who own the business are always on hand to address any concerns employees may have ■ Shift rota managed according to requirements: closed on Christmas Day and New Year's Day ■ Pay is above the standard rate ■ Introduction of a voluntary service charge for customers: to redistribute tips to those who are not in direct contact with customers (e.g. kitchen staff) ■ Regular team meetings: internal communication is strengthened through structured opportunities for discussion, such as the pre-season kick-off, meetings with department managers and cross-departmental team-building initiatives, which help to foster a positive working atmosphere and a sense of belonging (e.g. outings twice a year for excursions and dinner, and social gatherings outside working hours)

Source: Intesa Sanpaolo analysis – Tourism Focus Group, Province of Bolzano

Tab. 6 – Bolzano focus group: what measures have been implemented in the hospitality sector? Training, motivation, recruitment and seasonality management (continued from previous table)

Welfare measures and benefits	■ Reimbursement for commuters' travel costs ■ Health prevention through free medical examinations and check-ups, and 50% discounts on beauty treatments, extended to family members ■ Insurance for employees/Supplementary health fund for tourism workers in South Tyrol (mySanitour), paid for by hoteliers on behalf of their staff ■ Courses on nutrition and preventative health ■ Use of company car for personal purposes ■ Free accommodation ■ Option of a 50% discount on mini-breaks for yourself and family members at hotels in the Vita Alpina network ■ 50% discount on day spa treatments at the hotel on days off
Career guidance in secondary schools and links with vocational colleges	■ For the past 20 years, the HGV has been organising various career guidance days on the hospitality industry in secondary schools (involving 50 schools) with young hoteliers: these take place either at the association's own fully-equipped facility (the 'taste workshop') for a morning of activities, or in the schools themselves (featuring videos presenting the various hospitality schools) alongside a hotelier. For those interested, visits to hotels are organised, offering an experience lasting around two hours where participants meet experts who cook and provide tastings. These initiatives aim to show young people, including those from the local area, the opportunities offered by the hospitality trade: work in the hospitality sector is not widely recognised, even by families ■ A collaboration with local vocational schools was launched two years ago (Merano, Brunico, Bressanone), involving the organisation of meetings between hotel managers and school teachers to keep them updated on innovations in hospitality services and the challenges faced in the region; Vocational schools suffer from a high drop-out rate every year; despite the large initial number of enrolments (around 1,000), few remain in the sector. ■ Talent Day for Year 5 students at technical schools: meetings are organised with hoteliers, who discuss the skills they require and showcase the variety of establishments in South Tyrol ■ Teachers' Day: teachers from all schools are taken to the establishments, where sessions focusing on digital and interpersonal skills are organised, with the aim of helping them understand what the establishments need and what skills they are looking for in young people. ■ The HGV Association promotes various initiatives to foster links between local tourism stakeholders and the region's centres for technological and digital innovation: among the ' ', examples of activities organised in collaboration with the Bolzano Innovation Centre, Noitech Park, include a project to develop new tools for the hospitality sector, devised in partnership with a vocational school and with the participation of teachers, and a project with ASA Hotelsoftware House, which has provided vocational school teachers with genuine hotel management software, enabling students to tackle real-life scenarios rather than simulations devised by teachers

Source: Intesa Sanpaolo analysis – Tourism Focus Group, Province of Bolzano

Focus group on destinations in Veneto and the Cities of Art

In Veneto, the number of employees in the tourism sector, calculated as an annual average, stands at 135,934, accounting for 9.8% of the national total¹⁵. Around 20,000 people are employed in accommodation facilities in cities of art. The total workforce in the sector is estimated at around 260,000 people. The **focus group involved five business owners with hotels and non-hotel accommodation located in cities of art**; one of the participants also spoke in his capacity as a representative of the Veneto hoteliers' trade association (Federalberghi Veneto) and, in two cases, the businesses operate establishments not exclusively located in cities of art, but also in seaside or mountain resorts.

The picture painted by Federalberghi Veneto confirms the importance of cities of art within the regional tourism system: in 2024, they recorded 25 million visitor nights out of a total of 74 million, accounting for 34% of the total – a figure that rises to 46% when considering only stays in hotels. The average age of the workforce employed in the establishments run by the respondents is around 35–37 years. The gender breakdown shows an overall male majority, with 54% men and 46% women, but the proportion of women is particularly significant in food and beverage service, reception/front office and housekeeping roles. Staff come from a variety of backgrounds: some have gained experience, others come from vocational colleges, whilst others join without prior skills and are trained directly for the role they are to fulfil. The proportion of graduates remains low and is concentrated mainly in administration, bookings, reception, marketing and revenue management. This limited proportion is also linked to the sector's size structure: the approximately 3,000 hotels in the Veneto region are predominantly small in scale and, to date, university partnerships have mainly involved large chains. Against this backdrop, the project launched with Ca' Foscari University aims to strengthen managerial skills within the family-run business model, which represents a significant component of regional hotel management. At the same time, the two-year courses at the ITS Turismo in Jesolo are training specialists in management and executive control, incorporating new approaches to marketing and revenue management, and with a growing focus on the opportunities offered by digital tools and the application of Artificial Intelligence to business processes.

The inclusion in the focus group of accommodation providers that vary greatly in size, management model and the range of services offered — with or without catering — has provided a detailed insight into the hotel sector in cities of art, primarily **Venice. In these contexts, year-round operation mitigates the constraints of seasonality in employment relationships, but does not eliminate recruitment difficulties, which tend instead to be concentrated in basic roles, particularly housekeeping and maintenance.** In Venice, where connections to the mainland are time-consuming and costly, it is particularly difficult to find staff available for cleaning, especially in smaller establishments. For this reason, the practice **of outsourcing this service** has become widespread, often accompanied by hybrid solutions in which in-house staff, similar to housekeepers, oversee the coordination and supervision of the activities outsourced to external providers.

The central importance of housekeeping is reinforced by the specific nature of stays in cities of art, which are on average shorter than those at seaside or mountain resorts: in cities, there are around 2–3 overnight stays per booking, and cleanliness is one of the main factors influencing guests' ratings. In the cleaning sector, however, the number of Italian workers is now very limited. Maintenance also poses a significant challenge, particularly in Venice and in standalone properties, where the volume of work does not always justify employing a dedicated maintenance staff member. Companies are seeking basic operational skills relating to minor repairs in guest rooms and elementary manual skills in carpentry, plumbing and routine maintenance, but report difficulties in finding suitable candidates. In hotel groups that manage multiple properties under a single VAT registration, the management of maintenance staff,

¹⁵ See note 5: Tourism Labour Market Observatory

cleaning staff and other personnel is, by contrast, more flexible, particularly when the hotels are located in the same city. **The size of the business therefore plays an important role in the ability to optimise the use of resources, organise rotations** and offer greater opportunities to front-of-house and reception staff.

In city centres, the service offering is predominantly focused on bed and breakfast; where a restaurant is present, it is often open to the general public as well. According to some participants, however, the catering sector is a complex business, characterised by lower profit margins and greater uncertainty in recruiting qualified staff for the kitchen and front-of-house. **Younger staff are found mainly in reception, front office and front-of-house roles,** with a tendency towards a higher proportion of female staff. **There are no specific recruitment challenges for graduates,** but their employment is concentrated in administrative roles, bookings, reception, marketing and revenue management; these are often candidates with language qualifications who view hotel work as a temporary or transitional job following their three-year degree.

Even for strategic roles in administration and marketing, there remains the challenge of conveying to young people the importance of understanding hospitality processes and services, starting with the most basic tasks. Business owners report a certain impatience amongst the younger generation, and at times a lower level of reliability during the initial stages of selection and induction, with instances of candidates failing to turn up for interviews or on their first day of work. **Added to this are issues of competition amongst hoteliers in the same location,** particularly for front-of-house and kitchen staff, with practices that make recruiting staff even more challenging. At the same time, participants emphasise the need to review the approach taken towards younger candidates. Sometimes, more experienced internal staff – such as those in the kitchen – lack the ‘managerial’ skills needed to conduct interviews, select staff and build an effective team. It is therefore **important to strengthen leadership training for senior staff, so as to improve the working atmosphere, better support the induction of new recruits and increase the business's ability to retain staff.**

Listening to young people and paying attention to their work-life balance are emerging as central elements of HR policies, albeit within the constraints inherent to the hospitality sector. Some of the larger hotel groups have described initiatives aimed **at making work in the sector more attractive,** through additional pay for working on public holidays and bonus schemes linked to the company's overall performance and the quality of services provided by the various departments, as measured in part by customer ratings. The ‘score book’, applied not only to strategic roles but also to departments such as housekeeping, makes it possible to recognise the contribution of each staff member and to strengthen their sense of belonging. This is an approach to staff management similar to that adopted in the manufacturing sector, particularly in terms of sharing objectives and results with all employees.

With a view to placing greater value on work in the tourism sector, hoteliers finally emphasise that the status of a seasonal worker should not be automatically associated with job insecurity, including when banks assess creditworthiness. One of the reasons that may prompt employees to change sectors is, in fact, the inability to secure a mortgage. In many cases, however, these are employees whose contracts are renewed year after year and who choose to claim unemployment benefit during periods of inactivity. From this perspective too, the **actual stability of the employment relationship – albeit in a seasonal form – should be regarded as an integral part of the sector's ability to attract and retain skilled human capital.**

Tab. 7 – Focus group on cities of art: skills sought, roles to be filled and recruitment difficulties in the hospitality sector

General shortage of candidates in Venice	■ Venice is a city where transport links between the historic centre and the hinterland are poor , and it is even more difficult to find staff who are not local residents
Qualified skills	■ Language skills (not necessarily German), given the international nature of tourist flows, particularly in Venice) ■ Hospitality skills, courtesy and communication skills: a great deal of work is done on these aspects through in-house training
Outsourced and 'hybrid' housekeeping	■ There are no longer any Italians willing to work as room attendants; it is easier for the hotel to outsource cleaning services (housekeeping and laundry) ■ Room cleanliness is rated just as highly as the staff's friendliness
Maintenance challenges in Venice	■ It is difficult to find people capable of carrying out minor maintenance work : given the short length of guests' stays in the city, repairs must be carried out within a few hours of being reported
Prevalence of women	■ Women outnumber men in roles involving guest reception and customer contact (front office and dining room), as well as in marketing and administration, and in housekeeping
Skills required for kitchen and dining room staff	■ The greatest challenges lie within the kitchen and dining room staff : there is less willingness to relocate, even when accommodation is provided. Wages do not always compete favourably with other sectors or with forms of public support (e.g. universal basic income)
Young people tend to change jobs more frequently	■ The most highly qualified staff, in particular, tend to change hotels more frequently, both to satisfy their curiosity about new destinations and to broaden their experience ■ They are less reliable when it comes to honouring commitments: they fail to turn up for interviews, do not turn up on their first day of work, or leave their job after a week

Source: Intesa Sanpaolo analysis – Art Cities focus group

Tab. 8 – Focus group on cities of art: what measures have been implemented in the hospitality sector? Training, incentive schemes, sharing of objectives and results

On-the-job training for young people	■ If the right 'human' qualities are found, there is a tendency to overstaff by mentoring young people in the kitchen, at reception, etc., with on-the-job training
Employee incentive scheme: sharing of business objectives and customer satisfaction survey scores	■ 'Open number' sharing of the hotel's periodic management results: revenue levels and changes compared with previous seasons are presented at dedicated plenary meetings; this is a new approach in tourism, but it serves to foster a greater sense of responsibility and loyalty amongst employees towards the company, as they recognise the link between the company's revenue and their personal salary ■ Introducing a reward scheme is challenging: large hotel chains have been using it for some time, offering supplementary, tax-free benefits not only to permanent staff but also to seasonal workers, with economic and service quality indicators based on customer satisfaction questionnaires ■ Recognition is not limited to staff in strategic roles (marketing, bookings): the 'score book' is also applied to housekeeping; there is internal competition on service quality compared with other properties within the same corporate group. ■ In addition to review scores, room occupancy rates and room rates are also assessed as parameters for incentives: young people appreciate the prospect of a variable component in addition to their fixed salary, based on their own performance
Shift patterns: premium pay for public holidays, a shorter but more intensive working week, a day off on one's birthday	■ Meritocratic approach, exceeding the National Collective Labour Agreement (CNL): the Sunday service premium has been doubled (from 10% to 20%) and extended to Saturdays as well ■ Incentives for those who spread their 40 weekly hours over 5 days (rather than 6) ■ An extra day's holiday on one's birthday: highly appreciated
Online welfare platform for employee benefits	■ When benefits are channelled through the platform , this results in tax savings for the employee
Workplace climate analysis	■ Collection of suggestions to improve internal working practices

Source: Intesa Sanpaolo analysis – Cities of Art focus group

Focus Group on Upper Adriatic seaside resorts and the Euganean Spas

The 'Sea and Spas' focus group involved four operators representing two distinct tourism sectors: **on the one hand, seaside tourism in the Upper Adriatic**, represented by two companies active in the management of hotels and non-hotel accommodation; **on the other, spa tourism in the Euganean basin of Abano Terme and Montegrotto Terme**. The two destinations have different profiles in terms of seasonality and demand: the coast is characterised by a generally shorter season and a more international and family-oriented clientele, whilst the spa sector operates over a longer period, around 10 months, catering predominantly to an Italian clientele and middle-aged couples.

The two businesses on the Adriatic coast are major players, with a significant presence in the resorts of Bibione, Lignano Sabbiadoro and Jesolo, through dozens of hotels and thousands of holiday flats available for short-term rental. This organisational scale is also reflected in staff management: the companies employ several hundred permanent staff and, in one case, reach a total of around 1,000 staff during the peak season. This results **in a particularly structured approach to human resources, covering recruitment, training, induction and staff retention**. At the start of the season, collaboration with hospitality colleges enables the recruitment of around 100 interns per year, mainly in the catering sector; a significant proportion of these young people are subsequently retained and supported along pathways that can lead from apprenticeships to the attainment of a qualification. By contrast, the case study on the spa sector highlights a small-scale establishment where staff management remains directly overseen by the business owner.

Despite the differences between the two destinations, certain common trends emerge regarding the composition of the workforce. Women predominate in front-of-house and reception roles – where they are particularly valued for their dynamism and interpersonal skills – and *in housekeeping*. The average age is relatively low, under 30, particularly in the food and beverage, front office, entertainment and wellness departments. Conversely, in grounds and beach maintenance roles, only male staff of a more advanced age are employed, partly due to the lack of young applicants for this type of work. Young people account for around 20% of the workforce, whilst the proportion of graduates is even lower, at around 10%, with exceptions in administration, accounts, marketing and reception, particularly in the two major establishments in the Upper Adriatic, where there are also language graduates on permanent contracts.

Some employees are on permanent contracts and live locally, particularly in the spa area. In the seaside resort sector, however, the high seasonal concentration of demand makes it necessary to recruit a substantial number of workers from the South or from abroad, as the local labour pool is insufficient and it is particularly difficult to fill the more physically demanding roles, such as porters, kitchen assistants and cleaners, for which the use of foreign staff is now almost exclusive. In the post-Covid period, the time taken to recruit seasonal workers has become more critical, sometimes even jeopardising the Easter opening. Several factors contribute to this trend: the extension of the season until October, the lull following the winter season in other resorts, and the greater ease with which staff already confirmed in February and March decide not to turn up in April.

The availability of staff accommodation remains a widespread issue, common to all focus groups, but is particularly acute in destinations characterised by a high concentration of tourist flows within a few months. In the case of the Upper Adriatic seaside resorts, where there are more than sixty tourist arrivals for every resident, finding accommodation – even private accommodation – for staff represents a significant challenge. For this reason, it was deemed appropriate to devote a specific in-depth analysis to staff accommodation, examining both the differences between Italian legislation and that of the main tourism competitors – in particular Austria for mountain resorts and Croatia for seaside resorts – regarding tax relief on accommodation costs, and the initiatives developed in the Veneto region to identify practical solutions to the problem.

Tab. 9 – Focus group on seaside and spa resorts: skills sought, roles to be filled and recruitment difficulties in the hotel sector

General shortage of candidates in the Upper Adriatic seaside resorts	■ The coastline between Bibione and Lignano hosts around 2 million visitors during the tourist season, compared with a resident population of around 18,000. Insufficient recruitment from the local workforce and the need to rely on workers from the South and foreign nationals
Skilled workers	■ Language skills (German): no longer taught in schools; German tourists (whether at the seaside or at spas) expect to feel at home ■ Professionalism in hospitality: a mismatch between the skills stated on CVs and candidates' actual skills ■ Interviews for foreign applicants are conducted remotely; references can no longer be requested for privacy reasons
The pool of graduates from ITS and hospitality schools	■ Academic preparation is important; there is close collaboration with vocational hospitality colleges (located in both spa towns and coastal resorts) and with Higher Technical Institutes (Jesolo), which produce young people with the right aptitude, who quickly go on to fill positions of responsibility on permanent contracts
Experience as a minimum requirement	■ The minimum experience required is two years
Positions of responsibility that are difficult to fill	■ It is difficult to find people for positions of responsibility on the open market (e.g. department heads, maître d's, head chefs, sous-chefs and beach staff); the strategy is to develop them internally ■ There is a shortage of staff for the bar in the evenings ■ It is difficult to find lifeguards with MIP sea certification, whilst those qualified for swimming pools are available ■ Life in the hotel is like a 'home'; shifts are extremely long and, unless approached in the right way, are unsustainable
There is a lack of middle management to handle HR and strategy	■ Tourism businesses in the Veneto region are still too small and are unable to recruit middle management staff capable of managing human capital ■ Unlike larger establishments and hotel groups, which have dedicated HR departments, in smaller hotels staff management is handled by the owner
Difficulties in retaining young staff	■ The average age is quite low; even in the Euganean Spas, where workers are local, permanent contracts are no longer sufficient to retain them

Source: Intesa Sanpaolo analysis. Focus group: Seaside and Spas

Tab. 10 – Seaside and spa focus group: what measures have been implemented in the hotel sector? Training, internal organisation, reward schemes, sharing of objectives and results

In-house training	■ Great care is taken with onboarding, including in the cleaning sector, and with mentoring ■ Efforts are made to instil a 'passion' for work in the hospitality sector ■ Enriching training courses and experiences are offered for personal development, not just work-related: stress management, work-life balance, interpersonal skills, and handling customer complaints ■ It is sometimes difficult to find three days to organise training courses that staff can attend
Out-of-work activities	■ Team-building, visits to wineries, dinners, short breaks
Off-site courses are also available for staff looking to develop	■ We are developing courses that recognise the most deserving staff and foster their pride in the company and their sense of belonging
Enhancing and maintaining the website and the 'Careers' section	■ Highlighting the company's strengths on the website is proving effective in attracting and recruiting potential candidates
Arrangement of accommodation	■ Candidates expect to be provided with their own self-contained accommodation; flats with kitchen facilities are also offered, and meals are provided for hospitality staff ■ Some wish to bring their families with them, so proper flats are required ■ We are currently in the process of acquiring or securing a loan for use of land from the local council to build staff accommodation
Women in the workforce and continuous working hours	■ To enable women with children to look after their children, efforts are being made to organise shifts with continuous working hours so that at least part of the afternoon is free
Shift work is also in place for cleaning staff, with staggered start times	■ The first priority for candidates is finding a balance between work and leisure time: this is a major challenge because catering services operate all day, so efforts are being made to make shifts less demanding ■ For cleaning staff, the weekly rota becomes a problem because staff arrivals are concentrated on Saturdays. We are also looking to schedule arrivals on weekdays, so as to rotate Saturday shifts and retain the team
Permanent contracts to attract young people to the sector	■ If the sector does not offer a full-time salary, it risks being less attractive than other sectors: expectations have changed compared with the past. Indeed, working day may extend up to 14 hours

Source: Intesa Sanpaolo analysis – Sea and Spa Tourism Focus Group

Focus group on open-air holiday villages and campsites

The findings gathered in the **focus group on open-air accommodation** provide a detailed picture of accommodation facilities located mainly in seaside destinations in the Veneto region, including Bibione, Cavallino Treporti, Eraclea Mare, Rosolina Mare and Chioggia. Campsites and holiday villages vary in size, ownership structure and organisational models, but share certain structural characteristics: the highly seasonal nature of their services, the high operational intensity during peak months and the need to coordinate a large, flexible workforce comprising a wide range of professional profiles.

The management of services varies according to the size of the business and the organisational strategy adopted. In most cases, **the facilities tend to handle a significant proportion of activities in-house, particularly cleaning, reception, beach services, bathing facilities and routine maintenance**; certain functions, such as catering, the on-site shop, security or swimming pool maintenance, may instead be contracted out to external companies. **In smaller open-air resorts, the use of outsourcing is more widespread** and may even extend to lifeguarding services for the beach and swimming pools, as well as night-time security, whilst gardening and facility maintenance are more often carried out in-house. In such cases, directly employed staff can account for around a quarter of the total workforce employed by contractors.

The number of jobs generated by open-air facilities varies considerably: this ranges from establishments with around 40 direct employees to complexes which, in high season, employ over 500 workers, taking into account both directly employed staff and those employed through external companies. A significant proportion of staff are retained from one year to the next, reflecting the importance attached to the continuity of employment relationships even within a highly seasonal model. **However, the seasonal component remains predominant**, generally accounting for between 60% and 70%, whilst permanent contracts are concentrated mainly in administrative, technical and coordination roles. In larger establishments, the job offer is supplemented by benefits such as accommodation and meals, which have become essential in facilitating the stay of workers coming from outside the local area.

Employees are predominantly local, although some establishments report a significant presence of foreign workers, often long-term residents of the area who are now firmly integrated into business processes; among the most common countries of origin is Eastern Europe, particularly Romania. In other cases, however, the proportion of foreign staff is lower. In this sector too, the **issue of accommodation for workers coming from outside the region represents a significant constraint**, particularly in tourist resorts where housing supply is limited and heavily contested with tourist demand.

In terms of age and professional background, young people aged between 18 and 30 are mainly employed in seasonal roles related to beach services, reception and guest assistance, whilst their presence tends to be lower in departments characterised by a higher average age, such as cleaning and maintenance. Graduates tend to be concentrated in administrative, front-office and back-office roles—often with three-year degrees in languages—while remaining less represented in operational and technical positions. Female employment is significant and, in some establishments, exceeds 50%; it is concentrated mainly in cleaning, administration and reception services, whilst in the catering sector the gender balance appears more even. Some companies have also obtained gender certification and regularly monitor these aspects as part of their sustainability reports.

Recruitment challenges are concentrated mainly in skilled roles within catering and maintenance, with patterns largely similar to those observed in the seaside hotel sector. The seasonal nature of the work makes it more difficult to retain staff and contributes to high annual staff turnover, particularly amongst young people, who, after graduating, often tend to seek opportunities perceived as more stable. **To mitigate these difficulties, some establishments have strengthened their continuing professional development programmes**, work-study schemes and benefits packages, with the aim of gradually building in-house skills and fostering a greater sense of belonging to the organisation.

Alongside employment challenges, **the focus group also highlights a significant evolution in management models. Campsites and open-air holiday villages in the Veneto region are seeking an increasingly sophisticated balance between operational requirements, the quality of the customer experience and the quality of working conditions**. In larger establishments, environmental sustainability is managed through consumption monitoring, the adoption of home automation systems, management control tools and maintenance monitoring. Particular attention is also paid to revenue management, with advanced programmes for dynamic pricing and customer profiling.

The expansion and transformation of demand have also encouraged commercial and organisational investment. Some companies have developed a dedicated 'sales force', tasked with managing the entire **customer relationship cycle, following approaches now very similar to those in the hotel hospitality sector**. Indeed, the customer base for *mobile homes* and holiday accommodation now exhibits a higher turnover than in the past and includes new segments that

are less tied to traditional outdoor tourism, more dynamic in their choice of destination and more focused on seeking personalised experiences. This has led to the growth of in-house roles dedicated to designing experiential itineraries, storytelling, the production of audiovisual content, the personalisation of web pages and, more generally, digital communication activities. From this perspective, technology plays a pervasive role, not only as a tool for efficiency but also as a means of enhancing appeal, differentiating the offering and defining the skills required.

Tab. 11 – Open-air focus group: skills sought, roles to be filled and recruitment difficulties in the beach-based OPEN-AIR sector

Specific technical skills	Particularly in demand in the catering sector (chefs, qualified front-of-house staff), maintenance (technicians, gardeners), front office (customer service, knowledge of foreign languages, particularly German), and the beach resort sector (qualified lifeguards). In the case of lifeguards, restrictive regulations reduce the pool of potential recruits¹⁶
Qualified digital and managerial skills	- The use of new technologies, revenue management systems, home automation, CRM and the digitisation of processes requires staff with a degree or advanced training Those with digital skills find the fixed-term summer contracts offered by open-air holiday villages unattractive; it is difficult to compete for these candidates with other economic sectors offering permanent employment
Interpersonal and language skills	- Ability to manage customers, work in a team, solve problems and cope with stress, particularly during peak seasons - In addition to English, knowledge of German remains essential, but is increasingly difficult to find amongst young people: some are banking on the potential of AI, including for simultaneous translation, to resolve this issue
Positions that are difficult to fill in catering, beach services and maintenance	- It is difficult to find chefs and front-of-house managers, where demand far outstrips supply Lifeguards are in short supply, due to recent regulations and a shortage of young people with MIP marine certification - There is a shortage of maintenance staff and specialist technicians, both for routine management and for major maintenance of the facilities Difficulty in recruiting all staff for vacant roles well in advance of the start of the season, similar to the situation faced by hotels in seaside resorts: recruitment efforts often only begin as the seasonal opening approaches
Recruitment channels utilising online platforms, collaboration with technical colleges (ITS) and word of mouth	- Resort managers report that they are active on job portals such as Indeed and social media platforms such as Facebook Collaboration with schools: work-study schemes, work placements, apprenticeships, and specific courses in partnership with training organisations: it is common for young people on work-study schemes or work placements to be offered permanent roles for the following season Word of mouth amongst employees and former employees Temporary employment agencies and recruitment consultancies are also used – albeit less effectively and with mixed results – for more skilled roles, whilst job centres are utilised to broaden the pool of candidates
Difficulties in recruiting young people and those from outside the local area	- The issue of accommodation when attracting staff from other regions - Stress and workload: young people are less willing to accept intense work schedules and seasonal peaks
Difficulties in retaining young people and skilled staff, particularly in key roles	The seasonal tourism sector is less attractive as an employer, given the growing demographic shift and young people's preference for other sectors in the region

Source: Intesa Sanpaolo analysis Open-air focus group

¹⁶ The new restrictive regulations on lifeguard qualifications (DECREE 85/2024) have introduced age limits (18–50 years to work, starting at 16), stricter and updated physical tests (e.g. 100m swim in <1'40", 50m with manikin recovery, compulsory BLS), standardising training nationwide and making it more rigorous,

Tab. 12 – Open-air focus group: what measures have been implemented in the hotel sector? Training, internal organisation, reward schemes, sharing of objectives and results

In-house training	■ Investment in training: structured programmes, in-house courses, and continuous professional development, including through bilateral funds and sectoral bodies. ■ Investment in larger establishments for department head roles and more demanding positions
In-house provision of services	■ Development of an internal talent pipeline to retain and train staff
Extending the season	■ Creating a tourism model centred on events, groups and festivals to be scheduled at the start and end of the season ■ In order to be able to offer longer contracts and greater security (full NASpl benefits, permanent employment)
Employee benefits and corporate welfare	■ Provision of accommodation, meals, parking spaces, welfare schemes and financial incentives
Flexible working hours	■ More balanced shifts, part-time work, greater focus on wellbeing, work-life balance and leisure time – issues of particular concern to younger staff
Engagement and retention	■ Building a sense of belonging, team-building activities, sharing company objectives, and active involvement in company life
Diversification of catering services to stabilise staff numbers	■ To retain catering staff and move towards permanent employment wherever possible, larger facilities have introduced additional complementary activities (such as making panettone during the winter months) or have developed external catering services at campsites
Extending the summer employment of lifeguards for beach and swimming pool services	■ To address the difficulty in recruiting all the necessary beach and swimming pool support staff, staff carrying out winter maintenance are encouraged to undertake training courses to obtain a lifesaving certificate. Most of the maintenance work on the facilities is carried out during the winter
Management of accommodation and facilities for commuters	■ The management of staff accommodation, meals and car parks is a separate operation in larger campsites and holiday villages, which sometimes also involves renting and managing hotels and flats to accommodate staff during the season
Technological innovation	■ Automation, digitalisation, smart home technology and CRM tools are used to streamline processes and attract qualified talent

Source: Intesa Sanpaolo analysis – Open-air Tourism Focus Group

Staff accommodation: challenges, funding and initiatives for tourism staff housing

This in-depth analysis of staff housing stems from one of the clearest findings to emerge from all the focus groups: in tourist destinations with the highest visitor volumes, the availability of accommodation for staff is no longer a secondary issue, but an increasingly crucial factor in attracting and retaining staff. In the mountain resorts of Trento and Bolzano, as well as in seaside and spa resorts, operators report that the problem concerns not only the high cost of rent, but also the scarcity of supply, the difficulty in finding suitable solutions for workers relocating from other areas and, increasingly, the demand for higher housing standards than in the past: single rooms, greater independence and, in some cases, accommodation suitable for families. For businesses, this often means having to divert rooms away from accommodation services, rent external properties or design new housing solutions, whilst facing planning restrictions, difficulties in changing the designated use of properties and profit margins already squeezed by seasonality. In this sense, accommodation forms an integral part of the value proposition offered to workers: when it is lacking, even wages become less competitive and recruitment becomes more difficult.

A European comparison helps to put the issue into perspective. Among the Alpine countries, Austria currently has particularly favourable regulations for accommodation provided by employers near the workplace, with very significant implications for the tourism and hospitality

sectors¹⁷. From 2025 onwards, the Austrian regulations on accommodation near the workplace have in fact been made more advantageous: for accommodation that does not constitute the worker's main residence, no taxable value applies up to 35 square metres, whilst between 35 and 45 square metres the value of the benefit is reduced by 35%. Furthermore, in the case of shared accommodation, communal areas are apportioned amongst multiple occupants, ensuring that the floor area is not attributed entirely to each employee. This arrangement reduces the tax burden associated with the accommodation benefit and makes offering accommodation near the workplace more sustainable for both the company and the employee. For the tourism sector, which often operates in areas with high housing pressure and a high proportion of seasonal work or workers from other regions, this is a significant competitive factor: accommodation is not merely regarded as an ancillary cost, but as a tool for organisational efficiency and for enhancing the attractiveness of the job.

In Croatia, a direct competitor for seaside destinations in the Upper Adriatic, the availability of suitable accommodation is a key requirement, particularly for the employment of seasonal workers from third countries in the tourism and hospitality sectors. For the purposes of issuing a residence and seasonal work permit, the employer must demonstrate that the worker has suitable accommodation for the entire duration of their stay: the accommodation must provide sanitary facilities separate from the areas designated for sleeping and daily living, running water, electricity, heating where necessary, functional furnishings and equipment, and adequate hygiene and sanitary conditions; a maximum of six workers may be accommodated in the areas designated for sleeping, living and meal preparation. The most recent regulations have also strengthened standards regarding space and protection, stipulating a minimum of 14 square metres for the first worker and an additional 6 square metres for each further occupant, together with a cap on any rent charged by the employer, which must not exceed 30% of net pay and must not be automatically deducted from the payslip. From a tax perspective, the Croatian system is particularly favourable: accommodation provided or reimbursed by the employer may be recognised as a tax-free benefit for the employee, up to the actual cost and subject to appropriate documentation, and as a tax-deductible expense for the company. This provision may apply to company-owned properties, accommodation rented directly by the company, or the reimbursement of rent paid by the employee; Generally speaking, the favourable tax treatment applies to the cost of accommodation and not to utility bills. This results in a framework in which regulations governing the habitability of the premises and the tax treatment of the accommodation benefit combine to make staff housing a structural tool for attracting and managing seasonal labour in the tourism sector.

In Italy, at national level, the issue of staff housing was first comprehensively addressed in legislation by Article 14 of Decree-Law No. 95 of 30 June 2025, converted with amendments into Law No. 118 of 8 August 2025, which introduced a package of measures to improve the living and working conditions of employees in the tourism, accommodation and catering sectors. The legislation provides for a total allocation of 120 EUR M over the three-year period 2025–27 and is structured around two areas of intervention: on the one hand, grants for the creation, refurbishment and modernisation of accommodation for workers, with particular emphasis on energy efficiency and environmental sustainability; on the other hand, grants to support the rental costs of such accommodation, thereby making housing more accessible to employees in the sector. The subsequent decree issued by the Ministry of Tourism on 18 September 2025, published in the Official Gazette on 4 October 2025, defined the types of eligible costs, the beneficiaries, the allocation criteria and the operational procedures. Overall, the measure recognises that, in tourist areas with the highest housing pressure, the availability of staff accommodation has become an essential part of the infrastructure for the competitiveness of

¹⁷ Source: Austria, *Income Tax Guidelines 2025*, regulations on *workplace-related accommodation*: exemption from taxable value up to 35 m², 35% reduction between 35 and 45 m², pro-rata allocation of communal areas in shared accommodation.

businesses and for the attractiveness of employment in the sector¹⁸. On 2 October 2025, the Ministry of Tourism introduced a series of funding measures and incentives for hoteliers wishing to provide accommodation for their employees through the direct refurbishment of properties and/or the letting of accommodation. The legislation would provide for funding ranging from a minimum of 500,000 EUR to a maximum of EUR M to refurbish or modernise properties to be allocated to staff for a minimum period of 9 years, with the obligation to apply a discount of at least 30% on the rent compared to local market rates.

In Trentino, a regional law of 2024 permits the use of disused hotels to provide guest accommodation for seasonal workers, including those employed in agriculture¹⁹: whilst the measure is significant in principle, it has not yet resulted in widespread concrete projects across the region and is hampered by implementation constraints and administrative delays that mean refurbishment is not always cost-effective. In South Tyrol, by contrast, the issue has been addressed more recently within a broader framework, through the 'Abitare 2025' Reform, which has opened up the possibility of creating temporary accommodation for staff, including in certain industrial areas. This is not a measure designed exclusively for tourism, but a significant indication that the issue of housing for workers is now considered a strategic matter for the economic competitiveness of local areas as well. Also worth noting is the initiative by the Jesolo Hoteliers' Association, which sought to address the problem by forming a network and trialling a guesthouse for staff from member hotels: a converted hotel with 35 bookable rooms, with one room allocated to each member hotel. In 2024, it was immediately fully booked. Admittedly, it cannot solve Jesolo's accommodation needs, which amount to several thousand seasonal workers, but it demonstrates that this is a network that can work. There are certainly obstacles to replicating the initiative, particularly due to the bureaucratic procedures required (change of intended use) and the investment needed for adaptations and refurbishments.

From this perspective, the issue of social housing and, more generally, the availability of affordable accommodation for workers relocating geographically takes on a significance that extends beyond the tourism sector alone. In a country such as Italy, where labour mobility remains relatively low on average and the rental market is still highly rigid, the housing supply is one of the key enablers for expanding recruitment pools and making the matching of labour supply and demand more dynamic. For tourism economies that are highly seasonal or characterised by strong pressure on property prices, this issue is even more evident: without measures capable of increasing the supply of temporary and affordable accommodation, there is a risk that housing shortages will act as a structural brake on growth, on the quality of services and on the very ability to attract workers from other regions. For this reason, social housing, staff accommodation and temporary housing solutions should not be regarded as stopgap or emergency measures, but as components of a broader labour market infrastructure, necessary to support competitiveness, territorial cohesion and professional mobility.

¹⁸ Official Gazette, Art. 14, Decree-Law 95/2025, Law 118/2025, Ministerial Decree of 18 September 2025

¹⁹ Draft Law No. 19 of 11 March 2024, Provincial Law No. 4 of 15 April 2024, Autonomous Province of Trento

Conclusions

Overall, the analysis of the five focus groups confirms that the difficulties in recruiting staff in the Triveneto tourism sector cannot be interpreted as a mere problem of a numerical shortage of candidates, but as the result of a **broader mismatch between the structure of labour demand, the conditions offered by businesses, people's expectations and territorial constraints**. The summaries outlining the key findings from the various focus groups show, in fact, that alongside specific issues linked to individual destinations, a common set of critical issues emerges: the difficulty in filling technical, operational and managerial roles; the growing importance of language and interpersonal skills; the reduced willingness of young people to accept demanding, high-intensity shifts in the absence of career prospects; and the rising burden of housing and transport costs in areas with the strongest tourism sectors.

Regional differences, however, remain significant and help to clarify the nature of the phenomenon. In the mountainous areas of Trento and Bolzano, the issue of language skills – particularly German – is compounded by the difficulty of attracting staff to locations where the housing market is limited and seasonality continues to affect the stability of employment pathways; in South Tyrol, the role of welfare, workplace culture and the quality of leadership as factors in staff retention emerges more clearly. In cities of art, where the constraints of seasonality are less severe, the main challenges centre on housekeeping and maintenance roles, with a growing prevalence of hybrid organisational models and a strong emphasis on the corporate dimension in the ability to manage staff efficiently. In seaside resorts, spa resorts and open-air venues, by contrast, the concentration of visitor numbers over just a few months amplifies the need for seasonal labour, makes staff retention more difficult and increases the strategic importance of accommodation, shift organisation and the development of internal professional development pathways, particularly for roles in the kitchen, front of house, maintenance, beach operations and operational coordination.

The evidence gathered also clearly indicates that the most responsive businesses are not necessarily those that rely solely on offering higher wages, but those capable of **providing a more credible and coherent package of working conditions: continuous training, structured onboarding, higher-quality team management, reward schemes, organisational flexibility, responsiveness to individual needs and investment in workplace wellbeing**. In this context, human capital is increasingly taking on the characteristics of a strategic lever for competitiveness rather than a mere operational variable. This has a **significant policy implication**: to enhance the sector's attractiveness, it is not enough to act at the level of individual companies; rather, change must be accompanied by systemic interventions, focused on at least four key areas.

- The first concerns the **deseasonalisation and extension of periods of activity**, an essential condition for making career paths more stable.
- The second concerns the **issue of housing**, through fiscal, town-planning and organisational measures that facilitate the provision of staff accommodation and reduce one of the main barriers to entry.
- The third involves **closer cooperation with schools**, technical colleges, universities and international mobility schemes, in order to broaden the recruitment pool and raise the quality of candidates.
- Finally, the fourth concerns the **growth in size and managerial capacity of businesses**, particularly in contexts where the corporate structure does not yet allow for the professional management of human resources or the development of middle management roles. A significant part of the Triveneto tourism sector's ability to sustain the quality of its offering, organisational innovation and competitiveness in the medium term hinges on this area.

In addition to these aspects, the tourism sector, in order to remain attractive to younger generations, must also be able to capitalise on economic advantages: indeed, salaries and incentives play a key role in staff recruitment and the sector's appeal. With this in mind, institutional support to help cover labour costs can help reduce friction in matching supply and demand and make investment in training and retaining human capital more effective – a necessary condition for sustaining the quality and competitive positioning of destinations.

In summary, the sector is undergoing a period of transformation that demands ever-greater attention to the quality of skills, continuous training and the ability to offer working conditions and opportunities for growth capable of attracting and retaining qualified staff. The integration of traditional and innovative tools, combined with welfare policies and a more humane and participatory organisational approach, is emerging as the best way to overcome recruitment challenges and develop a stable and motivated workforce.

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Intesa Sanpaolo SpA - Head of Research Department Gregorio De Felice

Head of Industry & Local Economies Research

Stefania Trenti (Head)	stefania.trenti@intesasnpaolo.com
Ezio Guzzetti	ezio.guzzetti@intesasnpaolo.com

Industry Research

Ilaria Sangalli (Head)	ilaria.sangalli@intesasnpaolo.com
Letizia Borgomeo	letizia.borgomeo@intesasnpaolo.com
Anita Corona	anita.corona@intesasnpaolo.com
Enza De Vita	enza.devita@intesasnpaolo.com
Luigi Marcadella (Padua)	luigi.marcadella@intesasnpaolo.com
Enrica Spiga (Turin)	enrica.spiga@intesasnpaolo.com
Anna Cristina Visconti	anna.visconti@intesasnpaolo.com

Regional Research

Giovanni Foresti (Head)	giovanni.foresti@intesasnpaolo.com
Romina Galleri (Turin)	romina.galleri@intesasnpaolo.com
Sara Giusti (Florence)	sara.giusti@intesasnpaolo.com
Anna Maria Moressa (Padua)	anna.moressa@intesasnpaolo.com
Massimiliano Rossetti (Ancona)	massimiliano.rossetti@intesasnpaolo.com
Carla Saruis	carla.saruis@intesasnpaolo.com
Rosa Maria Vitulano (Rome)	rosa.vitulano@intesasnpaolo.com

Innovation & High-Tech Industry

Serena Fumagalli (Head)	serena.fumagalli@intesasnpaolo.com
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Local Public Finance Research

Laura Campanini (Head)	laura.campanini@intesasnpaolo.com
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