

Comparative Analysis of Tourism Development At The Example of Selected EU Countries*

Natalia ZNAMIEROWSKA and Milena BERA

West Pomeranian University of Technology Szczecin, Faculty of Economics, Poland

ORCID ID: 0000-0002-8441-8054

ORCID ID: 0000-0002-1997-349X

Correspondence should be addressed to: Natalia ZNAMIEROWSKA, nzamierowska@zut.edu.pl

* Presented at the 46th IBIMA International Conference, 26-27 November 2025, Ronda, Spain

Abstract

This article presents an analysis of tourism development in selected European Union countries. The study was motivated by the need to analyze changes in tourism development in individual European Union (EU) countries following the COVID-19 pandemic. The article is an attempt to fill the research gap in the field of changes in tourism development in recent years and to identify factors determining the development of tourism. Over the past few decades the changes has been observed in leisure activities and travel. This is driven not only by economic and technological but also by demographic changes. Tourism is undergoing continuous shifts, stemming from shifts in tourist expectations and modifying trends in tourist stays. Nowadays, tourists increasingly expect personalized tourism experiences. The COVID-19 pandemic has caused particularly significant transforms in the tourism market. The aim of the article is to conduct a comparative analysis of tourism development in selected EU countries, indicating changes in the years 2018-2024. The article analyzes secondary data from the EUROSTAT database and domestic and international literature. The analysis showed significant changes in the tourism market caused by the COVID-19 pandemic, which was reflected in the decrease in the number of tourist arrivals and a reduction in the number of tourist facilities. In 2020, there was a particularly strong reduction in tourist traffic in the countries surveyed, with the largest decline in arrivals of foreign tourists. Despite this, an increase in domestic travel percentage was observed during the pandemic (this was particularly noticeable in 2020 – with the exception of Greece, which was still visited more often by foreign tourists than domestic ones). This study serves as a starting point for further analysis of changes in tourism development in the European Union.

Keywords: tourism development, tourism

Introduction

Over recent years, we have observed changing expectations and needs of tourist trips. This is caused by the interaction of many factors and events. Changing economic trends, such as those related to sustainable development, also play a significant role in the changes in tourism. The changing tourist offer deserves special attention. Both travel agencies and tourist entities modify their offers for customers depending on their needs. Meyer 2015).

Considering the tourism offerings for society, we identify two main groups of tourists. On the one hand, there are clients participating in organized tourism, where the terms and conditions of their stay are clearly defined in the tourist offer. The client primarily decides on the travel agency, the tour operator (Rosa 2015). However, when choosing an individual trip, changes can be made at any stage of the journey and stay.

Personalization of the tourist offer provides the opportunity to tailor the tourist offer even better. Customers have been able to shape their travel plans for many years, but this has been extremely costly. Given the current climate of perfect competition, characterized by a large number of tourism providers, it is essential to take steps to attract customer attention. One form of tourism is low-budget tourism, which involves trips undertaken with the goal of minimizing expenses. It is a similar form to backpacking tourism, but the difference between these two forms is primarily the approach to costs, because backpacking does not have to be so restrictive in terms of expenses (Beyond 2010).

Tourism plays a significant role in the modern economy, not only in the business sphere but also in the educational and social spheres (Szejniuk 2014). The tourism sector is characterized by high volatility, which results primarily from its susceptibility to changes in customer preferences and social trends, which in turn leads entrepreneurs to take action to ensure that any fluctuations do not limit tourist traffic to the destination. One of the trends that influence changes in European tourism is, above all, the variability of customer, i.e. tourist, behavior. (Cooper, Fletcher, Fyall, Gilbert, Wanhill 2008).

Methodology

The aim of the study was to compare tourism development in selected EU countries. The study covered Poland, Germany, Bulgaria, Greece, Spain, and the Czech Republic. The article uses the purposive sampling method. The indicated countries have a diverse tourist offer. The study period covered the years 2018-2024. It highlighted changes in the tourism market, including the construction of new facilities and the number of incoming tourists. The article highlights differences between the analyzed countries. Based on the analyzed statistical data, the impact of the COVID-19 pandemic on tourism development in individual countries was identified.

The article analyzed secondary data from the EUROSTAT database and utilized an analysis of domestic and international literature. The research results were presented in graphical, tabular, and descriptive formats. The authors believe this is a starting point for further research on changes in tourism development in EU countries.

The determinants of tourism development

Tourism is an economic sector that significantly contributes to stimulating economic growth. The benefits of tourism development are analyzed in numerous economic studies (Sectanah, Sannasee 2015).

Among the factors influencing the development of tourism, one can distinguish the division proposed by A. Kaczmarek (2014). The classification includes groups of economic and socio-psychological factors. The classification includes groups of economic and socio-psychological factors. The first group primarily includes household income. For example, due to the increase in the minimum wage in the country, the income of some households is increasing. Taking into account the improved economic situation of society, there is an opportunity to spend part of the household budget on tourism and recreation (Kaczmarek 2014). The prices of tourist services are also important factors influencing the development of tourism. This is strongly correlated with household income and the economic situation in the country. Increased competitiveness in the tourism market can be defined by the increased availability of tourist offers and services. Expanding the range of goods and services significantly affects both price and quality, which allows for a better match of offers to tourists' personal expectations. (Leszka 2016).

When analysing the factors of tourism development according to the most important categories that stimulate the tourism, the following can be distinguished (Kaczmarek 2014):

- Economic factors – this is considered to be the most important group of elements that most significantly influence the development of tourism. These include, above all: rational income distribution, ensuring adequate use of surpluses; a favorable economic and social situation, a stable financial situation, which translates into the stability of the region; and a real increase in society's income. This stems from the need to first meet basic needs in order to engage in tourism, which is considered a higher-order need ;
- social factors – these concern issues related to people's behavior and perception of their needs. It is worth noting that changes in employment structures, as well as social changes related to cultural or mental transformation, influence the development of tourism.;
- political factors – thanks to government policy, spheres of economic life are regulated (e.g. monetary policy, fiscal policy, industrial policy, foreign policy, environmental protection policy);
- technical factors – these relate to the development of technology in the sphere of transport infrastructure.

Typically, as a result of the continuous growth of tourist traffic, tourist infrastructure is expanded and its quality improves;

- ecological factors – refers to the impact of tourism on the natural environment. The functioning of the tourism sector depends, among other things, on the attractiveness of natural resources. Therefore, it is necessary to take measures to limit the negative impact on the natural environment.

A different approach to grouping elements influencing tourism development is presented by M. W. Kozak (2008), who argues that the first step should be to examine elements that influence tourist attractiveness. These include the condition and nature of assets contributing to tourism development, including natural assets and material culture, as well as the level of development of tourism infrastructure and the necessary infrastructure that determines the accessibility of tourist attractions. Secondly, regulatory issues should be considered- related to the location and role of the tourism economy in the development policy of a given destination.

Results of research on tourism development in selected EU countries

When analyzing personal tourism in selected EU countries, attention should be paid primarily to changes in the tourism market in terms of the number of available facilities. (Tab. 1).

Tab. 1. Number of accommodation facilities in selected EU countries

	2018	2019	2020	2021	2022	2023	2024
Bulgaria	3 458	3 664	3 317	3 335	4 031	4 019	4 049
Czech Republic	9 426	9 383	:	10 898	10 652	10 293	10 104
Germany	50 020	50 498	49 987	49 197	48 742	48 275	47 846
Greece	37 919	37 827	23 128	24 513	30 221	28 854	29 108
Spain	51 418	52 894	53 174	55 565	56 174	57 492	58 545
Poland	11 076	11 251	:	9 942	9 766	9 809	10 354

: - the data are not available

Source: own study based on EUROSTAT data.

Considering 2018 and 2024, a decline in the number of facilities was observed in both Germany and Poland. In Germany, an increase in the number of tourist facilities during the period under review was only recorded in 2019, while a systematic decline has been observed since 2020, indicating a gradual shrinking of the available accommodation base. Like Germany, Poland also saw an increase in the number of facilities in 2019, but the outbreak of the COVID-19 pandemic caused many problems in the tourism industry. The tourism industry remained closed for 210 days in 2020. Over the next two years, the number of facilities continued to decline, with some entrepreneurs making the most difficult decision, such as selling tourist facilities. Since 2022, gradual development and an increase in the number of facilities have been observed, which allows for the ability to serve more tourists and also provides jobs in the local market, also contributing to local governments with tax revenues. It is also worth paying attention to Greece, where in 2020, as a result of the outbreak of the pandemic, approximately 40% of accommodation facilities were permanently closed. This was primarily due to restrictions on movement and an increase in the number of infections in society, which translated into the need for quarantine and mandatory COVID-19 testing. Spain, on the other hand, is an example of a country that recorded an increase in the number of tourist facilities during the period under review, including during the outbreak of the pandemic. This indicates a growing demand for accommodation services among tourists visiting the country.

Given the increasing number of available facilities, and therefore accommodations, it is possible to accommodate and service a greater number of tourist stays (Fig. 1), which often combine leisure and business stays. The growing number of facilities gives tourists greater flexibility in choosing their preferred location. As accommodations change, so does the price per night – which depends not only on the season but also on the location and standard of facilities offered.

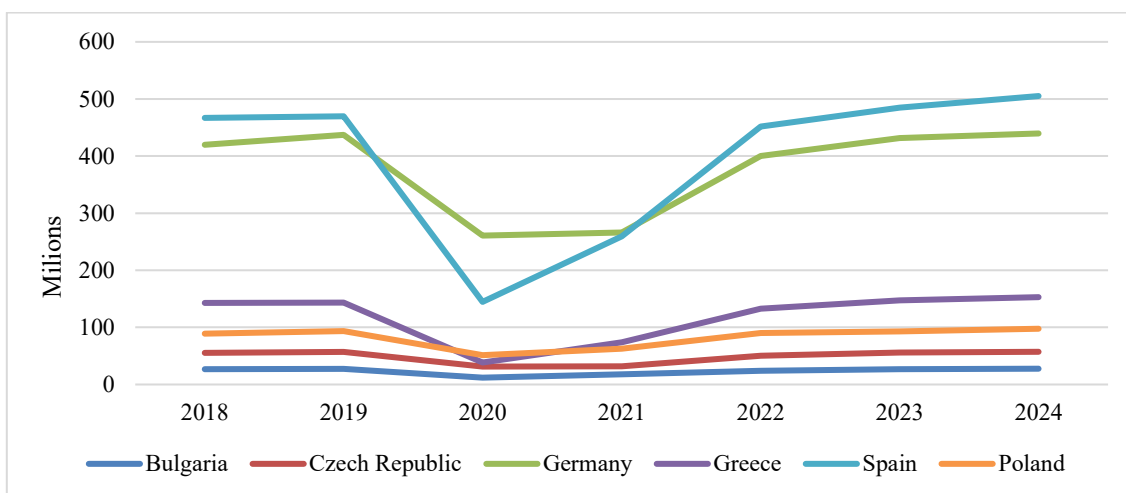


Fig. 1. Nights spent at tourist accommodation establishments by tourists (total)

Source: own study based on EUROSTAT data.

Based on Figure 1, one can see, first of all, a significant reduction in the number of nights spent by tourists in 2020 in Spain and Germany. In the case of Spain, this was a decrease of over 325 million nights, and in the case of Germany, it was a decrease of over 135 million nights. The significant changes in 2020 were caused by the declaration of the pandemic and the regulations regarding travel, stays, and quarantine that were in force as a result. Analyzing the EU countries selected for the study, all of them recorded a significant reduction in the number of nights spent in 2020. After this period, these countries recorded a gradual increase in the number of nights spent, along with the easing of regulations related to mandatory quarantine and COVID-19 testing. This was also reflected in the number of arrivals to the analyzed countries by domestic and foreign tourists (Table 2).

Tab. 2. Arrivals of residents/non-residents at tourist accommodation establishments (domestic, foreign)

	2018		2019		2020		2021		2022		2023		2024	
	foreign	domestic	foreign	domestic	foreign	domestic	foreign	domestic	foreign	domestic	foreign	domestic	foreign	domestic
Bulgaria	50%	50%	50%	50%	29%	71%	34%	66%	40%	60%	42%	58%	42%	58%
Czech Republic	50%	50%	50%	50%	26%	74%	23%	77%	38%	62%	43%	57%	46%	54%
Germany	22%	78%	21%	79%	13%	87%	12%	88%	18%	82%	19%	81%	20%	80%
Greece	72%	28%	73%	27%	54%	46%	69%	31%	74%	26%	73%	27%	74%	26%
Spain	50%	50%	50%	50%	29%	71%	32%	68%	47%	53%	50%	50%	52%	48%
Poland	21%	79%	21%	79%	13%	87%	11%	89%	17%	83%	20%	80%	20%	80%

Source: own study based on EUROSTAT data.

Taking into account the structure of tourist arrivals in the years 2018-2024, changes are observed in the case of both domestic and foreign tourists. Again, 2020 is characteristic in terms of the greatest changes in the period under review due to the outbreak of the pandemic, which in the case of the number of arrivals in most cases focused on increasing the percentage of domestic tourists, limiting the arrivals of foreign tourists (including Bulgaria, the Czech Republic, Spain and Poland). However, the pandemic had a different impact on the tourism

market in Greece, where foreign tourist arrivals accounted for as much as 54% in 2020. After 2020, the share of foreign arrivals remained above 70%. Meanwhile, in Poland, domestic tourist arrivals increased until 2021, reaching 89% of all stays, due, among other things, to the lack of mandatory quarantine for international travel and return. It is worth noting the increased attractiveness of the analyzed countries among foreign tourists, which was reflected in the structure of arrivals (Table 2).

When conducting a more in-depth analysis of tourist trips depending on the length of stay, attention was paid to the percentage of tourists who travel for one day outside their place of residence in the analyzed countries (fig. 2).

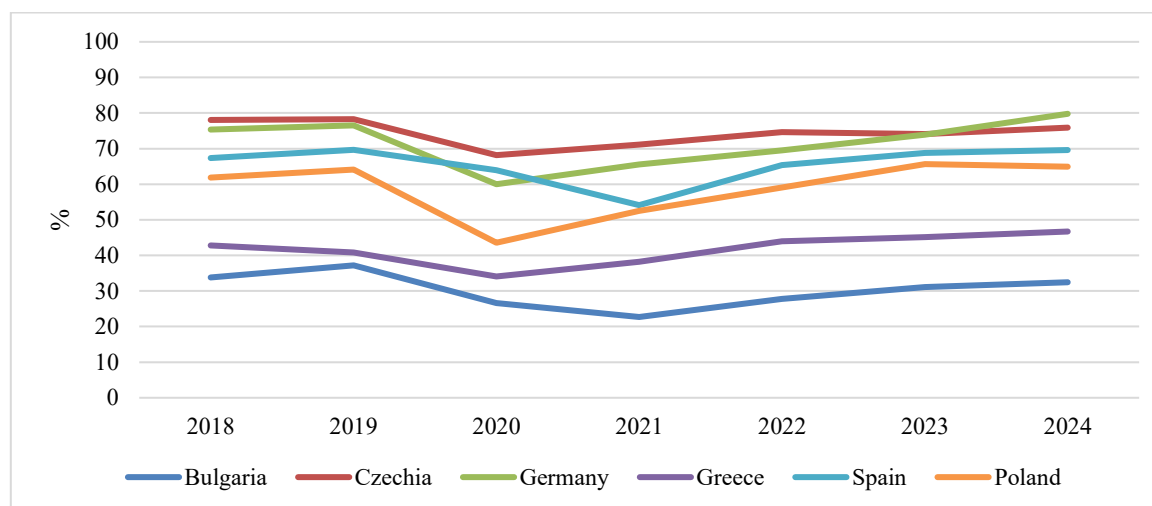


Fig. 2. Participation in tourism for personal purposes - % of total population

Source: own study based on EUROSTAT data.

Apart from a significant decline in the number of trips per day in 2020 in the Czech Republic, Germany, Poland and Greece, the two other countries covered by the study recorded a decline in 2021: Bulgaria and Spain. Considering the period under review, it's worth noting an increase in the percentage of tourists traveling for just one day. Economic reasons are one of the reasons for such short stays. Additionally, it is possible to find airline tickets at bargain prices, which include a return flight on the same day, which gives us the opportunity to visit the most interesting places in a given region for a bargain price. Furthermore, single-day trips are a particularly attractive option for those with limited vacation days or simply running their own businesses. This is an ideal solution for those who don't have to leave their businesses for multi-day trips, yet still be able to relax and explore new places. When analyzing personal tourism in selected EU countries, it's also worth considering expenses (Table 3).

Tab. 3. Trips for holidays, recreation and leisure

TIME	2018	2019	2020	2021	2022	2023	2024
Bulgaria	2 918 105	2 976 546	1 604 195	2 054 242	2 899 230	3 135 535	3 696 788
Czech Republic	20 370 897	20 787 403	14 544 473	16 290 624	20 130 317	17 804 271	18 771 557
Germany	142 389 578	134 524 262	65 135 468	79 534 701	125 089 080	136 994 009	155 035 665
Greece	4 580 011	4 078 407	3 584 581	4 001 939	4 925 244	5 086 009	5 603 050
Spain	81 686 578	81 753 903	39 340 729	57 183 947	74 310 443	79 806 194	81 075 089
Poland	27 003 311	28 829 407	20 836 533	24 555 172	30 793 977	32 421 779	34 427 027

Source: own study based on EUROSTAT data.

Tourist spending on holidays and recreation is closely linked to the financial situation of households. Due to economic development and improved economic conditions, demand for services related to tourism and all forms of leisure activities is growing. As with the previous charts and tables, Table 3 also notes a significant reduction

in spending on holidays and recreation. In Germany, spending fell by over 50%, similarly to Spain. However, since 2021, there has been a gradual increase in spending, which means a growing demand for tourist services, individual and organized trips, as well as tourist packages offered by various travel agencies. Growing spending on holidays and recreation is also a consequence of increased social mobility, a growing openness to exploring new places, and the courage to organize trips independently. It is still possible to use offers prepared by travel agencies, but more and more properties and travel agencies are offering a personalized approach to the customer, primarily regarding the length of stay and meals during the stay. The wide tourist offer also attracts tourists with attractions such as themed events, extensive spa & wellness facilities, and an aqua park.

Thanks to the improved economic situation of society, it is also possible to increase costs. Average expenditures per trip may result primarily from the choice of more expensive accommodations and more comfortable means of transportation (e.g., flying instead of a multi-hour train journey) (fig. 3).

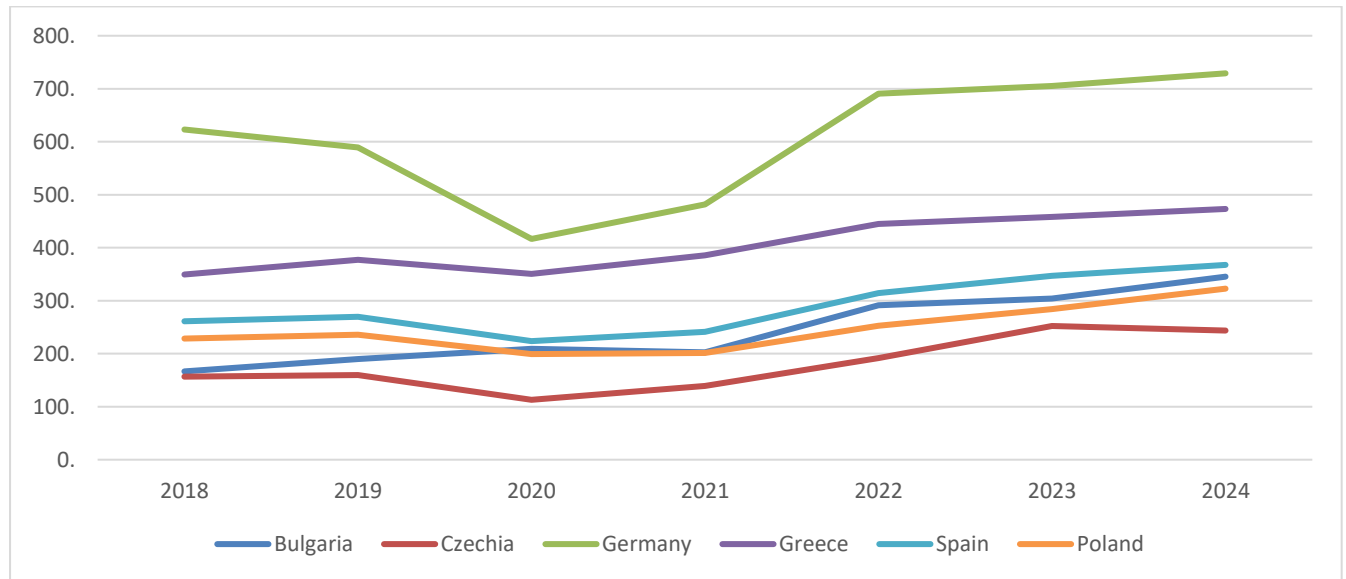


Fig. 3. Average expenditure per trip

Source: own study based on EUROSTAT data.

Among the countries surveyed, the highest average spending per trip was recorded in Germany, exceeding €700 in 2024. In Poland, it remained at a maximum of €322.77 (2024). The Czech Republic spends the least on trips – initially in 2018, it was €156.72, and in 2024, €243.44. The impact of the pandemic has also been noticed in average spending per trip. Among the surveyed group, only Bulgaria increased spending in 2020. A gradual increase in travel spending was observed after 2021.

Conclusions

When observing the situation in the tourism market, the influence of external factors and armed conflicts should not be overlooked. In recent years, the entire economy has experienced the effects of the COVID-19 pandemic. The consequences were particularly severe, particularly for the tourism sector in Poland and other European Union countries. The analysis showed that tourism gradually returned to its pre-pandemic state after 2021, but for some businesses, the pandemic forced them to close their operations. There has been a decline in the number of tourist facilities, which has gradually reduced the accommodation base.

Based on the analysis of statistical data from EUROSTAT, a significant slowdown in the tourism market was observed in 2020. This was primarily due to decisions made to limit the spread of the growing number of COVID-19 cases. Hence, decisions were made to introduce quarantine and COVID-19 testing requirements upon border crossing. In Poland, the operation of tourist facilities was also restricted for 210 days. Among the EU countries surveyed, domestic travel within the country was noted to have increased, as the entry of foreign tourists required quarantine, for example, in a hotel. 2020 saw a significant decline in tourist traffic.

During the period under review, an increase in the percentage of the population opting for single-day trips was

also observed, as was the average expenditure per trip. Both the change in travel patterns and the rising expenditure on travel are driven by changing trends. Individual tourism is becoming increasingly popular and is no longer significantly more expensive than organized tourism. By monitoring changes taking place in the market, tourism tries to adapt its offers to the individual needs of tourists. While it's still possible to use ready-made solutions offered by travel agencies, the public is increasingly choosing individual solutions, such as organizing sightseeing tours (each night in a different location) or combining business trips with leisure trips (e.g., staying at a tourist facility for a weekend, for example, after attending a conference, training course, or trade fair).

References:

- Artyshuk, O. (2010), Individual tourist packages in cultural tourism, *Cultural Tourism*, 9, 4–24.
- Cooper, C., Fletcher, J., Fyall, A., Gilbert, D., Wanhill, S. (2008), *Tourism. Principles and practice*, Milan, Italy.
- Hannam, K. (red.), Diekmann, A. (2010), *Beyond Backpacker Tourism: Mobilities and Experiences, Tourism and Cultural Change: 21*, Channel View Publications, Bristol – Tonawanda – Ontario.
- Kaczmarek, A. (2014), Selected factors of tourism development, *Publishing House of the University of Economics in Katowice*, 201-202.
- Kozak, M. (2006), Tourism competitiveness of Polish regions, *Regional and Local Studies*, nr 3.
- Kozak, M. (2008), *Tourism Development Concepts*, *Regional and Local Studies*, nr 1.
- Leszka, G. (2016), *Basics of tourism*, WSiP, Warsaw, p. 85-86.
- Meyer, B. (2015), Individualization of the tourist offer as a consequence of consumption and tourism trends, *Scientific dissertations of the University of Physical Education in Wrocław*, 50, 59-66.
- Rosa, G. (red.) (2015), *Consumer in the services market*, C.H. Beck, Warsaw.
- Seetanah, B., Sannasse, R. V. (2015), Marketing Promotion Financing and Tourism Development: The Case of Mauritius, *Journal of Hospitality Marketing & Management*, vol. 24, p. 202.
- Szejniuk, A. (2014), Work-life balance, *Journal of Modern Science 2/2014 vol. 21*. Józefów.