THE EVOLUTION AND DYNAMICS OF TOURISM IN EUROPE IN THE CONTEXT OF CULTURAL HERITAGE VALORIZATION

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Abstract
Tourism represents one of the most dynamic and influential economic sectors globally, having an essential role in the economic, social, and cultural development of states. In Europe, this sector is closely correlated with cultural heritage, which constitutes a major attractiveness factor for tourists and a strategic element in strengthening the competitiveness of destinations. The present study aims to analyze the evolution and dynamics of European tourism in the period 2015–2024, highlighting the relationship between cultural resources and the tourism performance of the member states of the European Union. The research methodology is documentary and statistical, based on the analysis of official data from the Eurostat database and reports from the World Tourism Organization (UNWTO). The study uses a complex set of indicators, grouped into two main dimensions: the tourism dimension (number of tourists, accommodation infrastructure, occupancy rate, workforce in the hospitality sector, tourism receipts, and average expenditure per trip) and the cultural dimension (employment in the cultural sector, government expenditure on culture, museum infrastructure, and the distribution of UNESCO sites). The analysis focuses on the top nine states in the European Union by the number of tourists in 2024, offering a comparative perspective on their performances. The results highlight the existence of distinct stages in the evolution of European tourism. The 2016–2019 period is characterized by a stable and moderate growth of tourist flows, supported by infrastructure development and the intensification of international mobility. The year 2020 marks a major rupture, caused by the COVID-19 pandemic, which generated significant decreases across all analyzed indicators. In the 2021–2022 period, an accelerated recovery of the tourism sector is observed, while the years 2023–2024 indicate a stabilization trend and a return to growth rates close to those of the pre-pandemic period.

Keywords: European tourism; cultural heritage; tourism infrastructure; tourism dynamics

JEL Classification: *Z32; Z31; Z33; L83*

1. Introduction

Tourism represents one of the most dynamic and complex sectors of the global economy, playing an essential role in stimulating economic growth, generating jobs, and regional development. In recent decades, this sector has experienced accelerated expansion, supported by increased international mobility, the development of transport infrastructure, and the improvement of living standards. According to international data, tourism significantly contributes to the gross domestic product of many states and plays an important role in balancing the balance of payments by generating service revenues (UNWTO, 2023).

Within this sector, cultural tourism occupies a central place, being one of the most relevant forms of contemporary tourism; it valorizes tangible and intangible cultural heritage and offers authentic experiences to visitors. The evolution of this type of tourism highlights the transition from an elitist activity to a mass one, integrated into the tourism development strategies of states (Richards, 2018). In this context, cultural heritage is no longer just a symbol of national identity, but also a strategic economic resource.

Europe stands out as one of the most important tourist destinations globally, due to the high density of cultural heritage and historical diversity; European cities concentrate numerous monuments, museums, and UNESCO heritage sites, giving them a significant competitive advantage. Historic cities transform cultural heritage into a tourism product, contributing to economic development and urban regeneration (Ashworth and Tunbridge, 2000); this relationship highlights the interdependence between tourism and culture and the need for sustainable resource management. The relationship between cultural heritage and tourism is essential for attracting tourists. Heritage represents a valuable but vulnerable resource that requires careful protection and management (McKercher and du Cros, 2002). At the same time, the existence of UNESCO sites significantly contributes to the growth of tourist flows and the consolidation of the international image of destinations (Botti et al., 2008). Thus, states with a rich cultural heritage, such as France, Italy, and Spain, are among the most visited in the European Union.

The evolution of European tourism has been influenced by economic factors and external events. In the 2015–2019 period, the sector recorded steady growth, supported by infrastructure development and increased accessibility (Rosato et.al., 2021). The accessibility of destinations and transport infrastructure played an essential role in consolidating Europe's position as a global leader in tourism (Hall, 2008). The year 2020 represented a major inflection point due to the COVID-19 pandemic, which caused drastic drops in tourist flows of over 50% in many European states; mobility restrictions highlighted the vulnerability of the tourism sector to external shocks and its dependence on international circulation. However, the post-pandemic period demonstrated the adaptability of European tourism. Starting with 2021, the sector experienced a gradual recovery, which accelerated in 2022 with the lifting of restrictions. The pandemic brought about important structural transformations, including an orientation towards sustainability and changes in tourist behavior (Gössling et al., 2021).

Tourism and culture are also closely linked through their impact on employment; these sectors generate employment opportunities and contribute to economic diversification, while cultural and creative industries play an essential role in value creation and stimulating innovation (Throsby, 2010). Furthermore, public policies have an essential role in supporting tourism and culture. Investments in infrastructure and the cultural sector contribute to the sustainable development of destinations and to increasing their competitiveness (Dwyer et al., 2010). Cultural infrastructure, including museums and UNESCO sites, significantly contributes to the attractiveness of tourist destinations; Europe maintains its global leadership position due to its rich heritage, which represents a sustainable competitive advantage in international tourism.

2. Research methodology

The present research is based on a quantitative and comparative approach, aiming to analyze the evolution and dynamics of tourism in the European Union in relation to cultural heritage. The methodology combines documentary analysis with statistical processing of secondary data, ensuring a comprehensive evaluation of the relationship between tourism performance and cultural resources.

The empirical analysis relies on official data collected from international databases, primarily Eurostat, the World Tourism Organization (UNWTO), and UNESCO. The study focuses on the period 2015–2024, which allows the identification of both long-term trends and the short-term impact of external shocks, particularly the COVID-19 pandemic.

A set of relevant indicators was selected and structured into two main dimensions. The tourism dimension includes indicators such as the number of tourist arrivals, accommodation occupancy rate, tourism receipts, and their dynamics. The cultural dimension comprises variables such as the number of UNESCO World Heritage sites, the density of museums, and employment or investment in the cultural sector. This dual approach enables the evaluation of the interdependence between tourism development and cultural heritage valorization.

The analysis is conducted on a sample of the top nine European Union member states ranked by the number of tourists in 2024, namely France, Spain, Italy, Germany, Greece, Austria, Portugal, Poland, and the Netherlands. A comparative perspective is adopted in order to highlight similarities, disparities, and specific national patterns.

Data processing involved the calculation of growth rates, comparative analysis across countries, and the interpretation of temporal dynamics. The results are presented using tables and graphical representations, which facilitate the identification of trends and structural changes.

The limitations of the research derive mainly from the use of aggregated secondary data and the lack of uniformity in certain cultural indicators across countries. Nevertheless, the methodology provides a solid basis for understanding the relationship between tourism and cultural heritage in the European context.

3. The dynamics of tourism and the cultural sector in Europe

According to data published by the World Tourism Organization, the main tourist destinations in the European Union in 2024 are France, Spain, and Italy, followed by Poland, Germany, Greece, Austria, Portugal, and the Netherlands. France occupies the first place, with approximately 102 million international tourists, followed by Spain (93.8 million) and Italy (57.9 million), with the other states recording lower values, between 21 and 39 million tourists. This distribution highlights a concentration of tourist flows in a few established destinations, specific to mature tourism markets; tourism development is closely correlated with the level of infrastructure, accessibility, and the capacity to valorize resources (Hall, 2008).

COUNTRY	2016	2017	2018	2019	2020	2021	2022	2023	2024
AUSTRIA	5.21	4.76	4.60	3.47	-52.67	-15.84	106.30	17.94	4.21
FRANCE	-2.10	4.93	2.96	1.78	-54.15	16.11	92.56	7.30	2.00
GERMANY	1.67	5.33	3.82	1.76	-68.53	-6.82	144.83	22.54	7.76
GREECE	5.08	9.66	10.77	4.07	-76.48	99.34	89.12	17.63	10.09
ITALY	4.76	5.90	3.67	2.33	-59.73	-30.24	86.19	14.83	1.05
NETHERLANDS	5.47	13.24	4.78	7.18	-63.91	-14.66	159.68	26.09	4.43
POLAND	4.44	4.50	7.47	7.83	-60.21	15.49	64.04	19.14	104.21
PORTUGAL	13.95	15.52	4.88	6.77	-75.65	49.70	252.38	19.37	9.43
SPAIN	10.47	8.70	1.15	0.85	-56.41	-14.29	129.49	18.99	10.09
UE-27	7.64	8.05	4.67	3.17	-65.93	21.44	103.62	15.63	5.58

Figure 1 The evolution rate of tourist arrivals in the 2016-2024 period
Source: Own processing based on existing data on Eurostat database, available at https://ec.europa.eu/eurostat/data/database (accessed 15.06.2025, 15.00)

Legend:

≤ -50	from -50 to -30	from -30 to 0	from 0 to 30	from 30 to 50	≥ 50

The evolution of tourist arrivals in the 2016–2024 period highlights significant differences between the analyzed states, as well as major changes driven by the global context.

Thus, France's dominant position reflects both the diversity of its cultural heritage and the efficient organization of its tourism sector. Spain and Italy confirm the essential role of cultural heritage in attracting tourists; destinations with varied and well-valorized cultural resources register higher tourist flows (Richards, 2018). The states in median positions, such as Poland, Germany, Greece, and Austria, present similar levels of tourism development; the expansion of tourism to these destinations is determined by the interest in authentic experiences (McKercher and du Cros, 2002). Overall, the distribution of tourist flows confirms the central role of cultural heritage in the development of European tourism; the existence of UNESCO sites significantly contributes to increasing destination attractiveness (Botti et al., 2008).

In the 2016–2019 interval, most countries record positive growth, but of different intensities. For example, Portugal presents the highest growth rates, exceeding 13% in 2016 and 15% in 2017, while Greece registers values of over 9% and 10% in 2017 and 2018. In contrast, states like France or Germany present lower growth, generally situated below 5%, which indicates a stability specific to mature tourist destinations.

The year 2020 marks a drastic drop in tourist arrivals in all states, with extreme values such as -76.48% in Greece, -75.65% in Portugal, and -68.53% in Germany; at the European Union level, the decrease is -65.93%, confirming the severe impact of the pandemic on the entire tourism sector.

In 2021, the evolutions are uneven: Greece registers a growth of 99.34% and Portugal 49.70%, while other states, such as Austria (-15.84%) and Germany (-6.82%), continue to register negative values; this difference reflects varying rates of recovery. The year 2022 is characterized by very high growth in all states, such as Portugal (252.38%), the Netherlands (159.68%), and Germany (144.83%), indicating a rapid recovery of tourist flows; however, these values are influenced by the very low level of the previous year.

In the 2023–2024 period, dynamics stabilize, with most states registering moderate growth, below 30%; for example, Germany reaches 7.76% in 2024, and France 2%. A particular case is Poland, which registers a growth of 104.21% in 2024, significantly above the other states, suggesting either a delayed recovery or an accentuated increase in tourist attractiveness.

Overall, the evolution of the indicator reflects both the major impact of the pandemic on European tourism and its capacity for rapid recovery, with significant differences between states depending on the structure and dependence of the tourism economy.

Figure 2 Net occupancy rate of bed-places and bedrooms in hotels and similar accommodation establishments
Source: Own processing based on existing data on Eurostat database, available at https://ec.europa.eu/eurostat/data/database (accessed 15.06.2025, 15.00)

Legend:

≤ 30	from 30 to 35	from 35 to 45	from 45 to 55	from 55 to 60	≥ 60

COUNTRY	2016	2017	2018	2019	2020	2021	2022	2023	2024
AUSTRIA	41.00	47.00	48.00	48.00	28.00	27.00	43.00	46.00	46.00
FRANCE	46.30	48.07	49.98	50.00	28.50	35.00	49.40	50.00	48.70
GERMANY	43.86	44.80	45.33	45.71	28.60	29.02	40.04	42.93	43.29
GREECE	50.10	52.80	51.50	49.50	30.10	42.90	51.10	54.70	50.60
ITALY	43.70	46.10	48.30	49.00	29.70	37.90	48.30	51.50	52.40
NETHERLANDS	47.60	50.40	50.90	50.20	26.80	26.90	46.90	53.60	54.40
POLAND	38.60	39.80	40.80	41.70	25.50	30.70	41.30	41.60	41.70
PORTUGAL	48.52	51.36	51.36	51.05	25.22	32.96	49.06	51.91	52.50
SPAIN	61.34	62.62	61.69	61.48	31.09	43.76	58.52	61.41	62.47
UE-27	47.13	49.09	49.78	49.85	28.18	33.89	46.74	49.20	49.35

The net occupancy rate of bed-places and bedrooms in the 2016–2024 period highlights important changes in the degree of utilization of tourism infrastructure; in the 2016–2019 interval, values remain relatively stable, generally situated between 45% and 55%, which indicates a good occupancy level. Spain stands out with the highest values, consistently exceeding 60%, while Greece, Portugal, and the Netherlands frequently register levels over 50%, reflecting a high tourist demand. In 2020, an accentuated drop in the indicator occurs in all states, with values falling below

30%; for example, Austria, Germany, and France drop to approximately 28%, and at the EU-27 level the average is approximately 28%, which highlights the strong impact of the pandemic on the utilization degree of accommodation establishments. Starting in 2021, a gradual recovery is observed, more accentuated in 2022 and 2023, when most states return to values close to those of the pre-pandemic period. In 2023, the Netherlands and Italy exceed 50%, and Greece reaches over 54%, indicating a significant relaunch of tourist demand. In 2024, the occupancy rate stabilizes, reaching values similar to or slightly higher than those prior to the pandemic; Spain again exceeds 62%, and Italy, Portugal, and the Netherlands register values over 50%, confirming the consolidation of the European tourism recovery process.

COUNTRY	2016	2017	2018	2019	2020	2021	2022	2023	2024
AUSTRIA	2.69	6.91	13.34	2.01	-40.74	-25.72	68.10	28.78	6.48
FRANCE	-4.33	6.54	7.09	-2.40	-49.19	23.47	33.31	20.29	8.29
GERMANY	3.08	6.74	6.64	-1.82	-62.19	0.18	41.38	20.92	6.08
GREECE	-4.22	13.86	12.80	6.53	-73.09	120.84	32.70	22.93	4.93
ITALY	2.41	10.14	10.45	0.60	-60.59	23.95	72.32	27.92	5.01
NETHERLANDS	10.59	12.46	9.52	-0.84	-53.92	-3.66	52.33	29.68	8.65
POLAND	6.81	16.86	11.77	0.90	-46.66	21.00	41.72	4.38	0.00
PORTUGAL	8.37	24.44	12.88	0.90	-57.22	31.37	58.97	25.17	8.73
SPAIN	7.25	13.33	7.26	-2.27	-76.90	85.96	110.94	27.60	15.76

Figure 3 Rate of tourism receipts in the 2016-2024 period
Source: Own processing based on existing data on Eurostat database, available at https://ec.europa.eu/eurostat/data/database (accessed 15.06.2025, 15.00)

Legend:

≤ -50	from -50 to -25	from -25 to 0	from 0 to 25	from 25 to 50	≥ 50

The evolution of the tourism receipts rate in the 2016–2024 period highlights important differences between states, but also common trends of the European tourism sector. Between 2016–2019, some states like Portugal, Poland, the Netherlands, and Greece register constant increases, frequently over 10%, which indicates an expansion of tourism activity and an increase in their attractiveness. On the other hand, states like France and Spain present more moderate variations, suggesting a high level of maturity and stability of tourism revenues. The year 2020 marks a sharp decline in receipts in all analyzed states, with the largest decreases recorded in Spain (-76.90%), Greece (-73.09%), Germany (-62.19%), and Italy (-60.59%), which reflects the major impact of the pandemic on the tourism sector. In the 2021–2022 period, a rapid recovery is observed, characterized by significant growth, such as Greece (120.84% in 2021), Spain (110.94% in 2022), and Italy (72.32% in 2022). These values are influenced by the resumption of tourist circulation and the recovery effect after the drops in the previous year. In the years 2023–2024, the growth pace tempers down, with most states recording values between 4% and 15%, indicating a stabilization of tourism revenues; overall, the evolution of this indicator highlights both the recovery capacity of European tourism and its sensitivity to external factors.

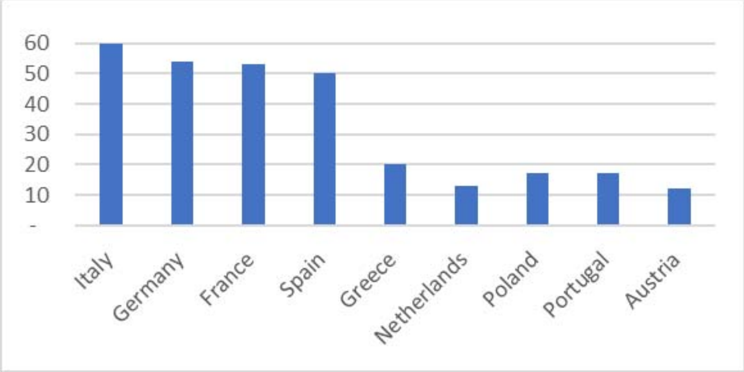

Figure 4 Distribution of sites inscribed in the UNESCO World Heritage in the analyzed states, year 2024
Source: Own processing based on existing data, available at https://whc.unesco.org/
(accessed 20.08.2025, 22.34)

The number of objectives inscribed in the UNESCO World Heritage for the main European states in 2024 highlights significant differences between them; Italy occupies the first place, with 60 UNESCO sites, followed by Germany (54), France (53), and Spain (50). These states form a dominant core, characterized by a diverse and well-preserved cultural and natural heritage; the high number of objectives reflects both the historical importance of these countries and their ability to valorize and promote heritage internationally. In contrast, the other states register lower values. Greece (20) is located at a considerable distance from the leaders, while Poland and Portugal (17 each) present moderate levels. The Netherlands (13) and Austria (12) are at the bottom of the ranking, with a smaller number of UNESCO sites.

The distribution highlights a concentration of cultural heritage in a few European states, especially those with a long history and high cultural diversity; furthermore, the number of UNESCO objectives has a direct impact on tourism, as these represent major attractions for visitors and contribute to the increase of tourist flows(Van der Zee et.al., 2024). Thus, states with a high number of UNESCO sites, such as Italy, France, and Spain, are also among the most visited tourist destinations in Europe; cultural heritage becomes, in this context, an essential factor of tourism competitiveness and economic development.

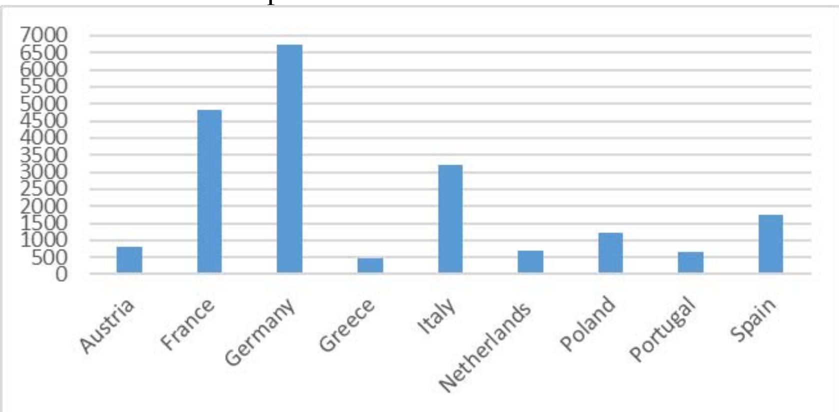

Figure 5 Number of Open Museums in 2023
Source: Own processing based on existing data on STATBASE, available at
https://statbase.org/datasets/tourism-and-leisure/(accessed 15.03.2026, 20.00)

The distribution of museums in European states highlights important differences in the development of cultural infrastructure. Germany (6,741) and France (4,811) possess the most extensive museum networks, followed by Italy (3,195), consolidating their role in cultural tourism. Spain (1,732) and Poland (1,233) are situated at an intermediate level. Austria, the Netherlands, and Portugal register between 662 and 825 museums, demonstrating more restricted but efficient systems. Greece (487) has the lowest number, due to the predominance of archaeological sites.

Overall, these differences reflect the capacity to valorize heritage and influence tourist attractiveness.

4. Conclusions

Beyond the quantitative evolution of tourism indicators, the analysis highlights a structural transformation of European tourism, increasingly oriented towards sustainability and the valorization of cultural identity. The post-pandemic period has accelerated the transition from mass tourism models to more diversified and experience-based forms of tourism, in which cultural heritage plays a central role. This shift emphasizes not only the importance of preserving heritage assets but also the need to integrate them into coherent and sustainable tourism strategies.

Another important conclusion concerns the resilience capacity of the European tourism sector. Despite the unprecedented shock generated by the COVID-19 crisis, the rapid recovery observed after 2021 demonstrates a high degree of adaptability, supported by institutional measures, digitalization, and the reconfiguration of tourism demand. However, the differences between states suggest that resilience is uneven and strongly influenced by factors such as economic structure, dependence on international tourism, and the flexibility of national policies.

At the same time, the research underlines the growing importance of cultural infrastructure and public investment in strengthening tourism competitiveness. States that combine a high number of UNESCO sites with well-developed museum networks and consistent cultural policies tend to achieve superior tourism performance. This confirms that cultural heritage should not be treated solely as a passive resource, but as an active component of economic development strategies.

Finally, the study suggests that future development of European tourism will depend on the ability of states to balance growth with sustainability. Over-tourism, environmental pressures, and the degradation of cultural assets remain significant challenges. Therefore, integrated policies that promote responsible tourism, digital innovation, and the protection of cultural heritage will be essential for maintaining Europe's global leadership in tourism.

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