

## Trends Regarding the Destinations Preferred by European Tourists during the Covid-19 Pandemic

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### Abstract

*Competition between tourist destinations has always existed, both nationally, regionally and internationally, and represents differentiation from a number of perspectives, such as the quality of the environment and services offered, tourists' perception of quality, value for money, etc. With the advent of the pandemic, competition has become even fiercer, with each tourist destination seeking to survive in the market. In this situation, tourism destination management has had to reassess and design its tourism offerings in order to gain market position and at the same time has had to adapt to the safety measures taken during the pandemic and implement new strategies to integrate these measures. The main tourist destinations in the European Union have been all the more difficult to manage as the interests of tourism organisations are diverse and stakeholders are often in conflict, especially during the pandemic. This paper explores the issue of management of the main destinations in Europe from a statistical perspective using the analysis and processing of existing official European Union data on the countries representing the main tourist destinations during the Covid-19 pandemic.*

**Key words:** tourism, Covid-19, destinations

**J.E.L. classification:** Z32

### 1. Introduction

Tourism is considered a driver of economic growth and one of the most important service industries in many European countries. The Covid-19 pandemic, with the safety measures and movement restrictions imposed, has put pressure on tourist destinations around the world to better position their tourism offerings in a highly competitive market, either by reducing costs or differentiating their products. In response to the pandemic measures, integrated management of tourist destinations and sustainable use of tourism resources have become a major issue for many European tourist destinations. Adaptability has been the key activity for destinations in Europe that have remained at the top. Among the most visited countries during the pandemic were Spain, Italy, France, Germany, Greece, etc. Although they were the most visited destinations in Europe during 2019-2021, the number of tourists and overnight stays decreased considerably compared to previous years due to the measures imposed in the pandemic. Nearby countries became the top destinations in Europe for tourists looking to travel close to home during this period. Therefore, the proximity of the tourist destination as well as the accessibility in terms of safety measures imposed were the main criteria in the choice of tourists. Moreover, there has been an increase in domestic travel. Travel restrictions around the world have led people to travel within their own country, thus boosting domestic tourism. In the European Union, receipts from domestic tourism were 1.8 times higher than receipts from international tourism (UNWTO). The countries where domestic tourism experienced the highest growth in 2019-2021 were Germany and France.

## 2. Literature review

The Covid-19 pandemic has had an impact on the world's tourism business. Perceptions of travel risk and management by tourists have been important factors in their choice to travel both locally and internationally. Due to extraordinary levels of travel restrictions implemented by about half of the world's population, the Covid-19 epidemic altered many facets of society, including tourism management. Bartl and Schmidt (1998) claim that destination management includes "the strategy employed by strong regions with the guts to focus their abilities on aggressively marketing and actively coordinating their most valuable competitive assets. As a result, destinations that can provide their guests a chain of services that are perfectly coordinated, pertinent to their decision, and cover the entire process from gathering information and making an easy booking through the ideal length of their stay to their return home, emerge." Schmidt and Bartl (1998) established destination management as a simple framework for travel companies to do business in the era of explosive technological development (Palatková, 2006).

According to Minguzzi, "Destination management is the integrated management of the processes necessary to establish a connection between a location and its visiting tourists. In order to manage demand, which depends on visitor volume and customer satisfaction, it is necessary to manage the services offered and the factors that attract tourists on the one hand and" (Minguzzi, 2006). Destination Management Organizations (DMOs), which are in charge of directing and organizing activities at the destination into a cohesive strategy, are typically in charge of destination management. Despite the fact that they are not directly in charge of all the actions taken by the many agents at the location, they combine resources, expertise, a certain amount of independence, and objectivity to set the course (UNWTO, 2007).

Destination Management Organizations (DMOs) frequently serve as the only advocates for a comprehensive tourism industry in a location. In this capacity, they make sure that the negative effects of tourism on the environment and local communities are minimized and that opportunities are shared to promote a vibrant intercultural exchange. In fact, a DMO can be most effective at fostering communication between the public sector, the business sector, and other stakeholders who might not normally work together or comprehend how their choices can affect the value chain within a tourism destination.

The positioning of the destination in the market is directly related to the development of management structures and procedures at the destination level. The only locations that can manage tourism development in a sustainable fashion and compete effectively are those that are sufficiently large. Destination management aids in elevating the destination and gauging its attractiveness. Destinations are spatial units that have the ability to be recognized in global competition, to be positioned as a brand, and to be created and promoted with sustainable development in mind because of their size and structure (Partale, Partale, 2019).

In order to maximize the economic and social benefits of tourism, a competitive destination must be properly managed, promoted, and coordinated with all relevant parties. Four distinct tasks are involved in destination management: (1) information function; (2) planning function; (3) satisfaction function; (4) marketing function. The information function aims to create an information base on supply, demand, achievement of objectives, etc., helping to create connections with stakeholders. The planning function refers to the creation and implementation of management strategies to provide guidance and development in the given tourism context. The satisfaction function aims at meeting tourists' expectations regarding the quality of services offered. This complex task includes the development and/or provision of fundamental tourism-related structures, the professionalisation of tourism-related businesses and the combination of services into marketable products. Last but not least, the marketing function aims to promote the destination so that as many people as possible reach it and help attract as many tourists as possible. (Partale, Partale, 2019)

Each tourism location is unique, thus it necessitates the development and application of various management methods based on the recognition and redefining of the destination's vision. In order to do this, each destination need a unique development concept that outlines its goals, brand positioning, core businesses, and key areas of activity. The information from the study and evaluation of tourist arrivals and overnight stays serves as the foundation for this. Monitoring progress toward previously

stated goals and maintaining control over associated actions is another step in the strategic planning process (Partale, Partale, 2019).

A successful destination management strategy contributes to a tourism location's growth in terms of both visitors and assets. Therefore, the quantity of lodging, the caliber of the services, the attractions, and the number of tourists are all indicators of effective destination management. Additionally crucial are sustainability, cooperation with stakeholders, and the development of partnerships. They are regarded as the most significant stakeholder group in terms of the amount of tourists and addressing their wants. Their significance is clear given how significantly they affect tourism. Destination management is responsible for monitoring the impact that visitors have and for investigating all the variables that influence their decisions. (2010) Bornhorst et al. Understanding destination management and how it may be accomplished will be improved by taking into account the viewpoint of tourists. To meet management goals, it can help to comprehend how tourists feel about destination management. Tourists are more likely to respond favorably to the policies and procedures put in place when it is recognized that they share the same values as other stakeholders, especially when an effort is made to inform them about a certain destination (Stanford, 2006).

With the advent of the Covid-19 pandemic, tourism destination management has required adherence to a very high degree of adaptability for the survival of tourism destinations. The emergence of the pandemic crisis has unprecedentedly transformed the reality of tourist destinations around the world, producing an unusual scenario of undertourism. (Mestanza, Bakhat, 2021) Tourism has seen a huge drop in demand due to restrictions, with the pandemic affecting the welfare of local communities that depended heavily on tourism. This triggered an economic crisis in both the tourism sector and its associated organisations, with the pandemic having a major impact on overall GDP and employment.

Tourism management's response to this has focused on safety and quality, which are indispensable in a situation such as that created by the Covid-19 pandemic. One of the key efforts to promote safe corridors and sustainable tourism in the wake of COVID-19 was the creation of a 'travel bubble', an agreement between two or more neighbouring countries to allow citizens to travel between them without having to stay in quarantine. (Fusté-Forné, Michael, 2021). Other destination management efforts have involved promoting streaming experiences, promoting medical, regional, creative and even virtual tourism. In the crisis period, it has become imperative for tourism businesses to develop strategic approaches through which they can generate a competitive advantage and cover regional tourism.

Tourism, as an important driver of economic activity, contributes to the GDP of many European countries, e.g. Greece, about 7%; France, over 7%; Portugal, 8%; and Spain, about 12% (OECD, 2020). These countries maintained their position as top tourist destinations even during the pandemic but experienced significant declines in tourist numbers and contribution to GDP. As international tourism declined by about 80%, domestic tourism helped mitigate the problem. For this reason, the tourism economy needs to rethink its future, move to the digital transition and use green, resilient and sustainable strategies to recover.

### 3. Research methodology

The research methodology is based on EU-wide statistical data on overnight stays in tourist accommodation establishments in EU countries for the period 2019-2022 to identify the main destinations in Europe preferred by domestic and foreign tourists. Thus, the analysis was carried out on the basis of tourist overnight stays by origin in the top destinations during 2019-2021, as well as using a comparative analysis of nights spent in March 2019-2022. We have chosen March as no data for the current year is yet available for the following months.

The indicators chosen to analyse the trend in tourism in the main destinations of the European Union are the *overnight stays of European tourists in tourist accommodation establishments in the EU Member States in 2019-2021*, the *distribution of overnight stays by origin of tourists (domestic/foreign) in 2019-2021* and the *overnight stays of tourists in the main tourist destinations of the EU in March 2019-2022*. The data processed in the research was taken from official data provided by EuroStat.

The information obtained from processing official data on overnight stays in EU countries has allowed us to get an overview of the evolution of tourism and helped to identify the most visited destinations during the years under analysis (2019-2020). Fluctuations recorded in March 2019-2022 were also identified in order to make a comparison highlighting the impact of the covid-19 pandemic on tourism in the main European destinations.

#### 4. Findings

According to EuroStat data, in 2019, EU citizens made 1139 million journeys and spent 5717 million nights while travelling. Tourism expenditure amounted to EUR 479474 million (Table 1). About three out of four trips (72.7%) were domestic (in the tourist's country of residence). In terms of overnight stays, domestic trips accounted for 57.6% of the total. Spending by tourists on domestic trips accounted for 42.7% of the total. These data indicate a dominant domestic market for most EU countries.

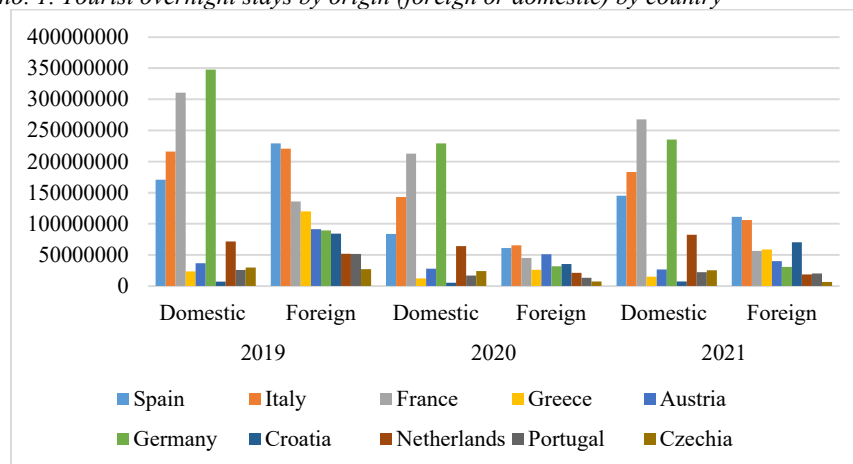
Table no. 1. Trips, nights spend, expenditure of EU residents - domestic and outbond

	Domestic trips	Outbound trips	Total trips
Trips	827420	311437	1138857
Nights	3295342	2421792	5717134
Expenditure (million euro)	204592	274882	479474

Source: Eurostat (<https://ec.europa.eu/eurostat/statistics-explained>) [Accessed on 16th November, 2022]

Based on data on nights spent by European tourists on domestic and foreign trips, it was found that Germany is the country with the most domestic tourists, while Spain is the country with the most foreign tourists. Thus, in 2019, more than 10% of European outbound trips were made to Spain, followed by trips to Italy (9%). France and Greece ranked next for countries that received a high number of European tourists from foreign countries. In terms of domestic trips, Gemania is followed by France, Italy and Spain. In 2020 the trend of nights spent in all 10 countries analysed is downwards. However, Germany remains the country with the highest number of domestic trips, while Italy, closely followed by Spain are the countries with the highest number of overnight stays by foreign tourists. In 2021, the number of overnight stays by European tourists shows a slight increase compared to the previous year, but remains well below the 2019 level. The countries preferred by tourists for outbound trips are Spain and Italy and for domestic trips France and Germany.

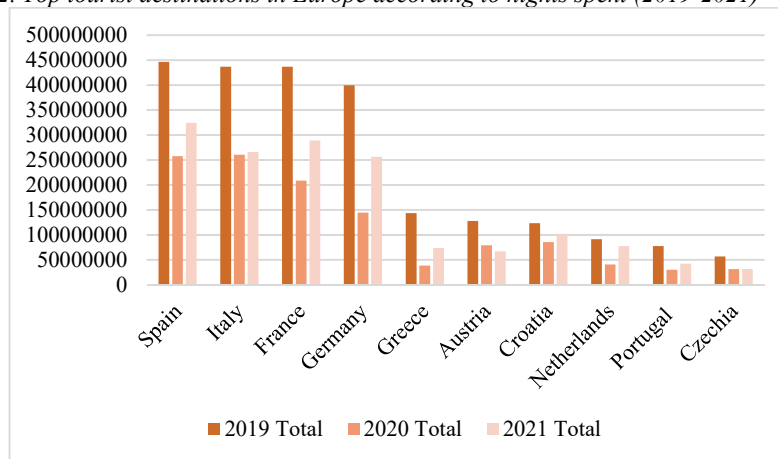
Figure no. 1. Tourist overnight stays by origin (foreign or domestic) by country



Source: Eurostat (<https://ec.europa.eu/eurostat/statistics-explained>) [Accessed on 16th November, 2022]

More than 400 million domestic and foreign tourists travelled to and stayed in Spain in 2019, making this European country the first most visited country in the EU, closely followed by Italy (436,954 million) and France (436,954 million). In 2020, Spain also ranks first in Europe in terms of travel by foreign and domestic tourists. However, there is a significant decrease of 42% compared to the previous year (257 841 million). In 2021, Spain remains the European country of choice for European domestic and foreign tourists, with an increase in overnight stays of 17%. The next countries in the top tourist destinations in Europe are Italy, France and Germany. They are followed by Greece, Austria, Croatia, the Netherlands, Portugal and the Czech Republic. In comparison to 2019, there is a trend toward less overnight stays across all of the nations examined in 2020. Additionally, there is a little rise in the quantity of overnight stays in 2021 compared to 2020, but it is still significantly less than in 2019.

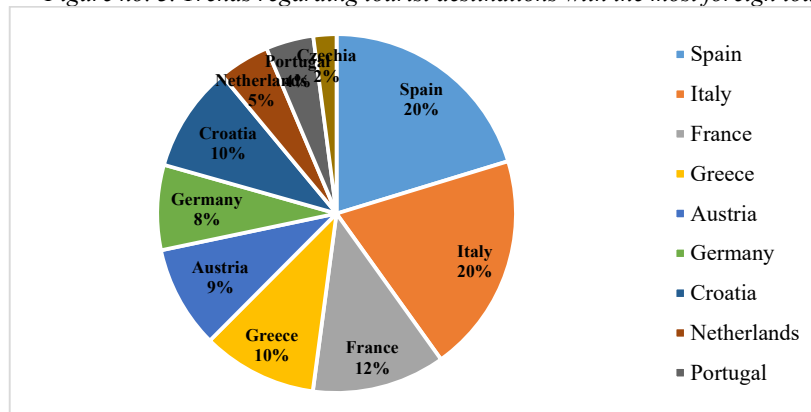
Figure no. 2. Top tourist destinations in Europe according to nights spent (2019-2021)



Source: Eurostat (<https://ec.europa.eu/eurostat/statistics-explained>) [Accessed on 16th November, 2022]

According to the data analysed, European tourists preferred destinations close to home during the period analysed. More than seven out of ten (71.4%) trips by Europeans were spent within the EU. For the period analysed (2019-2021) the country that received the most foreign guests is Spain (401.335 mil), closely followed by Italy (392.112 mil). France and Greece were the next European countries with the highest number of foreign tourists, representing 12% respectively 10% of the total of the top 10 most visited countries in Europe during the period analysed. Croatia and Austria also received a large number of foreign tourists (189 million; 182 million). Germany, the Netherlands, Portugal and the Czech Republic also received many guests during this period, but the number of domestic guests dominated.

Figure no. 3. Trends regarding tourist destinations with the most foreign tourists 2019-2021

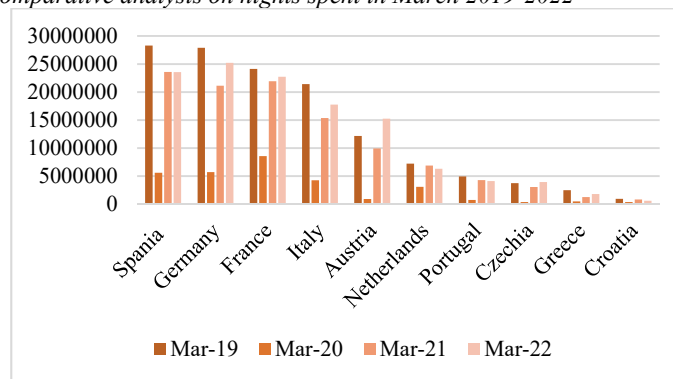


Source: Eurostat (<https://ec.europa.eu/eurostat/statistics-explained>) [Accessed on 16th November, 2022]

In order to follow the evolution of tourism during the Covid-19 pandemic until 2022 in countries considered to be top destinations in Europe, the number of overnight stays in March each year was analysed. This showed a downward trend in 2020, with a drastic decrease in overnight stays in the countries analysed in March of this year. In March 2020, overnight stays fell by up to 80% compared to March 2019. March 2021 saw major increases (by up to 18 mil) in overnight stays in the countries analysed.

Thus, in Spain, the main destination preferred by European domestic and foreign tourists, in March 2020 there were 5,591,945 overnight stays in tourist accommodation establishments and in March 2021 there were 23,614,135 overnight stays, more than four times more than in the previous year. Germany recorded 5,715,502 overnight stays in March 2020 and 21,125,594 overnight stays in the same month of the following year. In France, 8,571,391 overnight stays were recorded in March 2020 and 21,950,805 overnight stays in the same month of 2021. In each of the countries analysed there was an increase in the number of trips and nights spent by tourists in March 2021 compared to March of the previous year. The countries with the smallest decreases in the number of tourists in March 2020 compared to March 2019 were Croatia (approx. 45%), the Netherlands (approx. 50%) and Greece (approx. 65%). In March 2022 an upward trend continued in most of the countries analysed, with slight increases in the number of overnight stays. Countries where the number of overnight stays decreased in March 2022 compared to March 2021 are the Netherlands, Portugal and Croatia.

Figure no. 4. Comparative analysis on nights spent in March 2019-2022



Source: Eurostat (<https://ec.europa.eu/eurostat/statistics-explained>) [Accessed on 16th November, 2022]

## 5. Conclusions

The most visited countries in the European Union in 2019-2021 were Spain, Italy and France, closely followed by Germany. Greece, Austria, Croatia, the Netherlands, Portugal and the Czech Republic followed. In terms of type of travel, countries such as Germany, France, Italy, the Netherlands and the Czech Republic recorded a higher number of domestic visitors, while countries such as Spain, Greece, Austria, Croatia and Portugal recorded a higher number of foreign tourists. Domestic travel was also driven during this period by the Covid-19 pandemic, due to which movement restrictions and safety measures were imposed on the way guests were received and accommodated. There were some agreements between neighbouring countries on free movement between them to facilitate foreign tourism during the restrictions. One of the countries that has concluded such agreements is Greece because it is a country whose economy is predominantly based on tourism. In Greece, tourism is considered a strategic area and even a national priority, and special economic policies are implemented to enhance the positive effects that this branch has on the development of the national economy. During the Covid-19 pandemic, measures were taken at national level and management strategies were implemented to help the development of tourism activities, at least in part.

The main destinations in Europe are mainly around the Mediterranean Sea but also in other regions of Portugal, Spain and France, the Alps, the coastal areas of Belgium, and Germany, Finland and Sweden.

The regions most affected by the pandemic during this period, i.e. those with high susceptibility and exposure, are the main urban destinations, including the capital regions of Athens, Berlin, Madrid and Paris, and destinations in southern Europe and the Alps, such as Italy.

During the period under review, there is a drastic decrease in overnight stays in 2020, followed by a slight increase in 2021, with a focus on domestic travel. There are also countries with high susceptibility and low exposure that have benefited from a so-called pandemic advantage as they have experienced more tourists than normal. These include Austria and Croatia, among the countries analysed. The countries with the highest tourist activity in 2020 remained Spain, Italy, France and Germany.

However, being highly dynamic, the tourism sector is constantly adapting to new requirements, changing contexts and emerging offers in other areas. Consequently, preparing for resilience is essential to ensure the development of regional tourism in the medium and long term. The importance of preparedness and resilience has been underlined by the COVID-19 pandemic. The resilience of local and regional tourism ecosystems varies greatly depending on the tourism industries in an area and their share in the local and regional economy.

The hospitality sector in Spain, the top destination in Europe, has been hit hard by the pandemic, but has also recovered rapidly since 2021. The rapid recovery of the sector has led to an increase in demand for new employees. However, the sector - which typically employs one in eight workers - is facing staff shortages. The tourism sector in Spain accounts for 13.3% of the total number of registered workers in the country and is one of the sectors contributing most to job creation.

Spain is also the European country that received the most foreign tourists in 2019-2021, closely followed by Italy. The natural resources as well as the management of tourist areas in these countries contribute to their ranking among the most visited countries in the EU. In 2019 and 2022 Spain ranked first in the preferences of European tourists and in 2021 it was Italy. France and Germany recorded a lower number of overnight stays by foreign tourists (from Europe). Greece is the country that ranks third in the top in terms of overnight stays by foreign tourists recorded in 2019-2021.

The analysis of March 2019-2022 overnight stays showed a drastic decrease in tourism in the countries analysed in 2020 and a gradual increase in the following years. Thus, in March 2019, the most overnight stays were recorded in Spain, followed by Germany, France and Italy. In March of the following year (2020) the country with the most visitor overnight stays was France, followed by Germany, Spain and Italy. In March 2021 the most visited country in the EU was Spain, followed by France, Germany and Italy. And in March this year the top countries with the most overnight stays were Germany, France, Spain, Italy.

So Spain, Italy, France and Germany are the countries in the European Union with the highest number of overnight stays by domestic and foreign visitors in Europe. The research showed that Germany is the country with the most domestic visitors during this period, while Spain is the country with the most foreign visitors in Europe. The Covid-19 pandemic affected all the countries analysed and tourism worldwide, with the most drastic decreases in the number of overnight stays by European tourists in the countries analysed in 2020 and an upward trend in the following year. March, as the reference month for the start of the Covid-19 pandemic worldwide, shows the fluctuations in the top destinations preferred by Europeans in 2019-2022. So in 2019 the preferred country was Spain, in 2020 France, in 2021 it was Spain again and in 2022 Germany.

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