

Trends and Prospects for Tourism Development in EU Countries

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Abstract: The purpose of the study is to identify trends and prospects for tourism development in the European Union (EU). It has been established that tourism in the EU is recovering rapidly after COVID-19 due to high consumer demand. According to the results of the analysis, it is noted that tourism is a key sector of economic growth and a driver of job creation in the EU due to an increase in the number of jobs in tourism, an increase in the payment of wages, and the level of GDP. Measures to improve the welfare of the population through tourism are investigated. Promising directions for the development of tourism in the EU are proposed, including: support for people with disabilities, youth; preservation of cultural and natural heritage; increase of EU membership; harmonization of quality standards; and assignment to the European Commission of the responsibility to create an appropriate space for the activities of all those interested in the field of air transport. The results of the study made it possible to formulate recommendations on the prospects for tourism development in the EU, which will strengthen the euro against the US dollar, increase the competitiveness of Europe's tourist attractiveness in the world and contribute to GDP growth and the welfare of the EU population.

Keywords: tourism; EU; development; prospects; economy; forecast; inflation

JEL Classification: Z32; O52

1. Introduction

The purpose of the study is to identify trends and prospects for tourism development in the European Union (EU). The EU economy is focused on the social and environmental well-being of countries. Tourism is a popular type of economy that influences the economic development of countries and is a budget-forming industry. The importance of institutional factors such as low corruption, political freedom and intellectual property play a positive role in the development of EU countries and have a positive impact on the development of tourism in Europe compared to non-EU countries. Improving the environment has a positive impact on tourism revenues. This is due to the promotion of innovative practices in the field of circular economy in the areas of ecosystems, management and sustainable tourism. Today, a significant role in the development of tourism in the EU countries is played by the ever-increasing GDP per capita, which has been growing over the past decades, and the experience gained in overcoming the COVID-19 pandemic crisis. Furthermore, the development of tourism in the EU depends on the economy of the EU countries, which in turn depends on public administration, economic structures, business management, and other micro and macroeconomic indicators. The existing negative problems of the EU economy, such as the

shadow economy, loss of wealth due to income inequality, the financial crisis due to the war in Ukraine, inflation, and the slow development of digital technologies in the tourism industry, necessitate a more detailed study of the trends and prospects for tourism development in the EU.

2. Theoretical Part

Researchers Misini and Tosuni (2023) investigated which EU countries were most affected by COVID-19 and what economic consequences 27 European countries received from 2000 to 2020. The researchers also studied the impact of Russia's invasion of Ukraine on EU countries. It was found that the countries most affected by COVID-19 are those that depend on tourism. And Hungary, the Czech Republic and the Republic of Ireland were recognized as the most affected by Russia's invasion of Ukraine. In particular, this approach does not examine the impact of the pandemic on European welfare, nor does it determine the forecast values of tourism development in the EU in the future.

Grané et al. (2021) in their study identified the socio-demographic impact of the population in 28 European countries on European well-being after the COVID-19 pandemic. Scientists have proved the need for public policy to be differentiated and the need for governments to develop action plans to improve the physical and mental health of vulnerable populations. This approach points to the fight against poverty and state support for economically inactive segments of the population (retirement age) due to their financial difficulties. The scope of research in this aspect requires studying the impact of the COVID-19 pandemic on different age groups and supporting their well-being through tourism.

Researchers Shkolnykova et al. (2024) identified the factors that influence the economy in Central and Eastern Europe based on a clear distinction between EU and non-EU countries. This study identifies the importance of the impact of institutional variables on economic development in Central and Eastern Europe, thus leaving out Southern, Western and Northern Europe and how tourism affects the development of the European economy.

Erdiaw-Kwasie et al. (2023) studied tourism revenues in Europe. The researchers proved that tourism revenues are increasing due to the improvement of the quality of the ecosystem in EU countries and the increase in innovative components. The study was conducted for the period from 2000-2020 and requires the identification of further practical proposals for the development of tourism in the post-COVID-19 period.

Sánchez-Bayón et al. (2023) identified changes in the economies of EU countries due to failures in the management of the tourism sector, whose economic structure is not adapted to the digital transition. Researchers have identified improvements in the European economy due to digital technologies. Therefore, this approach emphasizes the restructuring of the tourism sector due to the impact of digital technologies, but there is a need to take into account the environmental component and the relationship between the EU governments and the population in this process.

Van der Slycken and Bleys (2024) identified the gap between wealth in Europe and GDP, due to the financial crisis and income inequality. The fact that the welfare of the population in 9 EU countries is declining indicates a focus on social and environmental well-being. Such

an approach requires exploring how tourism can have a positive impact on both improving the EU's GDP per capita and increasing the income of the population.

3. Methodology

The theoretical basis of the study is the fundamental works of scientists on the development of tourism in the EU, its evaluation, identification of problems and factors influencing its development. The following special methods were used in the study: structural and logical analysis (for the logical structural construction of the work and the formation of conclusions); generalization and systematization (to systematize the views of scientists, to identify approaches to identifying trends in the development of tourism in the EU); analysis and synthesis (to determine the peculiarities of digitalization in tourism, forecast values of tourism development in the EU, factors influencing tourism development); graphic representation (for analyzing the main trends and prospects of tourism development in the EU, visual representation of statistical materials and analytical data); comparison (to analyze tourism development before, during and after COVID-2019 and its consequences).

To determine the trends and prospects of tourism development in the EU countries, the following indicators were analyzed: the number of nights spent in accommodation facilities; the number of people employed in tourism; wage levels in the EU; GDP growth and its contribution to the travel and tourism sector; the number of employees by business size class in accommodation and catering establishments; the current state of inflation in tourism; and expected forecast growth in tourism based on GTS data; measures to support tourism development in the EU. The research was supported by the following documentation: UNWTO, Eurostat Statistics Explained, European Commission, European Parliament, European Innovation Scoreboard, Statistisches Bundesamt, and World Travel & Tourism Council.

4. Results

Summarizing the above, the study will determine: how tourism has developed in the EU after COVID-2019 and its current state; how tourism is improving European welfare; what factors have a positive impact on economic development in Europe due to tourism; how digitalization affects tourism, taking into account the environmental component and governing bodies; what measures can be taken to improve the welfare of the EU population through tourism and, as a result, what are the prospects for tourism development in the EU today.

Let us examine the short-term dynamics of the number of overnight stays in tourist accommodation facilities in the European Union (EU) with a comparison of data for the same period of the previous year, as shown in Figure 1.

These dynamics have been followed by a sharp decline in tourism during the COVID-19 pandemic since 2019 and throughout 2020. The analysis showed a steady growth in tourism over the study period, starting in 2008 until the start of the pandemic, after which the number of nights spent decreased in the EU and globally.

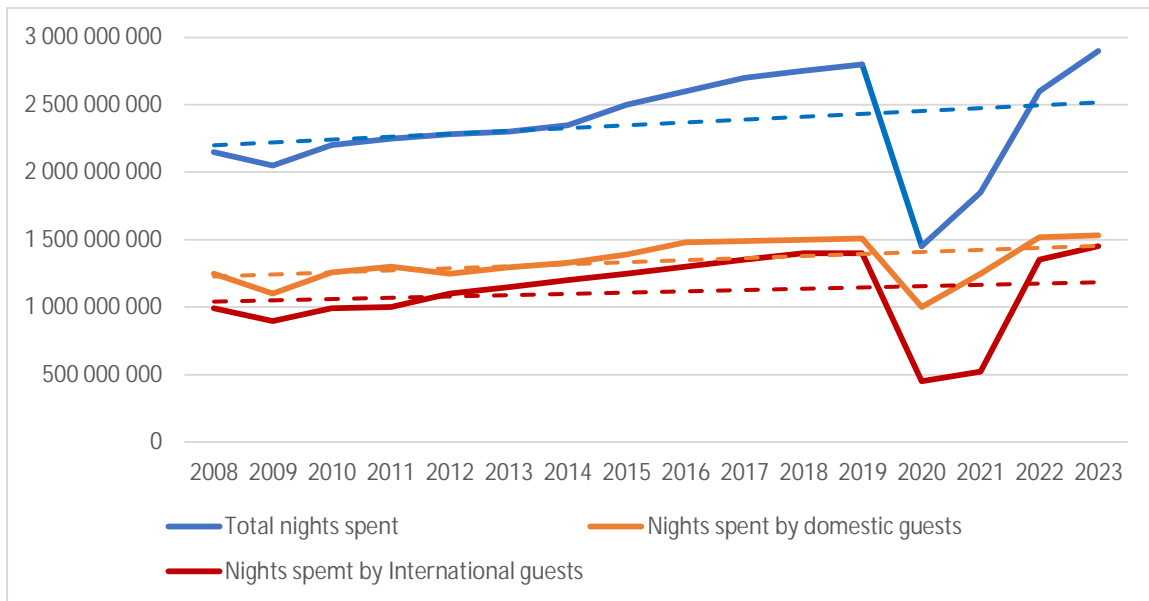


Figure 1. Annual estimates – Number of nights spent in tourist accommodation establishments, EU, 2008-2023 (Eurostat, 2024c)

Tourism has ceased its operations and gained new experience in overcoming the crisis due to the COVID-19 pandemic. Thus, the positive dynamics of tourism recovery in the EU countries have been observed since the beginning of 2021 and during 2022-2023, and the data for 2023 have already exceeded the figures for 2019.

The next indicator is developments in the tourist accommodation sector in the European Union. Figure 2 shows that the total number of international nights in the EU in 2022 was 1.2 billion (Eurostat, 2024c).

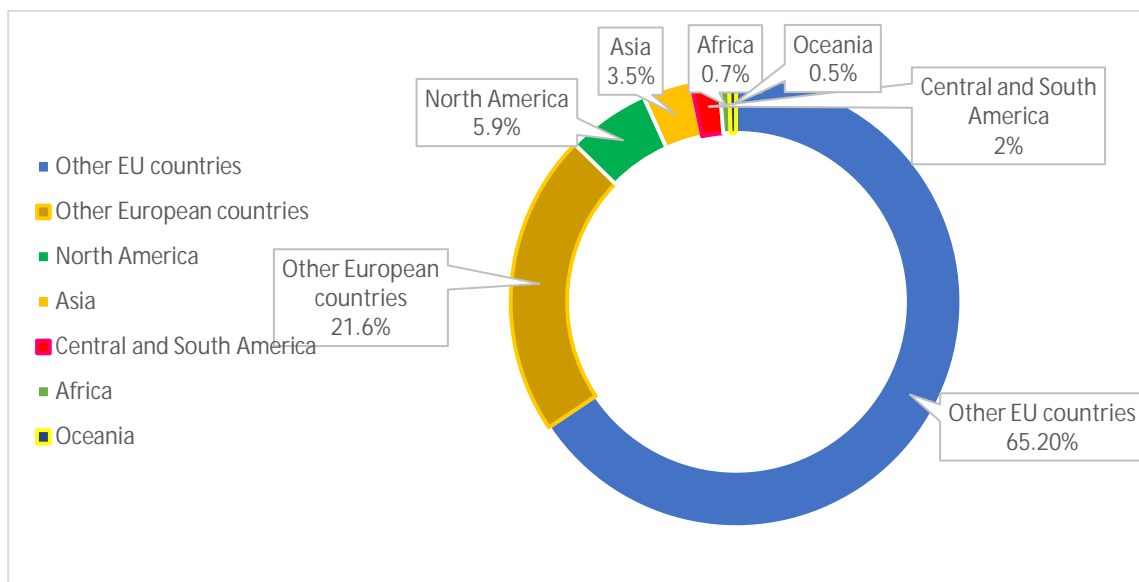


Figure 2. Nights spent by international guests in tourist accommodation in the world and the EU in 2022 (Eurostat, 2024c)

The results of Figure 2 show that among the countries of the world, Europe has the largest number of international nights. This indicates the high tourism potential in EU countries and the high interest of tourists in long-term travel. In 2022, there was a return of

international tourists traveling to the EU, with expenditure by foreign tourists increasing by 81% compared to 2021 and reaching almost €385 billion. Spending by domestic tourists fully recovered in 2022, surpassing the pre-pandemic high of €809 billion and reaching €814 billion (Eurostat, 2024a). Tourism is growing rapidly in Germany, Italy, Spain and France. Paris remains the most popular tourist destination in the world (Eurostat, 2024a).

After growing steadily between 2009 and 2019, tourism in the EU has become one of the sectors most affected by the COVID-19 pandemic from 2019-2020. The number of nights spent in EU tourist hotels in 2020 was halved compared to 2019. 2021 showed clear signs of recovery, reaching almost two-thirds of the 2019 level. The upward trend continued in 2022, when it reached 96%, while short-term indicators for monthly data showed that the number of nights spent in the first six months of 2023 exceeded the pre-pandemic level of the first six months of 2019 (Eurostat, 2024c). This figure also confirms the recovery of tourism in the EU after COVID-19.

The next indicator - the share of the population employed in tourism in 2022 by EU countries – is shown in Figure 3.

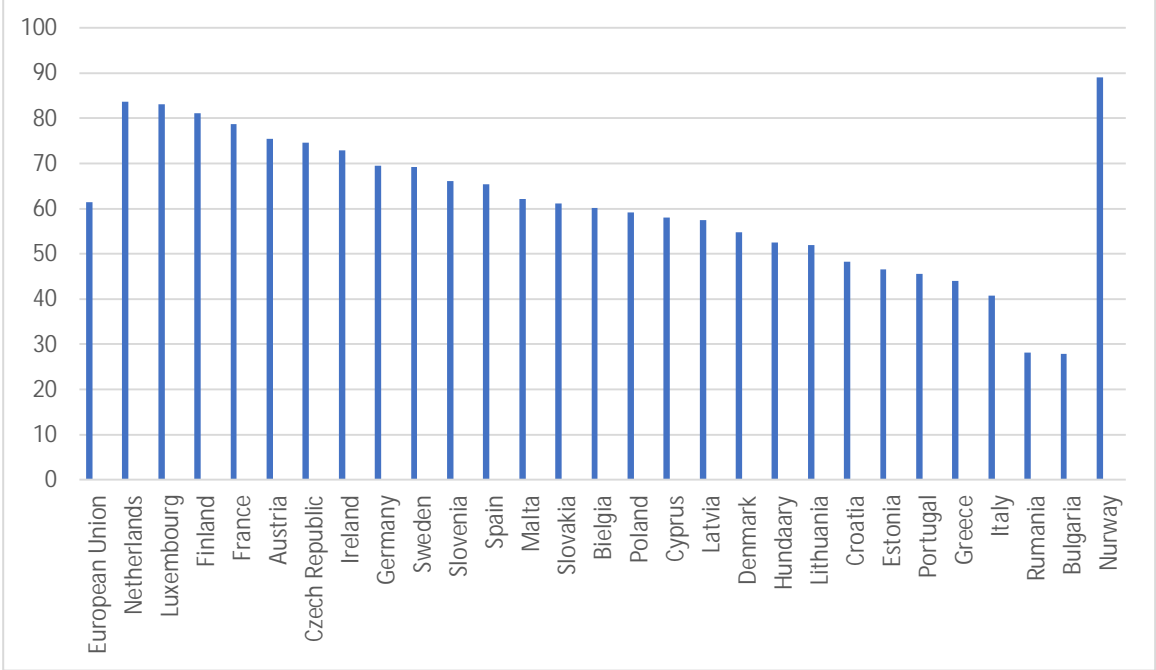


Figure 3. Share of population EU participating in tourism, 2022 (Eurostat, 2024c)

The data on tourism statistics in the European Union identify the leading countries that are developing tourism the most. Among them, the top five are Norway, the Netherlands, Luxembourg, Finland, and France. Tourism plays an important role in the EU by increasing the economic potential of countries, and employment, and has positive social and environmental impacts. In 2022, the tourism sector also created 2 million more jobs compared to 2021, reaching 21.8 million jobs - one in ten jobs in the EU. According to the World Tourism Organization, the tourism sector has recovered 3.1 million of the 3.6 million jobs lost during the pandemic (WTTTC, 2023). The World Travel and Tourism Council (WTTTC) predicted that in 2023, the tourism sector will create more than 687,000 jobs, recovering almost 90% of the jobs lost due to the COVID-19 pandemic, and reach more than 22.4 million, with one in nine

EU workers working in the travel and tourism sector (Eurostat, 2024a). The positive dynamics of growth in the number of people employed in tourism also indicates a recovery in tourism after COVID-19, the growth of tourism and the improvement of the population's well-being by reducing unemployment.

The next indicator is the hourly wage in the EU, which in 2022 increased by 4.4% across all sectors of the economy. In 2022, wages in the EU increased by +4.5% in the service sector, compared to 2021, and its hourly wage increased by +5.0%. (Eurostat, 2024 a). According to the average annual salary in the EU in 2022, it is possible to monitor not only EU tourism policy, but also regional and sustainable development policy.

Thus, in terms of the level of wages in tourism, it can be noted that the welfare of the population in the European Union is growing, increasing the standard of living of the population.

The next indicator is the contribution of the travel and tourism sector to GDP, which grew by 40.5% in 2022 to more than €1.37 trillion, accounting for 8.7% of the EU economy, approaching the record high of 9.6% of the economy in 2019.

Data on employment in the accommodation and catering sector in the EU are shown in Figure 4.

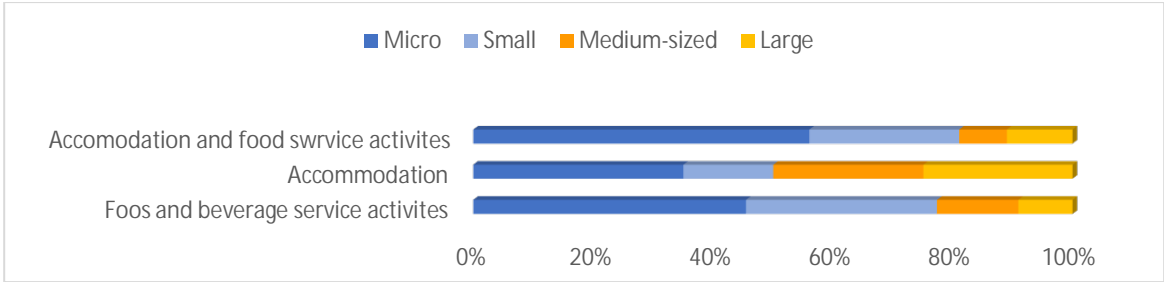


Figure 4. Sectoral analysis of employment by enterprise size class, accommodation and catering activities, EU, 2020 (% share of sectoral employment) (Eurostat, 2024d)

As you can see, we have presented an overview of statistics for the accommodation and food services sector in the European Union (EU) for 2020. It should be noted that these activities make up a significant part of the tourism offer, although they also serve local customers and business clients. 9.1 million people across the EU work in hotels and restaurants (Statistisches Bundesamt, 2024).

Examining European inflationary processes, we note that inflation in the European Union fell to 6.1% in 2023. Analysts point out that the decline in inflation is positive, especially as the disinflationary process has consolidated and expanded in all major price categories, including core inflation. However, core inflation is likely to decline only at a very moderate pace, given the strength of price pressures in the services sector. However, it is clear that inflation in the European Union has already peaked. Forecasts point to a gradual decline in inflation in the coming quarters, with expectations that it will average 5.3% across the euro area this year (ETC, 2024). Inflation in the service sector is returning to its previous level due to lower prices for some goods, but labor-intensive sectors are still experiencing growth. Positive currency movements against the euro in Q2 2023 were observed in the following

countries: Hungary (25.9%), the Czech Republic (15.3%), Bulgaria (10.6%), Poland (13.3%), Romania (11.0%), and Denmark (4.2%) (ETC, 2024).

As you can see, based on many years of experience, tourism maintains Europe's reputation as a leading economic growth destination. Although inflationary pressures have eased, we believe that the EU economy is not yet sustainable. Therefore, we note that there may be a temporary inflationary imbalance due to such negative factors as energy dependence and the war in Ukraine.

The forecasts for tourism in the European Union are based on GTS data. These are the results of the Global Travel Service (GTS) model, which is updated in detail three times a year. The forecasts are in line with the Oxford Economics macroeconomic forecast in accordance with the assumed relationship between tourism and the economy as a whole (Table 1).

Table 1. Visitor Growth Forecasts, % change year GTS (ETC, 2023)*

	Inbound					Outbound				
	2021	2022	2023	2024	2025	2021	2022	2023	2024	2025
Europe	10.9%	108.7%	28.4%	17.2%	13.5%	9.4%	111.6%	28.9%	17.2%	13.4%
ETC+2	24.0%	96.1%	13.2%	11.9%	10.5%	19.8%	101.3%	15.5%	11.8%	10.1%
EU 27	20.0%	106.0%	12.9%	10.9%	9.4%	17.3%	110.1%	14.1%	10.5%	9.3%
Non-EU	14.2%	112.7%	12.7%	10.8%	9.1%	16.0%	114.1%	14.5%	10.4%	9.0%
World	69.3%	44.1%	15.6%	16.8%	16.2%	36.8%	52.3%	20.9%	18.9%	14.9%

* Tourism Economics based on GTS as of 25.06.2023

The GFS forecasts for visitor arrivals include: an inbound figure based on the sum of overnight tourist arrivals per country and including intra-regional flows; an outbound figure based on the sum of visits to all destinations. The geography of Europe was defined as follows: Northern Europe is Denmark, Finland, Iceland, Ireland, Norway, Sweden and the United Kingdom; Western Europe is Austria, Belgium, France, Germany, Luxembourg, the Netherlands and Switzerland; Central and Baltic Europe is Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Moldova, Poland, Romania and Slovakia; ETC+2 is all ETC members plus Sweden and the United Kingdom.

The growth in forecast values is driven by high demand from visitors who are willing to pay for expensive holidays. However, there is concern about overcrowding of travelers. As a result, tourism organizations have launched campaigns to ensure an even distribution by raising the prices of entrance tickets to tourist attractions, as tourists will not necessarily spend money on entry. This increase in visitor arrivals does not bring a proportionate economic benefit. In our view, such a scheme is crucial for tourism to remain socially sustainable for Europe's most popular destinations.

As we can see, EU policy aims to maintain Europe's reputation as a leading destination, while maximizing the industry's contribution to economic growth and employment and encouraging cooperation between EU countries, in particular through the exchange of best practices.

The World Tourism Organization predicts that by 2033, the sector's contribution to GDP will grow to almost €1.9 trillion, representing more than 10% of the EU economy, and employing more than 26.3 million people across the region, with one in eight EU residents

Table 2. Measures to support tourism in EU countries (European Parliament, 2024)

Title.	Measures to support tourism in the EU
1. Activities that benefit tourists (travelers and/or holidaymakers)	Facilitating border crossing and protecting both the health and safety and material interests of tourists. They include Council Recommendation 86/666/EEC on fire safety in hotels, Directive 2008/122/EC on timeshare properties and Directive (EU) 2015/2302 on package travel. Rules on passenger rights in all areas of transport have been adopted.
	At the request of the Parliament, the Commission has taken initiatives in the form of five preparatory programs on targeted topical issues of European tourism.
	The «Eden» Initiative aims to promote Europe's 'great destinations', in other words, little-known and emerging destinations that are sustainable.
	The concept of "sustainable tourism" includes a "European Green Belt" (6,800 km of routes from the Barents Sea to the Black Sea), which aims to promote the transformation of the former Iron Curtain into a cross-border network of hiking and cycling trails. The EU also co-finances cross-border sustainable tourism projects to diversify tourism opportunities in Europe.
	The «DiscoverEU» program, among several other tourism promotion programs, allows 18-year-old Europeans to travel around the EU and learn more about the diversity of Europe.
2. Responsible tourism measures that benefit the tourism industry and regions	The Commission supports the creation of networks between the main European tourism regions. The EU offers a range of funding sources to help tourism contribute to regional development and employment.
	In April 2022, the Commission adopted a proposal to establish a pan-European system for the protection of geographical indications for non-agricultural products. These products are often important for local identity and tourist attraction. One of the objectives of the revised regulation is to stimulate regional economies and tourism in these areas.
	Harmonized tourism statistics have been collected in the EU since 1996. In October 2022, the Commission launched the EU Tourism Dashboard, a tool to help regional and national decision-makers guide policies and strategies in the tourism sector by increasing the availability of tourism statistics and assisting destinations and public institutions in monitoring their progress in the transition to green and digital.
	In November 2022, the Commission adopted a revised Regulation (EU) 2018/1724 on the collection and exchange of data relating to short-term rental services, with a particular focus on small and medium-sized enterprises. This initiative aims to promote responsible, transparent and fair growth of short-term rentals as part of a well-balanced tourism ecosystem.
3. Other events	The Commission holds a demonstration conference on tourism and plans to repeat them systematically.
	In 2023, the Commission adopted a regulation on the digitalization of travel documents. This has made travel easier as digital travel documents are easier to issue, which would benefit the tourism industry.

working in the sector (WTTC, 2023). In our opinion, such promising forecasts will have a positive impact on economic development and tourism in the European Union.

A study of tourism support measures in EU countries is presented in Table 2 (see below).

Since December 2009, the EU has been empowered to implement measures aimed at supporting, coordinating or complementing the actions of Member States in the field of tourism policy. Although the 2021-2027 Multiannual Financial Framework does not include a separate budget line for tourism policy, a budget for tourism activities was provided for in the Single Market Program during 2022-2023.

Measures to support tourism in EU countries include: measures that benefit tourists; responsible tourism measures that benefit the tourism industry and regions; and other targeted measures.

These measures are aimed at improving the well-being of the population through tourism, facilitating tourist travel and ensuring their safety and comfort in accordance with international quality requirements, and supporting vulnerable populations through financial and spa vouchers for rehabilitation; through digital technologies in tourism to reduce energy consumption, manage and reduce fuel costs, use mobile applications and camera systems; improve the environmental safety of society; create platforms with information on popular places to visit; create independent tourist routes and independent public transport for tourists; and promote trust between the public and authorities (But, 2023).

Based on the trends examined, we propose the following challenges for European tourism in the EU in the future:

- transport development and improvement in line with tourist flows and routes,
- environmental protection,
- creating adequate quality of tourism services; creating and effectively using the latest information and communication technologies as a key factor for maintaining competitiveness; improving working conditions and creating new jobs.

In our view, it is important that, following EU enlargement, the strategies used to implement EU tourism policy are similarly applied in the European Economic Area and in the candidate countries. These countries should be involved in the implementation of these policies and related measures and should support the development and dissemination of the evaluation methods and tools (quality indicators and benchmarks) necessary to properly monitor the quality of tourist destinations and services.

To this end, we propose a number of factors that will influence the future development of tourism policy in the EU:

- Development of the latest technologies that will facilitate the development of e-tourism services, which in turn will facilitate access to these services for a wider range of people through convenient online shopping and booking.
- Changes in the demographic structure of the population will lead to the development of new tourism products. Airfares are expected to fall, which will increase the number of such flights and make them more accessible to different population groups.

- The need for special routes and conditions for tourist routes for people with disabilities, who are also potential tourists and require certain favorable conditions, and for people over 60 years of age.
- Young tourists. Studies show that more than 20% of travelers to Europe are young people aged between 15 and 26, due to study trips.
- EU enlargement. The integration of the new Member States contributes to the development of tourism in the EU.

On the basis of the above analysis and taking into account the above challenges and factors, we propose the following promising areas for tourism development in the EU that will yield positive results:

- Persons with disabilities require special conditions and facilities.
- Young people need specific types of tourism services: safe travel, cultural experiences, youth exchanges, multicultural events, social and environmental activities, and training. In addition, young people need special accommodation, and have special transport and fare requirements.
- The challenge for tourism development in the new EU member states is to define the tourism sector on a professional basis and agree on quality standards;
- Preserving cultural and natural heritage as a key asset for tourism development in these countries.
- All airlines will have to provide consumer protection for their services in order to refund deposits (including taxes and surcharges) and repatriate consumers who have been harmed by the airline.
- The European Commission should be responsible for creating an appropriate space for all air transport stakeholders (airlines, airports and travel agents) to operate.

5. Discussion

Tourism is thus a major activity in the European Union, accounting for 10% of GDP and having a significant impact on the socio-economic development of the economy, reducing unemployment.

At the same time, tourism has the potential to contribute to environmental protection and poverty reduction. Tourism can also raise public awareness of the importance of environmental protection and involve as many people as possible in cooperation on environmental issues.

The study shows that after the end of COVID-19, tourism in the EU is set to recover from the beginning of 2021 and from 2022 to 2023. There has been some increase in the well-being of the European population due to tourism in the following indicators: growth in the number of jobs created, wage growth, GDP growth, and projected growth in tourism until 2025. Factors contributing positively to the economic development of Europe include the high tourism potential of EU countries, which increases the interest of tourists in long-term travel. Also, the recovery of tourism jobs lost during the pandemic and the reduction of inflation in the service sector. In order to identify ways to improve the well-being of the population in

the EU through tourism, the paper examines the existing tourism promotion measures of the European Union. Measures to support tourism in the EU include: measures that benefit tourists; measures for responsible tourism; measures that benefit the tourism industry and regions; and the introduction of digitalization to facilitate travel.

In our opinion, the proposed tasks, development factors, and promising directions of tourism development in the EU countries form the EU tourism policy. This approach is designed to promote employment and ensure the competitiveness of the European tourism market. We will define that tourism, relying on small and medium-sized enterprises, which are most suitable for adaptation and retraining in a market economy, will create a large number of jobs and increase the welfare of the EU population.

Further research will focus on determining the impact of innovative technologies on the development of tourism in Europe.

6. Conclusions

Thus, the trends and prospects for the development of tourism in the European Union are studied. It is established that tourism in the EU is recovering rapidly after COVID-19 due to high consumer demand. Tourism should be considered a key sector of economic growth and a driver of job creation in the EU due to the increase in the number of jobs in tourism, the increase in wages, and the level of GDP per capita.

Among the leaders of the EU countries are Germany, Italy, Spain, and France. Paris continues to be the most popular tourist destination in the world.

Among the measures to improve the welfare of the population through tourism are the following: financial support for vouchers to health resorts for vulnerable groups of the population; introduce digitalization in tourism to reduce energy consumption, manage and reduce fuel costs, use mobile applications and video surveillance systems; improve environmental safety for society; create platforms with information about popular places to visit; create separate public transport and tourist routes, and promote trust between the public and authorities.

The author proposes tasks, factors and promising directions for the development of tourism in the EU. Among the promising areas are: support for people with disabilities, youth; preservation of cultural and natural heritage; increase of EU membership; harmonization of quality standards; to entrust the European Commission with the responsibility of creating an appropriate space for the activities of all stakeholders in the air transport sector.

Thus, the study made it possible to formulate recommendations on the prospects for tourism development in the EU, which will strengthen the euro against the US dollar, increase the competitiveness of Europe's tourist attractiveness in the world and contribute to GDP growth and the welfare of the EU population.

Conflict of interest: none.

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