European Tourism Board

The EU Tourism

Journey Through Crisis and Resilience

PRESENTED BY

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Research Questions That Drive Our Story

Primary Research Question

1. How has EU tourism recovered from the COVID-19 pandemic (2020-2024)?

Secondary Research Question

1. Which EU countries achieved the strongest tourism recovery by 2024?

2. How do domestic and international tourist recovery patterns differ?

3. Which accommodation sectors (hotels, rentals, camping) performed best in recovery?

Data Behind the Story

Dataset
Eurostat official Tourism statics

Analysis Period
2019 - 2024

Geographic Scope
EU member state (27 states)

Understanding the **recovery of EU tourism** requires examining the. Eurostat dataset, which tracks tourism across member states from **2019 to 2024**, illustrating our **journey from crisis to resurgence**

This Eurostat data captures **formal accommodation** establishments but underrepresents the growing **informal sector (Airbnb, private rentals)**, creating an **accommodation bias** that favors traditional hospitality.

Additionally, **countries with stronger statistical systems** maintained better **reporting continuity** during the crisis, while smaller nations like **Malta and Cyprus** show extreme volatility due to limited sample sizes.

Our **analytical approach** preserves these **systematic gaps** rather than interpolating over them, ensuring our recovery narrative reflects **genuine crisis impact** rather than statistical smoothing.

Methodology

Technical Processing

The analysis was performed using **python** tools, with **pandas** utilized for data handling and **Matplotlib, seaborn and Ploty** for visualization.

Reproducibility

All analyses presented are fully **reproducible** using the code available on my GitHub repository (Click here to view source code), where all **data sources, processing steps**, and **scripts** are clearly documented.

Analytical Techniques

The analysis uses **2019 pre-pandemic levels** as a baseline. Comparisons are made across countries and sectors, alongside seasonal decomposition to identify recurring patterns and shifts in seasonality.

Key Insights From the Data

Statistical Overview

The dataset comprises **182,336** records spanning a period of **120** months across **27 EU states**, providing a comprehensive view of EU tourism recovery.

Critical Data

Key metrics highlight a **min of -95.2%** and a **max of +18.1%,** showcasing a recovery range of **113.4 points** with an average growth of **+6.0%** in 2024.

Country Performance

Denmark leads with a growth rate of **+20.2%,** while Latvia and Slovakia lag behind at **-16.1%** and **-14.6%,** reflecting a spread of **36.3 points** among EU countries.

Sector Transformation

The camping sector shows remarkable growth at **+115.3%,** while vacation rentals and hotels follow with increases of **+25.1%** and **+17.1%,** revealing a spread of **98.2 points**.
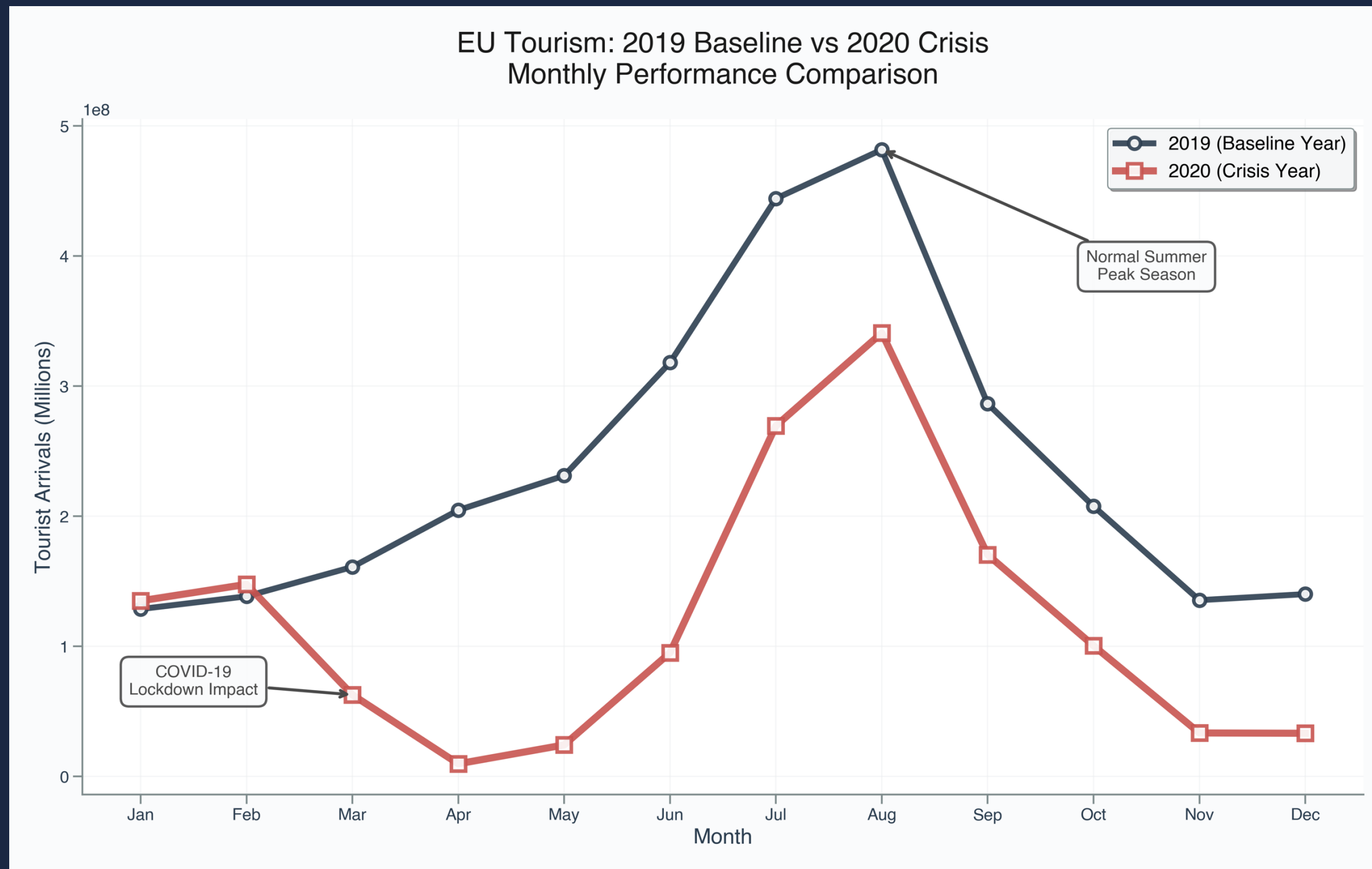
Temporal Patterns

The fastest recovery occurred between **2021 and 2022**, with breakthroughs in **2023** and a peak in **May 2024**, indicating significant seasonal shifts in tourism behavior.

The Golden Age

EU Tourism: 2019 Baseline vs 2020 Crisis
Monthly Performance Comparison

1e8

Tourist Arrivals (Millions)

- 2019 (Baseline Year)
- 2020 (Crisis Year)

Normal Summer Peak Season

COVID-19 Lockdown Impact

Month
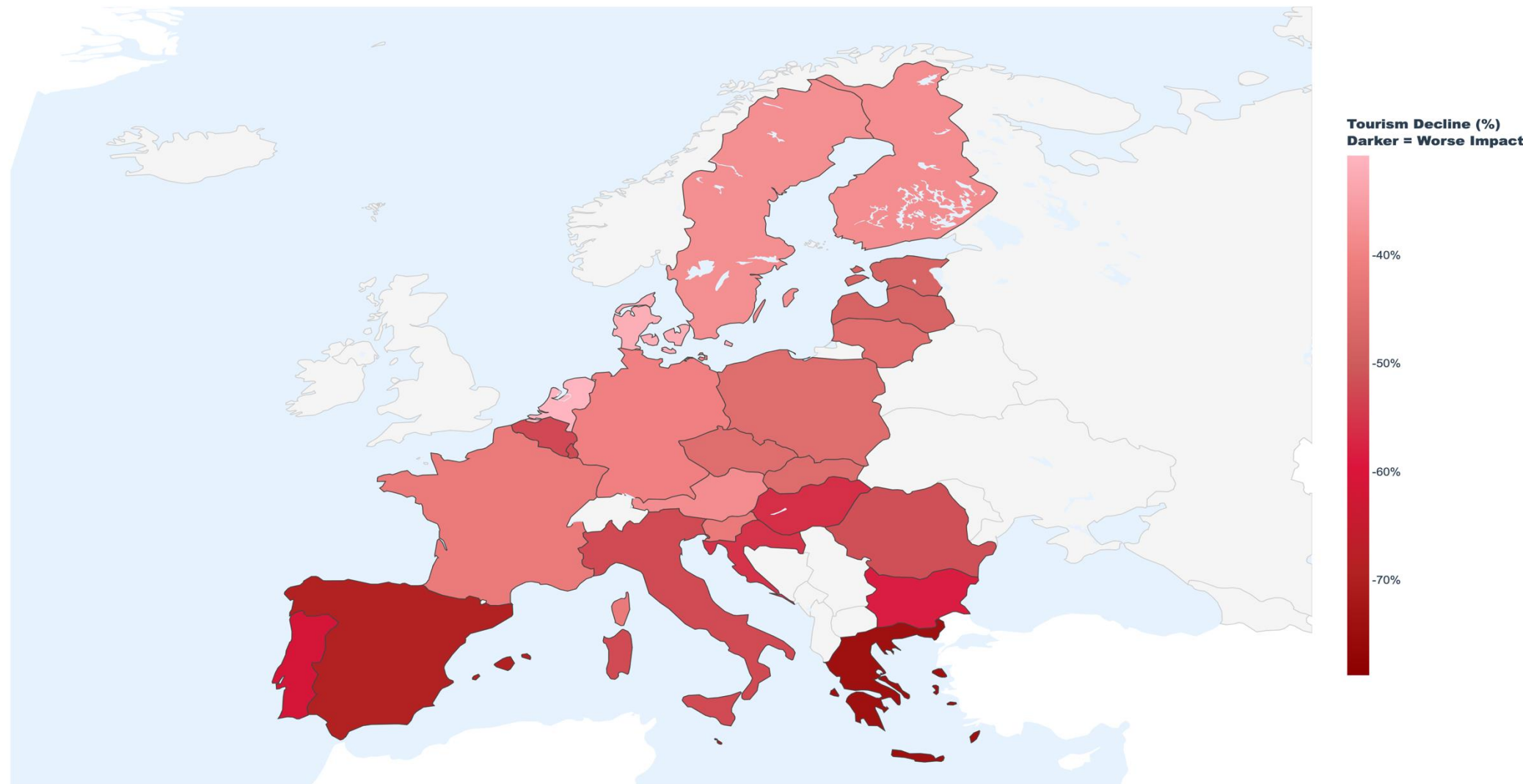
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

In 2019, European tourism flourished, marked by **steady growth** and peak participation during the summer. All 27 EU countries contributed to this vibrant landscape, creating a predictable and profitable rhythm in travel that set the stage for the challenges that lay ahead.

The Great Collapse

The dramatic decline in EU tourism

COVID-19 DEVASTATED EU TOURISM

Worst-affected countries in 2020

Tourism Decline (%)
Darker = Worse Impact

-40%

-50%

-60%

-70%

Source: Eurostat Official Tourism Statistics
Data: Tourist nights at accommodation establishments
Analysis: 2020 vs 2019 baseline comparison

-51%

EU Average Tourism Decline

This significant decline reflects the severe impact of the COVID-19 pandemic on the European tourism sector across member states.
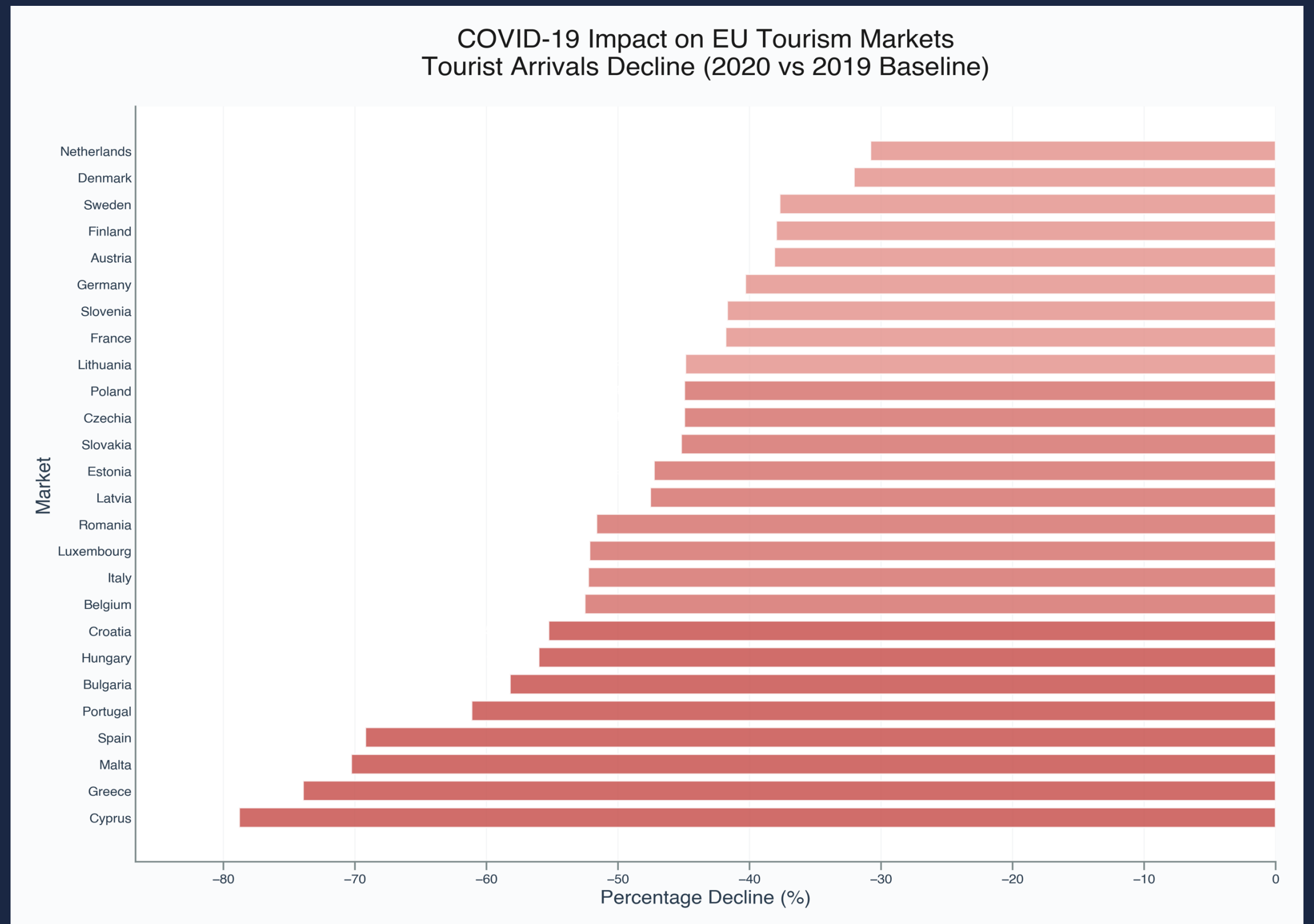
The Great Collapse (cont.)
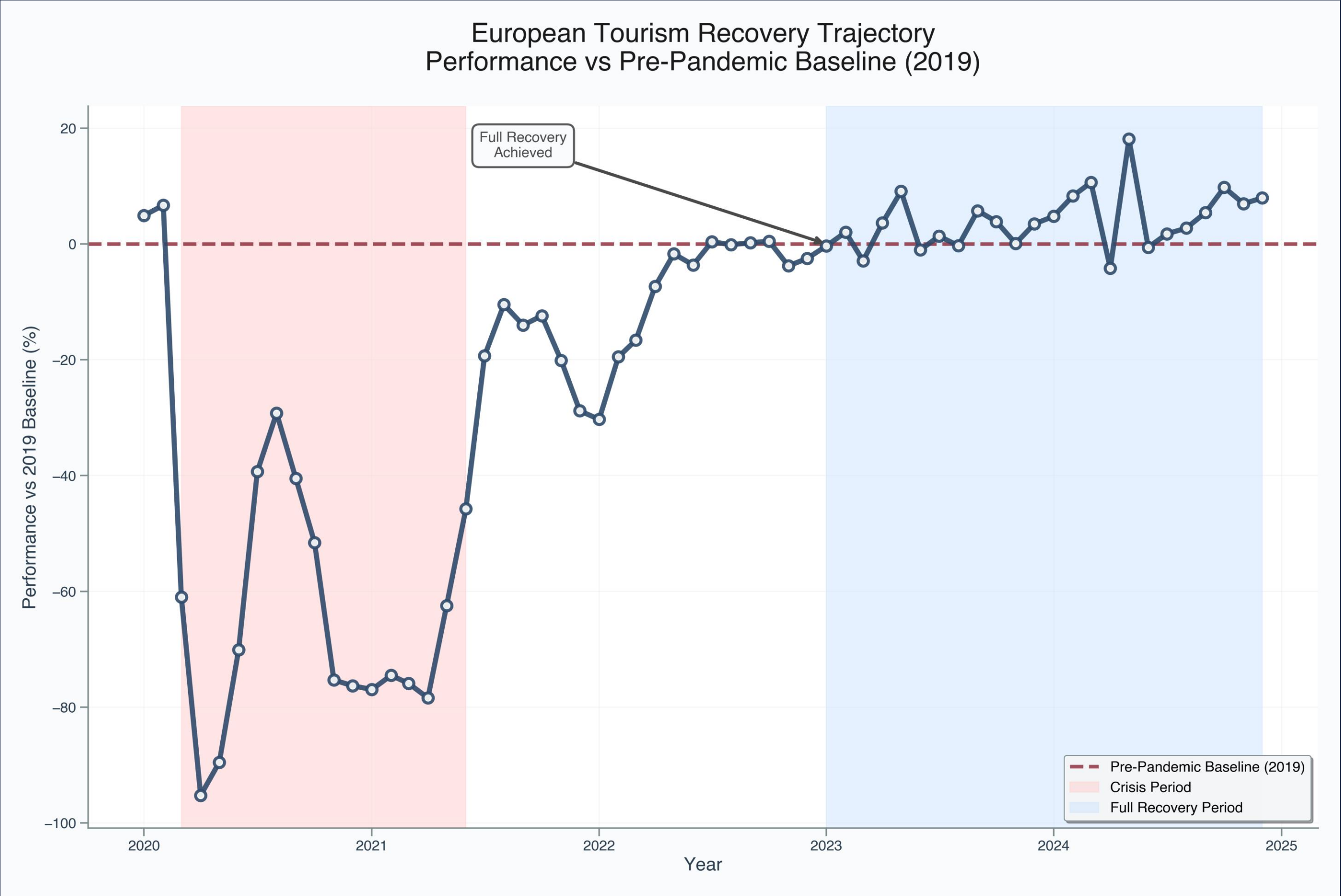
The dramatic decline in EU tourism

-79%

Cyprus: The Worst Hit

Cyprus experienced the largest drop in tourism volume, emphasizing the vulnerabilities of heavily tourism-dependent economies during global crises.

COVID-19 Impact on EU Tourism Markets
Tourist Arrivals Decline (2020 vs 2019 Baseline)

Recovery Trends

European Tourism Recovery Trajectory
Performance vs Pre-Pandemic Baseline (2019)

The Recovery Milestones

2020 -2021

The Valley of Despair

From complete collapse in April (**-95%**) to the first glimmer of hope by December (**-76%**) - Europe learned what silence sounded like.

2021 -2022

The First Steps

Building on 2020's foundation, tourism took its first tentative steps back to life, climbing from **-76% to -30%** in one remarkable year.

2022 -2023

The Breakthrough

The year tourism crossed the line - from negative to positive for the first time since the pandemic began returning to its pre pandemic levels
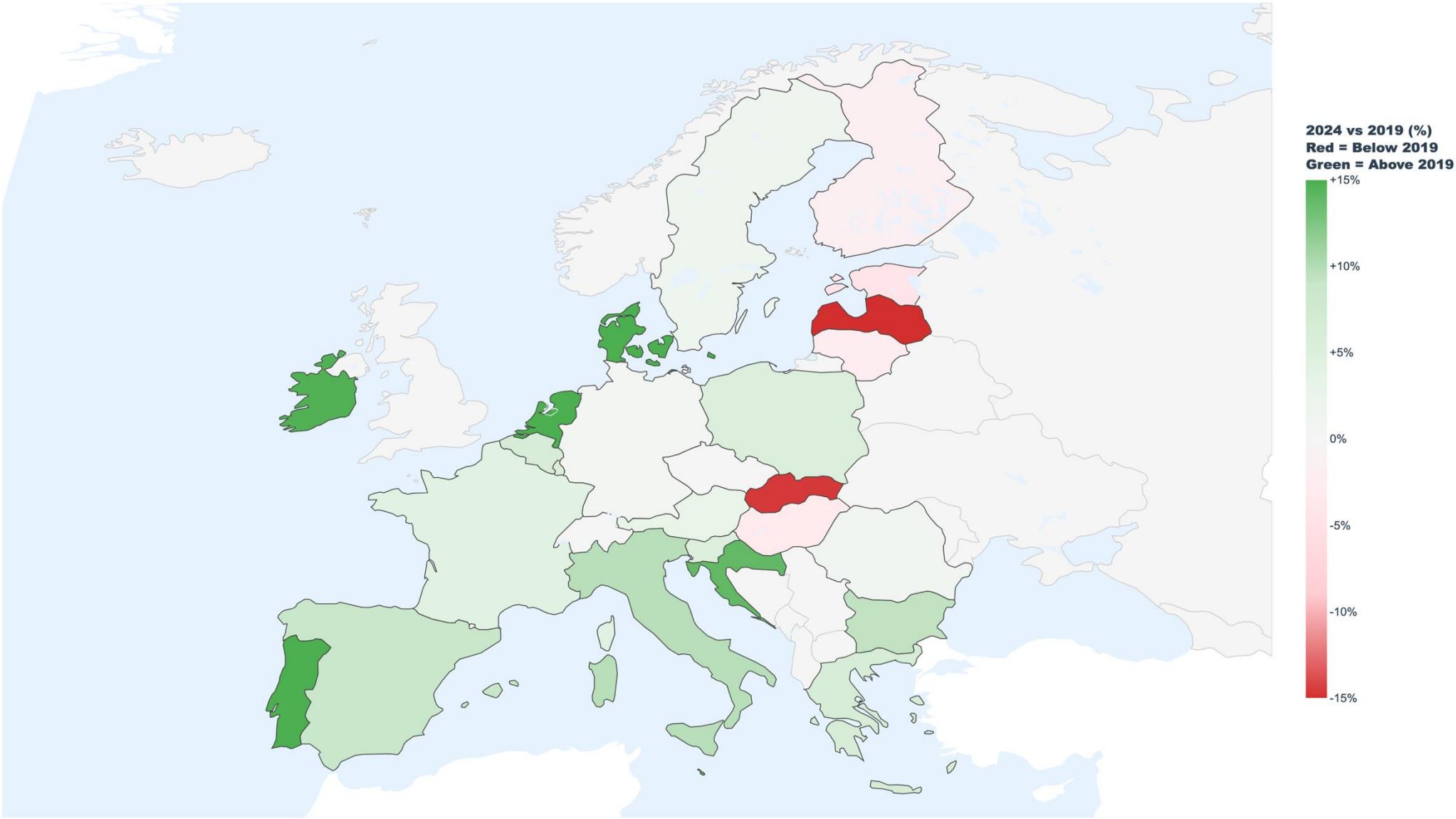
2023 -2024 & beyond

The Renaissance

Confidence returned as tourism not only recovered but began to thrive, reaching nearly 18% above pre-pandemic levels.

The New Champions

EU TOURISM: THE GREAT RECOVERY

2024 performance shows who bounced back strongest

2024 vs 2019 (%)
Red = Below 2019
Green = Above 2019

+15%

+10%

+5%

0%

-5%

-10%

-15%

Source: Eurostat Official Tourism Statistics
Data: 2024 performance vs 2019 baseline
Analysis: Average annual tourism growth
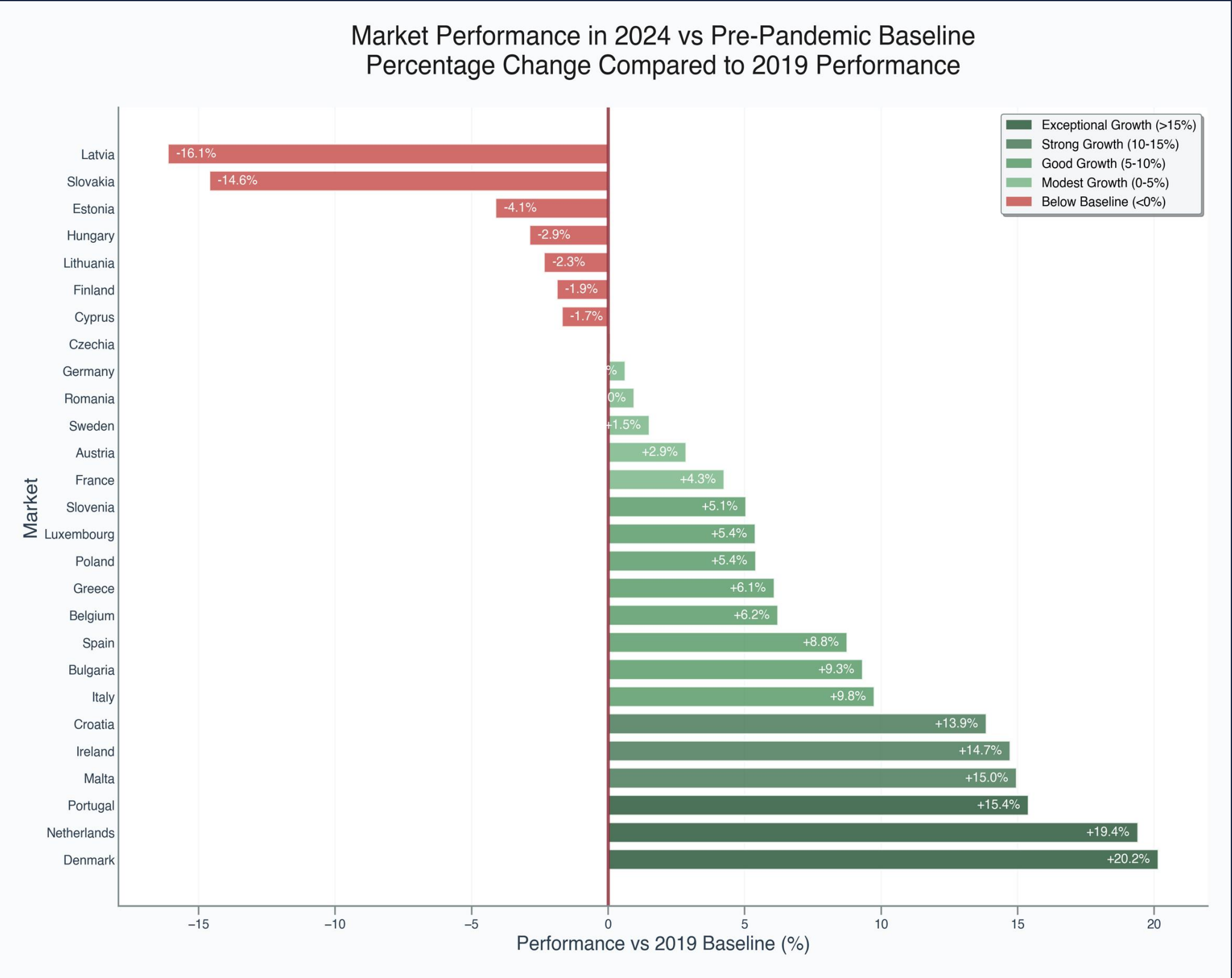
🥇 Denmark

20%

🥈 Netherlands

19%

🥉 Portugal
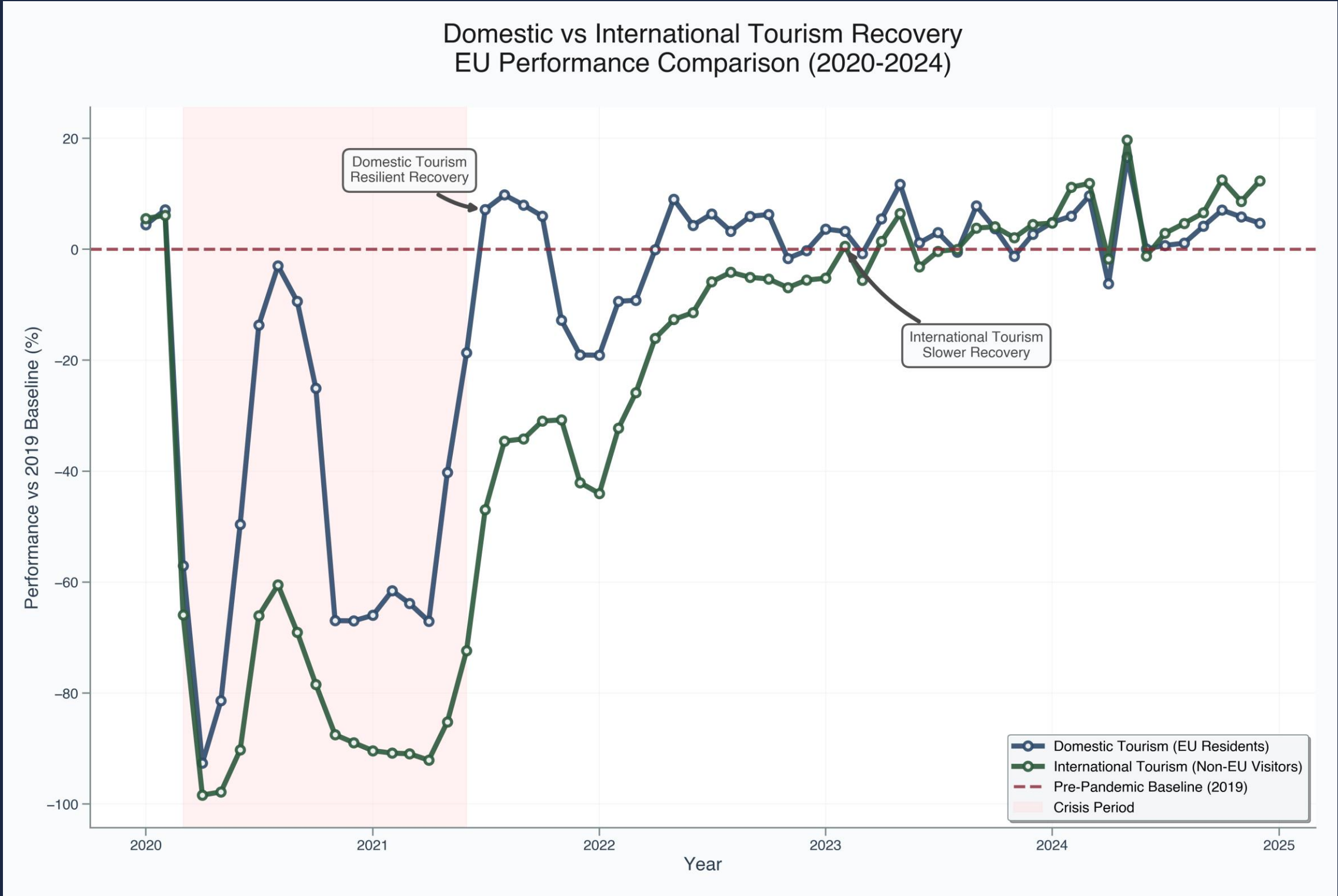
15%

The Struggling Survivors

Not Every Recovery Story Has a Happy Ending... Yet

While champions soared, some countries faced a different reality like **Latvia (-16%)** and **Slovakia (-14%)**. Traditional giants and island destinations struggled most, revealing how crisis can humble even the mightiest markets. Their challenge isn't failure; it's the complexity of rebuilding what was once considered unshakeable.

Market Performance in 2024 vs Pre-Pandemic Baseline
Percentage Change Compared to 2019 Performance

Legend:
- Exceptional Growth (>15%)
- Strong Growth (10-15%)
- Good Growth (5-10%)
- Modest Growth (0-5%)
- Below Baseline (<0%)

Market	Performance vs 2019 Baseline (%)
Latvia	-16.1%
Slovakia	-14.6%
Estonia	-4.1%
Hungary	-2.9%
Lithuania	-2.3%
Finland	-1.9%
Cyprus	-1.7%
Czechia	
Germany	
Romania	0%
Sweden	+1.5%
Austria	+2.9%
France	+4.3%
Slovenia	+5.1%
Luxembourg	+5.4%
Poland	+5.4%
Greece	+6.1%
Belgium	+6.2%
Spain	+8.8%
Bulgaria	+9.3%
Italy	+9.8%
Croatia	+13.9%
Ireland	+14.7%
Malta	+15.0%
Portugal	+15.4%
Netherlands	+19.4%
Denmark	+20.2%

The Tale of Two Recoveries

Domestic Tourism Led the Charge, International Tourism followed

Domestic vs International Tourism Recovery
EU Performance Comparison (2020-2024)

Performance vs 2019 Baseline (%)

Domestic Tourism
Resilient Recovery

International Tourism
Slower Recovery

Domestic Tourism (EU Residents)
International Tourism (Non-EU Visitors)
Pre-Pandemic Baseline (2019)
Crisis Period

Year

Two parallel journeys defined Europe's tourism recovery. **Domestic tourism** surged as restrictions limited international travel, leading to **faster recovery** from pre-pandemic levels and greater reliance on local destinations, which provided crucial economic relief and revitalized regional tourism sectors. Meanwhile, **international tourism** faced a slower, more **cautious recovery** due to border restrictions and travel hesitancy, but ultimately rebounded stronger by 2024.

The Great Outdoor Revolution

How Europeans Traded Hotel Lobbies for Starlit Nights

Accommodation Types

The recovery of tourism has seen a dramatic **shift in accommodation preferences**, with European travelers now seeking the joy of sleeping under stars near campfires, embracing unique and personalized outdoor experiences. A **115% increase** in camping represents a true **outdoor revolution**. Europeans are choosing nature over luxury, authenticity over amenities, and starlit nights over hotel suites

Accommodation Sector Performance in 2024
Growth vs Pre-Pandemic Baseline (2019)

The Deeper Truths Our Data Reveals

Resilience is Measurable

The EU tourism industry demonstrated quantifiable resilience

Crisis Accelerates Evolution

Changes that might have taken decades happened in years. The shift in accommodation type and domestic traveler increase shows this.

Recovery Isn't Uniform

Some countries have not only recovered from this but have emerged stronger while some other are still struggling.

Dashboard

View Dashboard

EU Tourism Recovery Dashboard
Rising from the Ashes: A Data-Driven Story of Crisis, Resilience, and Transformation (2019-2024)
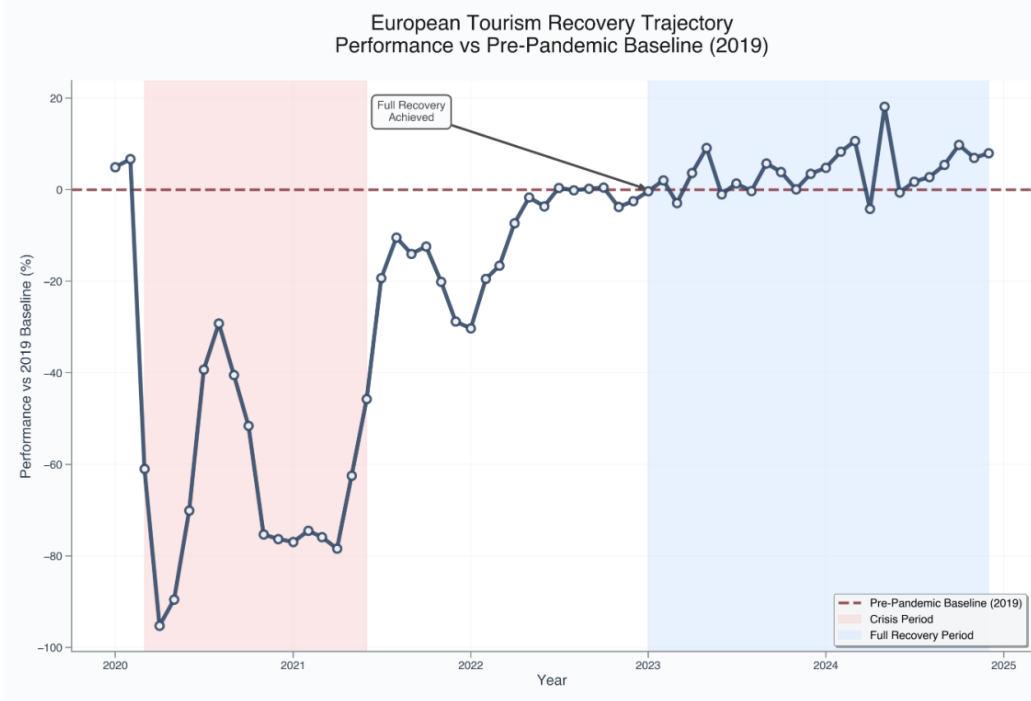
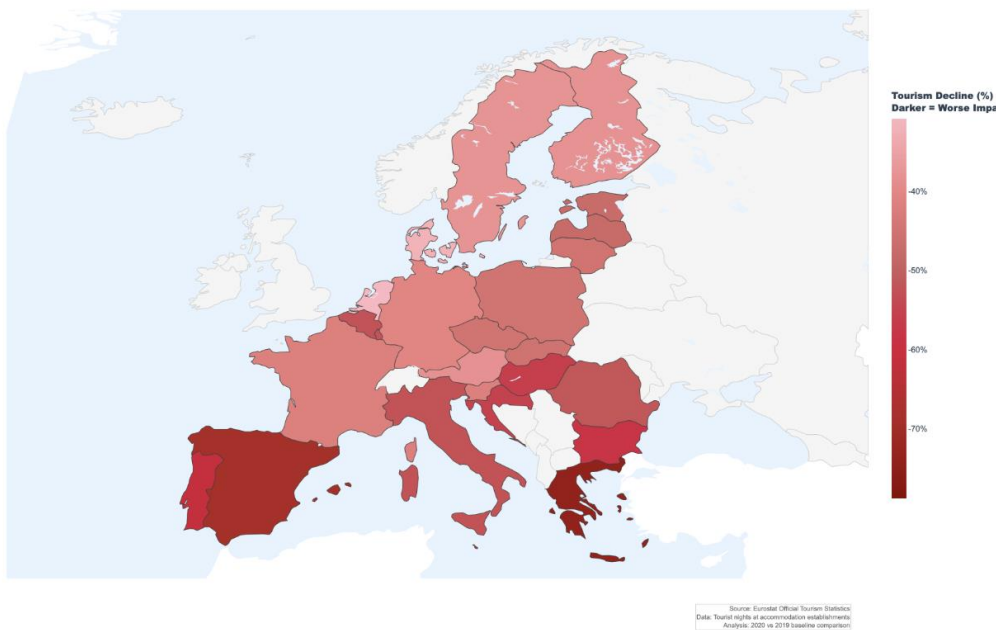Overview | Crisis Impact | Recovery | Champions | Sectors | Patterns

The Phoenix Story
From a 95% collapse to an 18% peak above pre-pandemic levels

-95%	+18%	3 Years	+38%
Peak Crisis Impact (April 2020)	Peak Performance (May 2024)	Full Recovery Timeline	Camping Sector Boom

The Recovery Journey

2019 — **The Golden Age**
EU tourism at its peak - the last normal year

2020 — **The Great Collapse**
95% decline in April - the darkest hour of European tourism

2021-2022 — **The Struggle**
Gradual recovery begins - adaptation and innovation

2023 — **Full Recovery**
Return to pre-pandemic levels - the breakthrough moment

2024 — **The Renaissance**
18% peak above 2019 levels - stronger than ever before

The Phoenix Rises (2020-2024)
The most remarkable comeback in modern European economic history

European Tourism Recovery Trajectory
Performance vs Pre-Pandemic Baseline (2019)

Full Recovery Achieved

Legend:
- Pre-Pandemic Baseline (2019)
- Crisis Period
- Full Recovery Period

Recovery Milestones

Period	Milestone
2020-2021	The Valley of Despair (-95% to -11%)
2021-2022	The First Steps (-11% to +1%)
2022-2023	The Breakthrough (+1% to +9%)
2023-2024	The Renaissance (+9% to +18%)

The Great Collapse (2020)
When the world stopped traveling

COVID-19 DEVASTATED EU TOURISM
Worst-affected countries in 2020

Tourism Decline (%)
Darker = Worse Impact

Source: Eurostat Official Tourism Statistics
Data: Tourist nights at accommodation establishments
Analysis: 2020 vs 2019 baseline comparison

Key Insights

Cyprus: 79% decline - worst affected EU member

Greece: 74% decline - islands stood deserted

Malta: 70% decline - tourism-dependent island hit hard

Spain: 69% decline - beaches empty, museums closed

Conclusion

This is not merely a data visualization project on European tourism recovery. This is proof that with the right data, analysis, and storytelling, we can find hope in the darkest statistics and reveal the extraordinary resilience within ordinary numbers.

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Data Source

Eurostat, Tourism statistics (2019–2024)
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Images

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Tools & Code

Analysis and visualizations created with Python, pandas, Matplotlib, Seaborn, and Plotly. Full reproducible code available on **GitHub**.