

OBSERVATIONS ABOUT TOURISM TRENDS - EUROPE FROM WEST TO EAST

Ivan Yonov

South-West University “Neofit Rilski”, Blagoevgrad, Bulgaria, iyonov@gmail.com

Abstract: The perpetual attention towards tourism market segmentation remains a significant issue. Scholars and practitioners alike face a formidable task in tackling this issue, given its reflection of the dynamic and varied needs of tourists, influencing their purchasing choices and holiday concepts. To that end, the author endeavors to delineate various approaches to market segmentation within the travel industry focusing on individual movement patterns. The paper aims to explore and elucidate the prevailing trends in European tourist movement geography drawing from an extensive survey of news articles and the author's own observations and discoveries.

In addition to delineating the predominant tourism segments of mass tourism and independent travel, this paper contributes further insights by highlighting contemporary market strategies, notably focusing on emerging segments such as LGBTQ+ tourism, "Adults only" accommodations, and effective management strategies for online platforms like TripAdvisor and similar entities.

The information foundation of this study is derived from curated sources including specialized online publications, official websites of Bulgarian and European tourism entities, perspectives from industry stakeholders, press communiqués from hotel chains and tour operators, alongside the author's experiential insights and findings.

The research methodology encompasses a range of scientific methods, each serving distinct purposes and offering inherent value. Among the employed methods are observation, synthesis, and analysis, as well as geographical approaches, systematization, reviews of specialized online articles, sociological investigations and others.

Following the current tourism trends in Europe moving from west to east, a detailed systematization of various market segments was produced highlighting their advantages and disadvantages as well as a parallel between mass tourism and independent travel. Special attention was paid to the advent of new hospitality models - sharing communities, vacation ownership, serviced apartments, co-living, co-working, the specifics of niche markets - culinary experience, ornithology, railway backpackers, and the use and inclusion of latest trends and strategies - LGBTQ+, artificial intelligence and inclusion of handicapped people.

Keywords: travel industry, market segmentation, geographical movement, Europe

1. INTRODUCTION

Tourism market segmentation is always seen as a question of constant interest. It has been a great challenge for scholars and practitioners due to the fact that market segmentation accounts for the ever-changing and diversified tourist necessities, hence their purchasing decisions and vacation ideas. The author makes an attempt to outline the alternative ways of market segmentation in the travel industry based on the movement patterns of individuals. The paper has the objective to discuss and explain the current trends of tourist geographical movement in Europe through a detailed news articles survey and author's observations and findings. Following his survey and personal observation, the author proposes a given distribution of tourism segments.

The first segment is occupied by the various forms of mass tourism, which is related to the universal package market. Mass tourism is viewed as the movement of a large number of organized tourists to popular vacation and recreation places (Naumov & Green, 2015). This large tourism segment comprises a variety of travels such as air charter travel, land travel, cruises, as well as special interest travels also defined as niche markets (cultural, culinary, sports, religious, rural and more).

The second extensive tourism segment is the independent travel which encompasses another wide range of travels having specific types of accommodation and meal plans. These are the camping and glamping, discover travel and backpacking, sharing communities and vacation ownership, serviced apartments, co-living and co-working, digital nomads, Airbnb travels, Booking.com travels. Independent travel is regarded as a type of non-organized travel where individuals organize their trip according to their own interests and preferences and what we find in the core of the concept is self-reliance (Stevens, 2023).

Besides the two large tourism segments – mass tourism and independent travel, this paper generates additional value by laying special emphasis upon the latest market approaches including LGBTQ+, “Adults only” and “How to handle Trip advisor & Co.”

2. MATERIALS AND METHODS

The current paper information basis is compiled from publications in specialized online press, data from official websites for Bulgarian and European tourism enterprises, insights by tourism business representatives, press releases by hotel chains and tour operators as well as author's personal observations and discoveries.

A number of scientific methods constitutes the research methodological apparatus, each of which has its intent and value. A few of the employed research methods are observation, synthesis and analysis, geographical approach, systematization, specialized online articles review, sociological research and more.

The observation method was used to trace and compare the present trends of market segmentation within the travel industry focusing on individual movement patterns. The implementation of synthesis and analysis involved determining the importance and topicality of the study, the development of theoretical thought and its practical manifestations. The geographical approach contributes to tracing the shift of tourism trends in Europe from west to east. The systematization method is of great significance for it facilitates the consecutive description and analysis of the existing trends and results of tourism development. The specialized online articles review fosters the analysis and evaluation of the operation of the various tourism enterprises. Sociological research is a key part of the study providing valuable information about the changes in consumer behavior.

3. RESULTS & DISCUSSION

In terms of the German source market, comparing the commonly expected trend of the decrease of the use of travel agents (visit to the agency) to the digital platforms, the trend returned towards positive and reached a market share of 37% in 2023 (counts for the average travel of 5 days and more). The average spending for packages reached 1.337 euro in 2023, compared to 1.032 euro in 2019 (www.reiseanalyse.de). For example, on 4th March 2024 European DER Touristik published current numbers of outbound bookings from Western Europe: 33% increase of bookings, 47% revenue increase compared to the same booking period one year ago. Turkey, Spain and Greece ranked among the top three destinations. Scandinavian countries are picking up. South-East Europe and Balkans, otherwise, were not highlighted.

Trends in Various Market Segments

Air Charter Package

According to German newsletter Tageskarte (www.tageskarte.io), currently the strongest market segment where clients feel secure is the fully organized travel. At least within the European community of tour operators, compulsory insurances make sure that travelers return home when something goes wrong (local catastrophes, bankruptcy of the tour operator, airline).

Tour operators plan their flight capacities long term in advance. Both, tour operators and airlines try to figure out travel trends and define the seasonal flight and hotel capacity. If trends do not follow this planning, it is relatively difficult to change the flight capacity for a destination. Traditionally, Western European tour operators look for Mediterranean destinations such as Spain, Greece, Turkey, and Croatia.

Going more eastwards in Europe, leisure travel is a huge share for budget airlines, (which more often serve independent travel), while there are still capacities in the modernized Black Sea airports for regular charters, as commented by the Fraport Management. However, it is expected that the lack of Russian, Ukrainian and Israeli tourists in 2024 shall be balanced by generating more supply and demand from Scandinavia and the traditional source markets like Germany, the UK, Czech Republic, and Poland. The strongest market, Romania, belongs to the land travel segment.

Land Travel

This field shows a wide array and combinations. Here we find a typical West-goes-East Movement. Southeastern Europe and the Balkans want to be discovered. This is not only the wish of the destinations (suffering from their own lack of marketing) but also a market demand situation.

If in the past, mainly workers from Western Europe traveled over challenging roads to their home countries in Eastern Europe and Turkey, mainly in summer, today modern road networks change the individual leisure travel targets. Croatia and Montenegro were the limits of traveling by car.

Either a ferry trip, for example, Italy – Croatia, or Italy-Greece and Italy-Albania, or the entire trip over land, the infrastructure allows those travelers a comfortable trip. Especially tourists traveling with their own campers started to discover the Balkan countries in the early 2000's. They were pioneers but positive feedback led to a steady increase. Campsites in Eastern Europe are rare and need to be adapted to the needs of today's travelers and their vehicles. These travelers have seen all of Europe and are financially considerably high spending guests, delivering higher revenues to the tourism industry than the tour operator package tourist.

Organized Tours: Land, River, Sea

There is an increased demand of combinations of the three kinds of travel. Often River Cruises, like along the Danube, are combined with excursions throughout the visited countries. There was a period when an American tour operator brought wealthy tourists from Vienna to a Bulgarian port, from where a Turkish luxury bus company collected the tourists, and a three-four days' tour through Bulgaria followed. Hand selected hotels were a must. The group continued to Istanbul by coach and entered a Mediterranean cruise, and vice-versa.

Sea Cruises had a spring approximately 10 years ago. Cruise ships scheduled interesting port calls around the Black Sea before returning to the Mediterranean. With the annexation of Crimea those programs were cancelled. A soon return is not expected since the very internal type of tourists are afraid of the war situation.

Cultural Tours have the same dynamics as the above subjects. However, it requires tremendous efforts of the specialized local travel industry to cover up what governmental institutions are not capable to deliver to the source markets. Individual travelers who had already seen a lot of Europe, organized themselves and used budget flights into the capitals, from where they find their ways to visit cultural attractions.

Sports Travel is mainly organized through associations. In the entire Balkan area, they appear as all-year-round destinations which are not limited to winter sports but offer a tremendous choice of activities. Their biggest challenge is to be positioned within the international markets where they are mostly not visible. Bansko was in the international press for a short time due to championships and forgotten afterwards. Same accounts for Pamporovo, Borovets, Kopaonik, Stara Planina. All these destinations have updated their infrastructure and hotel offers which often go along with spa and wellness services.

Niche Markets are often discovered by the initiatives of enthusiasts, let them be host or visitor. Today's social media allows them to connect. Culinary experience, ornithology, railway backpackers, just to mention a few, always lead to a wider spread interest than organized tours (packages). Market demand is clearly there. Locally it often goes with improvisation of the service providers which is understood as a likeable experience by the visitors.

Medical, Wellness and Spa Tourism

Health prevention and rehabilitation play a role in the mind of people of different income situations. European health insurances are supporting those patient demands as long as the medical hotel is: a) located in a recognized EU spa destination (commonly known as a resort); b) have permits to make treatments; c) have a licensed leading doctor on site who takes the responsibility about the recommended treatments. German insurances can accept the cost reimbursements of up to 80% of the treatments, while travel expenses remain to be paid out of the pocket of the patient/medical tourist. Eastern Europe is at the very beginning of being recognized for such affordable services while Poland, the Czech Republic, Hungary and the Baltic States are already positioned. However, in most cases a spa and wellness hotel is a leisure offer without medical treatment despite medical supervision.

Purely surgery services in Eastern Europe, such as dental treatments, scalp surgeries, eye treatments are becoming attractive to Western European patients and patients from the Middle-/Near East.

Sharing Communities, Vacation Ownership, Serviced Apartments, Co-living, Co-working

An absolute success model in Western Europe with a tough expansion, also having been the most resilient hospitality model during the pandemic lockdowns, has not entered Eastern Europe. While Vacation Ownership is a leisure-oriented exchange program (sample: Interval International, working with the vacation residential programs of major hotel chains), all other models are related to business travelers, digital nomads and city tourism short stays.

It is needless to mention that platforms like Airbnb are prospering in comparison to the existing hotel offer in some destinations, and not at lower average rates. At the same time Booking.com tries to reinvent itself. Heavy fees for such platforms are eating the margin of providers (hotels and other offered accommodation) at a time when inflation, energy cost, subsequently manpower cost, are rising at high speed.

The EU Commission is now preparing rules for short term rentals (STR) like Airbnb and similar platforms, to publish official registrations (tax, license) and to eliminate illegal rentals. Current local rules are fragmented and need to be unified. Side effect is a better harmonization of STRs versus local inhabitants' rental costs.

What is currently most discussed in the professional communication exchange

LGBTQ+

While in some African tourism hotspots, members of the community end in prison, market specific hotels in other countries provide comfort. One of the first of this community-oriented hotels opened in Cuba, another one in Austria recently. However, there is far more. Published by Greek GTP portal, the Greek Ministry of Tourism signed an agreement with the Queer Destinations Association which trains employees in the hospitality and travel industry how to accept and treat this particular market segment to provide an accepted and comfortable travel environment. Citing official data, Minister Kefalogianni said that the LGBTQ+ travel community represents **over 10 percent of the global demand** and some **16 percent of total expenditures** in the tourism sector. In terms of numerical value, it surpasses the threshold of 195 billion dollars.

Artificial Intelligence

Very disputable in all forums is the use of AI and robotics in all hospitality procedures, optimizing processes. The knowledge in the industry is still very low. Test programs provided by consortia of property management system (PMS) producers, are integrating AI to release staff from handling the back-office work of the PMS, eventually doing operational interactions and answer guest comments, (which is the Trip advisor headache), in order to allow the providers management to identify fake comments and answer real comments in proper manner.

Inclusion Strategies in Tourism

Barrier free access, sign language, Braille signage and texts are being intensively discussed in the source markets in order to allow people with handicaps to participate in international tourism. Best practice samples are introduced.

4. CONCLUSION

The present study endeavors to delineate and systematize contemporary tourism trends using a geographical framework to facilitate precise description and analysis. Beginning with Germany, a prevalent trend there revolves around organized air travel, primarily motivated by tourist safety and security concerns. Beyond Germany, other European nations, such as the UK, the Czech Republic, and Poland, favor leisure travel to the Black Sea region. Owing to its geographical proximity to Bulgaria and Greece, Romania predominantly relies on land travel. Similarly, workers migrating from Western to Eastern Europe and Turkey exhibit a preference for land travel, with Croatia and Montenegro emerging as noteworthy host destinations. River cruises along the Danube and sea voyages circumnavigating the Black Sea, before returning to the Mediterranean, are also notable features.

An additional noteworthy trend involves the surge in individual cultural travel, facilitated by the proliferation of cost-effective airlines. Sports tourism is gradually gaining popularity, often complemented by spa services. Notably, niche markets have garnered greater interest compared to organized tours. Spa and wellness tourism represents a burgeoning trend in Eastern Europe, while Poland, the Czech Republic, Hungary, and the Baltic States have already established themselves in this niche.

The onset of the Covid-19 pandemic has catalyzed the emergence of novel hospitality models, which continue to evolve and gain prominence. The imperative of inclusion is a subject of intensive discourse, with several best practices being implemented. Undoubtedly, the integration and deployment of artificial intelligence (AI) in the hospitality sector will optimize human resources by streamlining routine mechanical tasks.

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