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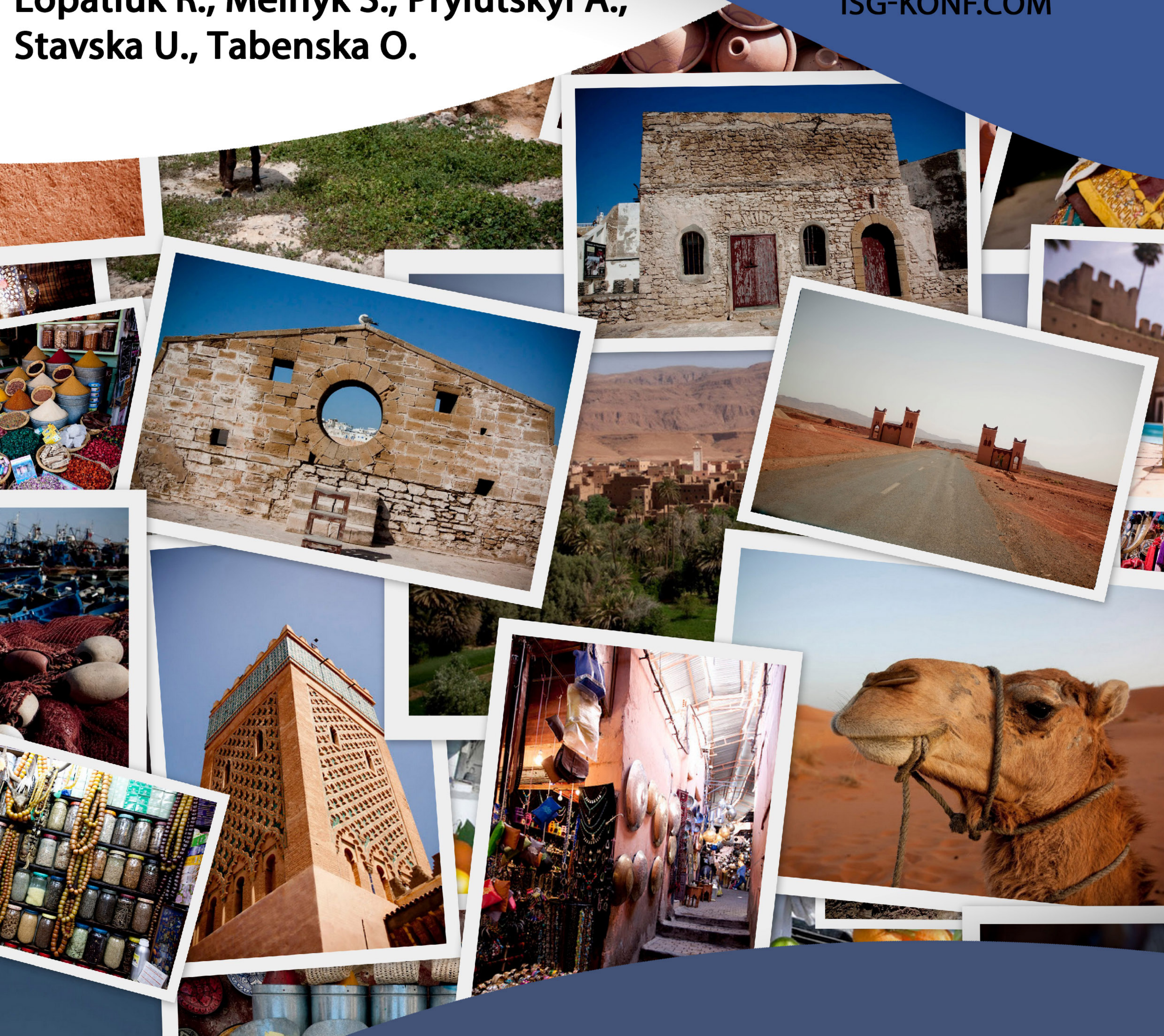

PROBLEMS AND PROSPECTS OF DEVELOPMENT OF HOTEL AND RESTAURANT AND TOURIST INDUSTRY IN THE CONDITIONS OF INTEGRATION PROCESSES

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Holovnia O., Zakharova T., Lopatiuk R., Melnyk S., Prylutskyi A., Stavska U., Tabenska O.

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INTRODUCTION

The development of the world economy indicates the growth of its integration and integrity through the deepening of specialization and cooperation of countries and business entities. Integration appears as an inevitable, objectively determined process that covers most spheres of economic life in the world, and takes place according to its own laws, general principles and goals, taking into account the various grounds, conditions and levels of such integration.

Today, we can observe two mutually exclusive features of integration processes: globalization of the world economy and simultaneous national protectionism, which has gained considerable influence in the last decade. We are observing, on the one hand, the strengthening of integration processes in the world economy in all spheres of social life, there is a reassessment of the system of risks for the modern state and, most importantly, we are witnessing an increasing pragmatism of relations between countries, the basis of which is dominated by economic factors.

At the same time, significant changes are taking place in the field of hospitality and tourism. The diversification of hospitality and tourism services, the development of the hospitality and tourism industry in new territories and competition in the market require the governments of different countries to reconsider their attitude to the development of this industry and to approach the development of its strategy more seriously. In modern conditions, the governments of many countries pay more attention to the formation of strategies for the development of regions, including strategies for the development of the hospitality and tourism industry.

Considering the fact that the field of hospitality has changed significantly in recent years and continues to change, we have seen modern trends in the field of tourism and the hospitality industry, which are definitely relevant.

The strategy for the development of the hospitality sector should harmoniously complement the socio-economic strategy of the country and combine the solution of priority socio-economic tasks: increasing the scientific, technical and innovative potential; increasing investment attractiveness and economic stability; improving the quality of life of residents.

It should be noted that the first sector of the world economy affected by the global pandemic of COVID-19 is tourism. In the current conditions of the global pandemic, it is obvious that tourism is losing employees and customers due to the impossibility of flights to different countries and the risk of contracting the disease from COVID-19. Nevertheless, even in this situation, you can find a way out: to reorient from outbound tourism to domestic tourism and discover your country from a completely different side.

At the same time, the economic consequences of the war in Ukraine are felt all over the world. Russian aggression has put pressure on global commodity prices, exacerbated disruptions in supply chains, and fueled inflation in most countries around the world. The world economy will lose a trillion dollars this year alone due to Russia's invasion of Ukraine.

The presence of unsolved problems and the contradictions of certain issues, the theoretical and practical significance of researching the management processes of enterprises in the tourism sphere and the hotel and restaurant business determined the choice of the topic of the collective monograph. The topic of the study was chosen taking into account the importance for the development of the tourism sphere and the hotel and restaurant industry of Ukraine of the processes of unification and integration of enterprises, the formation of new formats and management structures in accordance with the objective requirements of world hospitality standards.

The authors offer a monograph that is a summary of scientific searches and achievements regarding the results of research work of the Department of Management of Foreign Economic Activity, Hotel and Restaurant Business and Tourism of the Vinnytsia National Agrarian University on the initiative topic "Problems and prospects of the development of the hotel, restaurant and tourism industry in the conditions of integration processes".

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CHAPTER 1. MODERN TRENDS AND DYNAMICS OF THE EUROPEAN MARKET OF TOURIST SERVICES IN THE CONDITIONS OF GLOBALIZATION

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1.1 IMPACT OF THE COVID-19 PANDEMIC ON THE EUROPEAN MARKET OF TOURIST SERVICES

Tourism is one of the sectors of the global economy that has suffered the most in connection with restrictions on movement, the situation has been particularly difficult in the aviation industry. It is international tourism that contributes to cultural globalization between countries through the spread of ideas and values in the world with the expansion and enrichment of cultural relations [4, p. 58].

International tourist industry is one of the driving forces that stands out from among the other elements global economy, characterized by high growth dynamics and high development potential, which affects the formation of the most global economic system in general. In 2019, 1.5 billion were registered in the world of international tourist movements, which is 4% more compared to the previous one a year Thus, the "growth" of tourism is taking place for the tenth year in a row [10].

International tourism, which is a form of international human movement resources, has a mass character and is one of the leading highly profitable and the most dynamic sectors of the world economy. A specific trait international tourism is that it combines more than 50 related fields activities: culture, art, education, sports, hospitality, medicine, health, trade, nutrition, transport, communication, finance, everyday life, entertainment, construction and others [3, p. 42].

The tourism industry has seen a slow recovery since the increase of vaccination rates and the decrease in measures to contain COVID-19. Interest in nature-based, off-season and sustainable travel has grown, offering new opportunities to attract European tourists. However, a full rebound in long-haul travel behaviour is not expected until 2025. Many younger travellers feel inspired to travel to their bucket list destination. In the light of the pandemic, giving back to local communities is important for European travellers, especially among Western European countries.

Travel & Tourism has been 1 of the sectors worst affected by COVID-19. Due to the ongoing restrictions to international mobility, the sector suffered losses of almost USD 4.5 trillion globally in 2020, representing a GDP reduction of 49.1%. While there are still many restrictions limiting the ability to travel, strong pent-up demand points to a swift recovery as soon as restrictions are lifted, supported by the successful vaccine rollouts in many European countries.

The COVID-19 crisis is making it even more important to manage the perceptions of your potential clients. Consider this: even if your facilities are superbly cleaned, this will not matter if your potential clients think that hygiene might be problematic and are afraid to book with you. So, just as you invest in cleanliness itself, you need to invest in smart communications about cleanliness, so that you can influence the perceptions of travellers in the desired ways. How? Forget long written statements reporting on your hygiene protocols in detail. Use visuals and short blurbs of information that form the desired impressions.

For example, show an image of your refreshments bar, which looks perfectly clean, a disinfectant placed in a visible location and your bartender wearing a mask or shield and serving smiling clients. You can add a joyful caption such as ‘Peter at our bar is excited to serve you the best coffee in town. You can be sure he is smiling under the mask because he always is.

With this photo and a short friendly statement, you are communicating everything that can leave your potential guest with the impression that you have strict protocols and hygiene standards that ensure the safety of your clients. They do not have to read the long description of your procedures to feel that their safety is taken care of. Contemporary technologies and social media give us the opportunity to easily capture and share imagery and video content, so use them smartly to form perceptions that will make guests more likely to book.

The tourism industry has seen a slow recovery since the increase of vaccination rates and the decrease in measures to contain COVID-19. Interest in nature-based, off-season and sustainable travel has grown, offering new opportunities to attract European tourists. However, a full rebound in long-haul travel behaviour is not expected until

2025. Many younger travellers feel inspired to travel to their bucket list destination. In the light of the pandemic, giving back to local communities is important for European travellers, especially among Western European countries.

According to the latest UNWTO World Tourism Barometer, international tourism saw a 182% year-on-year increase in January-March 2022, with destinations worldwide welcoming an estimated 117 million international arrivals compared to 41 million in Q1 2021. Of the extra 76 million international arrivals for the first three months, about 47 million were recorded in March, showing that the recovery is gathering pace.

Europe and Americas lead the recovery. UNWTO data shows that during the first quarter of 2022, Europe welcomed almost four times as many international arrivals (+280%) as in Q1 of 2021, with results driven by strong intra-regional demand. In the Americas arrivals more than doubled (+117%) in the same three months. However, arrivals in Europe and the Americas were still 43% and 46% below 2019 levels respectively.

The Middle East (+132%) and Africa (+96%) also saw strong growth in Q1 2022 compared to 2021, but arrivals remained 59% and 61% below 2019 levels respectively. Asia and the Pacific recorded a 64% increase over 2021 but again, levels were 93% below 2019 numbers as several destinations remained closed to non-essential travel.

Europe offers the world's largest source market for outbound tourism, generating 618 million international tourist arrivals, which was almost 50% of the world's total before the coronavirus. Asia and the pacific account for 26% of the world's total number of international tourist arrivals, followed by North and South America with almost 18% [9].

Out of all 618 million trips by European citizens, 521 million travelled within Europe, 35 million travelled to Asia and the Pacific, 32 million travelled to North and South America, 18 million travelled to Africa and 12 million travelled to the Middle East.

In 2019, total European tourism (air, land and sea) out of Europe counted 496 million trips. It generated 35% of the world's international tourism expenditure. Of these trips, 14% (70.6 million trips) had a developing country destination, and 86% had a different destination outside the EU. Intra-European travel has not been taken into account. Trips to developing country destinations have been growing with 3% yearly since 2015.

Within Europe, Germany is the largest source market, with 13 million trips to developing country destinations, followed by the United Kingdom (11 million trips) and France (9 million trips).

Recovery of the European outbound travel market. Due to the spread of the COVID-19 virus, 2020 became a disastrous year for European outbound tourism. When the first infection was detected in Europe in January 2020, it had a major effect. By the end of March, Europe was considered the active centre of the pandemic by the World Health Organization (WHO), as its total new infections surpassed those of China. In response, every country in Europe resorted to total lockdowns. This was catastrophic for the outbound tourism market, and numbers plummeted.

The number of trips by aircraft out of Europe reached an all-time low in April and May 2020. While the summer and autumn of 2020 have seen a small recovery in the number of trips, travellers were still very restricted. This was expected to change in 2021. However, travel rates at the start of 2021 were the same as in most of 2020 because of new outbreaks and a slow vaccination rate in most European countries.

Although tourism from Europe dropped majorly, it dropped less excessively than tourism from other regions. European outbound travel dropped with 67% in 2020, which is less than Africa (73%), North and South America (73%), the Middle East (74%) and Asia Pacific (85%).

With vaccination rates rising, the European tourism industry is likely to recover. Experts expect that outbound travel from Europe will further recover in 2022, though perhaps not to pre-coronavirus levels yet. It is very uncertain when the tourism market will fully recover. Among tourism experts, 27% expect Africa to fully recover in 2022, 45% expect this to happen in 2023 and 27% think this will happen in 2024 or later. For the Asian market, these numbers are 14% (2022), 31% (2023) and 56% (2024 or later) respectively.

Variants of the virus, like the Delta variant, continue to make travel prospects uncertain. Travel restrictions can change within the short term. This highly influences travel plans. Therefore, travellers make sure their payment can be refunded and check-in dates are flexible. Because of that, cancellation policies and flexible arrangements are important. Flexible check-in dates and refunds will play a determining role for tourists when booking their holidays. A full recovery of outbound travel is expected in 2025 for long-haul destinations.

How COVID-19 changed the European travel market. COVID-19 has changed Europeans' perspective of travel in several ways. Travelling solo and trips to connect with loved ones are examples of these travel wishes. The pandemic has had a big influence on Europeans' well-being. This leads to increased interest in paying attention to mental wellness during holidays.

The desire to see more of the world has increased for many Europeans during the lockdown. They are looking forward to picking their travel plans up again now that more people are vaccinated. Some intend to already travel to far-away destinations by the end of 2021. During lockdown, people have gathered inspiration on where to travel next, mainly through talking to family and friends, watching influencers' social media channels and looking at old holiday pictures.

For the time ahead, travellers are looking to compensate for their cancelled travel plans. This is especially true among Millennials and Gen Z. Travellers are looking to rebook trips that had to be cancelled in 2020 (40%) or are looking to make up for a celebration that could not take place by going on a trip (38%). Gen Z and Millennials, people with higher incomes and families with children are the most likely to travel in 2021. Furthermore, 54% of vaccinated and 46% of unvaccinated people are looking to travel internationally.

European travellers are looking forward to compensating for lost time with a bucket list holiday, especially 18-24-year-olds. These younger travellers are likely willing to spend more in 2022 on a once-in-a-lifetime experience. Adventure travel will be important for this age group. They are also interested in FIT tourism. Packaged holidays are becoming less interesting for them, because they want to explore the destination on their own. Seniors and people who are travelling to far-away countries are still interested in package holidays. For long-haul destinations, package holidays are expected to increase, as people are looking for financial protection and reassurance after the pandemic.

On the flip side, travellers are expected to go back to familiar favourites. That familiarity invokes trust amongst tourists, as they travel again for the first time after lockdown. Also, 25% of travellers are looking for a countryside holiday, which is more than in previous years. This is especially true for domestic travel, but it is an important trend for outbound travel as well. Many travellers want to travel by car to nearby countries or regions.

COVID-19 has resulted in Europeans placing a high value on spaciousness, nature, air and environmental quality. Overcrowded destinations are avoided, and 32% of Europeans are willing to pay more to avoid crowded destinations. Holiday homes and apartments are in higher demand compared to hotels to avoid crowds. Many Europeans are interested in going off the beaten track to also get a unique and meaningful experience. Getting immersed in the local culture with locals is very appealing to them. Furthermore, 44% of Europeans are considering off-season travel to avoid crowded destinations. Couples are relatively more interested in off-season travel compared to families, with 51% and 38% willing to travel off-season respectively.

The pandemic has emphasised the need for natural, economic and social sustainability. This is also reflected in travel behaviour, as people are more interested in reducing their CO2 footprint while travelling. This means that people are more interested in staying at 1 destination during their holidays. This way, they can reduce their CO2 footprint by using less transportation. Interest in nature-based holidays has also increased. People value basic activities such as hiking and cycling in nature.

COVID-19 has brought uncertainty into people’s working life. Job opportunities and financial stability have decreased, and Europeans want to make sure their money is well spent on their holiday. Many will avoid unnecessary expenditures and put more effort into searching for the best deals.

Working remotely has become the norm during lockdown. This makes it easy for people to leisure travel and work online at the same time, because people are not required to come to the office every day. Italians, Spaniards and British people especially are interested in working away from their home or office desk. People will want to work in a comfortable working area with, for example, a beautiful view. A strong and private Wi-Fi connection is very important to accommodate these travellers. Next to that, people have an increased interest in extending business trips to enjoy more leisure time at the destination as well.

The demand for sustainable niche products. Accelerated by the pandemic, Europeans have an increased need for sustainable niche products and options when travelling.

Air travel is responsible for a lot of CO2 emissions, and people are increasingly becoming aware of this. For this reason, travellers are likely to stay closer to home to avoid harming the environment so heavily. To reduce their carbon footprint, 37% are willing to pay more. Almost 60% of travellers are willing to take fewer trips and spend more time at single destinations, especially Polish, Spanish and Dutch travellers.

Over half (51%) of European travellers plan to travel more in the off-season or are willing to pay more to visit less crowded destinations (37%). This is partly to reduce overtourism, but also to decrease the chance of COVID-19 infection.

The pandemic has had a huge impact on some local communities, especially those which are largely dependent on tourism. Because of this and to compensate for their long-haul travel, 1 in 3 people would like to spend more money to benefit the social and economic situation of local communities. This percentage is even higher for travellers from the United Kingdom (40%), France (40%) and Germany (40%).

Sustainable wildlife tourism is a major niche market for European travellers. European tourists are increasingly concerned with the well-being of wildlife and are willing to pay more to see animals in the wild instead of in zoos. They find it increasingly unacceptable when animals are used for entertainment purposes. For example, 88% of German tourists agree that tour operators should avoid activates that cause suffering for wild animals.

Offering vegetarian food is a must when offering packages for Europeans. Of the European population, 4.6% is vegetarian or vegan, and among highly educated and Western European travellers, this is even higher. Germany, the Netherlands and Austria are the countries with the highest percentages of vegetarians. Offering sustainable culinary options can make you really stand out from the competition. More information on how to do so can be read in our studies on the opportunities for food tourism from Europe.

Developing country destinations most visited by Europeans. While domestic and intra-European travel is becoming more popular, this chapter mainly focuses on Europeans going on long-haul travel to Africa and the Middle East, Asia and Latin America. Furthermore, the top 6 developing country destinations (Turkey, Morocco, Egypt, Thailand, Ukraine and China) make up over 50% of the trips to developing country destinations.

Turkey was by far the most popular developing country destination among Europeans until 2019. Because of political instability in 2016 and 2017, Turkey has seen a dip in incoming European tourists. However, there was a resurgence in arrivals in 2018 and 2019. The recovery of the tourism market in Turkey for 2021 was positive, but due to wildfires that took place during the summer, this forecast has been heavily dented.

Morocco has seen a stable number of European tourist arrivals over the past years. Many tourists that visit Morocco are people that were born in Morocco but now live abroad. Many tourists are also French. This is likely because of their colonial history and the many people that speak French in Morocco. Egypt has seen a steady increase in tourist arrivals over the years. The number of tourist arrivals since lockdown has also increased during 2021. Many Europeans are looking to spend their holidays along the Mediterranean Sea when they go to Egypt. The interest in Egypt as a destination has increased after the decrease in terrorist attacks.

Africa and the Middle East. After the threat of Islamic State (IS) had decreased, Africa and the Middle East recovered as important destinations for European tourists. Up until 2020, Africa and the Middle East received the most tourists from Europe in comparison to other parts of the world. In 2018, they saw the largest increase in European arrivals, with a 25.8% growth rate. Turkey, Morocco and Egypt are the top 3 developing country destinations that Europeans like to travel to.

Some destinations in Africa and the Middle East received many more European tourists than in previous years. Tunisia, for example, had an increase in tourist arrivals of 55% in 2018 and 18% in 2019. After 2 deadly jihadist attacks on a Sousse beach and Bardo National Museum in Tunis aimed at tourists in 2015, tourism to Tunisia decreased tremendously. It recovered in 2018, with tourist arrivals surpassing 2014, before the attacks took place.

Niger and Comoros have seen an increase in European tourist arrivals between 2018 and 2019, with a growth rate of 22% and 23% respectively. Niger increased its focus on assets that are appealing to tourists, such as local culture. The Comoro Islands have promoted themselves as an appealing destination for tourists interested in culture, wildlife and nature tourism.

Africa's tourism market will have a hard time recovering from COVID-19. This is because the amount of domestic and regional travel is lower compared to other world regions, and people from Europe are looking for more security by staying closer to home. Overall, Africa will see major losses in the tourism industry in 2021. A 78% drop in tourism expenditure is expected in North Africa and a 69% drop in South Africa. The quickest resurgence in the African tourism market is expected to be within the wildlife and nature tourism market.

The decline in tourist arrivals will be especially hard for Cabo Verde, where tourism was responsible for 71% of the total export and 93% of international guests. Mauritius is facing hard times because 10% of its GDP comes from tourism and 34% of its export products are within the tourism industry. In the Middle East, it is going to be especially tough for Jordan, where tourism makes up 12% of its GDP, 36% of its exports and 72% of international arrivals.

Asia. Thailand, China, India, Indonesia and Vietnam saw a steady increase in tourist arrivals in the years leading up to 2020. Asia witnessed the first cases of COVID-19 and was therefore also the first region to commence lockdown. In June

2021, many Asian countries suffered high infection rates again, and 70% of Asia's borders have been closed for non-essential travel. Quarantine upon arrival is necessary in almost all countries. This is devastating for the tourism market in Asia. Until domestic vaccination rates and vaccination rates from incoming tourists rise, the tourism industry will continue to suffer majorly in Asia. Tourism arrivals were down 75% in the first half of 2020 in comparison to 2019.

The Philippines was the most sensitive to the decrease in arrivals, as tourism accounts for 9% of its GDP and 10% of its exports. Thailand will have a hard time as well, as 7% of its GDP and 20% of its exports consist of tourism products and services.

Thailand's Phuket province reopened its borders on 1 July for people who are fully vaccinated. Thailand is looking to reopen its national borders entirely in mid-October for vaccinated people.

Asian countries are cheap to visit for Europeans. The continent's rich nature, cultural heritage and opportunities for luxury travel make it an interesting destination when restrictions have decreased. While cities in Asia used to be high in demand, it is likely that nature-based activities will see an increase in demand when the measures allow it. Latin America. International tourist arrivals in Latin America saw steady growth up until 2019.

Mexico is by far the most popular travel destination in Latin America among Europeans. Tourist arrivals in 2020 decreased with almost 60%, which is lower than the world average. Mexico did not see a total lockdown, which let it maintain some parts of the tourism industry. Meanwhile, the country has seen an 80-100% recovery rate in the tourism industry in 2021, which is unique in the world.

Latin America is expected to see the largest resurgence in sustainable travel, especially because sustainable awareness has increased during COVID-19. Conserving biodiversity, protecting local communities and indigenous people have attracted tourists' interests. El Salvador saw a tremendous increase of 29% in European tourist arrivals between 2018 and 2019. Traditional and colonial culture and nature travel are the main reasons for people to travel to El Salvador. Tourist favourites include the majestic volcanoes, craters, birdwatching opportunities and black-sand beaches.

Nicaragua had the largest decrease in European tourist arrivals, with 26% fewer tourists in 2019 compared to 2018. This decline was partly caused by the protests against social security reforms.

For many islands in Latin America, like Saint Lucia, Dominica and Antigua & Barbuda, the coming period will be tough, as tourism is a large part of their total exports. Panama is going into hard times as well, as 9% of its GDP and 28% of its total exports consist of tourism. Another country that is getting it tough is Jamaica, since 54% of its exports and 9% of its GDP come from tourism.

Germany. With almost 13 million trips to developing countries in 2019 (12% of all German outbound trips), Germany is the largest European source country.

Just like for most Europeans, Turkey is a popular destination among Germans. Turkey is expecting 2.5 to 3 million German tourists in the second half of 2021 if the pandemic allows it. This is close to the number of tourist arrivals before the pandemic. Turkey's nice climate, beautiful nature, interesting cuisine and culture, great beaches and cheap flights from European source countries make it an appealing holiday destination. Germany alone provided 27% of the trips to Turkey in 2018. The high ratio of German visitors can be explained by the large number of Turkish migrants living in Germany.

The favourite destination of German travellers differs per niche market. Germans who enjoy nature and cultural activities tend to travel to China. Another popular nature-based destination is Thailand, which also serves well as a luxury travel destination. Next to Thailand, German travellers visit destinations in Egypt, Turkey and Tunisia for luxury travel as well. To participate in local cultural activities, Germans prefer destinations in the Middle East, Morocco, Namibia and Kenia.

Germany saw a rise in domestic tourism during 2020, with 45% of travel being domestic. In 2019, this was 26%. This is likely to be because of the pandemic, but it is a trend that is likely to persist when the pandemic is over. At the beginning of October, 77% of the population was fully vaccinated. Mostly because of vaccinations, air travel out of Europe from Germany was almost 10 times higher in May 2021 compared to 2020. However, this number represents only 15% of the total trips before COVID-19.

In July 2021, passenger numbers out of Europe showed further recovery up to over one-third of the pre-COVID-19 passenger flows.

Table 1

The number of Germans travelling outside of Europe by air

Month	2019	2020	2021
January	6322720	6423267	848268
February	5919529	5958139	636531
March	7198047	3080015	890297
April	7791196	137090	964301
May	7664710	146225	1136260
June	8412173	510461	1796977
July	9343396	1227113	3493451
August	9633553	1641557	no data available
September	8829200	1329745	no data available
October	8944404	1219459	no data available
November	6816603	692767	no data available
December	6993276	916619	no data available

**Source: created by the author based on [11].*

German tourists generally do not like uncertainty. They like to prepare and tend to read a lot before their trip. They are, like most Europeans, direct in their communication and are well known for their tendency towards organisation and punctuality. Trying local food and hiking in nature are among their favourite activities. German tourists are more interested in beach tourism than other tourists with other nationalities. Germans are also the ones taking the most cruise trips in the world.

Germans want to include a lot of nature activities. Their love for the outdoors also reflects their values related to sustainability. They find it very important not to disturb nature, as 57% believe their holiday trip should be as environmentally friendly as possible and 23% said that they consider sustainability during their holiday planning. Another 4% state that it plays a determining factor. Next to experiencing nature, they also enjoy beach holidays, relaxing holidays and family holidays.

Booking accommodation and flight-tickets separately (FIT tourism) has seen a slight increase between 2010 and 2018. However, Germans still prefer to book package travel including both transportation and accommodation. In 2019, popular tour operators were Tui (17.9% market share), DER Touristic (8.5% market share), FTI

(7.9% market share) and Aida Cruises (5.2% market share). Most Germans book their trip online (42%) or face-to-face (40%). Important online and offline travel agents active in the German market are DER Touristic, RTK Group, TUI, BCD Travel and LH City Center. Booking through phone calls or email is the least popular.

The average number of days Germans go on holiday is almost 10 days. German travellers enjoy staying in hotels, with 66% of them having stayed in a hotel during their last trip. A large decisive factor for travel destinations is their budget. They largely spend their money on their hotel stay, flight and food.

German travellers value the opportunity for outdoor and other activities, feeling taken care of, cultural experiences and a feeling of having a ‘once in a lifetime’ experience during their travel the most. These are the most important determinators while choosing a destination.

The average budget for the next main trip was €1,583 in 2020, which is a decrease compared to €2,467 in 2019, although this amount will be higher for long-haul destinations. The booking process of German travellers usually takes 1 week or 1 to 3 weeks. They are likely to make their decision based off of reviews, information provided and deals. Germans look to book their travels through online travel agencies, search engines or travel comparison websites.

Germans are among the most willing to travel off-season, with almost half of them being willing to do so. Also, 39% of Germans are willing to pay more to avoid crowded destinations, and almost 60% of Germans are willing to stay at 1 destination during their travel.

Germany is the largest economy in Europe, with a GDP worth 3.3 trillion euros in 2020. It has experienced a smaller decrease in GDP during the pandemic compared to other European countries, with a growth rate of -4.8% in 2020. In 2021 and 2022, the growth rates are expected to be 3.6% and 4.6% respectively. Germany’s strong economy and its vast population make it an interesting and stable source market. In July 2021, almost half of the population was fully vaccinated against COVID-19.

United Kingdom. With over 11 million trips to developing countries in 2019 (19% of all British outbound trips), the United Kingdom offers the second-largest European source market. In 2019, 88% of people in the United Kingdom took at least 1 trip, with the average person taking almost 4 trips per year. Families with children over 5 years old enjoy most trips.

Just like for Germany, the most popular developing country destination for British people is Turkey, with 6% of people travelling there in 2018-2019. Asia is also an increasingly popular destination, along with North and South America. Compared to other age groups, 18-24-year-olds are increasingly interested in travelling to Africa. The most popular African destinations are Morocco, South Africa and Egypt.

Beach holidays and city trips are popular among British travellers. Adventure holidays are also seeing an increase compared to the years before: 10% took a lake or mountain trip and 7% took a camping trip, the latter being especially popular amongst the age group 55-64. Adventure tourism trips are increasingly popular among 18-24-year-olds. Wellness travel has also been rising in popularity. Many couples enjoy a romantic getaway.

The average budget for the next main trip was €2,155 in 2020, which is more or less the same as in 2019. Their stable holiday budget is an exception in Europe, probably caused by the high vaccination coverage at a very early stage.

Online bookings are by far the most popular, with 83% booking their trips this way. Consulting travel company websites and professionals have seen a rise, while social media are used less for travel information. British travellers have become more aware of fake news and fake reviews on social media, which makes them wary of using it for travel recommendations.

Holiday bookings through phone calls have seen a slight rise from 15% in 2018 to 17% in 2019. These bookings are mostly made by elderly people above 75 years old. In-store bookings have decreased from 15% to 12% between 2018 and 2019. High-end accommodation is the norm for British travellers. Package holidays, especially all-inclusive, are popular. However, booking transportation and accommodation separately is equally popular. These 2 forms of travel have not seen major changes in the past years.

Among the British, 50% have either been on a cruise and are likely to go again or have not been on a cruise but are interested in going on 1. Most people are interested in ocean cruises, followed by adult-only, river and land-based cruises.

British people care about sustainability. They find it important that the money spent on holidays contributes to the local community. Next to that, they find it important that plastic pollution is minimised and that the local animals are treated with respect. Half of British travellers find travel companies' green credentials important.

Some of the leading certification programmes are:

- Travelife, offering a certification programme for tour operators, travel agents, hotels and accommodations;
- Earthcheck, offering a science-based approach to increase efficiency, maximise the guest experience and minimise the environmental footprint;
- Green Globe, a global certification with a focus on hotels, resorts, attractions and conference centres.

It is important to realise that opting for certification has a big influence on your company. It usually requires hard work to obtain, but it can be of great support in increasing the sustainability of your business and marketing your company.

British people on average spend 8 days at their destination. Most British travellers stay at a hotel, while few of them stay with family or friends, a resort or an alternative accommodation. Most of the money spent goes to hotels, followed by flight expenses.

Compared to the French and Germans, British people tend to consider deals and low costs more as a determining factor for their travel decisions. However, they value the activities at the destinations and the cultural experience the most.

British travellers usually book their trip within 1 week or take 1 to 3 weeks to do so. Next to money deals, British people find reviews and information important decision-making factors. British people are mostly influenced by reviews on travel review websites, followed by search engines and online travel agencies. They usually also book their travels through online or offline travel agencies. Therefore, most British travel agents adopt a multichannel approach, offering their services both online and offline. Large travel agents offering online services are Hays Travel, Travel Counsellors and Tui.

A little over 45% of British people are willing to take more off-season trips, while 42% are willing to pay more to avoid crowded destinations. Almost 60% are willing to stay at 1 destination per trip instead of travelling to multiple destinations.

The United Kingdom is the second-largest economy in Europe, with a GDP of 2.3 trillion euros in 2020. While the GDP decreased with 9.8% in 2020, it is expected to grow significantly in 2021 and 2022, with 7.2% and 5.5% respectively.

France. With over 9 million trips to developing countries in 2019 (20% of all French outbound trips), France offers the third-largest European source market. Former French colonies such as Morocco and Tunisia are favourite French destinations, as they offer no language barrier and many French people have roots in these countries.

After a partial recovery in December 2020 and January 2021, air travel out of Europe declined again in early spring 2021. In June 2021, the number of passengers went up again, to about one-sixth of the pre-COVID-19 passenger flow.

The average budget for the next main trip was €1,522 in 2020, which decreased from €2,201 in 2019, although this amount will be higher for long-haul destinations.

French people usually speak little English compared to other European citizens, which makes it important to address them in French. The French share some cultural aspects with the Germans. For example, both are very straightforward in their communication (you may also consider it rude). The French, however, are open for more spontaneity during their holidays compared to Germans.

French people take almost 4 trips on average per year. French people mostly enjoy relaxing and sight-seeing holidays, followed by family visits. Just like the British and Germans, romantic getaways are also well liked among the French. French people spend around 10 days at the holiday destination on average.

The French are also the most open to alternative accommodation compared to other countries, although around 50% of the travellers prefer to stay in hotels. They are the most likely to stay with family or friends during their trip compared to other European countries, and 48% of French tourists claim that family/friends is/are the most important reason for their travel. This is relatively high compared to the average EU citizen (38%). Especially former colonies, like Morocco and Tunisia, receive these visitors.

Natural features/nature (58%) and cultural and historical attractions (36%) are mentioned most often as reasons to return to the same destination for a holiday in a poll by Eurobarometer (compared to 45% and 31% for the EU in total). Therefore, nature and cultural trips offer the most opportunities when targeting the French market. The French have a very high preference for beach holidays as well.

The size of the budget is crucial for 77% of French travellers to how they spend their holidays. However, they also consider the destinations' activities to be 1 of the most important factors in choosing their destination. Other determining factors are the feeling of having a 'once in a lifetime' experience, cultural experiences and outdoor activities. French travellers usually book their trip within 3 weeks.

French tourists have very specific needs and find those very important. They value freedom during their trip and therefore prefer to travel independently and not join group tours. Furthermore, they also care more for family entertainment compared to German and British people. Activities for the whole family are thus important to them. Lastly, they do not like crowded places, as they would rather get a fresh view on something unique.

Before French people go on holidays, they like to look up reviews and information on the destination online and search for deals before making their final decision. Most French travellers use search engines such as Google to decide on their holiday. They also make use of travel agencies and airline websites. When looking for French sustainable tourism companies, a good starting point is the Agir pour un Tourisme Responsible (ATR). The largest French airline, also focussing on long-haul destinations, is Air France-KLM.

Almost half of French travellers are willing to travel off-season, with 28% willing to pay more to avoid crowded destinations. Also, 51% are willing to stay in a single destination instead of multiple destinations. Almost 40% of French people are willing to pay more to support the local community.

France is the third-largest economy in Europe, with a GDP of 2.3 trillion euros in 2020. The GDP decreased with 7.9% in 2020 but is expected to grow with 6% and 4.2% in 2021 and 2022 respectively. France has a population of 67 million.

Italy. With 4.3 million trips to developing countries in 2019 (16% of all outbound trips), Italy offers the fourth-largest European source market. Italy is known as 1 of the first places in Europe where COVID-19 occurred, and it has seen a serious impact with a relatively high death rate and high economic consequences. The Italian vaccination rate is comparable to Western European countries, with 78% of the adult population having been fully vaccinated as of October 2021. As of May 2021, the Italian outbound travel market has failed to recover.

The most important developing country destinations were Albania, Egypt, Morocco and Turkey. The main African destinations (besides Egypt and Morocco) are South Africa, Tanzania, Madagascar, Mauritius and Ethiopia.

The overall holiday budget of Italians has dropped from €1,757 in 2019 to €1,377 in 2020 and is lower than the budgets of German, British and French tourists.

Italian tourists still prefer travel agencies over online bookings, as only 39% of Italians are booking online compared to the 49% average in Europe. Many Italians also tend to travel in larger groups, often with large (multi-generational) families and prefer an Italian-speaking guide. Margins for tour operators and travel agents are generally lower for larger groups. However, their large group sizes offer some economies of scale.

Italians feel a need for a more personalised booking service because they prioritise the authenticity of their holiday. The preferred accommodation types for Italian travellers are hotels and tourist villages. The popularity of such accommodation also increased in 2018 by 6.7%. Italians have the highest preference of all Europeans for beach tourism.

Almost 40% of Italians are willing to take more off-season trips, while 28% are willing to pay more to avoid crowded destinations. Also, 56% are willing to stay at 1 destination per trip instead of travelling to multiple destinations.

Italy is the fourth-largest economy in Europe, with a GDP of 1.7 trillion euros. The GDP decreased with 8.9% in 2020 but is expected to grow with 5.0% and 4.2% in 2021 and 2022 respectively. Italy has a population of 60 million.

Spain. With 3.7 million trips to developing country destinations (17% of all outbound trips) in 2019, Spain is the fifth European source market. Just like Italy, Spain has been hit very hard by the pandemic. The overall holiday budget of Spaniards has dropped from €1,798 in 2019 to €1,347 in 2020, which is comparable to the budget of the Italians but lower than the budgets of German, British and French tourists. The Spanish vaccination rate is relatively high, however: 83% of the adult population was fully vaccinated by October 2021. Mainly because of that, the number of trips out of Europe was also higher than in Italy during the first months of 2021.

Morocco in particular is an important destination. Due to strong historical ties, tourism for the purpose of visiting family, friends and relatives offers opportunities for Moroccan suppliers. Other important destinations are Mexico, Thailand, Turkey and China. Many Spanish-speaking countries, including the Dominican Republic, Peru, Ecuador and Cuba, are also in the top 10 destinations.

The Netherlands. With 3.5 million trips to developing country destinations (17% of all outbound trips) in 2019, the Netherlands is the sixth-largest European source market. Although the Dutch market is recovering, most trips are domestic or within the EU. Table 5 shows an insight in the development of travel outside of Europe during and before the crisis. Comparable to Germany, Dutch passenger flows out of Europe recovered up to about one-third of pre-COVID-19 levels by July 2021.

The most important aspects of choosing a destination for Dutch tourists are the variety of possible activities in the destination and a sunny destination. Turkey is by far the most important developing country destination. The main African destinations are Morocco, Egypt, South Africa, Gambia and Tunisia.

Dutch people tend to be price-conscious holiday bookers who aim for good value for their money. The largest age groups of Dutch tourists are 65+ and the age group 45-64. The age group 45-64 spends the most on holidays, with an average of €1,687. Online bookings are the most popular among the Dutch, as 80% of all bookings are made online. The largest travel agents active in the Netherlands are TUI Netherlands, BCD Group, D-rt Group, Corendon and Sunweb Group.

The Dutch are in general very direct in their communication. Dutch tourists are often good English speakers, and some speak German and French as well.

Almost 47% of Dutch people are willing to take more off-season trips, while 30% are willing to pay more to avoid crowded destinations. Also, 64% are willing to stay at 1 destination per trip instead of travelling to multiple destinations.

The Dutch vaccination rate is relatively high, however: 79% of the adult population was fully vaccinated by October 2021.

The Netherlands has a GDP of 798 billion euros. The GDP decreased with 3.7% in 2020 but is expected to grow with 3.3% and 3.3% in 2021 and 2022 respectively. The Netherlands has a population of 17 million.

The Dutch GDP per capita is higher compared to other important European source markets, which means that the Dutch have a relatively high income and have more money to spend on holidays.

Eastern Europe. Before the coronavirus, Eastern Europe was an ever-growing market and had the highest growth rates of trips to developing countries from Europe. People from Poland took 28% more trips to developing countries in 2018 than in 2017. In some other countries, this growth rate was even higher. Bulgarian citizens travelled 27% more to developing countries, the Czech Republic had a growth rate of 36% and Lithuania even had a growth rate of 56%.

Countries from Eastern Europe take relatively many trips to developing countries compared to other European countries. Polish travellers take 24% of their trips to developing countries, Bulgarian tourists take 26% of their trips to developing countries, Hungarian citizens 29% and Greek travellers 34%. Most travellers in these countries are first-generation travellers. They generally focus on standardised holidays like sun & beach holidays and round trips.

It is important to realise that tourists from these countries focus on a few developing country destinations. Most of their destinations are neighbouring destinations. Out of all Hungarian trips to developing countries, 82% were to Ukraine. Bulgarian tourists visiting a developing country also have a very specific focus – about 90% visit Turkey. While Greek tourists also show much willingness to visit Turkey (48%), many Greek tourists travel to the neighbouring Albania (38%). Polish developing country travellers mostly visit Ukraine (47%), followed by Belarus (18%) and Turkey (12%).

1.2 SEGMENTATION AND ORGANIZATION OF THE TOURIST DEMAND MARKET IN EUROPEAN COUNTRIES

When attracting European tourists, it is very important to know which markets offer the most opportunities. Therefore, we have provided a top 6 of the most interesting markets.

Several niche markets in the segment of nature tourism, such as (1) wildlife watching and bird watching, (2) walking, (3) adventure tourism trips and (4) ecotourism, offer the most opportunities. These niche markets are high in demand, especially right after border restrictions are lifted, because these niche markets include activities in spacious, off-the-beaten-track destinations and therefore cause less concern for coronavirus infection. Despite the high demand, we do not consider sun & beach tourism as the market offering the most opportunities, because it is mainly dominated by large suppliers offering fixed packages. Within the sun & beach tourism market, Generations Y and Z in particular offer opportunities for small-scale suppliers of sustainable trips. (5) Tangible (built) heritage and intangible culture tourism also offer opportunities, but mainly for when the fear of COVID-19 infections has reduced. This is because of the urban setting in which this tourism often takes place, and right now, many people will avoid crowded cities to avoid infection. (6) Wellness activities and fitness are likely to be in high demand in the short run. Europeans want to take care of their mental wellbeing after stress has taken a toll during lockdown.

In this chapter, we will further discuss the niche markets offering the most opportunities, structured by the market segments these niches belong to. Nature tourism. Compared to other segments, nature tourism is expected to recover fastest, because rural destinations are expected to gain popularity. In 2021, 56% of travellers are looking to spend their holidays in rural destinations and doing simple outdoor activities such as hiking.

Almost all (96%) European tour operators offer services related to 1 or more niche markets within nature tourism. Nature tourism is often part of a longer, more diverse trip. For example, people like to combine a city trip with an escape to more rural destinations. Therefore, it is important to offer a diversity of products and services to attract Europeans.

Nature tourism covers many niche markets. Table 2 offers an overview of the niche markets within nature tourism and the percentage of European tour operators active in this niche.

Table 2

Percentage of European tour operators active in a primary nature tourism niche market

Niche market	**Definition**	**Percentage of European tour operators active in this niche**
Sun & beach tourism	Sun & beach tourism refers to holidays taken for the purpose of staying at or near beaches.	65.6%
Wildlife watching	Wildlife watching involves viewing wildlife in their natural habitat. It includes different types of safari such as 4x4, walking, fly-in, river/canoe and horseback safaris. The niche also includes trips to view marine life.	57.7%
Walking	Walking tourism refers to trips in which walking in the natural environment forms a significant part of the trip. It includes hiking and trekking, long-distance walking and specialist techniques such as Nordic walking.	49.8%
Ecotourism	Ecotourism refers to an environmentally based tourism experience that is sustainable, has low impact on the natural environment and helps to preserve the long-term nature of the community/project/site.	42.3%
Bird watching	Bird watching is defined as tourist travel for the specific purpose of observing birds in their natural habitat. The niche is sometimes referred to as birding or avitourism.	37.3%

Continuation of table 2

Fishing	Fishing tourism involves travel with the primary purpose of fishing. This can be in either freshwater or saltwater. Fishing is sometimes referred to as angling.	13.6%
Cycling	Cycling tourism refers to recreational travel involving leisure cycling as a fundamental and significant part of the trip. It includes cycling types such as road cycling, mountain biking and cycle touring.	9.3%

**Source: created by the author based on [11].*

Table 2 gives you a general idea of what Europeans like when on vacation, as well as an indication of how European tour operators cater to European tourists. However, you need to realise that the competition in these markets is also large. This means you need to find ways to distinguish yourself from your competitors.

What you can do with Table 6 really depends on the niche market your company is in. If you operate in a very popular niche market, you could target almost all European tour operators with an appealing offer, if they are active in your country. However, you need to really focus on your unique value proposition (to find out what that is, read our report on how to determine your unique value proposition).

When operating in a more specific niche market, you really need to find those tour operators that fit with your product. These might be:

- Tour operators that offer your product in your market already. In this case, a decent offer might be very interesting if it is comparable to or better than that of your competitors;
- Tour operators that offer your product in another destination. You might be able to convince tour operators to add your destination to their current offering;
- Tour operators that offer similar products for your destination. If you are operating in sailing tourism, for instance, you could target tour operators that sell activities in other water sports or even have a diverse offering in sun and beach tourism.

Wildlife watching and bird watching. Wildlife watching is the second-largest niche market and is the largest in most sub-Saharan African countries. Within wildlife watching, there are different target groups. Most European travellers enjoy seeing animals such as the Big 5. However, lesser-known animals are also interesting for wildlife travellers, especially wildlife enthusiasts. Wildlife enthusiasts usually have specific interests and are keen on learning a lot about local wildlife. Expertise and knowledge are therefore very important when attracting wildlife enthusiasts.

Specialist niches within birdwatching are hardcore birding, enthusiastic birding and casual birding. Hardcore birders have very different demands compared to enthusiastic and casual birders. While hardcore birders travel for the sole purpose of birding, enthusiastic and casual birders are also interested in other activities. This niche market requires a lot of expertise and knowledge about local birds and birdwatching.

Provide nesting sites, feeders and hides and make sure there are fresh water sources that attract birds. This will optimise the likelihood of spotting birds. Avoid disturbing the birds, as it will frighten them off and will put off birdwatchers, as they find it very important to treat wildlife well.

The United Kingdom and Germany offer the main source markets for wildlife watching and bird watching.

Walking tourism. Walking tourism is the third most offered niche market by tour operators and can be divided into several specialist niches: Nordic walking, long-distance walking and hiking/trekking. Specific passion groups are walking charity events, coastal walking and walking on volcanos. For most target groups, walking could be an interesting add-on to your current services. You could also offer a specific hike for a specialist target group.

Some examples:

- Offer a few days' hike along local villages including a homestay for a Generation Y or Z target group interested in community-based tourism.
- Organise a 1-hour trip with a guide for a multigenerational target group to add an activity suitable for everybody.
- Organise a coastal walk to diversify your sun and beach offering.

Ecotourism. Ecotourism refers to an environmentally based tourism experience. These trips have low impact on the natural environment and help preserve the local environment or benefit the local community and economy. Specialist niche markets within this niche are agritourism, rural tourism, dark sky tourism and camping.

Europeans tend to be aware of their possible impact on the climate and the environment. Europe is therefore the largest market for sustainable tourism and is even expected to have a 51% market share in the segment. Among European retailers, 85% have reported increased sales on sustainable products in the past 5 years. Especially French and Dutch retailers report that they have seen increased popularity concerning sustainability.

COVID-19 has increased sustainable awareness. People are looking to give back to local communities and decrease their environmental footprint. This brings many opportunities for the ecotourism market. Immersion in the local culture and participating in outdoor activities is very appealing to many Europeans.

Adventure tourism. Adventure tourists are adventurous people and are eager to undertake unique and extreme activities. These tourists are likely to be among the first tourists to discover or rediscover remote and long-haul destinations. Moreover, adventure tourists are usually more loyal to their tour operator. This is because they trust their tour operators more compared to other tourist segments. If a tour operator considers a destination safe and border restrictions allow it, these tourists will go.

The adventure tourism market is expected to recover at a faster pace than other tourism markets. It is even estimated that travel spending on this segment in 2021 will be close to the pre-COVID-19 level, with only 7% less than in 2019. Most adventure tourism activities are outdoors and at a safe social distance. This makes it desirable for people to undertake this kind of holiday post-lockdown. Especially 18-to-24-year-olds are eager to go on adventure holidays, especially after COVID-19 travel restrictions. These holidays usually include a once-in-a-lifetime or bucket list experience.

Most European tour operators offer services related to 1 or more niche markets within adventure tourism. This includes niche markets that have a crossover with segments of nature tourism or cultural tourism, like wildlife watching, walking and many more.

Table 3

Percentage of European tour operators active in a primary adventure tourism niche market

Niche market	Definition	Percentage of European tour operators active in this niche
Adventure tourism trip	Adventure tourism holidays are characterised by adventure activities, the natural environment and cultural experiences.	32.3%
Adrenaline (hard adventure)	Adrenaline activities refer to hard adventure activities which require a high level of expertise to take part in and usually involve an element of personal risk.	10.4%
SAVE	SAVE tourism includes 4 major travel profiles: Scientific, Academic, Volunteering and Educational. The sector is characterised by the acquisition of knowledge for personal or professional reasons, and volunteering is the most common link between all 4 profiles.	5.4%

**Source: created by the author based on [11].*

Adventure tourism trip. The most popular niche market within the adventure tourism segment is the adventure tourism trip. Adventure tourism trips are characterised by adventure activities, the natural environment and cultural experiences. Adventure tourism trips are distinguished by their diverse offering, can include activities such as walking and cycling and mostly offer a combination of nature and culture. An adventure tourism trip could include visiting a city on the day of arrival, cycling through nature and spending the following night in a homestay in a small village, from where activities are initiated such as wildlife watching, fishing and getting in contact with locals.

The United Kingdom and Germany offer the largest markets for adventure tourism trips, followed by France, Italy and Spain. Within those countries, your ideal target market depends on your offering. Generation Y and Z tourists offer opportunities, because they are the most eager to explore, the most open to new activities and the most eager to join physical activities. They will be the most open to very active holidays, especially if they are without children. Generation X will have more money to spend, and European baby boomers are still very active despite their old age.

Cultural tourism. Cultural tourism refers to travel where tourists want to learn about the destination's culture. The trip will include tangible and intangible features of a country's history, heritage, culture, lifestyle, art, architecture or religion.

Table 4

Percentage of European tour operators active in a primary cultural tourism niche market

Niche market	Definition	Percentage of European tour operators active in this niche
Intangible culture	Intangible cultural heritage refers to experiencing the living culture of local people, such as attending music festivals.	51.6%
Tangible (Built) heritage	Tangible (built) heritage refers to visits to cultural attractions that involve built heritage, such as a museum, or a man-made architectural structure, such as the pyramids.	50.5%
City breaks	City breaks refer to short break travel in town/city destinations and involve cultural activities around tangible, intangible and food and drink activities, both during the day and at night.	30.5%
Food & wine	Food tourism refers to people that like to experience culture through its cuisine. It is sometimes referred to as culinary tourism or gastronomy tourism. Wine and other beverages are often included.	25.1%
CBT	Community-based tourism (CBT) refers to tourism experiences hosted and managed by local communities. This directly benefits the local community and its economy. The trips are sustainable and responsible.	21.1%
Religious/spiritual	Religious and spiritual tourism refers to travel for religious or spiritual purposes, such as undertaking a pilgrimage and visiting sacred sites.	5.4%

**Source: created by the author based on [11].*

Tangible (built) heritage and intangible cultural heritage. Tangible (built) heritage refers to visits to cultural attractions that involve built heritage. Museums and man-made architectural structures such as pyramids are examples of tangible heritage. Interesting specialist niche markets are museums, art galleries, historic properties, places of worship, architectural tourism and other visitor attractions.

Intangible cultural heritage refers to experiencing the living culture of local people. Attending music festivals is an example of intangible cultural heritage. This niche market can be divided into the specialist niches music festivals and events, films, DNA/genealogy, battlefield tourism, dark tourism and other festivals/events.

Creating attractive descriptions of all tangible and intangible cultural sites in the area is an easy way to create content for your website. This also increases the likelihood of people finding your website via search engines, and it makes your accommodation or organised trip more attractive as well.

The tangible and intangible culture niche markets both mostly take place in urban settings and are expected to recover at a slower rate. People want to avoid overcrowded places in the near future because of the threat of COVID-19 infection. Therefore, tangible and intangible tourism mainly offer opportunities in the long run. It is important to pay extra attention to COVID-19 measures and apply them. For example, make sure there is enough space and hand sanitiser and make sure social distancing can be adhered to.

Wellness tourism. The overall wellness of Europeans has decreased because of the impact of COVID-19. This can only partially be explained by economic reasons such as loss of income and decreased job security. Many Europeans feel less satisfied with their health and their relationships with others, leading to feelings of loneliness, stress and depression. Therefore, many Europeans want to focus on their mental and physical wellness during their holiday. Wellness tourism is expected to grow with an annual growth rate of 7%, to $1.1 trillion globally by 2028.

Examples of wellness holidays are:

- Yoga or meditation retreats, fully focussing on mental wellness;
- Luxurious sun and beach trips, focussing on relaxation, combined with culinary activities, beauty treatment and massages;
- Escape to nature trips, combining a digital detox with exploration and enjoying nature;
- Sports trips, combining physical activities and working on your health with healthy food and the opportunity of meeting new people.

1.3 MARKETING CHANNELS OF COMMUNICATION IN RURAL GREEN TOURISM OF THE EUROPEAN MARKET

Green tourism is not a very clear concept in Ukrainian realities, but for the countries of the European region, it is already commonplace and a way of life. It can be classified as non-traditional form of tourism, which became an example of the growing ecological savvy of the population. Along with this, it activates changes in the socio-economic life of the rural population, namely: the growth of rural employment, development rural infrastructure, obtaining stable and significant incomes of villagers, strengthening the rural budget settlements That is why this issue is quite relevant and requires further, more detailed study.

Green tourism is also called rural or ecological tourism, and in Europe the name is still common "slow". Green tourism is oriented towards the development of rural areas, assistance to its population, and not a less important factor is the rapprochement of man with nature, knowledge of the surrounding world, familiarization with problems of rural areas, adoption of new cultural values.

Each country has its own interpretation of the concept of green tourism, but it is worth paying attention to definition of the International Society of Ecotourism, because it outlines all its aspects: "Ecological tourism consists in responsible travel to natural areas, which ensures the preservation of the natural environment, supports the well-being of the local population, and also contributes to the education of tourists" [5].

What became the prerequisite for such an active development of rural tourism? There are several reasons for this active growth. The first crisis in the agricultural sector became one of the main ones.

The largest number of villagers and the largest the amount of territory with a rural structure is in such countries as Great Britain, Portugal and Switzerland, where the population of rural areas can reach 10,000 people. And the smallest are rural settlements are observed in Denmark and Norway, where a settlement of up to 200 people is considered a village. Despite by all these indicators, a rural area is a small settlement with a low population density.

The rapid urbanization of the nineteenth and twentieth centuries gave birth to new social structures, distinctive from "traditional" societies in the countryside. Preservation of the old way of life and thinking is important for preservation of rural "character" and it is precisely this in combination with scenic values and opportunities recreation in rural areas attracts tourists from urban areas.

The first place in the introduction of green tourism as part of international tourism belongs to France and Switzerland, where in the 18th century the first guest houses-chalets for service appear in the Alps expeditions of British nature-loving tourists. And surprisingly, the leader in the supply and demand of rural tourism for a long time it was considered France, where as early as 1951 an organization was created that offered shelter in villages under vacation time A few years later, the National Federation for the Development of Rural Tourism was founded [1].

The first place in the popularity of rural tourism passed from France to the Netherlands, where the number of rural tourists is 39%, in Denmark – 35%, Germany – 34%, Great Britain, France and Portugal – 29%, Spain and Ireland – 27%. Most countries define rural tourism as the main one in the direction of protection and reproduction of national rural landscapes, that is why this type of tourism is encouraged at the national level and is considered as a component of the Integrated Social and Economic Development Program village It can become the main lever for the upliftment of rural areas. European Bank for Reconstruction and development, make a series of calculations that indicate that the arrangement in the city of a native of the countryside 20 times more expensive than creating conditions for his life and work in the village, as well as the fact that the income from one bed is equivalent to the annual income of a farmer from one cow [6, p. 31].

This became especially noticeable during the pandemic, when the governments of the countries try in every way to support small and medium-sized businesses, as well as agriculture and tourism industry. This was manifested in the creation of special support funds, additional capital investments in industry, tax holidays and guaranteed loans.

In Europe, the practice of analyzing the tourism sector using the distribution indicator is widespread of nights that tourists spent in places of accommodation. Annually, Eurostat submits analytical data based on number of nights spent in the place of stay by degree of urbanization. Over the past few years, this indicator has was fairly balanced, with about a third of the total falling into each category: 33.7% in cities, 33.4% in cities and suburbs, and 32.9% in rural areas. Based on these data, you can conclude that they were mainly rural tourists [8].

Green tourism is actively developing in Poland, the Czech Republic, Finland, Switzerland, Belgium, Sweden and others countries According to experts' estimates, green tourism is associated with 0.5 to 0.9 million jobs, including services tourists in Europe can be provided with more than 2 million places in country estates [2].

Germany, France, the Netherlands, Belgium, Poland and the Czech Republic have the largest percentage of trips where rest in nature is the main motive. It is not surprising that among these countries there are two fairly young EU members, Poland and the Czech Republic, which successfully adopted the experience of green tourism and implemented it in their economy for support and development of rural areas. These six countries are considered the most relevant markets ecotrust services in Europe.

At the current stage, all national organizations of rural tourism and agritourism in European countries are at the end 1990s pp. united in the European Federation of Farming and Rural Tourism (European Federation for Farm and Village Tourism), the abbreviated name of the federation is "EuroGites". The main goals of this organization are: popularize recreation in rural areas, introduce principles, promote green development tourism and implement targeted investment in rural tourism development projects. Each of the European ones countries has its own characteristics of organizing green tourism. In Italy, green tourism means traditional cooking mozzarella, pasta, cheese making, as well as the viticulture process, vine care, cultivation of grape snails and resort tourism. In Austria, green tourism includes harvesting activities herbs, preparation of dairy products, active mountain and eco-recreation. In Finland under the green tourism rest on the shores of protected lakes and rivers is understood. In Spain, green tourism is particularly developed In the Canary and Balearic Islands, that is, recreational tourism, but along with it, gastronomic tourism is popular travel and animal care. An interesting fact is that in Hungary the national specialty is horse riding tourism, in Romania ethnographic and ecological tourism, but in Poland green tourism is not related to traditions of the country.

The organization of rural tourism vividly reflects how different cultural values and customs are. To for example, in France, the organization of recreational services in rural areas is regulated by the National organization of holiday homes and green tourism (Maison des Gites de France et du Tourisme Vert). The main one is her the goal is to offer tourists agro-residences for every taste and type of recreation, which are certified according to high national service standards and. It is worth noting that rural tourism is endowed with special national charm and rich gastronomic traditions, as for the houses, they look much more comfortable than in Northern Europe, and each region has its own unique charm.

Gradually, such organizations were registered in other Western European countries. Today in the countries of the West and In Central Europe, you can observe a sign of competition in the field of green tourism, where some countries broke forward, and the others gave up their positions a little.

Farming gradually began to be replaced by agribusiness, and mechanization and modernization are changing the picture rural reality. In many rural regions of Europe, agriculture has ceased to exist the most important form of land use and the most important form of activity of the village community.

Rural tourism perfectly suits the trend of European travellers seeking authentic, unique experiences and local lifestyles. European rural travellers want to experience natural, unspoiled landscapes and stay in authentic accommodation. Rural communities in developing countries often have great resources to offer such experiences. Cultural experiences and interaction with locals are increasingly popular, as well as agritourism and farm stays.

Rural tourism has many definitions. In this study, rural tourism refers to trips where the main motive is to enjoy: rural areas, rural communities, rural experiences.

Rural tourism aims to include and benefit rural communities, while preserving their environmental and cultural assets. It brings economic development to rural areas by creating additional income and employment. Tourism development can also improve the social wellbeing in rural areas, for example by stimulating improvements in infrastructure, sanitation and electricity networks.

It is closely related to: nature and eco tourism, adventure tourism, community-based tourism, cultural and heritage tourism.

Rural travellers participate in activities, lifestyles and traditions of rural communities. This way they get a personalised experience of the countryside. They usually rent rural accommodation, which they can combine with (rural) activities and attractions, preferably using the local social, cultural and natural resources.

Examples of rural accommodation are a: campground or tent, community lodge, family-run guesthouse, farm, local family or homestay, rural bed & breakfast or small hotel.

Common activities include: animal observation, boat trips, using cycling or walking trail, horse riding, tours (e.g. village, coffee, tea or wine tours), workshops (e.g. cooking or handicraft).

Popular attractions include: archaeological or heritage sites, cultural centres or museums, cultural, gastronomic, heritage and other ro, utes/trails, landscape sceneries or wildlife sanctuaries, local agricultural or craft organisations, markets.

Health and safety measures. Health and safety are important to European rural travellers. They often inquire about the safety of their destination. Vehicles and accommodation also have to be safe. Guides should have good local knowledge. They must know which places are safe to visit and which are not.

Political stability. Safety is important to European travellers, especially because some developing countries are politically unstable. Most commercial tour operators do not offer holidays to countries that their Ministry of Foreign Affairs has declared unsafe. This has previously led to a drop in tourism arrivals in countries such as Mali, Egypt and Kenya.

Rural experiences.Rural travellers are interested in authentic, rural experiences. They like places and activities that are entertaining as well as educational. These should reflect the unique character of the area, its rural qualities and its heritage.

Unspoiled landscapes and sustainability. The main reason for a rural holiday is to enjoy the quality of natural, unspoiled landscapes. This is often more important to rural travellers than the level of facilities.

Quality. European travellers are price-conscious. However, rural long-haul travellers are generally from higher socioeconomic groups. They are willing to pay more if they get a quality experience. Quality is generally more important to them than price. In this context, quality includes such things as authentic experiences, good organisation, hospitable staff, experienced guides and safety.

Authentic accommodation. Rural travellers are looking for a wide variety of accommodation types within a broad price range, from campsites to rural hotels. They like authentic, small-scale accommodation run by local people, preferably reflecting the authentic rural heritage of the area. Freedom and flexibility are also important, especially for families.

Recreational and soft adventure activities. Rural travellers like to participate in recreational activities such as walking and cycling. Other soft adventure activities are also becoming popular, such as horse riding or canoeing. Sleeping in a safari tent, for example, offers an authentic experience for families with children.

Accessibility. In rural areas, accessibility can be a challenge. There is often a lack of good roads and public transport. Unclear and inadequate signs are a common complaint from rural travellers. You need clear signposting at the start of a trail or route, as well as regular road signs, including a plan for checking and maintenance.

Traveller profile. Rural travellers are generally: highly educated, well-travelled, from higher socioeconomic groups.

They can roughly be divided into three main segments:

Older generations. Rural tourism is especially popular among Europe’s relatively large older age group of 50–70. They have more free time and money than other groups. Often their children have moved out, or they are entering retirement. These are usually experienced travellers that enjoy rural, quiet environments and look for new experiences. They want high value for money and are willing to pay more for authentic experiences. Older travellers generally seek higher levels of comfort than younger groups.

Younger travellers. Younger rural travellers are the second largest segment. They have often travelled as children and/or studied abroad. This group is interested in exploring new destinations further away. There are two groups of younger travellers.

High income, little time. These are young professionals with high incomes but limited time to travel. They are mostly between 31–44 years old and often travel in couples, although there is also a singles market in this age group. These travellers are looking for unusual “once in a lifetime” experiences and want to fit as much into their holiday as possible. Comfort is important to them.

Smaller daily budgets, extensive time. This group is mostly between 18–30 years old and includes, for example, backpackers and gap year travellers. Their daily budgets are small but they travel over extended periods of time. These travellers choose cheaper accommodation. They want to engage with local communities and experience local life. Some are interested in volunteer work on community or conservation projects. However this so-called voluntourism also poses risks, for example to local children and wildlife.

Families. Family travel is a large, growing segment. It includes parents and grandparents with children or grandchildren, or sometimes several generations travelling together. Rural tourism is popular among families. In Germany, for example, families are one of the largest market segments for rural tourism. Families are becoming more quality-conscious and price-conscious. They want good facilities and wish to balance safety and fun. Families like rural holidays to combine fun and excitement with cultural enrichment and higher-end experiences.

European travellers increasingly include elements from the local culture in their holidays. They are looking for experiences, rather than going sightseeing. During these experiences, they like to interact with local people. Many developing countries have interesting rural areas with their own cultures and traditions. This offers opportunities for rural tourism providers.

European rural travellers increasingly research and plan their trip online. To gather information and share experiences they use:

- peer review sites, like TripAdvisor and Zoover.
- travel forums, like Lonely Planet's Thorn Tree forum.
- social media, like Instagram, Facebook, Twitter and YouTube.

Online research is a trend that has increased exponentially over the past years. Although growth has peaked, the use of internet to research tourism will continue to increase. It is predicted to remain the most important research channel for years to come.

Selecting smaller specialised tour operators. Smaller European tour operators specialised in your destination or in rural, nature, eco or community-based tourism offer the best opportunities.

You can identify relevant tour operators via trade associations, events and databases, such as:

- Agriterra – supports farmer organisations in developing countries, for instance in developing rural tourism.
- ECTAA – national associations of travel agents and tour operators per European country.
- European Alliance for Responsible Tourism and Hospitality (EARTH) – European network of member and partner organisations in responsible tourism.
- ITB – annual tourism trade event, March, Berlin.
- The International Ecotourism Society (TIES) – global network of ecotourism professionals and travellers that organises the Ecotourism and Sustainable Tourism Conference (search for members).
- World Travel Market – annual tourism trade event, November, London.

Generating direct sales. European rural travellers increasingly book their holidays directly with service providers at the destination. To increase your chances of direct sales you can promote your product on rural tourism websites/portals, such as All

Rural and Responsible Travel. Also consider developing your own national or regional rural tourism portal.

Travellers have many destinations and types of holiday to choose from. This makes tourism a relatively price-sensitive and competitive industry. The price of a long-haul trip consists of three dimensions:

1. The exchange rate between the currencies of the country of origin and the destination country.
2. The costs of transport to and from the destination country.
3. The price of goods and services the traveller consumes in the destination country.

European tour operators are not open about the purchasing prices of their tourism products. According to industry experts, their margins vary between 10–25%. Prices of holiday packages vary widely as they depend on a lot of factors, such as: availability, destination, modes of transport, period of travel, number of travellers, length of stay, type of accommodation, included activities.

Concluding the analysis of the European experience in the organization of rural tourism, we draw attention to new trends in its development associated with the process of globalization. Globalization in the field of tourism, first of all, involves the disappearance of any barriers in international tourist exchanges, the tourist "shrinking" of the globe thanks to the cheaper transcontinental air flights and the creation of a more or less homogeneous tourist infrastructure in terms of the level of service in all countries of the world, etc. Globalization in rural tourism and agritourism is gaining momentum, primarily due to the introduction of global data banks of the planet's agritourism offer and mechanisms of global electronic trade in these services.

In modern realities, green tourism is beginning to gain momentum. Of course, it will pass it is still a long time until it reaches at least half of the tourist flows belonging to traditional tourism.

But from the events of the last two years, we see that this direction is quite promising and deserves attention, because it combines the development of the countryside, the increase in the income of the local population, and improvement infrastructure and the involvement of city residents in history and cultural values in the countryside.

Globalization provides an opportunity for the development of various types of tourism, including medical and health tourism. Medical tourism is one of the important factors in the development of the health care sector, replenishment of the state budget, attraction of foreign investments and creation of a positive image of the country.

Medical tourism is an activity related to the organization of medical care for patients far away from their place of permanent residence. Moreover, patients can travel to medical institutions both within the country (domestic medical tourism) and far abroad (international medical tourism).

Many "medical tourists" take advantage of the opportunity to combine medical care with rest at resorts, health centers, SPAs, and wellness centers. Every year, medical and wellness tourism is gaining more and more popularity, especially among residents of the USA, Canada, and Western European countries. For example, in the US, the number of people who do not have full health insurance exceeds 50 million people. In the majority of the population, health insurance does not cover the treatment of chronic diseases, operations, full dental treatment and prosthetics. Therefore, many Americans prefer to undergo these types of treatment abroad.

Despite the fact that citizens of Canada, Great Britain, Sweden, the state covers up to 90% of the cost of medical services, in order to get to the necessary medical specialist or for a scheduled diagnostic procedure (for example, ultrasound diagnostics), sometimes you have to wait several months. The average waiting period for planned surgical intervention in these countries is about two years. Therefore, patients often choose medical institutions in Asian and Eastern European countries, where they can get the necessary medical services immediately and even in more comfortable conditions than in the Motherland.

Often, patients are simply forced to engage in international medical tourism because they cannot receive certain medical services in their country due to regulatory prohibitions and restrictions. Many patients with infertility problems from Italy, Germany, and Scandinavian countries go to clinics in Ukraine and India for the use of certain methods of assisted reproductive technologies (surrogate motherhood, oocyte donation).

Residents of Ukraine have also discovered medical tourism for themselves. Today, trips by Ukrainians for treatment and diagnosis to medical facilities in Western Europe, the USA, Israel, or Turkey have become quite common.

Almost 1 million foreigners visit Turkey every year, spending about 10 billion dollars on treatment. Advertising and sales of services are handled by a special agency, to which the state allocates funds for advertising and pays bonuses. A separate department for the development of medical tourism has been established in the Ministry of Health of Turkey. The Ministry has concluded agreements with a number of countries that constantly refer patients to Turkish medical facilities.

In recent years, Ukraine has been actively participating in the development of medical tourism at the global level. When the Global Healthcare Travel Council was established in 2013, Ukraine became one of the founding countries. Currently, the Global Healthcare Travel Council includes specialized associations of 56 countries [7].

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