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NICHE TOURISM MARKETS – MEANS OF ENHANCING SUSTAINABLE ECONOMIC DEVELOPMENT IN EU'S EASTERN PERIPHERY

Mara URSACHE*

Abstract: *Within Europe, processes of economic convergence and divergence operate at various geographical scales, resulting in a very uneven geographical landscape. As mentioned in the international literature, the European economic space is characterized by a core-periphery structure. From this point of view, tourism has important significance since it is a noteworthy activity in the European Union and contributes to employment, income generation, overall development and economic rejuvenation of rural, peripheral or underdeveloped areas.*

There has been a shift in the nature of tourism demand driven by changes in consumption patterns, namely an increasing emphasis on more personalized or on specialized forms of tourist packages. This aspect required smaller and more flexible provision that created niche markets capable of providing peripheral areas the opportunity to capitalize on their comparative advantages associated with their natural environments, cultural heritage, and the role of local food in reinforcing personal identity and authenticity.

The purpose of this study is to analyze EU's Eastern periphery (Bulgaria, Hungary, Poland, Romania and Slovakia) niche tourism markets potential and identify a few guiding principles that may lead to sustainable economic development.

Keywords: core – periphery; tourism; niche tourism markets; EU

JEL Classification: L83; O52; P52

Introduction

Regardless of the level to which we turn our attention, one of the fundamental features is the tendency of an uneven spread in space and time, as the result of the permanent „game” between centripetal forces – of attraction and concentration and centrifugal forces – of dispersion.

Due to the complexity and economic, social and cultural heterogeneity characterizing the European continent along with EU's enlargement towards East, the conceptual pair core – periphery gained importance, forming the basis for the European policies regarding support for lagging behind areas in terms of development and sustainability. From this point of view the tourism sector has particular meaning, since as illustrated in the literature it can engender employment, infrastructure, investments and earnings and can change polarities, distanced, peripheral places consequently becoming attractive and highly frequented central places within the tourism system.

However, despite the significance of the tourism sector, the dominance of the mass model of tourism development has led to the deterioration of the resources of many places, and, finally, to a decrease of their quality, causing on a series of negative effects on the host destinations. In the face

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of the economic crisis and its associated drawbacks, globalization and rapid technological change, the necessity to turn toward more adequate, specialized and flexible patterns of tourism development and the discovery of new emerging markets are of crucial importance.

Through image creation, niche segments allow destinations to differentiate their tourism products and compete in an increasingly competitive and cluttered tourism environment. Therefore, niche tourism is seen to be a response to a growing number of more sophisticated tourists demanding specialist tourism products. Niche tourism is seen as a means of increasing the attractiveness and competitiveness of places.

1. Conceptual framework

We live in an unequal world. Development inequalities have long been the focal point of academic interest. The territorial organism appears as an asymmetric system often explained in a variety of ways: rich versus poor, north in contrast with south, developed areas in opposition to developing ones, or core versus periphery.

Peripherality (the character of being peripheric) is a matter of perception. In a geographic approach of the world, peripherality is defined as „the outermost boundry of any area” (Stevenson, 2010), an obviously spatial interpretation. However peripherality is more than a simply geographical concept. To be peripheral means to be marginalised, to lack power and influence and it consequently includes social, political and economic implications.

A peripheral area, then, is one that suffers from geographical isolation, being distant from core spheres of activity, with poor access to and from markets. It also suffers from economic marginalization, caused either by a lack of resources, by a decline in traditional industries or agriculture, or by a lack of know-how and training in areas such as marketing and innovation (Brown, 2000, p. 8).

Botterill *et al.* (2002) provide the following set of characteristics that distinguish peripheral from core regions.

Table 1 - Features of core vs. peripheric regions

CORE	PERIPHERY
High levels of economic vitality and a diverse economic base.	Low levels of economic vitality and dependent on traditional industries.
Metropolitan in character. Rising population through in-migration with relatively young age structure.	More rural and remote – often with high scenic values. Population falling through out-migration, with an ageing structure.

Innovative, pioneering and enjoys good information flows.	Reliant on imported technologies and ideas, and suffers from poor information flows.
Focus of major political, economic and social decisions.	Remote from decision making leading to a sense of alienation and lack of power.
Good infrastructure and amenities.	Poor infrastructure and amenities.

Source: Botterill *et al.*, 2002, p. 9

In addition to these features, Müller (2011b) listed characteristics of, and challenges for tourism in peripheral areas. These include: (i) lack of local control over decision-making –communities strive to direct attention towards endogenous growth to reduce the dependence on external actors; (ii) weak internal economic connections and information flows – making individual economic growth more directly linked to the core or other regions instead of encouraging local cooperation; (iii) geographical remoteness from markets and poor infrastructure: an increasing issue of concern for peripheral tourism, mainly in the context of climate change; (iv) ageing societies with decreasing population figures – most peripheral communities face this trend which puts pressure on local businesses and public services; and, (v) lack of innovation and human capital – thus making positive change less likely.

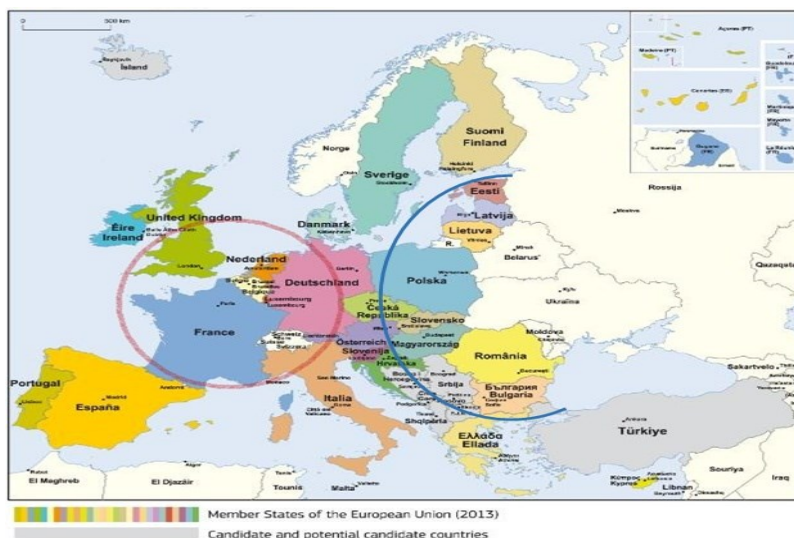
2. The uneven landscape of the European Union

The European economy is one of the wealthiest macro-regions in the world. However, inside Europe itself important disparities and diverging development pathways exist, creating a profound fragmentation of the economic space.

The regional inequalities between EU's countries have turned into a stringent problem mainly after the expansion towards East from 2004 and 2007, leading to serious challenges for the cohesion process. Economic integration leads to an asymmetric spatial structure, resulting in greater congestion and increased specialization at the expense of peripheral countries/regions (Krugman, 1991a). European economic integration of developing economies, causes a number of changes in their economic geography and sector restructuring both at intra and inter-country level (Traistaru *et al.*, 2003), due to variation among the factors that influence the tendency of firms to locate in a certain region (Baldwin and Wyplosz, 2006). Eventually, such restructuring is often considered to determine patterns of divergence between Eastern countries and old EU member states.

In other words, a core – periphery pattern can be identified, as illustrated in Figure 1.

Figure 1 – The core-periphery pattern of EU



Source: Author's representation based on European Commission's Geographic maps of Europe available at <http://ec.europa.eu/avservices/photo/photoByMediaGroup.cfm?sitelang=en&mgid=38>

Although a number of terms are used to define the economic and decision-making center of EU („pentagon”, „blue banana”, „blue orchid”, „golden triangle” etc.) it is unanimously recognized that the core consists of the Western Europe's main growth axis – spreading from London and South – East England through France, Belgium, Netherlands, Luxembourg and Germany to Switzerland and Northern Italy, with a secondary center raising in the South between Barcelona and Milan, known as the European Sunbelt. In the East lies what is defined as Europe's periphery.

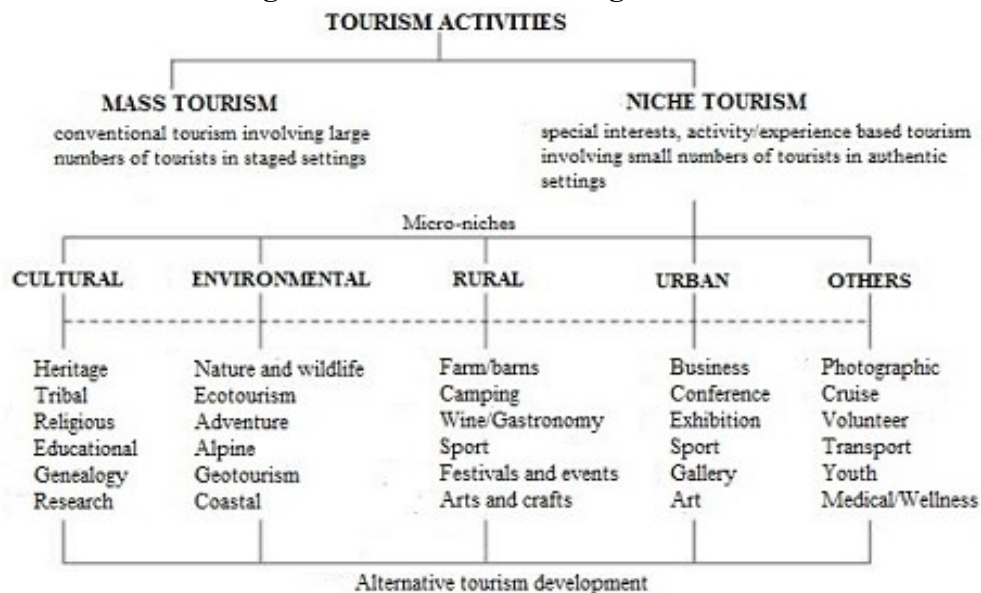
3. Reorientation from the classical thinking pattern towards a personal signature of tourism products

Whenever the objective is to build close and long-lasting relationships with customers, a niche approach is more efficient than a classical segmentation strategy.

At present, travelers are more experienced, have more disposable income and more leisure time to travel, hence tourism allows them to break out from the everyday routine of their normal environment and engage in a world of freedom and novelty (Pascariu, 2006). Therefore, more and more tourists are searching for active participation in courses and tangible learning experiences, and in this search the natural landscapes, cultural heritage and cuisine experiences, in various ways, play an increasingly significant role.

The contemporary tourism market is characterized by a big number of definitions linked to a diverse set of recreational activities, demand for alternative locations, entertainment and attractions, thus new tourism segments are rousing. Niche tourism can be defined in relation to this myriad of factors interrelating and reacting to ever-changing tourism requests and market trends as can be seen in figure 2.

Figure 2 – Niche tourism segments



Source: Author's representation

As it can be observed, the tourism sector is characterized by a varied palette of niche segments. Because the approach is extensive and we can't address all these segments, nor is this the purpose of our paper, hereinafter we choose to present by way of example three of these niche markets: cultural tourism, gastronomic tourism and wellness tourism. The reason behind our choice is twofold. Firstly, natural and cultural heritage assets, gastronomic traditions and experiences have become promoters for regeneration and sustainable growth of a destination. Further, when asked how they sustain their wellness people respond „taking a vacation”. As people started to significantly pay attention to their health considering the daily routine characterized by a high level of stress, they engage in maintaining or improving their health habits even when they travel. Secondly, EU's Eastern periphery is a growing tourism region. The variety of cultural and natural elements, traditional values associated with authenticity and the high number of natural spa and wellness resorts represent key assets for developing and practicing these forms of tourism that bring in revenues, create jobs, and may help improve the well-being of the local communities and tourists.

The demand for long-term development or sustainability and the structural difficulties that hinder the development of peripheral regions bring forward the need of a more integrated and realistic model of the tourism product (Pascariu and Tiganasu, 2014).

3.1. Cultural tourism

Tourism has a major role in the development of destinations around the world. In the majority of cases, culture is a significant asset for tourism. Culture and tourism have a mutual advantageous relationship. On the one hand, culture is being increasingly used as an element of the tourism product which can improve the attractiveness and competitiveness of places, regions and countries. On the other hand, tourism has been incorporated into cultural development policies as a way of supporting cultural heritage and cultural production. The relationship between tourism and culture is perceived as of great significance for promoting a more direct relationship between these two elements. This synergy is even more important, considering the growing importance of both tourism and culture for economies around the globe.

As tourism progressively shifts away from its prior focus on scenery and natural resources (e.g. sun, sea and sand), travelers become more caught up in symbolic and sensory consumption of the images and impressions associated with particular destinations. Tourists are looking for destinations which are related with particular legendary characters, ideas or events, and they want to experience the sights, sounds, traditions, beliefs of the destinations they visit.

According to the UNWTO report „Tourism 2020 Vision”, cultural tourism belongs to the most popular forms of tourism and the interest for it increases faster than for other forms of tourism. As well, UNWTO estimates that cultural tourism accounts for around 40% of all European tourism.

A Eurobarometer survey on European holidays in 2014 indicates that a quarter of respondents mentioned culture as one of their main reason for taking a holiday and nearly half of the respondents said that the natural features and cultural and historical attractions would determine them to go back for another holiday.

3.2. Gastronomic tourism

As tourism destinations are fiercely competing for attention and growth, local customs are becoming an increasingly important source of new products and activities to attract and captivate travelers. Gastronomy plays a fundamental role in the process of attracting tourists because eating is

the only experience that stimulates all five senses and the local cuisine has turned into a significant source of identity formation in postmodern societies (Richards, 2002). The variety of cooking methods, local products and colorful ingredients embrace all the traditional values and promote distinctiveness and authenticity in an increasingly crowded marketplace, respect for culture and tradition, a healthy lifestyle, experience and sustainability.

Gastronomic tourism is a rising phenomenon that is being built up as a fresh tourism product due, *inter alia*, to the fact that as stated in the field literature more than a third of the tourist spending is associated to food, the money being often spent directly with local business.

Maket *al.* (2011) draw attention to the distinctive characteristics of food consumption in tourism: „It is largely essential (tourists need to eat when they travel away from home), it occurs in a foreign and unfamiliar context (in terms of food and foodways), it is of a temporal nature (tourists are usually in a sojourn instead of staying in the destination for a prolonged period of time), and it bears symbolic meaning and can be associated with travel motivation”.

Tourists have differing tastes and demands in terms of food experiences. Uniqueness, genuineness and locality are basic building blocks of food experiences for travelers. Yet, in a globalised world these assets may seem under threat, as to a great extent fast food chains dominate the market. As Groot (2010) highlights in his survey on local food, „Ironically, the emergence of mass tourism has given new opportunities for local products to be celebrated and sold as part of a unique cultural history. As a matter of fact, locally produced food has increasingly come to represent a place in a global market”. Despite the fact that local cuisine may be imitated and globalised, it is the feeling related to the original food experience that has become particular and idiosyncratic in a globalised world. Thus, gastronomy is also a means of improving the image of a destination which is seen as a competitive advantage on the tourism market.

3.3. Wellness tourism

Health and well-being are common aspirations shared by people across all ages, revenues, principles, traditions and continents. The desire to be free of illness, to age pleasantly and to allow our minds, bodies, and spirits to accomplish their potential are as old as civilization itself.

Unfortunately the modern lifestyle is characterized by an aging population, chronic diseases coupled with the unhealthy eating habits (time is money therefore fast food is many times seen as a compromise option) and stress. The rise of wellness tourism is a direct response to combat this trend, mainly determined by consumer demand.

In a search of the literature regarding how tourism and health intermingle, one can observe two approaches of the topic: medical tourism and wellness tourism. But are these two paradigms one and the same thing? Offering a simple answer, no. Below we present the features that distinguish wellness tourism from medical tourism.

Wellness tourism	Medical tourism
Generally people who are healthy – preventive.	Generally people who are sick – corrective.
Travel to maintain, manage or improve health and well-being – individual responsibility.	Travel to receive treatment for a diagnosed disease, ailment or condition, or to seek enhancement – clinical responsibility.
Motivated by desire for healthy living, disease prevention, stress reduction, management of poor lifestyle habits and/or authentic experience.	Motivated by desire for lower cost of care, higher quality care, better access to care and/or care not available at home.
Activities are proactive, voluntary, non-invasive and non-medical in nature.	Activities are reactive to illnesses, medically necessary, invasive and/or overseen by a medical doctor.

Source: Global Wellness Tourism Economy Report 2013, p. 19

Wellness tourism is seen as „a holistic mode of travel that integrates a quest for physical health, beauty, or longevity, and/or a heightening of consciousness or spiritual awareness, and a connection with community, nature, or the divine mystery” (Bushell and Sheldon, 2009, p.11).

Therefore, medical tourism and wellness tourism are essentially different activities that encounter different traveler or patient requirements. The conditions and features that make a destination successful in either form of tourism are as well very different. The overlap between wellness tourism and medical tourism takes place around activities such as thermal baths, health resorts, sanatoria, medical spas, DNA testing, and executive checkups – activities that can be likewise preventive and curative. Wellness tourism is larger than medical tourism.

4. Niche tourism in EU’s Eastern periphery

Tangible-intangible, movable-immovable or spiritual heritage assets create competitive advantages and innovation and become promoters for regeneration and growth of a destination (Bailey *et al.*, 2010).

Through its specificity, the tourism sector is seen as coupled to a country’s heritage more than other industries. The competitiveness of the European tourism industry is intimately interrelated to its sustainability, as the quality of tourist destinations is strongly shaped by their natural and cultural

heritage. Sustainability is recognized as of great potential for bringing heritage conservation, tourism and economic development into a balanced and constructive relationship.

The European Union remains one of the favorite destinations for tourists worldwide and is characterized by the diversity and richness of cultures, arts, cultural and natural heritage. At present, the centre of gravity is beginning to move toward East - EU's Eastern periphery recording consistent annual growth in terms of incoming tourism – 7% in 2014.

Additionally to being an inexpensive destination due to its relatively lower cost of living compared to the countries defining Europe's core, Eastern Europe has also shown to be financially attractive to tourists owing to the lower cost of flights to the region. The shift from the traditional packaged holidays to more personalized vacations is also proving to be advantageous to the Eastern European travel industry.

The five chosen member states (Bulgaria, Hungary, Poland, Romania and Slovakia) are not uniform but diverse entities considering their location, topography, climate, natural landscapes, history, culture and economic development. These countries are known for their cultural legacy and natural beauties, traditional delicious cuisine, natural spa and wellness resorts which have been a local tradition for centuries.

Europe's cultural heritage is „one of the oldest and most important generators of tourism” (Thorburn, 1986), and it maintains its fundamental role in the European tourism industry to this day.

Culture has a significant direct contribution to the economy and society in terms of generated income and people employed and it also brings a substantial contribution to social well-being and to the development and preservation of social capital. The bond between culture and economy has passed thru a major shift, from the simple safeguarding of culture to its economic enhancement, which reveals the relationship among culture, society and economic development (Power and Scott, 2004). Furthermore, the erroneous idea that the economic enhancement of cultural heritage could impede its safeguard and vice versa, is slowly fading (Zanet *al.* 2007).

Culture and cultural heritage should be seen as being essential in a country whose tourism product has been largely based on sun/sea/sand holidays, like Romania and Bulgaria (because unfortunately the share of arrivals in the sea-side area decreased from 13,6% in 2007 to 12,8% in 2011 (WTTC, 2013). Tourism demand is also highly seasonal and spatially concentrated. Hence, cultural tourism is regarded as one promising means for diversifying the basic sun/beach holiday product, for spreading the tourism season and determining travelers to come across hitherto unknown areas, customs, beliefs, values of the Eastern periphery member states.

Cultural tourists stay longer, visit twice as many places, spend more per day and consequently have a significantly greater per trip economic impact. Cultural tourism has turned into an essential instrument of economic and social change in Europe. Cultural consumption has grown and tourism is an increasingly important form of cultural consumption. Bulgaria, Hungary, Poland, Romania and Slovakia are considered particular destinations that people all over the world are visiting in order to know their cultural and natural heritage. However, although the rich cultural and natural assets of these countries is a major pull factor and an important source of competitive advantage in the battle for tourism market share and thus sustainable growth, most tourists coming to these states view culture as one part of the total tourism product, rather than a primary motivation when visiting. Eastern European countries must sustain their development taking advantage of their cultural legacy.

The food of Eastern Europe is healthy and extremely diverse. It is as varied as the history of the region, strongly influenced by several cultures - from the Mediterranean to the Ottoman Empire. The traditional Bulgarian cuisine is universally regarded as one of the healthiest in Europe, not only because of the ingredients used, but also because of the way they are prepared. Bulgarian dishes are very light, made with sunflower oil so that the ingredients retain their natural qualities. The most famous dish is bean soup, whose composition and taste varies from one region to another, depending on local tradition. Among specific foods tourists can also find kebabcheta (seasoned meatballs made from minced pork meat), kavarmakebap (pork meat with various vegetables), moussaka, the well-known shopska (Bulgarian salad) and baclavale (an extremely sweet desert specific for the Balkan region). The excellent Bulgarian cuisine is complemented by numerous high-quality local wines that are (especially the red types) among the most popular in Europe. Typical Bulgarian wines are Gamza and Mavric (red) and Dimi and Pamid (white).

Hungarian cuisine is famous worldwide. Whether we talk about soups, main courses or desserts, all are very tasty. Who visits Hungary must taste the famous gulyasleves, hereafter goulash, a dish prepared from potatoes, meat, onions, carrots and paprika. It is like a consistent soup that can be served more or less spicy. Kürtőskalács is another famous dish, made from sweet, yeast dough (raised dough). Dobos cake and Hungarian wines are also famous brands. If we talk about Hungary's traditional drink, everyone will think of the well-known palinca, which is made from 100% fruit and has an alcohol value of at least 37.5%.

The Polish cuisine is delicious, meat being the main ingredient in most traditional dishes. Pierogi is perhaps the most famous Polish dish, representing dumplings filled with many types of ingredients and can be sweet or salty. Zurek is one of the most popular soups of Poland; it is practically a soup made from rye flour, but served as soup, with meat, usually smoked and then boiled,

sliced sausages, potatoes or boiled eggs. Kielbasa represents all kinds of Polish sausages, internationally renowned for their quality, the vast majority being smoked. Regarding desserts, popular is the poppy cake, served with homemade jam, a treat not to be missed on a visit to Poland. As for drinks, Polish are large consumers of vodka.

The main ingredient in the Slovak cuisine is milk. And rightly so, as Slovakia is famous for its dairy products of excellent quality and delicious taste - various types of cheese from sheep, goat or cow, smoked or not smoked, cheese or traditional butter. A well-known national dish is dumplings with cheese (halusky). Beer is very popular in Slovakia and of very good quality.

Romanian cuisine is diverse and contains many customs and culinary traditions, as a result of the junction with the gastronomic culture and traditions of other nations who came into contact with Romanian people through history. Soups, mamaliga, sarmale, tochitura are just some of the tempting, tasty, flavored, colorful, scent, authentic traditional Romanian meals. One of the most important drinks is wine, with a rich tradition in its preparation.

Eastern Europe's cuisine is still not westernized. Of course one will find the global fast food chains here and there but this region is still characterized by authenticity and tradition. Grandma's still sweep their doorsteps with handmade brooms, fruits are still picked in the forest, folk costumes are still worn in some regions, and gastronomic traditions that go back centuries are performed with pride even nowadays.

Even if the world is globalised and has become more opened, tourists search for experiences based on distinctiveness and local inheritance. Gastronomy embodies all the traditional values of a destination and the feelings associated with them and has become a viable solution to reinforce and diversify tourism, promote sustainable economic development and high quality local products.

Europe is a leading power in the global wellness tourism sector growth, accounting for more wellness trips annually than any other region, according to figures from the Global Spa & Wellness Summit (GSWS). Europe ranks No.1 globally for annual trips taken (203 million) and No.2 for expenditures (\$158.4 billion USD or 115.3 € billion).

Due to high costs of healthcare services in highly developed countries, wellness tourism to developing countries, ranging from dental care to cosmetic treatments, for potential cost savings has emerged in the past years (Antwi and Phillips 2013).

Eastern European states are recognized for natural spa and wellness resorts, which have been a tradition for centuries. Based on the registry of the National Directorate of Curative places, in Hungary there are approximately 1,500 thermal springs, 219 acknowledged medicinal waters, 212 acknowledged mineral waters, 5 medicinal caves. More and more the region is also a chosen

destination for more complex procedures, like heart and orthopedic surgeries, including heart transplants and prostate cancer treatment. According to a survey conducted by portal Treatment Abroad in 2013 regarding top ten fastest European wellness tourism market, three states pertain to EU's Eastern periphery: Hungary, Poland and Slovakia. Romania is home to more than one third of Europe's mineral and thermal springs. Natural factors are complemented under carefully medical care by physiotherapy, acupuncture, electrotherapy and medication produced from plants. Herculane, 1 May and Felix thermal baths are known worldwide.

Most of Eastern Europe states have centuries old traditions of traveling for care, which involves a variety curative, rehabilitative and preventive therapies related to balneotherapy, massage, mud and algae treatment.

Wellness tourism is a niche market with high potential for enhancing the competitiveness and sustainable development of the sector and the economy as a whole. Wellness tourists stay longer due to treatment-based services and spend higher amounts for the specialized services. Wellness tourism is distinguished by lower seasonality, being independent of the weather. The increased need for individually customized services brings a major competitive advantage for this type of tourism, thus contributing to a higher level of guests' satisfaction.

Concluding remarks

Given the growing economic significance of tourism on the global marketplace and due to the fact that the focal point moved to special interests activities and experience based tourism, niche markets are a research area worthy of further investigation. More and more, destinations worldwide are trying to distinguish themselves through the development of distinctive products and experiences based on „alternative” and „creative” forms of tourism.

Niche tourism markets, such as cultural, gastronomic and wellness tourism, provide peripheral areas the opportunity to capitalize their comparative advantages associated with their natural environments, cultural heritage, the role of local food in reinforcing personal identity, authenticity and enhancing sustainable growth.

The most successful destinations are those which recognize the wider implications of the relationship between tourism, culture, traditions, nature, particularly in terms of attracting new residents and inward investment and hence development on long term.

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