

# ANALYSIS OF THE TOURISTS' FLOWS TO BULGARIA FROM THE NEIGHBORING EMITTING MARKETS

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## Abstract

*The tourism industry is an important economic sector in the world economy. This is one of the most fast-growing industries in Bulgaria and the biggest contribution brings the inbound tourism from the neighboring countries. The main goal of the paper is to define the importance of the tourist flows from Romania, Turkey, Greece, Republic of Macedonia and Serbia to Bulgaria, analyzing the fluctuations in the period of 2010 – 2016. Some recommendations for development of the tourism in the country and new tourism products are highlighted as a result of the analysis. They could attract tourists from the neighboring countries for short or long stay. For this purpose, the paper discusses the basic indicators of the travel industry as international arrivals from visitors of abroad, nights spent by foreigners in accommodation establishments, etc.*

**Keywords:** emitting markets, tourist flows, Bulgarian inbound tourism, tourism destination

**JEL:**L83, Z30, Z31, Z32, Z33, L10

## Introduction

The tourism industry has important role in the economic development of the countries through the travel expenditure generated on tourist trips and the employment. The direct economic contribution of travel and tourism amounted to approximately 2.31 trillion U.S. dollars in 2016. (Statista Inc., Direct and total contribution of travel and tourism to the global economy from 2006 to 2016)

In Bulgaria, according to the Bulgarian National bank's data, the incomes from international tourism in the balance of payment for the period January – November 2016 amounts to 3141.9 million euro, that is 15.4% more compared to the same period of 2015. (Ministry of Tourism)

In 2016, the total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts) was 363,000 jobs in 2016 (11.9% of total employment). This is forecast to rise by 5.3% in 2017 to 382,500 jobs (12.4% of total employment). (WTTC, Travel and tourism economic impact 2017 Bulgaria) According to the National Statistical Institute's data in 2016 in Bulgaria only in the hospitality and restaurant sector there are 157.8 thousand persons employed.

Many decades in Bulgaria are developed intensively mostly summer sea tourism and winter ski tourism. In the last years more cultural tours are created and attention is paid to the sustainable development of tourism.

The inbound tourism in the country becomes more important for the economic development of Bulgaria. The international arrivals and the tourism expenditures of the tourists from neighboring countries have a significant share. The main goal of the present paper is to analyze the fluctuations of the tourist flows from Romania, Turkey, Greece, Republic of Macedonia and Serbia to Bulgaria and based on this data to highlight the main implications about the opportunities to attract more tourists from these countries. For this reason, the article discusses the tourist flows in the period of 2010 – 2016 from aforementioned countries as emitting markets.

## Literaturereview

The tourists' flows are analyzed in different aspects. Some of the authors emphasize on the economic impact of the tourists' flow, others on the spatial distribution, carrying capacity of the destination or sightseeing place, the management of the tourists' flows, their measurement through the new technologies, etc. Another point of view to the problem is the seasonality of the tourists' flows and their time distribution. The aspects the different authors are analyzing the tourists' flows in their studies, could be classified as follows:

- Economic aspect (Witt et al., 1994, 1995 and 1998; Bowden, 2003; Capone, 2016; Rogerson, 2017);
- Spatial aspect (McKercher and Lew, 2005 and 2008; Yang and Wong, 2012; Lohmann and Netto, 2016);
- Time aspect (seasonality) (BarOn, 1975; Phelps, 1988; Butler and Mao, 1997; Petrevska, 2013).

The geographical scale of the research represents another aspect of tourists' flows studies. There are authors (Shepherd, 2010; Bizzarri, 2012; Mihai and Simoni, 2012) that discuss the global tourist flows, and other group that analyze regional aspects in tourist flows (Jansen-Verbeke and Spee, 1995, Basiron et al., 2014; Laframboise et al., 2014).

It's necessary to be made a literaturereviewoftheuseddefinitions, in order to be made a complete analysis of the fluctuations in the tourism demand and preferences of the travelers,

The terms "visitor" and "tourism" according UNWTO are as follows: "A visitor is a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips taken by visitors qualify as tourism trips. Tourism refers to the activity of visitors." (UNWTO, Glossary of terms)

The presentpaperdiscusses data for the tourist flows into Bulgaria. Because of this it's necessary to clarify the term inbound tourism. There are two concepts that are used equally: incoming and inbound tourism. Incoming is more commonly used in the practice whilst inbound- in the scientific literature and for statistics purposes.

The UNWTO uses the term inbound tourism. According the organization's glossary "inbound tourism comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip." (UNWTO, Glossary of terms) The inbound is part of the international tourism.

The definitions for tourism destinations could be classified semantically in the following groups:

- As spatial/geographical category
- As economic/marketing category.

EduardoFayos-Solaetal. summarize the definitions of tourism destination in three groups:

- From a demand perspective - a destination comprises all those local components being an objective of the tourist's visit;
- From a supply, spatial/territorial perspective - a destination is a composite of goods and services performing in an interconnected way to satisfy the needs and expectations of tourists;
- From a systemic perspective – a destination is a complex system, conformed by networks of agents and subsystems of resources, services and products. (Fayos-Solá et al., 2014)

One of the first attempts to be defined the term tourism destination is of Georgulas in 1970. He bases his definition on the geographical aspect. Tourism as an industry occurs at 'destination areas' – areas with different natural and/or manmade features, which attract non-local visitors (or tourists) for a variety of activities. (Georgulas, 1970)

According to prof. Peter Petrov from the Geographical department of the Bulgarian academy of sciences, the tourism destination is a market oriented territorial system with relatively autonomous management and well distinct center, receiving visitors and offering comprehensive and complete tourism products.

The Tourism society uses the term visitor destination in place of tourism destination. It defines it as “places that are recognized as visitor destinations and for which it is possible to measure aspects of the demand for and supply of tourism services within defined boundaries. Visitor destination is preferred to ‘tourism destination’ because by definition it includes all categories of visitor. Typically, such destinations have some form of public/private sector organization in place; they are promoted as places to visit and have some form of management process in place for visitor related purposes.” (Tourism society)

UNWTO defines the tourism destination as a physical space with or without administrative and/or analytical boundaries in which a visitor can spend an overnight. It is the cluster (co-location) of products and services, and of activities and experiences along the tourism value chain and a basic unit of analysis of tourism. A destination incorporates various stakeholders and can network to form larger destinations. It is also intangible with its image and identity which may influence its market competitiveness. (UNWTO)

More of the definitions accept the tourism destination from a systemic perspective, including the present paper.

## **Methodology**

At the present paper, several methods as descriptive statistical analysis, empirical analysis, cluster and comparative method, index method for measurement and analysis and other methods of research and assessment of the dynamics of the phenomena are used.

The used data in the research as: international arrivals worldwide and by country, purpose of the trip of the citizens of the neighbor countries to visit Bulgaria, tourism expenditures, occupancy in the accommodation sector, incomes from accommodation, etc., characterize the inbound tourism in Bulgaria from the analyzed emitting markets.

The main sources of statistical information are the National Statistical Institute of Bulgaria, the Ministry of tourism, UNWTO, WTTC, World economic forum.

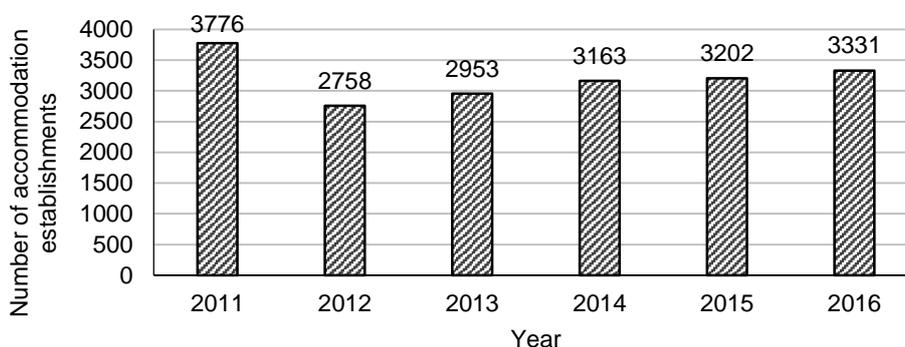
The data comparison of total number of tourists that have visited Bulgaria and the share of the visitors from the neighboring countries, shows the importance of the neighboring emitting markets for the development of the Bulgarian tourism industry. The fluctuations of the tourist flows in the period of 2010 – 2016 and monthly could serve as basis for future analysis and creation of competitive tourism products. Thus, could be increased the international arrivals in Bulgaria, including in the periods, that are traditionally characterized by less arrivals from each of the neighboring countries. The data about the arrivals are basis for future analysis: of the role of the economic and political stability in the country, the threats of terrorism the political relations between Bulgaria and the neighboring countries, the effect of the migration crisis and other phenomena.

The nights spent by foreigners in accommodation establishments and the number of tourists /people who has at least one overnight/ show the average duration of the stay of the tourists in the country. The numbers of the international arrivals by country shows the level of attractiveness of Bulgaria for the tourists from neighboring emitting markets.

## **Discussion, results and findings**

By 2016 in Bulgaria there are 3 331 accommodation establishments – hotels, motels, huts, camping and other with more than 10 beds (Chart 1).

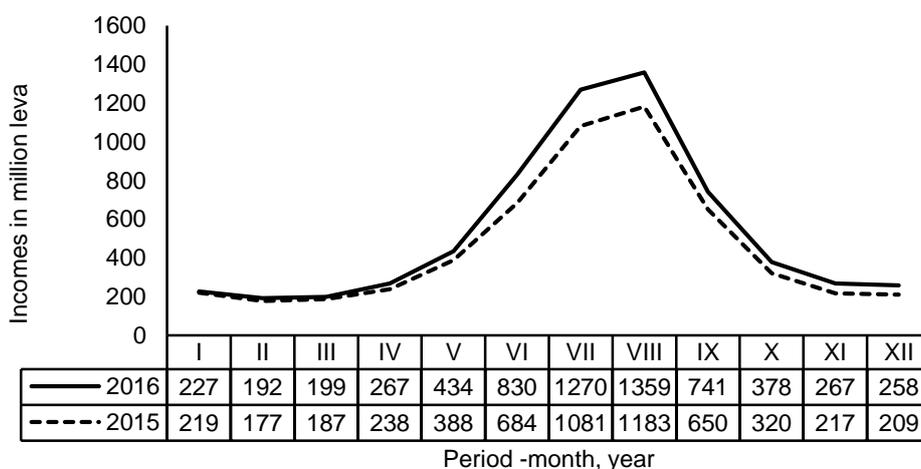
Chart 1 Number of accommodation establishments in Bulgaria in the period of 2011 – 2016 r.



Source: elaborated by the author according to the data of the Ministry of Tourism of Bulgaria

According to the Bulgarian National bank's data, the incomes from international tourism in the balance of payment are increasing every year and in 2016 are amounted to 6 422 millionleva (3 283,7 million euro), that is 15.7% more compared to the previous year. The highest incomes are generated in months of July and August (Chart 2).

Chart 2 Incomes from tourism generated in the period of 2011 – 2016 r.



Source: elaborated by the author according to the data of the Ministry of Tourism of Bulgaria and the Bulgarian National Bank

Every year the number of foreign citizens who visit Bulgaria is increasing. The arrivals with purpose of visiting friends and relatives, vacation and recreation are growing as well. According to the National Statistical Institute's data in the period of 2010 – 2016 constant moderate growth in international arrivals is observed, and there is a slight decline in 2015. In 2016 the international arrivals in the country reached 10 604 396. From the table below (Table 1) is visible that the arrivals from the neighboring countries is about 50% of the total number of international arrivals in the country.

Table 1 International arrivals in Bulgaria in the period of 2010-2016

Countries	2010	2011	2012	2013	2014	2015	2016
Romania	1445342	1499415	1468179	1465600	1439853	1499854	1743697
Turkey	943137	860654	984212	1053046	1094985	1237841	1312895
Greece	1017914	1120640	1087260	1105437	1100789	1024526	1157062
Republic of Macedonia	409970	439679	424182	429008	441107	506052	562365
Serbia	307838	365644	396448	428582	453891	501091	490668
Total arrivals from neighboring countries	4124201	4286032	4360281	4481673	4530625	4769364	5266687
Total arrivals	8374034	8712821	8866552	9191782	9408821	9316624	10604396

Source: elaborated by the author according to the data of the National Statistical Institute

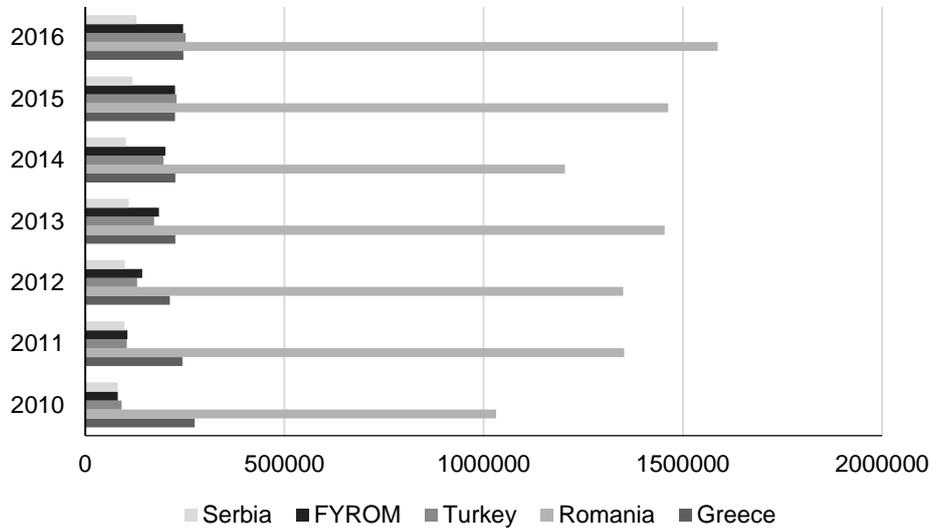
The Romanian tourists have the biggest share of the arrivals from the neighboring countries – average 30%. They mark growth of 1.04% in 2011 compared to 2010 and after that there is a decline in the period of 2012 – 2014. In 2016, they reach the record to date 1 743 697 arrivals.

The Turkish and Greek tourists each form 22-25% share of the total arrivals or 50% in total. The Turkish tourists mark sustainable growth in the arrivals from 2012 to 2016. Only in 2011 is observed a decline of 0.9% or 82 483 arrivals. In the arrivals of Greek tourists there is a decline in the period 2012 – 2015, but it doesn't reach the minimum of 2010. In 2016 are observed the highest numbers of 1 157 062 arrivals.

Republic of Macedonia and Serbia have shares of about 10% each. The arrivals from Republic of Macedonia show a decline in 2012, but don't reach the lowest numbers of 2010. In 2013 there is a slight growth of 1.01% or 4 826 arrivals. In 2016 this trend is kept and the highest numbers of 562 365 arrivals are reached. The lowest number of arrivals in the last years is from Serbia. Although only Serbia doesn't show a decline in the arrivals in the period of 2010 – 2015, a slight decline is marked in 2016 compared to 2015. It is less than 1% or 10 423 arrivals. The decline in the arrivals from Serbia in 2016 and the fluctuations in the period of 2012 – 2014, there is constant growth of the arrivals from the neighboring countries.

The analysis of the nights spent by foreigners in accommodation establishments shows how many tourists visit Bulgaria for one day without overnight or spent the night out of the accommodation establishments (using the homes of friends or relatives). The biggest share in night spent by citizens of neighboring countries in the period of 2010 – 2016 has Romania with a maximum reached in 2016 - 1 587 836 overnights or 65% (Chart 3). There are some fluctuations in this period: a decline in 2010 – 2012 and a moderate growth till 2016. Serbia has the smallest share, although compared to 2010, the number of nights spent is increased by 57% (from 81 397 overnights in 2010 to 128 319 in 2016). Greece, Republic of Macedonia and Turkey generate approximately the same number of nights in 2016 (about 10%), but in the beginning of the discussed period the nights spent by Greek citizens have been twice more than the Turkish and Macedonians. Bulgaria becomes more and more attractive destination for longer stay of the Turkish and Macedonian citizens in the last 7 years. The nights spent by Turkish tourists reach 251 819 and from Macedonian tourists – 245 171.

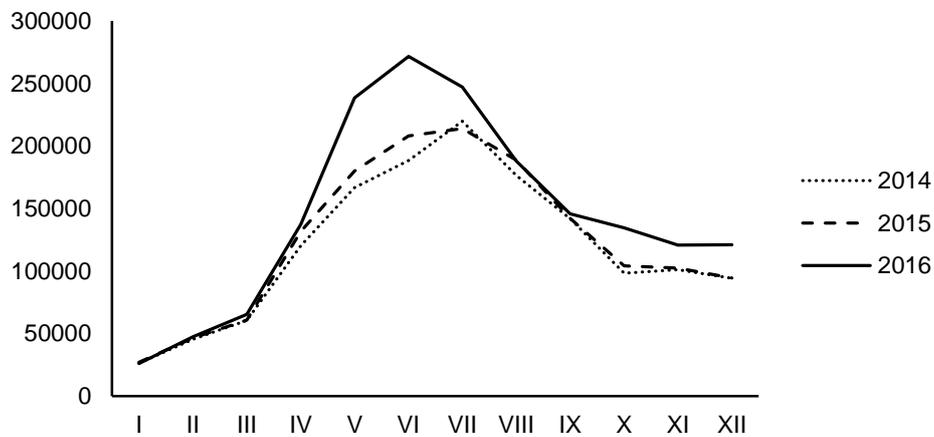
Chart 3 Nights spent by citizens of the neighboring countries (2010 – 2016)



Source: elaborated by the author according to the data of the National Statistical Institute

The statistical data shows that Romania is a strategic emitting market for Bulgaria. It is situated north of Bulgaria. Romania has a Black sea coast with resorts in the region of Mamaia. There are some ski resorts as well. Some of the most popular skiing resorts are along the Valea Prahovei and in Poiana Brasov. Despite this the Romanian tourists are attracted by the Bulgarian Black sea side resorts, the new and modern hotels, the golf courses in the region of Cape Kaliakra. The Romanians visit the Bulgarian Black sea coast during the holidays like Eastern, New Year, etc. as well. Some of the tourists transit through Bulgaria on their way to Greece and Turkey. They are interested also in the Bulgarian ski resort Bansko and Borovets. The Romanians visit some border cities as Ruse and Vidin and cities in the Northern part of Bulgaria for shopping or for sightseeing tours of cultural and historic places of interest. The regular flights between Sofia and Bucharest and the good economic relationship between Bulgaria and Romania contributes to the business tourism's development. Chart 4 shows the highest number of arrivals in the summer months (May - August). The reason is the summer sea tourism and the golf tourism in the North Bulgarian Black sea coast.

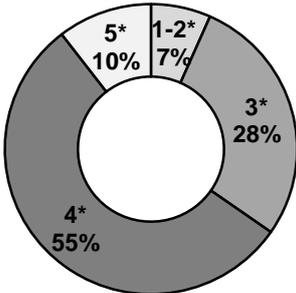
Chart 4 Total arrivals from Romania/by months/



Source: elaborated by the author according to the data of the National Statistical Institute

The Romanian tourists prefer mostly 3-star and 4-star hotels during their stay in Bulgaria. 55% of the nights spent by Romanians in 2016 are in 4-star hotels and 28% in 3-star (Chart 5). The ratio price – quality in 4-star hotels is most appropriate to their preferences and purchasing power.

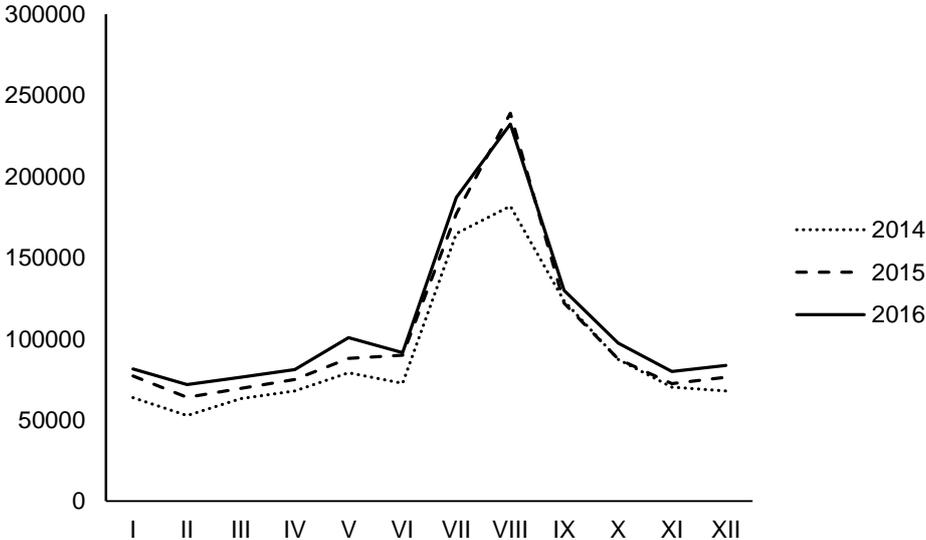
Chart5 Structure of the nights spent by Romanian citizens in accommodation establishments in 2016 (by category)



Source: elaborated by the author according to the data of the National Statistical Institute

The second biggest market for inbound tourism in the last two years from the neighboring countries is Turkey. It's situated south of Bulgaria and has well developed summers sea tourism mostly in the region of Aegean and Mediterranean Sea coasts. Despite this the highest number of arrivals from Turkey are observed in the period of July – August. There is a decline in the next months and slight growth in December and January. Unlike the data of arrivals from Romania that are characterized by fluctuating peak between June and August in the last years, the peak of the tourists from Turkey is definitely in August (Chart 6). Some of the main reasons are the higher summer temperature in their country, the less developed resorts on the Turkish Black Sea coast, the direct flights between Istanbul and Varna, the visit of friends and relatives and transit workers between Turkey and West Europe, during the vacations in August.

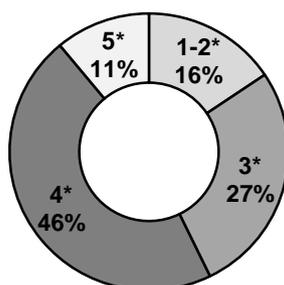
Chart6 Total arrivals from Turkey /by months/



Source: elaborated by the author according to the data of the National Statistical Institute

Like the Romanians, the Turkish tourists prefer to accommodate in 4 and 3-star hotels during their stay in Bulgaria. 46% of the nights spent by Turkish citizens in 2016 are in 4-star hotels and 27% in 3-star. Chart 7 shows that the nights spent in 1 and 2-star hotels are 16%. This is twice higher than the Romanian tourists (7%).

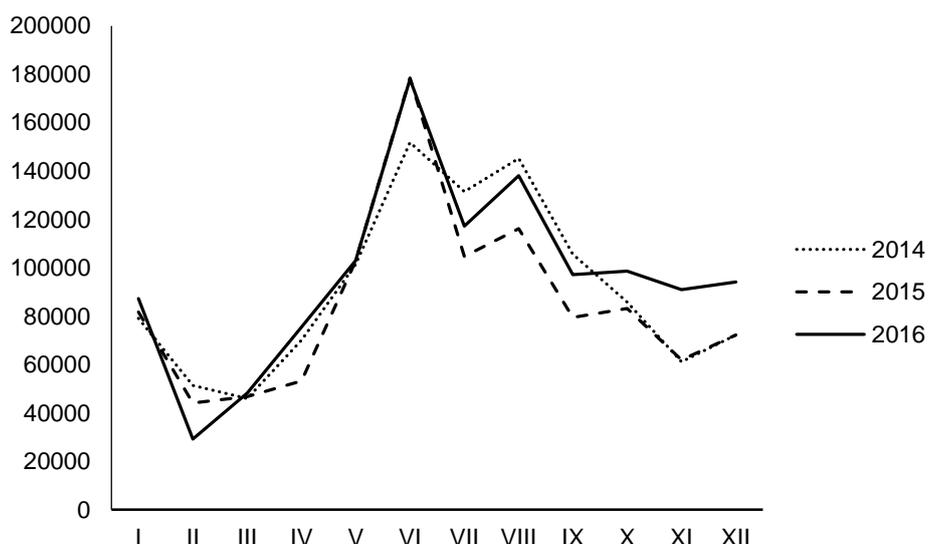
Chart7 Structure of the nights spent by Turkish citizens in accommodation establishments in 2016 (by category)



Source: elaborated by the author according to the data of the National Statistical Institute

Regarding the inbound tourism generated by the neighboring countries Greece is the main competitor of Bulgaria. It is situated south of Bulgaria. Greece offers very good conditions for summer sea tourism. Until 2012 it occupies the second place by visitors in Bulgaria, but in the last two years is displaced by Turkey. Some of the main purposes of the Greeks for visiting Bulgaria are shopping, city breaks and ski tourism in the resort of Bansko. In the summer, the Greek tourists visit the cooler mountains' resorts. This is one of the main reasons for the peak of arrivals in August together with the vacations and the official holiday on 15 August.

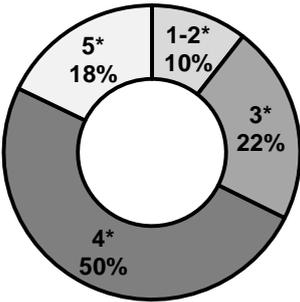
Chart8 Total arrivals from Greece /by months/



Source: elaborated by the author according to the data of the National Statistical Institute

Like the Romanian and Turkish tourists, 50% of the nights spent by Greeks are in 4-star hotels. But there is a big difference. 18% of the Greek tourists prefer the luxury 5-star hotels. This is almost twice than the Romanians (10%). This fact could be explained with the higher incomes of the Greeks, compared by the other neighboring countries. The share of nights spent in low cost hotels is comparable with the Romanian tourists. The nights spent in 3-star hotels are comparable with the Turkish tourists.

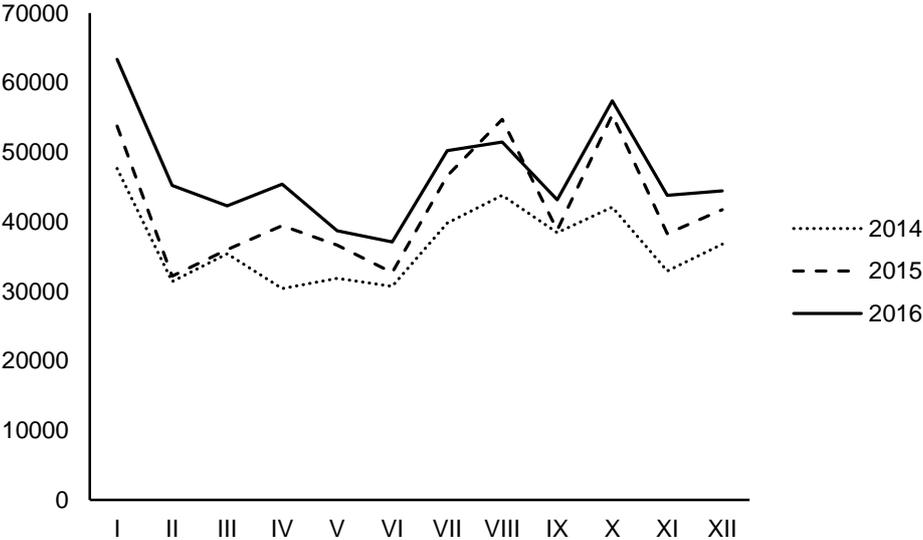
Chart 9 Structure of the nights spent by Greek citizens in accommodation establishments in 2016 (by category)



Source: elaborated by the author according to the data of the National Statistical Institute

In 2016 the fourth biggest emitting market for incoming tourism between the neighboring countries is Republic of Macedonia. The highest number of arrivals is in January when the Macedonian tourists visit the nearby Bulgarian winter resorts and practice city tourism during the Christmas and New Year holidays. The second peak of arrivals is in June and July, but the numbers are significantly lower. The reason is the preference to the Greek sea resorts because of their proximity and the better infrastructure to them. The growth of arrivals in October is generated by shopping, business and cultural tourism.

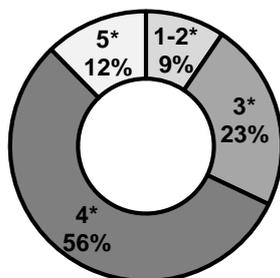
Chart 10 Total arrivals from Macedonia /by months/



Source: elaborated by the author according to the data of the National Statistical Institute

As percent distribution, the structure of the nights spent by Macedonian tourists is like that of the Romanian. More than half of the tourists spent their stay in 4-star hotels and 12% in luxury 5-star. Only 9% use the services of low category hotels.

Chart 11 Structure of the nights spent by Macedonian citizens in accommodation establishments in 2016 (by category)



Source: elaborated by the author according to the data of the National Statistical Institute

Compared to the rest of the neighboring countries, in 2016, Serbia shows the lowest number of arrivals, according to the data of the National Statistical Institute for the total international arrivals in Bulgaria. This trend is kept in the last winter season (December 2016 – March 2017) as well. This could be seen below on Table 2.

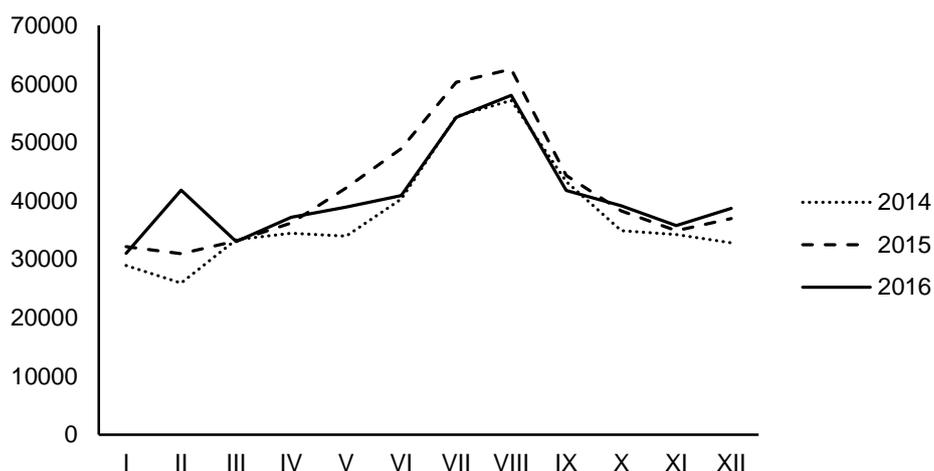
Table 2 International arrivals from the neighboring countries in the period of December 2016 – March 2017 compared to December 2015 – March 2016.

Country	Number of international arrivals	Difference	Difference, %
Greece	290 771	67 777	30,4
Republic of Macedonia	188 918	5 637	3,1
Turkey	186 548	13 708	7,9
Romania	171 963	36 119	26,6
Serbia	115 624	556	0,5

Source: The Ministry of Tourism of Bulgaria

Chart 12 shows that the highest interest to Bulgaria from the Serbian tourists is realized in the summer months (June - July). Usually, in this period the Serbian citizens visit the Bulgarian seaside resorts. The main competitor of Bulgaria for inbound summer tourism from Serbia are Croatia, Montenegro and Greece.

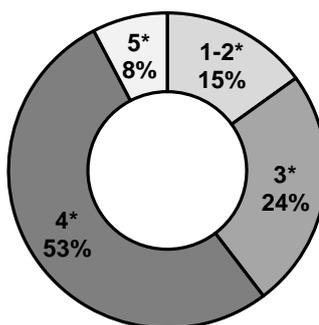
Chart 12 Total arrivals from Serbia /by months/



Source: elaborated by the author according to the data of the National Statistical Institute

Like the rest of the discussed groups of tourists, the Serbians prefer to stay in 4-star hotels in Bulgaria. In total 80% of the Serbian citizens prefer to stay in 4 and 3-star hotels. It's interesting that like the Turkish tourists the share of low-category accommodation stay of the Serbians is relatively high – 15%.

Chart13 Structure of the nights spent by Serbian citizens in accommodation establishments in 2016 (by category)



Source: elaborated by the author according to the data of the National Statistical Institute

## Conclusion

In the last years the international arrivals increase as well as the share of the arrivals from countries that are not neighboring of Bulgaria. Despite this fact the arrivals from Romania, Turkey, Greece, Republic of Macedonia and Serbia generate 50% of total international arrivals in Bulgaria. In the last tourist season (December 2016 – March 2017) the Ministry of Tourism reports a growth of 19.9% compared to the same season in 2015 – 2016. This is a record after Bulgaria joins the European Union in 2007.

The main factors that help to accelerate the development of the tourism, the principal implications and recommendations, could be defined as follows:

- The peace and the good relationship between the neighboring countries have to be kept, because they are the basis for the tourism development;
- The good cooperation between the stakeholders has to be developed (incl. visa facilitation, building better infrastructure and transport connections, cooperation between the touroperators from the neighboring countries, etc.);

- The Ministry of Tourism of Bulgaria have to continue the policy of popularization of Bulgaria as tourism destination all year around, participating in the regional travel fairs;
- It has to be developed initiatives related to legislative changes that are going to improve the Bulgarian tourism product's quality;
- Bulgaria has to improve the quality of the tourism services and to reach the level of its main competitors;
- The ratio price – quality of the tourism products has to be improved. The accommodation establishments must prepare competitive price offers that are going to stimulate the tourism demand from the neighboring countries;
- Combined cross-border tourism products with the neighboring countries have to be developed. This way tourists from farer markets are going to be attracted;
- The image of Bulgaria as a secure tourism destination has to be kept.

The analysis and the scientific researches intourism have to develop in close cooperation between the scientists and the specialist of the neighboring countries. The tourism industry is a sector that generates a significant share of the gross domestic product of the national economies. An important role in these analyses have the standardization and the unification of the methodologies of collecting statistical data and the definition of basic terms in the tourismology.

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