Challenges ahead for Bulgarian's competitiveness as a mountain tourism destination

Desafios futuros para a competitividade da Bulgária como destino de turismo de montanha

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Abstract

A re-examination of the concept of tourism reveals new dimensions and draws specialists' attention to its multi-directional social influences. Tourism is one of the fastest growing industries in the global economy, fostering economic development worldwide. It is recognised that tourism must be developed and managed in a controlled, integrated and sustainable manner. With a joint effort, an attempt could be made to realise objectives like improvement of quality, competiveness and sustainability of tourism products offered regardless of the particular scale – national, regional, or international – by "pursuing" tourists' needs.

However, this paper is focused on the priority given to the tourism industry in the economic development of the Republic of Bulgaria in bid to position the country well on the international level of competitiveness. This necessitates research on the opportunities of tourism and the economy of Bulgaria to help attain the competitiveness within the context of sustainable development.

Keywords: Tourism destination, mountain tourism, competitiveness, sustainable development.

Resumo

A reavaliação do conceito de turismo revela novas dimensões e chama a atenção de especialistas para as suas influências sociais multidirecionais. O turismo é uma das indústrias de mais rápido crescimento na economia global, promovendo o desenvolvimento económico mundial. Reconhece-se que o turismo deve ser desenvolvido e gerido de uma maneira integrada e sustentável controlada. Com um esforço conjunto, poderia ser feita uma tentativa para atingir objetivos como a melhoria da qualidade, da competitividade e da sustentabilidade dos produtos turísticos oferecidos, independentemente da escala - nacionais, regionais ou internacionais - de acordo com as necessidades dos turistas.

No entanto, este trabalho está focado na prioridade dada à indústria do turismo no desenvolvimento económico da República da Bulgária na tentativa de posicionar bem o país a nível internacional em termos de competitividade. Isto exige pesquisa sobre as oportunidades do turismo e da economia da Bulgária de modo a conseguir competitividade no contexto do desenvolvimento sustentável.

Palavras-chave: destino de turismo, turismo de montanha, a competitividade, o desenvolvimento sustentável.

1. Introduction

A re-examination of the concept of tourism reveals new dimensions and draws specialists' attention to its multi-directional social influences. Analysis done by international organisations studying the development of the tourism industry has put an emphasis on tourism's indisputable contribution to economic growth and employment on both the regional and international levels.

The trends of tourism planning and development resulting from cooperative work of governments and private organisations are subject to tourism's ability to have a positive influence on economic growth, standards of living and, last but not least, employment. Within these joint efforts, an attempt is made to realise objectives such as improvement of quality, competiveness and sustainability of tourism products regardless of the particular scale – national, regional, international – by "pursuing" tourists' needs.

The re-launched EU Sustainable Development Strategy and Lisbon Strategy (http://europa.eu/legislation_summaries/environment/sustainable_development/l28117_en.htm) recognise tourism as an important factor in the improvement of quality of life and business competitiveness through development of sustainable forms of tourism (cultural, eco, balneotherapy/spa, and so on) and implementation of activities compatible with the laws of nature. In the Community, strategic directions for cohesion in tourism are prominent among the measures for economic growth stimulation. In particular, the preservation of historical and cultural heritage is specified as a tourism development potential. These strategic directives emphasise the role of tourism especially in the development of rural regions and the need for an integrated approach to quality focused on satisfaction of consumers and based on the economic, social and environmental dimensions of sustainable development.

2. Literature review

A growing body of research is emerging on competitiveness and analysis of tourist destinations. Approaches to competition and competitiveness currently are noticeably interdisciplinary, especially in the sphere of tourism. Analysis of publications so far in this area shows serious researches on separate aspects of competition and competitiveness of tourist products (Ribov, 1996; Ritchie & Crouch, 1993; Stankova, 2011). Some researches measure competitiveness using information about the perceptions of tourists and their opinions of experiences in different countries. Others, like Dwyer and Kim (2003) use published information to measure the competitiveness of tourism destinations. Dwyer & Kim (2003), Mihalic (2000), Ritchie and Crouch (1993) discuss competitiveness as a relative concept and how its values vary independent of the choice of year and/or of country.

It can be concluded that the challenges of measuring competitiveness draws scientists, researchers and specialists in tourism because competitiveness is seen as a key factor in the success of tourist destinations. At the same time, a certain deficit of empirical information about the competitiveness of tourist destinations in Bulgaria can be identified. In addition, while separate research has been focused on destinations for sea tourism, research in the areas of mountain and ski tourism are missing in Bulgaria (Stankova, 2011, pp. 65-77).

3. Methodology

Identifying the tourism industry as a priority in the economic development of Bulgaria is of great importance in order to position the country well for international competitiveness (Statev, 2011). This necessitates research on the opportunities of tourism and the economy of Bulgaria in order to attain competitiveness within the context of sustainable development. In this regard, the empirical methods used in this study consist of systematic observation, classification and interpretation of data. The interpretation of research is based on the results achieved through a direct individual survey of tourists setting off from Bansko (Welcome to All Season Ski Resort Bansko, http://bansko.org/). Tourists who had trouble filling in the questionnaire were interviewed. This field work was performed between December 25, 2008 and February 7, 2009. To process the data, a descriptive analysis was used where the basic parameters of the distribution of answers were calculated. The maximum allowed amount of stochastic error at a guaranteed confidence probability of 95% did not exceed ±1.7% for evaluations of a 50% relative share in the total for foreign tourists. For the British tourists the maximum allowed amount of stochastic error was ±2.8%, for the Irish ±5.3%, for the Danes ±5.6%, and for the Russians ±5.7%. Also, this research used some official results from a series of marketing researches on the Bulgarian position in different generating markets and on the attitudes of foreign tourists visiting Bulgaria, carried out by the government.

These are perceived as an acceptable empirical methodology to solve problems and create new knowledge that is generally applicable to the explanation of the current position of Bulgarian mountain tourism. The processing of data and the derived summaries based on this facilitate the process of understanding the strategies that should be followed to improve the competitiveness of mountain tourism in Bulgaria.

4. Main results

As Gorcheva (2009) points out, the development of the tourism sector over the last eighteen years in Bulgaria has been shaped by a number of external economic factors as well as by the pace of economic reforms in the transition period, in addition to the characteristics of the Bulgarian economy's integration into the EU. Within this context it should be noted that in Bulgaria, mountain and sea recreational tourism is still characterised by a significantly seasonal character. Although in recent years an overall trend has been observed toward a combination of winter and sea holidays and travel products in order to establish a basis for all-year employment of staff in tourism. Of course, a great variety of other types of tourism has also been developed based on various consumers' motives related to cultural interests, business trips, travel for participation in sports events, and so on.

It is known that Bulgaria has significant natural resources available for the development of mountain recreational and cognitive tourism. The fresh air; unique flora and fauna; favourable weather conditions; and variegated landscape forms, combined with a rich cultural-historic heritage make the destination an attractive choice for recreational holidays of Bulgarian and foreign tourists. Development of mountain tourism is determined mainly by the presence of a set of factors, namely:

- resources – natural-geographic resources, varied plant and animal world, rich cultural-historic heritage;
- traditions – Bulgaria offers a relatively good experience in the areas of both mountain and sea tourism;
- legislative basis – recognised norms and practices harmonised with European legislation;
- superstructure – medium and high class, as well as ambitious infrastructure projects for the period ending in 2020;
- educational standards – recognised experience and traditions in training staff to meet the needs of the tourism industry and standards related to the qualification of ski-instructors and mountain guides (according to Bulgarian tourism law).

Upon recognition of international tourism as a leading export sector of Bulgarian economy after 2011, some significant changes have been observed in the organisation and functioning of tourism, especially of mountain resorts. It should be noted that privatisation in Bulgarian tourism has brought qualitative changes in the structure of supply. In 1995 more than 60% of hotel facilities in the mountains were of a low category (one and two stars) and only 7% of all the services offered were provided by three-, four- and five-star hotels. In the first years of the new millennium, new infrastructure projects were developed – lifts, tennis courts, roads, and so on. Family hotel-keeping has been developed, as well as chalets and villa rentals. New hotels, chalets, and new ski slopes have been constructed. There has been an increase in the number of jobs in mountain resorts thus contributing to employment stimulation.

Modern mountain tourism in Bulgaria has been established in 16 recognised mountain resorts, as well as in at least 100 villages and areas having no official resort status. A major part of tourism centres are villages or small towns with a population of 500 to 10,000 inhabitants, located at an altitude below 1000 m. There are 15 out-of-settlement complexes like Pamporovo and Borovets, almost all of them are in the middle of mountains located at an altitude below 1600. Results from the research carried out in the places visited by Bulgarian tourists during winter holiday travel prove that Bansko and Pamporovo are the resorts most preferred by domestic tourists (Filipova, 2010).

Large mountain resorts are of great importance, according to quantitative and qualitative parameters, among destinations in Bulgaria. They have developed recreational winter tourism in combination with alternative forms – activities to supplement the product offer during the winter season and main activities during the summer. Stationary recreation and mountaineering are aimed mainly at the domestic market. These are dispersed across wide areas and are done mainly in summer months. The development of these two types of tourism in most of the cases is not restricted by serious investment in contrast to ski and winter sports.

There is a noticeably large disproportion between the resorts of Borovets, Pamporovo and Bansko and other tourism centres. These three resorts provide 40% of beds in mountain tourism (National Statistics Institute). They feature mainly big hotels with an average capacity of 124 beds and according to the data for 2011, they provided 56% of stays and 72% of receipts from stays for mountain tourism. They are visited by 83% of foreign tourists visiting Bulgaria (Table l). Their dominant role is related to the structure of their accommodation facilities which differs from that of other mountain tourism centres in our country.

Table 1 - Major indicators of the three leading mountain resorts in Bulgaria for 2011

Accommodation type	19% in the three leading resorts	81% in the other resorts
Beds	40%	60%
Nights (including foreigners)	56% (92%)	44% (8%)
Visitors (including foreigners)	44% (83%)	56% (17%)
Revenues of nights (including foreigners)	72% (93%)	28% (7%)

Source: National Statistics Institute

Mountain tourism takes a tangible share of the domestic tourism market (20% of visits and 17% of overnight stays), but it forms only 14% of the total income from stays of Bulgarians. Domestic tourists prevail in small mountain centres but their attendance is tangible in large resorts as well. The short duration of their stay (approximately 2 or 3 days) is due mainly to poor supply and restricted options for leisure activities, as well as to price levels which are high by local standards.

International demand exceeds local demand in the three large resorts. After the end of the winter 2011-2012 season, high results were reported. The growth in the three leading resorts is more than 10% as compared to the previous season. As reported by the Bulgarian Tourism Chamber, the tourism season was successful, with an average holiday length of 5-8 days. An increase in the number of tourists from Great Britain, Russia, Germany, Romania, Greece and Serbia was registered. Almost all the hotels offered package proposals with included spa services. In Bansko, Dobrinishte, Pamporovo and Borovets, ski tourism was combined with balneotherapy. Wine and culinary tourism also experienced development (Pandelieva, 2012).

Bulgaria has the potential to expand its current number of foreign tourist visits and has a positive outlook of growth in foreign markets. This is shown by the results from a series of marketing researches on Bulgarian positions in different generating markets and on the attitude of foreign tourists visiting the destination.

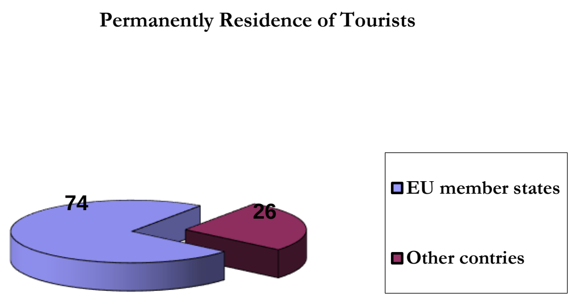
Research on foreign tourists at the destination of Bansko is also of interest. This paper pays particular attention to certain aspects of this research and emphasises their importance in uncovering a major finding: Bulgaria has a potential for development as a destination of mountain tourism in East and Central Europe.

This research was conducted through random selection with direct individual inquiry among tourists leaving Bansko. Tourists who encountered difficulties in filling the questionnaire were interviewed. The total number of questionnaires was 3,310. The samples for the principal markets were boosted. This way there were 1,250 questionnaires completed by British tourists, 337 by Irish, 301 by Danes, and 300 by Russians. The remaining 1,122 questionnaires were from tourists from other countries. Questionnaires in English, German, French, Russian, Greek, Turkish, Romanian, Serbian and Macedonian were used. In order to remove the effect from sample boosting when processing results weighting was performed based on the number of tourists by countries who visited Bansko in the months of December 2008 and January 2009.

Foreign tourists coming into Bulgaria are presented by markets, gender, age, education and objectives of visits for the winter season studied, as follows (Figure 1);

Figure 1 - Foreign tourist flow characteristics

Greece	45.3
Romania	14.5
Serbia	5.4
Great Britain	5.4
Russia	3.8
Germany	2.3
Ireland	2
Ukraine	1.3
Turkey	1.2
Israel	0.9
France	0.9
Belgium	0.8
Holland	0.7
Macedonia	0.5
Denmark	0.3
Others	14.7

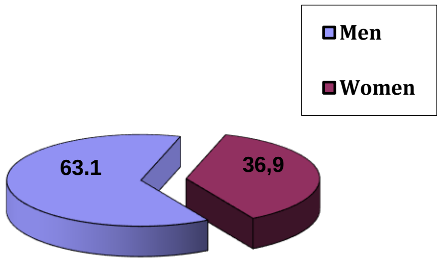


Source: Author

In winter months, the most significant share is that of tourists from Greece at 45%, followed by Romania at 14%. After them with 5% shares each are Great Britain and Serbia, Russia 4%, Germany and Ireland 2% each, Ukraine and Turkey 1% each, and others. Seventy-four percent of tourists are from the European Union and the other 26% come from other countries.

Among tourists from Great Britain, Ireland, Denmark and Russia the share of men is lower taking into consideration the aggregate, i.e., among the British 54%, among the Irish 53%, among Danes 56%. Among tourists from Russia, women are a majority by 52% (Figure 2).

Figure 2 - Gender alignment of the respondents

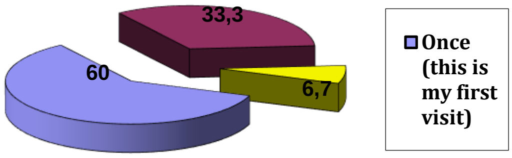


Source: Author

Foreign tourists are mainly young and middle-aged people. Thirty-two percent of them are at an age between 18 and 29. The share of those between 30 and 39 is 28% and between 40 and 49, 26%. Tourists over the age of fifty are just 14%. The average visitor is young, educated, employed, most frequently single and without children. Eighty-eight percent of the Irish, 87% of Danes, 84% of the British and 83% of the Russians belong to this category.

In the course of the period studied, 60% of tourists visited Bulgaria for the first time, and 33% for the second time. Visitors coming for the third time or more formed only 7%. Constant to new tourists ratio is 40 to 60%, which means an increase by 9 points in the share of those visiting destinations for more than one time as compared to the results reported for the preceding year (Figure 3).

Figure 3 - Number of visits with recreational purpose



Source: Author

Table 2 - Number of Visits with Recreational Purpose

Sequence of arrivals	British	Irish	Danes	Russians
Once (this is my first visit)	58.9	53.4	79.9	63.6
Twice	27.2	35.8	15.6	22.4
Three times	13.9	10.8	4.5	14.0

Source: Author

As shown in table 2, 80% of the Danes, as well as 64% of the Russians, 59% of the British and 53% of the Irish declared that this was their first visit to Bulgaria. Tourists declaring more than two visits are 14% of the Russians and British.

The improved "new/constant tourists" ratio is a good indicator for the quality of service in the resort. It should receive a positive evaluation in view of the large supply of similar travel services in Europe and tourists' natural desire to explore new places.

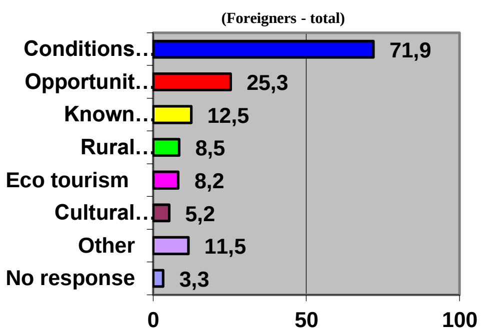
Nearly a third (32%) of foreign tourists questioned undertake one trip per year for tourism purposes. Twice a year, 30% travel and 23% - more than three times. Of the Russians 32%, 13% of the Irish, 12% of the British and 7% of the Danes travel once a year for tourism purposes. Two trips are undertaken by 44% of the Irish, 41% of the Danes, 31% of the British, and 26% of the Russians. Of the British 25%, 15% of the Irish, 13% of the Danes and 8% of the Russian travel three times a year.

The largest share (68%) of the foreigners surveyed travel once in winter for tourism purposes. Two trips are undertaken by 7%, and 8% undertake more than three. The average number of trips for tourism purposes remains 1.2 times. Of the Irish 65%, 63% of the Russians, 60% of the British, and 54% of the Danes travel once in the winter season for holiday purposes.

The preferred accommodation is three (26%) and four stars (47%) hotels. Of the tourists, 10% stay in lodgings or country houses. Those who stay at a home (flat) of their own were 1%, and 6% stay with friends of theirs. A tenth (10%) of the Danish tourists lodged in country houses. Thirty-six percent of British tourists prefer 4-star hotels; 43% prefer three-star hotels. The Irish tourists' choice is similar: 42% stayed in 4-star hotels and 42% in 3-star hotels. In contrast, Russian tourists choose a higher class of hotels with 4% in 5-star, 60% in 4-star, and 28% in 3-star hotels.

A detailed analysis of data proves that of motives to choose the destination of Bansko as an end destination of their trip, 72% of those surveyed point out the good conditions for ski sports. The second place (25%) is taken by the beautiful nature and options for mountaineering. A further 12% identified as significant the fact that they know Bansko. Good opportunities of rural tourism, preserved environment and eco-tourism options are pointed out by 8% of inquired (Figure 4).

Figure 4 - Reasons for choosing Bansko as tourist destination



Source: Author

According to the prevailing share of tourists the favourable conditions for ski sports are a factor of further weight: 89% of Danes, 83 and 84% of other groups stated that this was the most important reason to visit our country. As compared to the others, the Danes more frequently define Bansko as a known region (46%) and point out its beautiful nature (23%).

Foreign tourists' decisions to visit Bansko are also influenced by the entertainment options (37%), good impressions from a previous visit (33%) and low prices (32%). A particular personal interest or hobby (30%) and the chance to meet local people (29%) come next. Bansko is becoming more and more popular as a tourism destination according to 25**%**. 22% point out a positive correlation between the quality of services and their price. One of ten (11%) has been invited by relatives or friends.

The types of tourism enjoy by the foreign tourists surveyed during their stay in Bansko are also of interest for the research (Table 3). Among the major activities, the first place (72%) is taken by the winter sports – skiing, snowboarding, walks in the mountains – followed by passive recreation, balneotherapy, spa and wellness tourism - 27%, cultural tourism (22%) and round trips (21%). Other types stated, though of smaller shares, are extreme winter sports (17%), health tourism and dental treatment, wine and culinary tourism, rural tourism, and eco-tourism. The rarest reason of visit stated is business and conference tourism (6%), as well as religious and pilgrimage tourism (9%).

Table 3 - Tourism types enjoyed by foreign tourists

Main tourism products consumed during stay in the destination	Foreigners (total)	British	Irish	Danes	Russians
No response	4.7	4.3	3.5	1.6	6.6
Ski, snowboard, mountain walks	71.9	89.8	87.2	92.6	81.5
Books, walking or others	27.2	12.5	19.2	9.5	21.6
Balneotherapy, spa or wellness tourism	26.6	5.1	11.0	5.3	26.6
Cultural tourism	22.0	6.1	9.5	14.0	20.8
Travel, voyage, amusements	20.6	6.1	13.7	7.4	12.7
Extreme winter sports	16.9	15.8	18.8	30.0	15.4
Night live and gambling	15.4	11.1	17.4	18.1	1.2
Health tourism and dentistry	14.7	1.8	4.2	2.5	4.2
Culinary and wine tourism	13.4	4.5	9.9	21.4	8.1
Rural tourism	13.4	1.7	5.3	2.5	1.5
Eco-tourism	10.3	1.9	5.3	2.1	3.5
Religious tourism and pilgrimage	8.6	1.9	2.6	2.5	2.3
Hunting	8.4	1.4	2.2	0.4	3.5
City break tourism	6.4	3.5	11.0	4.1	1.9
MICE	5.9	2.1	3.1	2.1	0.8
Other	1.1	0.4	0.4	-	0.4

Source: Author

Results proving that one among three Danes practiced extreme winter sports as a basic form of tourism are of interest. For this indicator they hold first place among all foreign tourists. Danes put culinary and wine tourism third (21%). After ski, snowboard and mountain walks, the Russians preferred best balneotherapy, spa and wellness tourism (27%) and passive recreation (22%). Among the British, the second place of a basic form of tourism is taken by extreme winter sports (16%), and the third by passive recreation (13%).

By preferred manner of holiday, the Irish gave second place to passive recreation, and third to extreme winter sports. Round trips were taken with a relatively greater frequency by the Irish (14%) and Russians (13%), as compared to the British (6%) and Danes (7%).

Night life and gambling were most attractive to the Danes (18%) and Irish (17%). The Russians (1%) were most indifferent to this kind of entertainment, and the British showed a moderate interest 11%. Of those surveyed, 68% enjoyed extra forms of tourism in addition to the major ones. The extra activities of those surveyed feature a greater variety than the major ones. A further 36% went to observing crafts, practicing religious and pilgrimage tourism or enjoying the night life. Among those questioned, 35% diversify their activities by city break tourism. A further 34% focus on business or culinary and wine tourism, while 31% is the share of extreme sports; balneotherapy, spa and wellness tourism; or hunting tourism as an extra form of activity. Round trips and journeys account for 30%, the same as the percentage of those practicing eco-tourism. Of those surveyed, 29% stated that in addition to the major tourism activities, they enjoyed health tourism and balneotherapy or enjoy passive recreation. Rural tourism was enjoyed by 28%, and one among four, some form of cultural tourism.

The most frequent extra form of tourism stated by the British (22%) and Danes (31%) is passive recreation, but by the Irish (36%) and Russians (34%), religious and pilgrimage tourism. The guests from Russia enjoyed crafts observation and hobbies with the same frequency. The British often entertain themselves with night life and gambling (19%) or consume products of culinary and wine tourism, balneotherapy, spa, and wellness tourism (13%).

The greatest accumulations around various activities of extra tourism are observed with the Russian tourists. Passive recreation and round trips show equal shares (28%). They are followed by night life and gambling (26%), culinary and wine tourism, city break tourism, business and conference tourism with a 25% share each.

This group of foreigners use to the largest degree the opportunities offered by resorts.

The concise analysis made emphasises indisputably the opportunities available for the development of tourism in the resort complex of Bansko. There are similar results reported for the other two leading mountain resorts in the destination of Bulgaria – Borovets and Pamporovo.

5. Conclusions

Flagestad and Hope (2001) share the opinion that the survival and development of winter sports destinations are to a large extent centred around strategies for creating competitive advantage and at the same time meeting the criteria of sustainable tourism laid down by the WTO. At one time, Porter's competitive advantage (Porter, 1980) was widely accepted as being of central importance to the success of organisations, regions and countries. Additionally, according to Kozak and Remmington (1999) at the beginning of the new millennium, much management effort has gone into establishing strategies and operating procedures which will lead to competitive advantages and to measuring performance against key competitors. The above established positive outlook for holidays with ski sports, ski holidays and round trips orientated towards nature sight-seeing, summer holidays in the mountains and trips aiming at entertainment and casino visiting, however, should be combined in a manner attractive to the "typical" visitor of mountain resorts in Bulgaria. Despite the fluctuations in the international tourism markets and the resulting of the investors, the past twelve years indicated the achievement of good results in certain subsectors of the Bulgarian tourism industry (Dimitrov, 2011). The improvement of competitiveness of tourism products offered is related to concentrating on tourism products and types of holidays in which Bulgaria is truly competitive in international markets. These are mainly winter holidays combined with trips for sight-seeing of natural and cultural sites, or with spa, balneotherapy and wellness recreation.

The basic positioning of a very good "price/quality ratio" can be complemented, for example, by the aspect of "familiarity" (similar attitude of mind, culture, no language barriers) in the East European countries like Russia, Ukraine, and the Czech Republic. In neighbouring countries like Romania, Serbia, Greece and Turkey, it is best to emphasise mainly the "large variety of holiday opportunities within a close distance". In the German market, the offer should include "exceptional hospitality" and for Great Britain, "all-year destination".

A quality improvement strategy aiming at international competitiveness in countries of tourism supply to Bulgaria, especially in the area of mountain tourism, should include more aspects like improvement of the quality of "food and cuisine" (focused on regional cuisine), enhancement of the quality of attendance, improvement of roads and installation of bilingual (with Roman letters) road signs, and, finally, removal/improvement of visa requirements (Turkey, Ukraine, followed by Russia).

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