

Evaluation Of The Growth Potential Of Selected Bulgarian Tourist Markets And Destinations

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EXECUTIVE SUMMARY

The main goal of this tourism industry sector initiative of the University of Delaware / FLAG, a program funded by USAID, is to accelerate the development and growth of private Bulgarian enterprises in a competitive environment.

The role of FLAG in the Bulgarian competitiveness initiative is to assist in the implementation and to target the business strategy outlined in the MSI competitiveness analysis and exercise.

In this assessment of the tourism sector, FLAG is targeting the development of competitive industry clusters at the regional and city level with the aim to increase the potential for export and employment growth beyond the mass market beach destinations. This includes technical assistance (TA) and training for the development of small, locally owned and operated hotels, bed and breakfasts, and other services that make tourism work in not yet developed and non-traditional tourist areas of the country.

One of the principle purposes of this survey was to evaluate the growth potential of selected Bulgarian tourism markets and destinations and identify needs for TA and training to effectively facilitate access to international "niche-tour" operators in support of export promotion.

While the study focuses on all market segments, specific emphasis is placed on necessary support activities and actions to develop niche markets beyond the traditional "Sand, Sea, and Snow" tourism.

To make tourism work in non-traditional tourist areas of the country, the FLAG initiative is aimed at supporting entrepreneurs who run small, locally owned and operated hotels, and bed and breakfasts in locations that can be integrated in "Roundtrip Tours" or "Fly, Drive and Sleep" packages. Entrepreneurs need to be made aware that facilities which reflect the "Bulgarian Lifestyle", are favored by international tourists, providing that the basic needs for safety, convenience and comfort are satisfied.

In addition to TA the study identified a serious need among local tourism entrepreneurs for acquiring basic "know-how" in start-up and efficient operation of small businesses. A customized basic business and entrepreneurship training program will be of significant benefit to most hotel entrepreneurs to improve the efficiency, quality and standards of their operation that will directly affect their ability to compete and make a profit.

The study considers the three elements of transportation-"cost, convenience, and speed" - that are vital to the success of any efforts to develop regional tourism. It is a known fact, that developments closer to major population or tourist centers have a higher propensity for success and that potential of visitors, both international and domestic, seems to be directly related to distance and the ease of access by various modes of transportation. In that sense, the Bulgaria National Railway Network can play an important role and can provide a major impetus for regional tourism development.

The tourism potential and readiness of the city of Sofia as a "European" convention and trade show city - and as a "City Break" Destination has been considered and evaluated. While the mid to upscale hotel room capacity can supports conventions with up to 4,000 delegates, the development of this profitable market requires the support and promotion by the international airlines serving Sofia and the deliberate efforts by an industry coalition to actively solicit this profitable business within the EU countries.

To make "City Breaks" work, Bulgaria must take advantage of the progressive liberalization of air traffic rights in Europe by considering landing rights for Europe's low cost airlines such as BUZZ, EasyJet, Go, Ryanair and Virgin Express in addition to air-charters of major airlines such as Condor. Since the reservation for low-fair airlines is mostly internet (not travel agent) driven, local tour operators have substantial opportunities to service arriving visitors.

All tourism enterprises previously owned by the state-owned tourist operation "Balkan Tourist" have been privatized and acquired mostly by local entrepreneurs. The study identifies a critical need for training of hotel management personnel in finance, accounting, food and beverage merchandising and controls, sales and marketing, service concepts, quality assurance, and other critical areas of hotel and resort management, to assure the international competitiveness and sustainability of privatized hotels and resorts.

In summary, Bulgarian entrepreneurs are the engines to unlock the countries tourism potential far beyond "Sun, Sand, and Snow". The international community can show the way and provide the technical support and training necessary to prepare them to develop and manage successful and sustainable tourist businesses in many of Bulgaria's communities.

To achieve the most favorable "Foreign Exchange" earnings, a deliberate effort should be made by FLAG advisors to maximize the use in domestic products in developing tourist enterprises and in servicing the foreign tourist.

OVERVIEW:

Principle guidelines used for this assessment :

- Use of existing studies and initiatives to consider synergy of programs and the practical implementations of recommended actions
- Assess the support needs of entrepreneurs through discussions, interviews and on site inspections
- Review the application of "Best Practices and Know How" by owners of small travel and tourism enterprises and by regional tourism organizations
- Select and concentrate on markets and destinations that offer potential for achieving near-term and sustainable results
- Identify the support level needed at the private entrepreneur level to successfully launch the "Discover Bulgaria" program as a means to attract foreign tourists with a diverse interests
- Compare tourist offerings in Bulgaria to a competitive set of countries in the Mediterranean.

The proposed vision is:

- Have Bulgaria recognized as a diverse European tourist destination, located the cross roads of East and West, that offers a multitude of tourist offerings and experiences throughout the year
- All regions of Bulgaria share in the prosperity and economic benefits by capitalizing on the diversity of historical roots, variances in climate from the seashore to the lowlands to the mountains, pristine natural beauty, arts and crafts, festivals and dance, roses, food and wine. Harness the potential of:

750 km mountains with forests, lakes and hot springs
Thracian Lowlands with wineries and cultural sites
Danube Plains with wineries and inter-coastal commerce
378 km. coastline with 94 km sandy beaches -Mediterranean climate
72 Cultural and Historic Places of Interest - 9World Cultural Heritage sites
80 places of Natural Beauty (Gorges, Lakes, Waterfalls, Caves, Parks
60 historic towns and resorts (5 UNESCO protected sites)
Extensive road and railroad network

- Have Sofia recognized as one of Europe's livable cultural cities and historic centers, worth a special trip.

- Balance of Regional inequalities

Objectives for implementing the vision through FLAG-type assistance:

- Open new marketing and distribution channels
- Facilitate the creation of new tourism products
- Seek improvement in all elements of transportation

Proposed Action over the next 12 to 18 months:

1. Support a broad based "Discover Bulgaria" program

Provide technical assistance to selected travel agents and tour operators in the following areas:

- Help develop and market "seven to fourteen days excursion packages"
- Help develop and market "Fly- Drive" Vacation Packages
- Help establish links with "Niche" tour operators (tour operators who serve affinity groups such as historical societies, alumni groups, Rotary, professional groups, fraternal groups etc in Europe, USA and Canada)

2. Support the development of "Village and Eco Tourism"

- Provide technical assistance and finance facilitation to "qualified" developers for start-up operations including Bed and Breakfasts, Restaurants, Souvenir Production, Tour Services at the village level - support the implementation of the ARD Biodiversity Conservation and Economic Growth Project
- Provide "seminar" programs in Successful Small Business Management including topics of concept development, finance, cost controls, cost effective sales and marketing, standards of service, quality assurance, safety and sanitations
- Help introduce "National Rail Pass" using the Swiss Model to the national Railroad

3. Support the development of Convention and City Tourism

- Provide technical assistance in enlisting international airlines to feature Sofia as a "City Break " and Convention destination in airline magazines and show a short "Discover Bulgaria Video" on in-bound Sofia flights
- Provide leadership in setting up an industry-coalition to promote and market Sofia as a convention city at the Incentive Tourism Fair in Geneva.

4. Support the development of Wellness Spa Tourism

- Provide technical assistance to operators and private owners of hotels and resorts who wish to gain a competitive advantage by adding Spa and Wellness facilities

Current Market Segments Assessment and Opportunities for Improvement

Competitive Position: Beach and "Roundtrip" Tour Market

The 2001 vacation catalogues of major tour-operators, including TOUROPA, GULET Touristik, and Neckermann Reisen, served as a basis for assessing the current competitive position of Bulgaria in the competitive set of Mediterranean Countries.

Because of similar climatic conditions and similar duration of flight time from major European feeder markets, Bulgaria faces fierce competition for the "Sun, Sand and Sea " Tourist from Spain, Portugal, Italy, Malta, Croatia, Montenegro (future) Greece, Tunisia, Morocco. Egypt is not in the competitive set for beach tourism because of the extreme temperature during the summer months.

Of all destinations surveyed, Bulgaria is the only mass market beach destination where most of the accommodations are rated Three Star rather than Four Star, which places Bulgaria as the least expensive vacation destination in the competitive set and as a consequence near the bottom of visitor spending. The cost of tour packages for 3-star hotels is lowest in Bulgaria. The owners of many privatized hotels face the challenge of implementing standards that satisfy the demands of western tourists and secure financing for critical renovations and improvements.

Other tourist countries, which feature mostly 4 and 5-star hotels and resorts, also offer high-class amenities such as Golf and Health and Beauty Spas.

Striking differences in tourist offerings by major tour operators provide the groundwork for developing Bulgaria Tourism Industry in the Lowlands and mountain regions:

- Bulgaria is the only country that does not feature 7 to 14 days excursion packages (the pricing of these packages compare to beach vacation packages)
- Bulgaria does not offer a combination one-week excursion one-week beach packages
- Bulgaria does not offer Sea or River Cruises (the pricing of cruise packages compares to beach vacation packages)
- Bulgaria does not offer Fly and Drive or Fly, Drive and Sleep Packages for those visitors and adventurers who would like to discover the country on their own

- Bulgaria does not offer Fly and Rail Packages for those who wish to discover the Country by rail
- Bulgaria does market special "Health and Spa Packages"
- Bulgaria does not yet offer Golf Packages
- Bulgaria as a major producer of quality wines does not offer wine tours

Discover Bulgaria- Organized Group Travel The potential of "Round Trip / Excursion Tourism"

Current Situation:

This is a "virgin" market crucial to the successful launch of the "Discover Bulgaria" program. Presently, Bulgarian tour operators only offer "one day" excursions from beach resorts to nearby Bulgarian villages and monasteries without overnight stays. The economic benefit to communities away from beach resorts is minimal.

This offer is targeted to beach-bound tourists as a diversion from "sun, sand and sea". Combination packages "one week mountain / one week beach" are not yet offered although such packages can provide a competitive advantage for Bulgarian tourism.

Historical Societies, Alumni Clubs, Architectural Groups, Religious Groups are not yet target for Round Trip Tourism.

Opportunity:

For the development of 8-14 days "Round Trip Tourism", new markets need to be targeted:

- The Experience/Relaxation seeking tourist
- The Culture / Communication seeking tourist.
- The Culture/ Nature Seeking Tourist

Creative Tour Packages and travel itineraries for a one – two week "Discover Bulgaria" program need to be developed with domestic and international travel partners who specialize in "Niche Markets" to really open up the cultural and natural riches of Bulgaria to the international tourist.

Air- Bus- Lodging Packages
 Air- Rail-Lodging Packages
 Air- Rail Packages
 River Cruise-Bus-Lodging Packages
 River Cruise-Rail-Lodging Packages
 Mediterranean Cruise- Bus - Lodging Packages

Discover Bulgaria - Individual - Adventure Travel The potential of "Village and ECO Tourism"

Current Situation:

Although some tourist organizations such as the Pirin Tourism Forum have developed excellent collateral material to promote the history, culture, and nature of the region, the "tourist offering" have not yet been "packaged" and promoted to the international tourist seeking adventure and freedom to explore.

International donor organizations including USAID, specifically the ARD Biodiversity Conservation and Economic Growth Project and the Bulgarian American Enterprise Fund, GTZ, the British Know-how Fund, the Swiss government agency, have provided substantial technical assistance and funding for developing the infrastructure for successful village tourism.

The Bulgarian-American Enterprise Fund (BAEF) promoting the development of enterprise and entrepreneurship in Bulgaria has a successful Hotel and Tourism Program. The program has invested in 100 hotels, disbursing 118 loans worth 16 million USD. The loans are typically used for privatization, reconstruction and furnishing of existing hotels varying in size from \$20,000 to \$2,000,000. The clients include a wide range of businesses in the skiing resorts Bansko, Borovetz, Pamporovo, the cities of Shumen and Rousse, the Golden Sands beach resort and a number of smaller resorts on the southern coastline. BAEF maintains a web-site (www.discoverbulgaria.com) which promotes hotels in which they have invested. At present however, the site does not support on-line registration and the hotel rates published. The site is currently being upgraded

The program is constantly growing and the existing portfolio shows good loan service ratios. BAEF however does not finance green field sites, or lodging operators in remote areas and tourist destinations.

Private Bulgarian entrepreneurs have already developed unique lodging and recreation facilities in mountain villages such as Kovachevitsa, Leshten, Aprilizi and other locations. These entrepreneurs have found a way to market their offering on the domestic market but have not yet been linked to international niche tour operators. Financing for the development of "Bed and Breakfasts" remains a challenge, as banks are reluctant to take countryside real estate as collateral for loans because of lower liquidity.

Opportunity:

The essence of village tourism is found in the statement: "One of the goals of the tourist is to penetrate the inside and back regions of the attractions in order to experience the authenticity of a place" (McConnel 1976-94)

The challenge is now to provide technical assistance to entrepreneurs in villages for further development of the infrastructure including lodging, arts and craft centers and tourist services. This village near or at national reserves

and mountain areas need to be connected to the international market place through guidebooks.

How transportation is provided and marketed to individual tourists is critical to the success of developing village tourism. Switzerland and Austria can provide the role model for developing the "Rail Pass"-Combination "Rail and Bus Pass".

The more affluent visitor will purchase "Fly -Drive Packages" offered by international niche tour operators and local car-rental partners. These packages can also include lodging at selected areas and entrance fees.

Discover Bulgaria - Health and Spa Tourism

The potential of Wellness, Beauty and Health

Current Situation:

The competitive set for Bulgaria to compete "Health and Wellness Tourism" includes Germany, Austria, France, Italy, Spain, Hungary, Switzerland, Poland, Rumania, and the Czech Republic. According to the Ministry of Economy, there are a number of challenges Bulgaria is faced with when trying to qualify its "Balneological Centers" for inclusion in European national health care schemes:

- Need confirmation that Mineral Water is unique
- Need to upgrade qualification of medical personnel
- Need to upgrade the standards of medical equipment
- Need to modernize treatment facilities

This suggests that Bulgaria could develop a competitive advantage with developing a combined "wellness and health" and health market in key resort areas.

According to a study by IUOTO (Health Tourism, IUOTO, Geneva Switzerland, there are approximately 1,100 health resorts- (bath in mineral water) in Europe. Many such health resorts provide wellness and beauty programs in addition to therapeutic and medical procedures. To succeed economically, many of these resorts offer combined skiing and health holidays, nature and health holidays, golf, and seaside and health holidays.

Development of Health and Spa Tourism in Bulgaria is a capital intensive, long-term proposition which needs to start with the privatization of "Balneology Centers and Mineral Springs " in areas that have the potential to develop "Internationally competitive Wellness Resort Complexes".

The opportunity:

The development of Health and Beauty Spas should focus on adding Spa facilities to the existing sea and mountain resort complexes and developing new complexes near major urban centers. The deliberate marketing focus should be on expanding seasons and increasing the competitive advantage. According to several studies conducted by Health Fitness Dynamics, Inc (HFD) a Florida based consulting organization, wellness and spa facilities with trend-sensitive concepts as part of resort complexes can enhance the economic and marketing potential of the resort:

Some of the key findings include:

- The 30-49 age group dominates the market
- Rest, Relaxation, feeling pampered and beauty services are most sought
- Resort with Spa's have a preferred booking status - marketing advantage

- Increased length of stay and higher perceived value for room rate
- Spa revenues come primarily from massage, facials, body treatment and nail care
- 59% prefer to purchase individual services rather than a package

Discover Bulgaria - City Tourism

The potential of convention, incentive and "city break" tourism: SOFIA

Current Situation:

Sofia has not been featured in City Programs since 1995. The presence of international hotel brands on the Sofia market enables the city to pursue this market to boost Hotel occupancies and the utilization of **convention** facilities. Without the expansion of the market, these operations remain below the economic target zones for sustained profitability.

The capacity of the international airport is underutilized. The number of visitors to the opera, theater, historic churches, monuments and museums can be increased to provide revenues for restoration and upkeep.

Tour operators such as TUI have not yet included Sofia in their City Programs and the international airlines serving Sofia do not yet promote the city as a convention and "City Break" destination. The high cost of airfares is a major detriment to the development of convention and incentive tourism.

International Airlines flying to Sofia enjoy consistently high load factors and in the absence of competition from Europe's Low -fair airlines, the airlines demonstrate an invert monopolistic behavior in the pursuit of aggressive pricing policies.

The Opportunity:

Sofia has developed the basic infrastructure and elements to develop and compete for the profitable business of major European conventions and as a "City Break" destination:

- International Airport in proximity of city destination
- Convention and Exhibit Facilities for 4,000 delegates
- Mid to Upscale Hotels (1,500 rooms) in proximity of Convention Center
- No Visa Restrictions
- Attractive Restaurants, Cafes, Pubs and entertainment facilities
- Guided tours to nearby cultural and historic attractions (Spouse Programs)
- Opera, Ballet and Theater Performances
- Post Convention Tours to Wine Country, Mountain (Ski) and Sea Resorts
- Business friendly atmosphere and global communication network
- Public Safety and Security
- Value for Money

An industry coalition made of airline representatives, hotels, the cultural center and other meeting facilities, restaurants, attractions, shops, meeting service providers, tour services operators is needed to represent Sofia at the International Incentive Market in Geneva.

Proposed Government Actions for Industry Sector: Tourism

General:

Bulgaria needs a Master Plan: Tourism Development and Strategy

The basic document outline should be as follows:

Strategy

Mass or Class Tourism, Environmental Impact, Benchmark

Starting Position: 2002

Profitable Tourism Products for Key Regions

Basic Principles for the Development Strategy

Government Qualitative and Quantitative Goals

Environmental Impact for existing infrastructure and new developments

European Travel Market Trends

Tourism Potential of Bulgaria

Assessment of Bulgaria as an Air, Sea, Rail, Bus, Private Car Destination

Quality and Quantity of Hotels and Lodging Facilities

Basic Infrastructure Development Strategy and Action Plan

Sales and Marketing Plan

Bulgaria needs a post-privatization assessment of sustainable tourism development and overall economic impact:

Sustained Business Potential of Privatized Companies: Measure - Profitability

Quality and Type of Business generated: Measure - Occupancy and Visitor Spending

Foreign Exchange Earnings or Losses

Ratio of foreign exchange earnings vs. foreign exchange outflows (imports)

Increase in Tax Revenue

Ratio between tourist tax revenue and total tax revenue

Ratio between tourist tax revenue and public expenditures in favor of tourists

Economic Impact of tourist projects between foreign ownership and local ownership

Ratio of Market Access; Ratio of Staff Training and Development

Level of new job creation and small business creation

Control over development on the Regional Level

Precise procedures applicable to all tourism development projects

Proposed actions:

- Provide Support for a “Discover Bulgaria” exhibit at the following international tourism fairs: ITB –Berlin; World Travel Market- London; Incentive Travel Market-Geneva; Tourism Fair-Moscow (all tourism enterprises, large and small, BATA affiliated or independent should have equal access to the booth)
- Support the development of an “Image Marketing” campaign for a “Discover Bulgaria” programs - video to be shown at airports, hotels, and tourist information centers
- Support for the Development of “City breaks” and Convention and Incentive Tourism. Enhance Bulgaria’s competitive position: Grant Landing Rights for Low-cost Airlines
- Provide National and International Press Support for Tourism Activities News Releases, Travel Writer Program, Information centers at embassies abroad
- Support the development of “Village / Nature Tourism”
Provide standards, credit and incentives for the development of “Bed and Breakfast / Private Rooms, and village based tour services
Establish “Rail Pass System” for Tourists - Use Swiss Model
Support the development of a National Directory for “Bed and Breakfast”
- Support the development of world-class Wellness and Spa Resorts
Identify “green-field” sites and seek strategic developers, operators and investors
Privatize and reposition sanatoriums as Beauty Spas and Wellness Centers
- Support the development of world class Golf and Conference Resorts
Benchmark model: Moscow Country Club, Nakhabina

Tourism policy considerations and actions for all regions and summary recommendations:

Environmental Considerations in view of changing consumer attitudes:

Set up WTO and UNEP norms for measuring the impact of tourism development

- Fragility of ecosystem (species, flora, fauna) and biodiversity
- Waste management systems and waste-water treatment
- Drinking water safety; cost of consumption by tourist projects in communities
- Intensity of land use-tourist /density of land occupied by tourist structures
- Protection of atmosphere, noise, pollution and visual aspects (billboards)
- Tourism Construction Standards – Harmony with Environment
- Intensity of tourist transport by mode of transport

Tourism policy considerations and actions for all regions and summary recommendations:

Social Measurements:

- Affect on traditional way of life
- Affect on cost of living
- Low or high economic impact of tourist activities (users of infrastructure vs. contributors to the local economy)
- Cost of public health and safety
- Intensity of tourist visitations
- Number of jobs by skill level created (seasonal/permanent)
- Affordability of restaurants, cafes, sport facilities by local population

Economic Impact:

- Proportion of tourist activity to all economic activity in community
- Development policies linked to profitability of tourism enterprises
- Type and quality of business generated
- Proportion of local ownership
- Foreign Exchange earning and losses
- Ratio of tourist tax revenues and public expenditures favoring tourists

Tourism Concept Development and Planning in the National Interest:

- Requires a clear strategic direction with the “New Europe”
- National, Regional and Community level co-ordination necessary for the development of a Master Plan

Privatization:

- -Changing Ownership models with legislative reassessments
- Focus on strategic investors and operators for larger projects
- Reconsider incentives to attract foreign investment capital

- Increase market potential by facilitating more hotel real estate transactions involving international hotel brands.
- Implement value based management performance metrics
- Separate property asset management from the hotel operation metrics
- Identify new financing mechanism for hotel and resort projects

Pricing:

- Requires clearly differentiated approaches to avoid the business risk of excessive price competition and market / profit erosion
- The Bulgarian tourism industry must consider the impact of transparency and price convergence with the introduction of the EURO and adopt different strategies to defend market and or increase market share
- Consider challenges of transparent pricing when using the Internet

Tourism policy considerations and actions for all regions and summary recommendations:

Lodging Facilities – Hotels and Motels:

- Establish rating standards according to European norms
- Provide target market – oriented hotel product
- New licenses only for 3star plus facilities and amenities
- Focus on developing mid to up-market hotels and resorts

Lodging Facilities- Private Rooms and Bed and Breakfast

- Establish basic standards for comfort, sanitation and safety
- Achieve step-by step improvements in present offering
- New licenses only for 3star plus facilities

Lodging- Camping/ Mountain Chalets:

- Upgrade facility, service and sanitary standards
- Minimize licenses for camping places

Expanding Marketing Potential

- Develop niche markets for cultural and back to nature tourism
- Seek co-operation from international niche-tourism operators
- Develop co-operative internet marketing with direct booking capabilities
- Consider the market potential of an aging European population when reconstructing hotel and resort facilities
- With increasing trade, focus on increasing business travel (trade shows, incentive travel and major international conventions)
- Consider the “European Package Travel Directive” when marketing destinations and individual resort locations.
- Partner with airlines for “City Promotion Packages”

Tourism policy considerations and actions for all regions and summary recommendations

Education:

- Set up regional hospitality- vocational training centers – (service employees, cooks, reception, information centers, tour guides etc.,
- Provide for foreign vocational exchange programs (know how transfer)
- Focus on Service as a behavioral capability and professional competency
- Consider E-learning capabilities when training hospitality workers

Technology:

- Consider Room Allocations using the Internet as distribution channels for on-line bookings – need to consider a single image inventory
- Consider the “position” /representation on the e-agent city site
- Consider offering real time room availability and consistent pricing

Transport:

- Seek expedient re-start of Danube Cruises originating /ending in Bulgaria
(Consider affiliation with Casino Austria)
- Expand capacity for Black Sea/ Mediterranean Cruises originating in Bulgaria
- Upgrade the environment friendly rail transportation to tourism destination – (Introduce Bulgarian “Rail Pass” modeled after Swiss Rail pass) Special Ski and Panorama Trains
- Improve attractiveness of Marinas and increase capacity
- Provide Solar powered boats for lakes and river excursions

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