

# Bulgaria

## Tourism in the economy

Tourism is a priority sector in Bulgaria and in 2018 directly contributed 3.1% to GDP, generated 2.9% of employment, and directly supported approximately 93 000 jobs.

The total number of international arrivals was 12.4 million in 2018, an increase of 6.7%, compared to the previous year. International leisure visitors grew by 5.5% reaching 5.8 million while international business visits numbered 1.7 million, an increase of 10.6% over 2017. EU markets continued to be the most important for inbound tourism with a share of 61.4% and a total of 5.7 million arrivals. The top three inbound markets in Bulgaria were Romania (1.4 million arrivals), Greece (1.1 million) and Germany (850 000).

Domestic tourism in accommodation facilities with a bed capacity of 10 or more rose by 2.2% to 3.9 million in 2018, accounting for 9.1 million nights, up 1.6% from 2017.

## Tourism governance and funding

The tourism policy in Bulgaria is founded on partnerships between government and local authorities, NGOs, business and civil society, promoting opportunities for investment, new skills, jobs and stimulating competitiveness within the tourism industry. The Council of Ministers is the national body responsible for formulating national tourism policy in Bulgaria. The Ministry of Tourism implements policy and coordinates the activities of other ministries and institutions. The Ministry of Tourism is also specifically responsible for regulation, product development, marketing, research and information, external project funding and supporting regional organisations.

The National Tourism Council is the consultative body, which operates under the authority of the Ministry of Tourism. Its members include representatives of tourism-related ministries as well as national, regional and local tourism associations, transport operators and consumer bodies.

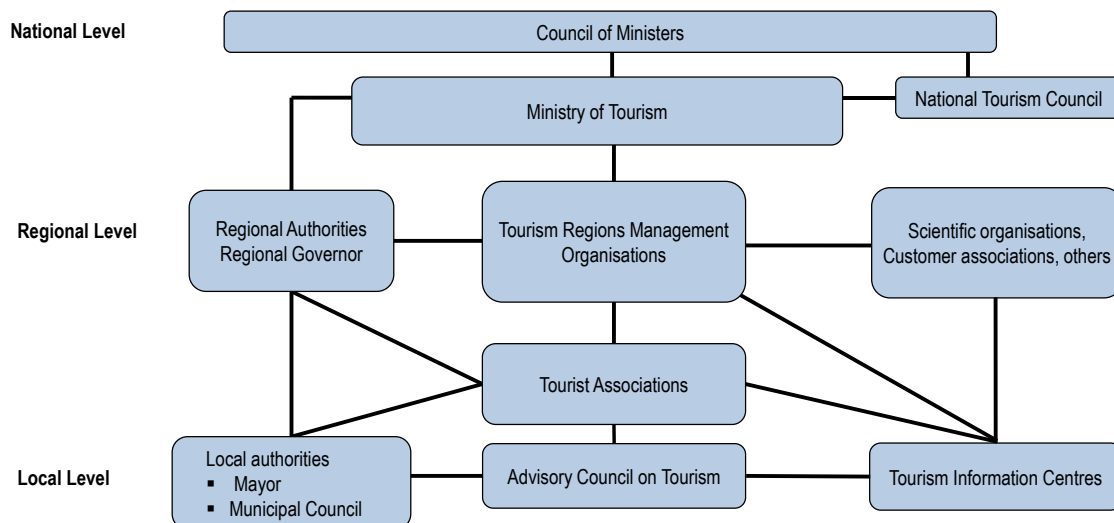
Recent legislative changes have led to the establishment of nine Regional Tourism Management Organisations. The members of these include tourism associations, regional and municipal administrations, institutes, museums, scientific bodies and tourism schools. The Regional Tourism Management Organisations are responsible for regional tourism product development and marketing of the nine identified tourist regions in Bulgaria.

The Ministry of Tourism works closely with the private sector and other stakeholders as well as collaborates with regional and local tourism bodies listed in the National Tourism Register. At the regional level, authorities develop and implement tourism strategies and programmes in line with national tourism and regional development strategies.

The Tourism Act regulates the co-ordination associated with the interaction of the State and municipalities in the implementation of activities related to tourism, as well as the participation of not-for-profit legal entities. The Tourism Act makes provisions for local authorities to adopt tourism development programmes

according to local resources and need, and establishes an Advisory Council on Tourism and a Municipal Commission to oversee the development of tourism related facilities.

### Bulgaria: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2020

The budget of the Ministry of Tourism for 2019 was BGN 19.35 million, of which BGN 14.57 million was allocated to marketing activities. The Ministry is responsible for administering funds from both the national government and the European Union.

### Tourism policies and programmes

In 2018, the Council of Ministers approved the updated National Strategy for Sustainable Development of Tourism in the Republic of Bulgaria to 2030 and the related Action Plan for the period 2017-2020. The implementation of the Strategy is the responsibility of the Minister of Tourism. The most important challenges addressed by the Strategy are overcoming the seasonal and geographic concentration of Bulgarian tourism, encouraging the industry to be more sustainable, improving the qualifications and skills of the workforce, and upgrading and investing in new accommodation and other facilities.

In 2018, 56% of all arrivals registered by accommodation establishments with 10 or more beds were in the period from June to September, and the remaining 44% dispersed throughout the rest of the year. Travel is concentrated in Varna, Burgas, and Dobrich - with the other 25 districts receiving slightly over half the arrivals. To encourage tourism to other regions, the government developed tourist routes highlighting cultural tourism, congress tourism, spa and wellness tourism, eco-tourism and rural tourism.

The Ministry is aligned with UN Sustainable Development Goals and has a clear implementation framework and funds for investment in technology, infrastructure and human resources.

The Strategy's long-term objectives are to:

- Establish a favourable business environment to develop sustainable tourism by updating the regulatory framework and reducing burdens on business.
- Develop a competitive tourism sector by stimulating improvement in all types of tourism businesses to ensure high quality products.

- Position and promote Bulgaria in international markets.
- Develop regional tourist areas by stimulating the growth of tourism SMEs and establishing destination management organisations in nine tourist regions across the country to ensure balanced growth.

The Strategy is delivered through an agreed annual Action Plan which includes:

- Ensuring effective coordination between institutions and integrating tourism into related sectoral policies.
- The creation of special visa application centres to facilitate travel in co-operation with the Ministry of Foreign Affairs of Bulgaria.
- Active co-operation between the Ministry and domestic and international travel trade companies to create joint tourism products and packages.
- New product development to diversify the tourism offer, make it more distinctive and tailored to different types of tourists. For instance, the recently elaborated cultural and historic destinations, SPA, wellness destinations and wine and culinary destinations within the country.
- Positioning and promotion of Bulgaria as a year-round tourist destination and building a positive image among key international target markets via marketing activity.
- Revisions to regulations in order to facilitate the establishment of regional DMOs and other local organisations.
- Providing business support and finance for SMEs, capacity building and support to access national and international markets
- Developing a unified system for tourist information at a national level, which acts as a networking platform for tourism business (see box).

Additional amendments to tourism legislation in 2019 aim to facilitate the involvement of industry stakeholders and to attract more investment in sustainable development. The amendments will facilitate tourism business also through eased regulations relating to the establishment of tour operators, the certification of spa and wellness centres, and the operation of restaurants, hotels and other accommodation.

### Integrated Digital Tourist Information System in Bulgaria

The Ministry of Tourism is currently developing an Integrated Tourist Information System, established in 2019, in collaboration with tourism businesses. The Integrated Tourist Information System is an electronic database containing information on a wide range of public and private sector tourism related stakeholders including tour operators, accommodation providers, trade associations and others. The system also provides information on major events as well as relevant statistical data. Eventually intended to be fully online, the platform will gather large volumes of data from many areas, and from different institutions, enabling users to track growth in arrivals at daily and weekly levels, the development of a range of indicators, as well as supplementary data at regional level. The system is a gateway for communication between national, regional and local stakeholders, acting as a "one stop shop" with information submitted by any of the participants in the country's National Tourism Register. The platform will also ensure innovative and secure data transfer between institutions, leading to more accurate monitoring and benchmarking and better decision making at all levels. The budget allocated for the creation of the System amounts to BGN 1.2 million and will be overseen by a Council for Digitalisation in Tourism.

## Statistical Profile

### Bulgaria: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	3 154	3 415	3 809	3 806	3 890
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	7 621	8 046	9 035	8 949	9 096
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism<sup>1</sup></b>					
Total international arrivals	9 409	9 317	10 604	11 596	12 368
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Romania	947	987	1 097	1 139	1 377
Greece	1 032	973	1 067	1 158	1 116
Germany	714	623	827	870	850
Turkey	438	519	565	636	625
Republic of North Macedonia	408	474	528	545	560
Nights in all types of accommodation	14 078	13 352	16 151	17 106	17 749
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	..	..	..	6 228	6 699
Overnight visitors (tourists)	4 158	4 632	5 392	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Turkey	1 107	1 242	1 219	1 311	1 516
Greece	867	1 043	1 201	1 341	1 403
Romania	322	333	423	481	523
Serbia	316	315	405	463	494
Germany	239	273	345	402	422
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b>					
<b>Inbound tourism</b>					
Total international receipts	4 494	3 574	4 141	4 598	4 999
International travel receipts	3 908	3 146	3 634	4 045	4 416 e
International passenger transport receipts	587	428	508	553	583
<b>Outbound tourism</b>					
Total international expenditure	1 454	1 345	1 631	2 035	2 236
International travel expenditure	1 199	1 116	1 357	1 684	1 857 e
International passenger transport expenditure	256	230	274	351	378

.. Not available; e Estimated value

1. Arrivals from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078243>

## Bulgaria: Enterprises and employment in tourism

	Number of establishments <sup>1</sup>	Number of persons employed				
	2018	2014	2015	2016	2017	2018
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	..	..	..	..	..	..
Accommodation services for visitors	3 458	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..	..
Food and beverage serving industry	..	..	..	..	..	..
Passenger transport	..	..	..	..	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	..	..	..	..	..	..
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. Not available

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078262>

## Bulgaria: Internal tourism consumption

Million BGN

	2016		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>1 438</b>	<b>7 322</b>	<b>8 760</b>
Tourism characteristic products	1 315	5 654	6 968
Accommodation services for visitors	385	1 537	1 922
Food and beverage serving services	370	2 432	2 802
Passenger transport services	340	818	1 158
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	..	..	..
Travel agencies and other reservation services industry	80	0	80
Cultural services	109	656	765
Sports and recreation services	30	211	241
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	123	1 668	1 791
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078281>



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