

Bulgaria

Tourism in the economy and outlook for recovery

Tourism in Bulgaria provides an important source of employment and economic earnings. In 2019, tourism-related employment supported approximately 236 300 people. The impacts of the COVID-19 pandemic saw this fall to approximately 194 600 people in 2020, a decline of 41 700 people.

In 2019, international tourism was the driver of the Bulgarian tourism sector. There were 12.6 million international arrivals who accounted for BGN 8.5 billion, or 88.2% of total tourism spend. The impact of the pandemic saw international visitors fall by 60.4% to 4.9 million in 2020 before recovering to 7.2 million in 2021 – 42.7% below pre-pandemic levels.

Domestic tourists reached a record 4.1 million in 2019. Despite a significant decline in 2020, domestic tourists recovered in 2021, with domestic nights in all means of accommodation reaching 9.6 million, 0.5% below 2019 levels.

Bulgaria expects inbound tourism to achieve 2019 levels by 2025 but the total contribution of tourism to GDP is expected to take longer to recover, returning to pre-pandemic levels by 2025-27.

Tourism governance and funding

The Ministry of Tourism is responsible for implementing state policy relating to tourism and co-ordinating the activities of related ministries and other institutions in its implementation. The national tourism policy is formulated by the Council of Ministers.

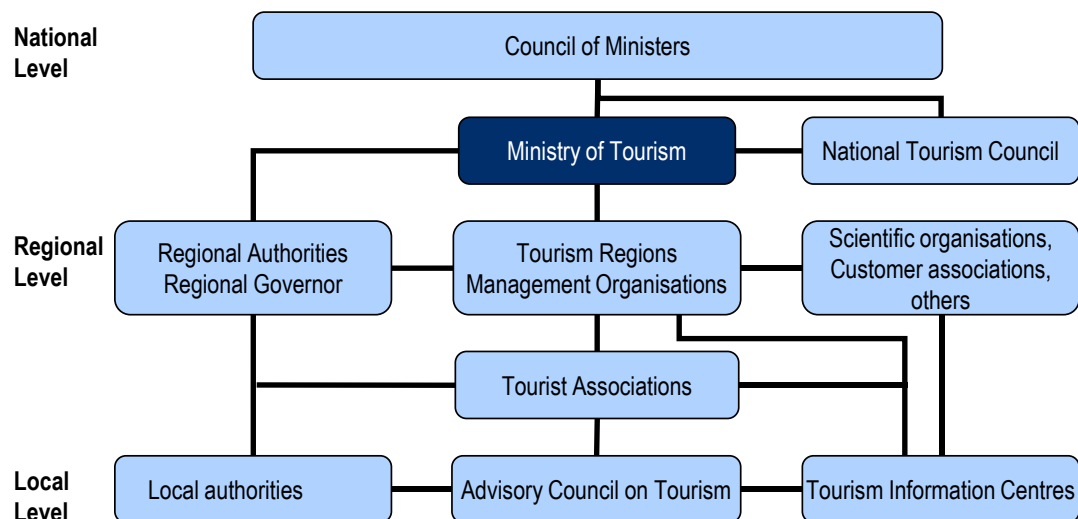
The Ministry's main activities include developing and implementing the National Strategy for Sustainable Development, developing short-term programmes and plans, regulating the tourism sector; assisting regional management organisations; national marketing and advertising, international relations; and participating in international programmes.

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. Regional authorities are in charge of implementing the national tourism policy at the regional level. At the local level, municipal administrations are responsible for tourism development. The municipal council adopts a tourism development programme in line with the priorities of the regional strategy and in accordance with local tourism resources and needs.

Tourism development is co-ordinated and planned horizontally across sectors, including with the digital transformation of SMEs outlined in the Ministry of Economy's programme economic transformation and with reforms targeting energy efficiency, regional development, and the digitalisation of cultural heritage in the National Recovery and Resilience Plan.

In 2020, the budget for tourism totalled BGN 19.6 million. An additional BGN 51.6 million was allocated for schemes supporting tourism businesses during COVID-19. In 2021, the budget for state aid amounted to BGN 59.9 million.

Bulgaria: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2022.

Tourism policies and programmes

In 2022, the Ministry is in the process of updating and adapting the Tourism Sustainable Development Strategy 2030. Upcoming legislative changes will increase the competencies of the Regional Tourism Management Organisations as separate entities (see box below). These provisions should help the DMOs finance their activities and attain financial sustainability in the long run.

As an immediate response to COVID-19, Bulgaria developed a measure for tour operators to stimulate inbound tourism. Those with existing contracts with air carriers were entitled to EUR 35 per passenger taking a flight into Bulgaria through a package tour. Additionally, in response to the suspension of travel, the Ministry of Tourism responded with compensation grants for tour operators and travel agencies to allow them to reimburse customers. There were eight measures in total for supporting tour operators, tour agencies and the tourism sector. Because of the measures, there was no case of tour operators or travel agencies' insolvency in the last two years.

The most important challenges for Bulgarian tourism are sustainable development and digitalisation. These challenges emerged strongly during the COVID-19 crisis and will be key to the rebound and future development of the sector. Increasing tourism sector competitiveness is a priority in the Tourism Sustainable Development Strategy until 2030. The gathering and sharing of tourism data, sustainable management at the regional level, and enhancement of digitalisation in SMEs will help to resolve some of the most pressing problems in tourism and increase competitiveness while contributing to green and digital transitions.

The main policy responses and initiatives aimed at tackling the key high-priority challenges include:

- Enhancing institutional capacity building.

- Encouraging sustainable and effective resource management and measures for climate change adaptation, including using protected natural areas as a resource for the sustainable development of tourism.
- Improving tourists' safety in Bulgaria.
- Upskilling the workforce through higher skills.
- Stimulating tourism investment and securing access to finance.
- Continuing the focus on digitalisation and innovation.
- Controlling air and water quality and achieving sustainable waste and water management.

Regional tourism management organisations in Bulgaria

Destination management is a relatively new dimension in Bulgarian tourism policy. It was outlined in the Concept for Tourism Regions in 2015 and the Tourism Act, after which nine regional tourism organisations were established in 2018-19. The main goal of Regional Tourism Management Organisations is to decrease regional disparities by developing strong regional brands and specialised forms of tourism based on local tourism resources. The aim is to enable the sustainable development of the regions and increase the competitiveness of the tourism sector and the quality of the tourism product based on a partnership between all stakeholders.

In the period from 2019-22, two projects were launched to support the organisations' functioning and capacity building for effective tourism management at the destination level. These are focused on increasing the capacity of SMEs in the tourism sector by providing support for the creation and functioning of Management Organisations in tourist areas and improving the quality of services of SMEs in tourism through the use of ICT and web-based marketing.

In 2021, the nine Regional Tourism Management Organisations developed their marketing strategies, which were approved by their Members and the Ministry.

The strengthening of the Regional Tourism Management Organisations' position as an inevitable factor for tourism management on a regional level will continue in the new programme period 2021-27, in which it is planned that they will also become eligible beneficiaries under the EU-funded operational programmes.

Statistical Profile


Bulgaria: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	3 806	3 890	4 120 p	2 848 p	3 755 p
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	8 949	9 096	9 675 p	7 312 p	9 627 p
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism¹					
Total international arrivals	11 596	12 368	12 552	4 973	7 188 p
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Romania	1 139	1 377	1 287	626	822 p
Greece	1 158	1 116	1 168	271	259 p
Germany	870	850	761	138	288 p
Türkiye	636	625	649	332	401 p
North Macedonia	545	560	554	169	175 p
Nights in all types of accommodation	17 106	17 749	17 480	4 656 p	7 994 p
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	6 228	6 699	7 007	3 973 p	5 182 p
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Türkiye	1 311	1 516	1 622	..	..
Greece	1 341	1 403	1 461	..	..
Romania	481	523	554	..	..
Serbia	463	494	515	..	..
Germany	402	422	446	..	..
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	4 598	5 093	4 832	1 779	..
International travel receipts	4 045	4 495	4 287	1 624	..
International passenger transport receipts	553	598	546	155 e	..
Outbound tourism					
Total international expenditure	2 035	2 247	2 196	1 252	..
International travel expenditure	1 684	1 870	1 826	1 039	..
International passenger transport expenditure	351	377	370	214 e	..

.. Not available; e Estimated value; p Provisional data

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

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/yxvn6o>

Bulgaria: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed				
	2020	2017	2018	2019	2020	2021
Total	..	..	..	..	..	..
Tourism industries	..	..	..	..	..	..
Accommodation services for visitors	29 924 p	79 347 p	82 646 p	84 373 p	68 370 p	.. p
Hotels and similar establishments	4 486 p	41 330 p	43 633 p	44 810 p	29 207 p	..
Food and beverage serving industry	20 259 p	94 737 p	93 796 p	94 354 p	77 237 p	.. p
Passenger transport	4 817 p	23 384 p	22 634 p	22 497 p	20 908 p	..
Air passenger transport	55 p	1 691 p	1 865 p	2 042 p	1 744 p	..
Railways passenger transport	.. p	5 954 p	5 831 p	5 853 p	5 705 p	..
Road passenger transport	4 732 p	15 437 p	14 573 p	14 213 p	13 158 p	..
Water passenger transport	.. p	302 p	365 p	389 p	301 p	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	2 149 p	2 719 p	2 818 p	3 002 p	2 891 p	..
Travel agencies and other reservation services industry	1 808 p	6 280 p	6 421 p	6 214 p	4 506 p	..
Cultural industry	1 208 p	1 724 p	1 744 p	1 914 p	1 635 p	..
Sports and recreation industry	4 477 p	23 826 p	23 980 p	23 940 p	19 036 p	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available; p Provisional data

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/yud7s0>


Bulgaria: Internal tourism consumption

Million BGN

	2019		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	1 129 p	8 455 p	..
Tourism characteristic products	1 084 p	5 528 p	..
Accommodation services for visitors	524 p	2 398 p	..
Food and beverage serving services	297 p	1 980 p	..
Passenger transport services	214 p	641 p	..
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	10 p	263 p	..
Cultural services	18 p	98 p	..
Sports and recreation services	22 p	147 p	..
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	44 p	2 927 p	..
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/4jwgve>



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