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## THE COVID-19 CRISIS AND TOURISM IN BULGARIA

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**Abstract.** The tourism industry in Bulgaria is in crisis, caused by a global factor external to the industry - the COVID-19 pandemic. The pandemic has affected the overall socio-economic development, incl. tourism, globally, regionally and nationally. This circumstance demonstrates the important role of four key factors: the geopolitics of EU structures, the policies formulated by the World Health Organization (WHO) and the World Tourism Organization (UNWTO); and the national tourism policy, which is harmonized with them. The object of this study is the national tourist space of Bulgaria, and the subject of the study is an analysis of the relationships between the main groups of factors: geopolitical, economic and state-legal, and the tourism industry in the country, strongly influenced by the crisis COVID-19, as well as major trends in the development of tourism in the years of the pandemic.

*Research background:* The drastic decline in active mass international arrivals to Bulgaria in 2020 – 2022 period was larger than the number of Bulgarians traveling abroad. This was caused by the outflow of large international tour operators supplying tourists to seaside, and winter resorts in Bulgaria. Among the reasons for this are, besides the mass character of tourism, the policies of international, but not least and at the national level.

*Purpose:* Study of the main groups of factors: geopolitical, economic and state-legal, affecting tourism in the period 2020 – 2022 influenced by the crisis COVID-19, as well as major trends in the development of tourism in the years of the pandemic.

*Methods:* Content analysis, statistical analysis

*Findings and novelty* The development of tourism in Bulgaria, in the context of the COVID-19 pandemic, is undergoing a process of transformation under the influence of international, and national policies. A proactive national policy is needed, taking into account the changes that have taken place in the development of tourism, both in terms of supply and demand.

*Keywords:* COVID-19 pandemic; tourism policies; tourism trends

### 1. Factors influencing tourism in times of crisis

The tourism industry is in crisis, caused by a global factor external to the industry - the COVID-19 pandemic. As a result of the pandemic, the overall socio-economic development, incl. Tourism, regardless of the spatial level of development, is influenced by three key factors: 1 / the policy formulated by the World Health Organization (WHO), 2 / the World Tourism Organization (WTO-UNWTO) and 3 / national tourism policies. The policies formulated by these three entities. Tourism is in the process of transformation, aimed at overcoming the limitations of global socio

- economic restructuring, characterized by a pronounced geopolitical nature. Adhering to the definition of geopolitics, understood as "the science of distribution of spheres of influence in the context of the geographical location of the subjects"<sup>1</sup>, the objective analysis of Bulgaria's position in view of future directions should take into account the geopolitical context. **Transformation in the tourism sector** requires rapid and radical change, based on national tourism policy, taking into account the current features of global geopolitics, respectively the changing tourist geographical area in regional and global terms. The manifestation of geopolitics in tourism, in our opinion, first of all manifested itself by modifying the morphostructure of the global tourist space, understood as a model reflecting a certain period of time, fixing the spatial structure of used natural and socio-cultural landscapes globally. The main factors that led to this new morphostructure are those imposed by the WHO, respectively European Union (EU) pandemic measures and measures restricting the movement of people. On the other hand, a powerful geopolitical factor is the information flow broadcast by the UNWTO on the state of various destinations in the world, highlighting some of them as "green". The spatial image of tourist destinations has been subject to the above restrictions, becoming an instrument of "soft power" of geopolitics (Nye 1990; Nye 1994), forming images of space, respectively the worldview (Minca 1996b), with a direct impact on the attractiveness of individual countries and destinations. Information about destinations closed due to the COVID-19 pandemic has become a powerful and effective tool for influencing their tourist image in order to increase or decrease their attractiveness internationally. The results are available only two months after the restrictions were imposed. According to the World Tourism Organization (UNWTO)<sup>2</sup>, as of May 18, 2020, all tourist destinations worldwide have imposed travel restrictions. Of the 217 destinations, 163 (75%) have completely stopped active international tourism and only seven (7) destinations have seen relief from restrictions<sup>3</sup>. It is stated that changes will be needed, leading to a way out of a crisis of similar magnitude. In a press release dated 02.12.2020 UNWTO<sup>4</sup>, offers classifications of top green destinations, characterized by a more favorable health picture of COVID-19.

The effect of the global management of COVID-19 information is available in **Bulgaria** in the summer and winter of 2020.

The total number of overnight stays in all accommodation establishments registered in January 2021 was 463.7 thousand, or 56.5% less than in the same month of the previous year, before the COVID-19 pandemic<sup>5</sup>. The visits of foreigners to Bulgaria in the same month were 241.7 thousand, or 60.0% less than in January 2020 [5], and the trips of Bulgarian citizens abroad in the same month were 303.7 thousand, or by 28.2% below those registered in January 2020. According to the indicator of tourist visits for the purpose of rest and excursions in 2022, the country was visited by 4272502 foreign tourists compared to 2306819 tourists in 2021, 1364688 in 2020

<sup>1</sup> <https://askonline.ru/geopolitika-eto-prostyimi-slovami/>

<sup>2</sup> One planet vision for a responsible recovery of the tourism sector. Copyright: © 2020, world tourism organization (unwto)

<sup>3</sup> <https://www.unwto.org/covid-19-travel-restrictions>

<sup>4</sup> World tourism organization Madrid, 2 dec 2020

<sup>5</sup> <https://www.nsi.bg/bg/content/1981/>

and 5860447 twisters in 2019. *The larger decline in the number of international tourists in Bulgaria compared to the number of Bulgarians traveling abroad can be explained by the effect of mass tourism, in particular by the outflow of large international tour operators supplying tourists to winter resorts in Bulgaria.* Bulgarians travel both unorganized and organized, using local, Bulgarian travel agencies, e.g. there is no dependence on external travel agents.

The drastic decline in active mass international tourism in the country is significantly influenced by policy at the national level.

Our country does not pursue a proactive tourism policy in response to abrupt changes, but exhibits inert behavior - does not take initiatives to attract tourists, as observed in neighboring countries, such as Turkey and Greece, which stimulate charter flights by substantially financing a flight seat. The situation is not used to ease the visa regime for citizens of countries outside the EU, which have been important markets for years, such as the Russian market. The problem of visas for foreigners from non-EU countries has been a long-standing one, and despite numerous discussions between tourism organizations and state institutions, there has been no positive result. Efforts are focused mainly on improving the organization of consulates issuing visas. A possible solution to the problem of visas for foreigners from non-EU countries is the issuance of electronic visas, but currently in Bulgaria there is no such practice.

As a result of the above, the tourist image of the Bulgarian geographical area is not simply overshadowed, but is collapsing, as major international tour operators operating in the country are withdrawing from Bulgaria. International tourist arrivals in the second year of the pandemic, in 2021, when the international tourism community took a number of initiatives to restart tourism, testify to the lack of geopolitical emphasis in national tourism policy. As proof of this statement, we will present data from a survey conducted by the National Center for Parliamentary Research (NCPI)<sup>1</sup> regarding public attitudes related to tourism. The survey was conducted in June 2021 among 1000 adult citizens of the Republic of Bulgaria. The methodological tool is a semi-standardized interview. Although the summary assessment is too abstract and influenced by three factors: 1 / the current epidemic situation and anti-epidemic measures; 2 / the general increased criticism of the actions of public institutions; 3 / the diverse personal experience of the Bulgarian citizens regarding the condition. The state policy in the field of tourism is approved by only one fifth of the interviewees - 20.2%, while the share of those who do not approve it is twice as high and amounts to 44%. and the prospects for tourism development in Bulgaria. Approval is demonstrated more often by respondents who prefer to spend their holidays in Bulgaria. Approval is relatively evenly distributed to all age groups, with the exception of people between the ages of 30 and 39. Those critical of state policy prefer to spend their holidays only abroad, they are between 30 and 39 years old, highly educated and living in Sofia. Among the critical remarks, respectively recommendations, of the respondents an important place is occupied by the opinion that it is necessary to invest more funds in advertising of Bulgarian tourism. We will note that this is a clearly formulated opinion of the expert community in tourism in

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<sup>1</sup> [https://www.parliament.bg/pub/ncpi/20210802124248\\_NCPI\\_Tourism\\_2021.pdf](https://www.parliament.bg/pub/ncpi/20210802124248_NCPI_Tourism_2021.pdf)

Bulgaria before the pandemic. We will also point out that, along with more financial resources for advertising, the strategic reorientation of the national tourism policy from mass summer and sea tourism to tourism, meeting the modern demand for higher emotional, psychological, spiritual, cultural, related to gaining experience in various spheres of life, for which Bulgaria has an exceptional nature and social - cultural resources throughout the country. Last but not least, the need for a radical change in the marketing tools for tourism advertising in line with new technological developments should be emphasized.

In the context of the COVID-19 pandemic, the actions of the Ministry of Tourism are rather an implementation of health policy. The emphasis is on the survival of the business, without looking for opportunities to turn some disadvantages into a plus. The country's participation in a number of high-level international forums remains more or less formal representation without real positive effects. In support of this statement we will point out the very definite positive answer – 95.2% of respondents in the survey of June 2021 [6], to the statement: "The state should strengthen international cooperation in the field of tourism in order to stimulate foreign tourists to choose Bulgaria as a place for their vacation."

The establishment of Bulgaria on the international tourist map as an attractive tourist destination in the Covid-19 pandemic is a function of proactive national policy, taking into account the interest of tourism in Bulgaria, new behavior of consumers and producers of tourism services in the context of global geopolitical framework.

## **2. Features of tourist demand as a result of the COVID-19 pandemic**

As a result of the above circumstances, a number of problems that the country is facing before the COVID-19 crisis are deepening, such as: lack of labor, low average annual employment at the accommodation base; strong seasonality of the tourist product; dominant supply of mass tourism, respectively dependence of destination Bulgaria on major international tour operators.

As a result of the COVID-19 pandemic, significant changes are taking place in the mega environment of the tourism system, leading to significant changes, covering all major aspects of tourism demand, which are likely to continue in the future. This requires rapid adaptation to them of the tourist offer.

### *New characteristics of the tourist demand in Bulgaria*

The mentioned new features in the tourist demand during the COVID-19 pandemic are outlined both on the basis of statistical data on the travels of Bulgarians during the two years of the pandemic and by the study conducted by the National Center for Parliamentary Research (NCPI) in the tourist demand and attitudes for travel during the rest are the following:

- *Impossibility of free movement between the countries of the world*

The pandemic has closed borders, tightened travel rules by introducing: a COVID-19 certificate as a mandatory document for entry into a number of countries and for access to a hotel, restaurant, entertainment or shopping center; of specific requirements for different types of tests. Some countries in 2020 and 2021 are closed to unvaccinated visitors.

These restrictions are becoming a test for tourism and policies - regional and national, to counter the pandemic.

• *Leisure travel has become a way of life.* The number of Bulgarians vacationing in the country during the three summer months - June, July and August, 2020, amounts to 1.51 mn. i.e., 71.9% of the total number of tourists, incl. foreigners<sup>1</sup>. Comparison with 2019. Of them 0.82mn. (62%) have vacationed on the Bulgarian Black Sea coast, while the number of foreign tourists is much smaller - 0.51 million (38%). This predominance of Bulgarian tourists on the Black Sea coast of Bulgaria is a precedent for the last 15-20 years. The reason is the outflow of foreign tourists as a result of the Kovid-19 pandemic.

Recreational travel has become part of the lifestyle of Bulgarian citizens. This is evidenced by the data on the number of Bulgarians resting in the flock in 2020 [6] and their attitudes for recreation until the end of 2021. [5] Despite the complicated epidemic situation, 59% of adult Bulgarian citizens plan a vacation (in the country or abroad) in 2021, with the largest share (43.7%) of those who plan to spend their holidays in Bulgaria. One third (31%) of the respondents state that they do not intend to rest

• *Change in the geography of the Bulgarian tourist flow - 0.68 mn. (45.3%)* of all Bulgarian tourists have chosen to spend their summer holidays in the interior of the country. Such a high share of summer vacationers in the interior of the country is a kind of record and hitherto unrealized goal, formulated in a number of planning and strategic documents, studies and analyzes to overcome the severe spatial anomaly inherited from the era of mass tourism of the 80s. We believe that this phenomenon can be rightly determined as a positive effect of the pandemic crisis.

It is a matter of tourism policy, respectively of strategic reorientation, to use this charge and to stimulate sustainable tourism development in the interior of the country.

• *Predominant mass tourism for international tourists* - despite their greatly reduced number. Only 78,267 (13.2%) of them vacationed in the interior of the country [6] in the summer of 2021. For 30 years after the beginning of the transition, Bulgaria has been developing mostly cheap mass tourism - summer recreation on the Black Sea coast and mountain recreation - winter sports in the three main mountain resorts, Borovets (Rila Mountain), Bansko (Pirin Mountain) and Pamporovo (Rhodopes).

• *The number of international tourists decreased sharply in 2019.* Preceding the COVID-19 crisis, 2.12mn. international tourists have vacationed in the summer national resorts of Bulgaria<sup>2</sup>. In 2020, their number drops sharply to 0.72 million.

The same trend, but less pronounced, is observed for international tourists in winter. In the two national resorts Borovets (Rila Mountain) and Pamporovo (Rhodopes) in 2019 110280 vacationers, and in 2020 their number decreased by 30% to 70619. The weaker decrease can be explained by the fact that winter resorts are visited from tourists from Bulgaria's neighboring countries.

• *Changing the business mix* - the COVID-19 crisis, respectively actions taken / not taken by the state led to a change in the leading markets in 2020. The top

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<sup>1</sup> <https://www.tourism.government.bg/taxonomy/term/211>

<sup>2</sup> <https://www.nsi.bg/bg/content/1981/>

5 countries in the summer of 2020 have changed compared to those in 2019. One of the main markets - Russia, which occupies a place in the top 5 for many years goes to 11th place (Table 1) [6]

**Table 1.** Number of tourists in the landlocked seaside districts of Varna, Burgas and Dobrich by leading markets 2020

Leading markets	Number of tourists
<b>1 Romania</b>	<b>288141</b>
<b>2 Poland</b>	<b>66423</b>
<b>3 Germany</b>	<b>55624</b>
<b>4 Czech Republic</b>	<b>30971</b>
<b>5 Ukraine</b>	<b>26604</b>
<b>6 France</b>	<b>6324</b>
<b>7 Belgium</b>	<b>489</b>
<b>8 Hungary</b>	<b>4711</b>
<b>9 Great Britain</b>	<b>3097</b>
<b>10 Netherlands</b>	<b>2978</b>
<b>11 Russia</b>	<b>2601</b>
<b>12 Serbia</b>	<b>2399</b>

- *New behavioral model for leisure travel*

The pandemic of COVID-19 changes has imposed a new pattern of behavior when planning vacations. The travel risk element has increased. Many of the prepaid holidays for 2020 lost their money, some of them received the amounts with a long delay. This is largely reflected in the choice of vacation spot and type of tourism.

According to the survey from June 2021 [6], about one third (31%) of adult Bulgarian citizens have canceled their vacation in 2020. Over two thirds of the respondents indicate that they travel less often.

Among the main reasons are the declared emergency epidemic situation with the limitations and inconveniences and worries of the people in travel, hotel stays and leisure. Approximately one third of the respondents did not cancel their vacations - 35.6%, nor did they plan such vacations - 33.2%.

A large number of respondents - 81%, preferred to travel only in Bulgaria, another 77% narrowed the circle of people they travel with to four people.

Another personal measure related to the COVID-19 pandemic is the use of personal transport for planned trips (71%), which also reflects the distance - closer destinations are chosen. Another important feature of the new behavior of tourists is the demand for secluded places, away from mass destinations (59%). The choice of quiet and peaceful places in small-capacity accommodation, other than large hotels.



### **3. Features of the tourist offer during the pandemic of COVID-19. Behaviour of the tourism business in the conditions of the Covid-19 pandemic**

The National Statistical Institute of Bulgaria conducted a short survey in June 2021 among accommodation managers in order to collect accurate and timely information about the state and development of the tourism business during the epidemic situation in the country.<sup>1</sup> With a view to the survival of the business in a highly dynamic and unpredictable environment, the most frequently adopted measures in the second year of the pandemic are in the following areas:

- offering clients an alternative period for using the already made reservations - half of the respondents (52.4%) adopt this practice;
- nearly two thirds of the respondents (62.8%) intend to reduce the price of a package of services, and 42.0% - the price of accommodation;
- in terms of staff, the largest percentage of respondents (9.1%) take as a measure "paid leave", 7.7% - "unpaid leave", 7.1% - "dismissal / reduction" 6.4% - "part-time work." 3.6% - "reduction of staff remuneration", and 2.4% - "remote form of work".

#### **Quality of the tourist product.**

One of the chronic problems in Bulgarian tourism, of course with quite a few examples of very good practice, is related to the quality of the tourism product. As already mentioned [6], more than half of the adult Bulgarian citizens sharing a negative assessment of the state policy in tourism are of the opinion that the conditions for tourism have deteriorated in the last five years or have remained bad, Half of them - 50.1 % believe that it is necessary to exercise stricter control over the quality of tourist services. We will point out that the reasons for poor quality are complex. Among them is the problem of labor. In the above-mentioned survey, just over a third of the respondents categorically state that the state must enforce labor law with regard to all employees in the tourism industry. It is widely known that those working in tourism have low salaries, there is a high turnover, which puts the industry to the test at the beginning of each tourist season to work with unskilled staff from the country and abroad. Despite the large number of secondary and higher schools preparing staff for tourism. Many of them are looking for work abroad, while others are finding work in sectors outside tourism. We believe that the state can find tools for active and effective intervention, including by using the opportunities of European programs under EU grant schemes.

#### **Main conclusions**

The development of tourism in the context of the COVID-19 pandemic is undergoing a process of transformation under the influence of policies implemented in the fields of health and socio-economic development, including tourism, by three key international organizations - WHO, WTO and EU.

This essential feature of global development objectively requires adaptation of national tourism policies to the global geopolitical framework - from a proactive position, taking into account the national interest, focusing on improving the tourist image of Bulgaria's geographical area regionally and globally. During the two

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<sup>1</sup> [https://www.nsi.bg/sites/default/files/files/pressreleases/Accommodation2021-06\\_covid.pdf](https://www.nsi.bg/sites/default/files/files/pressreleases/Accommodation2021-06_covid.pdf)

years of the pandemic, the tourist image of the Bulgarian geographical area not only remains in the shadows, but collapses due to the withdrawal from Bulgaria of the major international tour operators operating in the country. In the context of the COVID-19 pandemic, the actions of the Ministry of Tourism are rather implementation of health policy. The emphasis is on the survival of the business, without looking for opportunities to turn some disadvantages into pluses

A proactive national policy also requires taking into account the changes that have taken place in the development of tourism, both in terms of supply and demand. There is a new behavior of consumers and producers of tourist services. New opportunities are being created for the strategic reorientation of national policy, namely, overcoming the severe territorial disparity in the development of tourism by using and directing the charge of the domestic tourist market, which during the two years of crisis seeks recreation in the interior of the country on the basis of diverse and of high recreational value natural and cultural-historical tourist attractions.

Much more active state intervention is expected to improve the quality of the tourist product in a number of areas: enforcement of labor law in respect of all employees in the tourism industry; finding tools for active and effective intervention, including by using the opportunities of European programs under EU grant schemes, to solve the acute problem of staff shortages for tourism. In response to measures taken by the state to support employers [8], less than a quarter of -21.0% of accommodation facilities benefited from them. About two thirds - 67.8% of managers, intend to continue working, 22.4% - to continue with their current activities, although with reduced volume, 6.1% plan to suspend their activities, and 2.1% predict their termination. It is noteworthy that the share of business entities that planned to cease operations in March 2020 - 64%, fell significantly to just over 20% in June 2021. These data show a good effect of measures to support business and to feel for business recovery potential.


Among the main efforts of the state to achieve sustainability in tourism development is the use of adequate marketing tools, based not only on new technologies, but also taking into account the new features of tourism demand nationally and internationally.

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