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***PROMOTING HERITAGE - AND CULTURE - BASED EXPERIENTIAL TOURISM  
IN THE BLACK SEA BASIN***

Project No BSB-1145

Potential for the Development of Experiential Tourism in Bulgaria

Needs Assessment Report

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## Forewords

This Needs Assessment Report (NAR) is prepared as part of the PRO EXTOUR Project (Promoting Heritage and Culture-based Experiential Tourism in the Black Sea Region) and funded by the EU within the framework of the Black Sea Cross-border Cooperation program. The culture and heritage based experiential tourism (HCBET) has been recognized for its high potential to raise awareness for the country's heritage and cultural resources and to promote sustainable tourism development (Pine M., 2020). The present research aims at outlining the benefits and challenges for developing HCBET in Bulgaria. It is based on desk research and review of the existing literature, strategic documents and other sources of secondary information as well as a primary study of the attitudes and perceptions of various stakeholders involved. On one hand, NAR reveals the market dynamics, including the demand and the tourists' preferences towards the consumption of this specific tourist product. On the other hand, it outlines the main challenges and future trends according to tourist providers, non-profit organizations, government structures and academics.

Bulgaria has a huge potential for tourism development due to its rich cultural heritage, natural resources, and unique sites. The country has established traditions in tourism and hospitality and the travel sector has been recognized as a priority in the policy making agenda. In 2020 the country was visited by 12.55 million tourists and the tourism sector has contributed with 8,17 billion BGN (4,09 billion EUR) or 10.8% of the Bulgarian GDP, and employed more than 340 600 people (WTTC, 2019). Despite its plethora of resources, the tourism activities are mainly focused on leisure, while almost two third of the visitors are attracted by the Black sea coast region and practice sea-sand-sun tourism. In the same time, Bulgaria is ranked third in Europe for the number of cultural and historical monuments and boasts with 10 UNESCO heritage sites. It is evident that the country has unleashed potential for development of cultural and heritage-based experiential tourism.

The present document attempts to summarize the problematics related to experiential tourism development, based on a conducted applied research of the stakeholders' opinion and attitude. It presents an overview of the Bulgarian tourism sector in general, with a specific focus on the resource-base, potential and obstacles for heritage and cultural experiential tourism development. It outlines future trends and serves as a foundation for developing of a Regional Action Plan.



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## 1. Country profile: Bulgaria

### 1.1. An overview of the physical, demographic and economic aspects

Bulgaria is in the center of Balkan peninsular occupying a territory of 110 910 sq.km with a population of 7 million people (NSI, 2019). Situated on the crossroad between West and East and founded in the 7th century A.D., Bulgaria is one of the oldest states on the European continent with turbulent past and strategic importance.

Fig. 1: *Map of Bulgaria*



Within a relatively small compass, the Bulgarian landscape exhibits striking variety. Open expanses of lowland alternate with mountains cut by deep river gorges, while the Black sea coast offers amazing golden sand beaches thus attract a number of visitors. Bulgaria boasts a mix of Eastern and Western cultural heritage, which is evident in its architecture, religion, traditions, crafts and cuisine. The total of cultural and historical sites on the territory of Bulgaria is around 40 000, placing country in the top three in

Europe (right after Greece and Italy). Bulgaria proudly hosts 10 of the UNESCO world heritage sites, four of which are situated in the Black sea coast region (The BSB eligible territory of the country).

Bulgaria has a mild climate and an abundance of natural and man-made resources which contributes to the diverse tourism offer. The Black sea coast is the most exploited resource for tourism accounting for 70% of the total night stays. This region provides for a plethora of recreational, sports and medical activities such as SSS (sun, sand, sea) tourism, SPA, diving, adventure, underwater exploration and archeology. The second biggest draw for the tourists in the country is the mountain ranges which takes more than 1/3 of the Bulgarian territory. Due to its mild elevation, the mountains are perfect for ski and hiking. They are also a home of a number of historic villages, which retain their authentic renaissance architecture. Some of them are recognized as “ethnographic reserves” and protected by special state regulations.

Other important tourism resources include mineral waters, natural parks and protected territories, caves, unique species and unmatched sceneries. Those are an excellent foundation for practicing adventure, eco, ornithology, speleo, golf, culinary, wine and festival tourism (with more than 120 events staged in 2017) or other form of sustainable tourism.

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## 1.2. Defining the BSB program eligible areas

The country is divided into six regions of planning. The eligible areas as per the Black Sea Cross-border Cooperation Program are North East and South East planning regions.

The **North East** is the smallest planning regions in Bulgaria and covers 14 645 sq. km. It borders the Black Sea on the East and Danube River on the north which gives it a strategic advantage in terms of transport connectivity and trade. The major administrative districts are: Varna, Dobrich, Shumen, Targovishte. 13.2% of the Bulgarian population lives here. The regions generated Euro 5.95 bn or 10.6% of the Bulgarian GDP. The service sector (mainly tourism and hospitality) is particularly important for the North East Region and accounts for the 66,8% of the GVA (Gross Value Added). The industry share is just 27% and the agriculture - 6%. The investment activities focus mainly in Varna administrative region, due to its appeal as a tourist and logistical centre on the Black Sea coast while Dobrich region (comprising most of South Dobrudzha) is known as the “Bulgarian granary” for its fertile soils, and is recognized as a leading crop producer. The share of the SMEs is extremely high - 98,8% or 52 982 of the enterprises are micro, small and medium-sized.

Fig.2: Bulgaria: Six regions of planning



The **South East** planning region is the third biggest region in Bulgaria, with an area of 19 664 sq. km, that covers almost a quarter of the country’s areas. It borders Black Sea on the east and Turkey to the South. Its main districts are Bugras, Sliven, Yambol and Stara Zagora and has a population of 1 032 079 inhabitants. The South East Region relies mostly on the service sector (54.1%), followed by the Industry

(41%), while the Agriculture accounts for only 4.9%. Due to the proximity of the Black Sea Coast, Tourism is one of the most important and rapidly growing sectors. The main industrial sectors are food and drinks production, textile, chemical industry and wood processing.



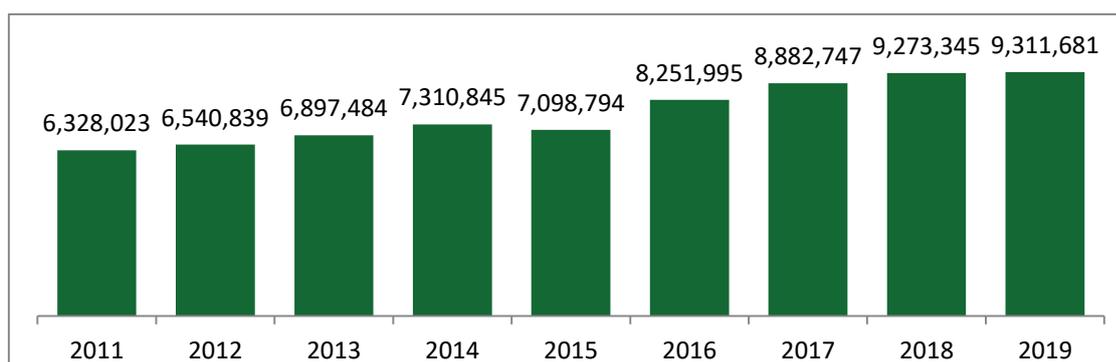
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## 2. Tourism system of the country and the eligible area

According to data from the Ministry of Tourism and the National Statistical Institute (Ministry of Tourism, 2020), in 2019 Bulgaria welcomed a total of 9 311 681 international visitors, which is a 0.4% increase compare to 2018. As the Figure 3 suggests, the number of visitors in Bulgaria has been increasing for the last nine years.

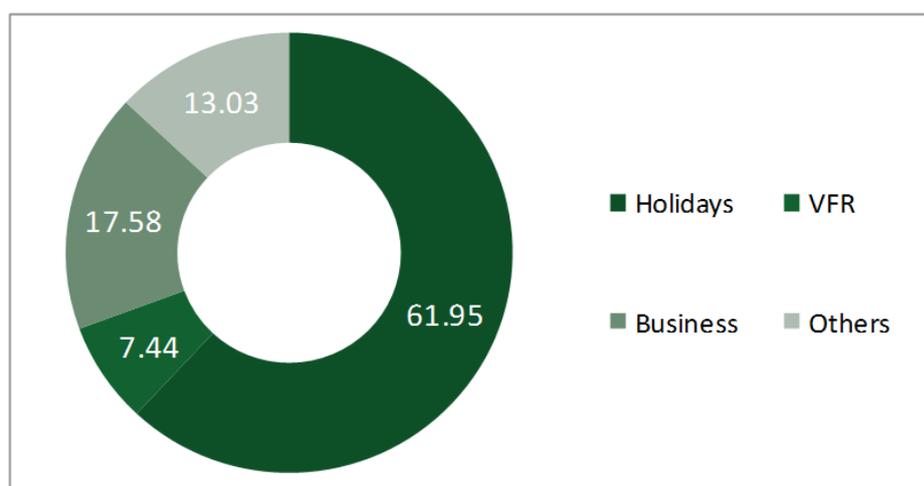
Fig.3 International visitors in Bulgaria for the period 2011-2019



Source: Ministry of Tourism, Tourism report for January-December, 2020 (Ministry of Tourism, 2020)

There is a growth of the holidays and vacations arrivals, which rose with 1% for the last year. Business visits are 1 761 190 which represents also an increase with 1% compare to the previous year. Figure 4 presents the main reasons for visit (in percentage):

Fig. 4 Structure of tourist visits according to their main purpose in 2019 (in %)



Source: Ministry of Tourism, Tourism report for January-December, 2020 (Ministry of Tourism, 2020)

The Tourism sector in Bulgaria has generated more than EUR 3.6 bln income in 2019 and EUR 3.7 bln. in 2018. The chart below shows the distribution of the international tourism receipts

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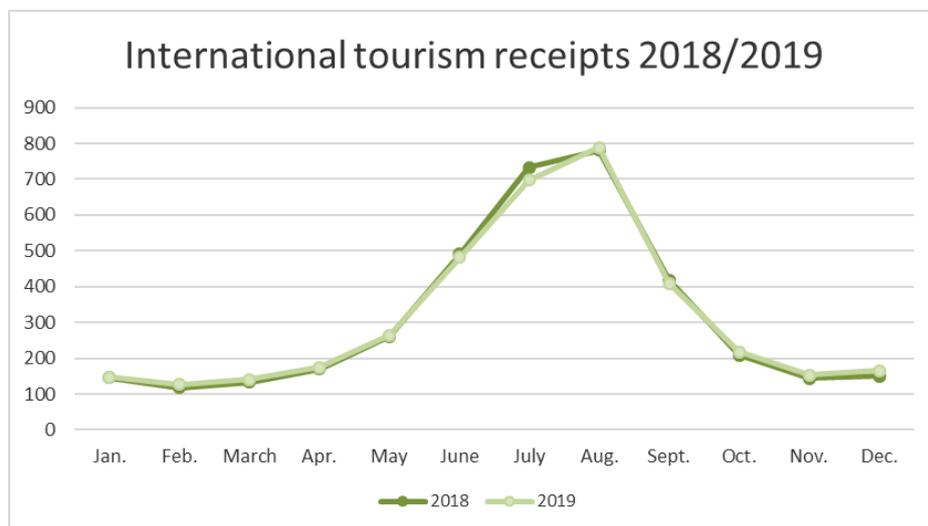


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throughout the years 2018/2017. It reveals the seasonal dependence of the tourism industry, which has a distinctive peak in the summer months (July and August).

Fig. 5 Receipts from international tourism (mln. EUR), annual data



Source: Ministry of Tourism, Tourism Report for January-December, 2020 (Ministry of Tourism, 2020)

The main factors that attract tourists to Bulgaria are: affordable prices, quality accommodation, high service quality, climate and nature, the perceived safety, security and cleanness and the sightseeing opportunities (Figure 6).

Fig. 6. Top motivators for visiting Bulgaria, according to their importance



Source: Ministry of Tourism, Bulgaria branding strategy project, 2013 (Ministry of Tourism, 2020)

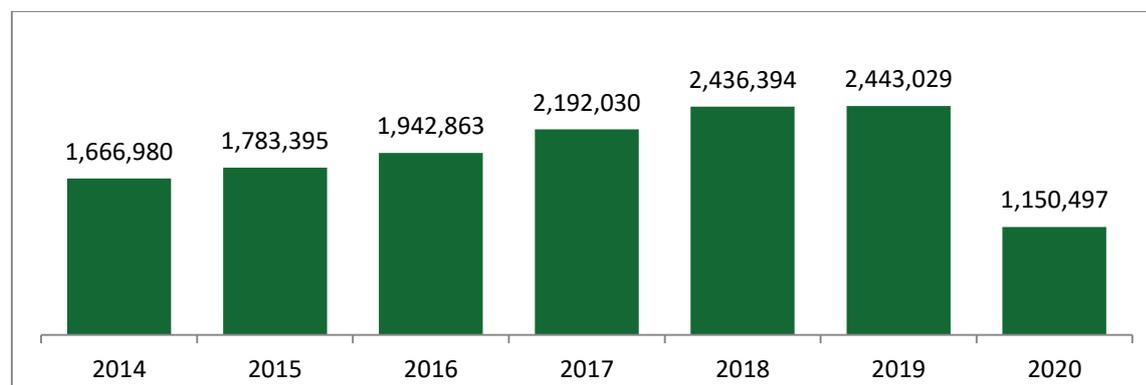


According to a survey, conducted by the Ministry of Tourism, the overall satisfaction rate of the international visitors in Bulgaria is very high (ranging between 88-95%). The tourists enjoy the beauty of the nature, the traditional cuisine and the cultural heritage of the country. They also appreciate the friendly and welcoming attitude of the local people who usually speaks at least one foreign language.

Along with international visitations, the domestic tourism also shows significant growth. It accounts for 3 300 000 visits, which is a 7% increase compare to five years ago. Bulgarians are also active in outbound travels. In 2017, for example 6 227 623 Bulgarians visited other countries (40% accounts for the Balkan neighbors Greece, Turkey, Romania and Serbia), which is a 15.5% growth compare to 2016.

Unfortunately, the Covid19 global pandemic has a disastrous impact on the tourism industry in the country and worldwide (UNWTO, 2021). The data comparison between January-May 2020 and the same period of 2019 shows decrease with 52,9% in the number of tourists' visits (the latest available statistics). This means that the arrivals to Bulgaria during 2020 were twice less than the previous year with the biggest decrease registered is of the vocational and leisure tourism (- 57,1%).

Fig. 7. Tourist arrivals for the period January-May (in absolute numbers)



Source: Ministry of Tourism, 2020 (Ministry of Tourism, 2020)

Tourism and hospitality sector provides favorable conditions for investments. The statistics reveals that the sector has attracted capital investment of BGN 1 294 mln. (EUR 645 mln.) in 2016. In 2017 the investments have increased by 5.8%. The predictions are that in the next ten years, the investments in tourism will rise by 1.5% annually to reach BGN 1 586.8 mln. in 2027 (WTTC, 2019).

The hospitality businesses in Bulgaria developed significantly in the last 20 years (see the chart below). According to the National Statistics Institute, there are 3664 registered lodging establishments in the country with more than 10 beds (including hotels, motels, chalets and others). They offer 328 264 beds which is three times more than in 2001 (NSI, 2019).

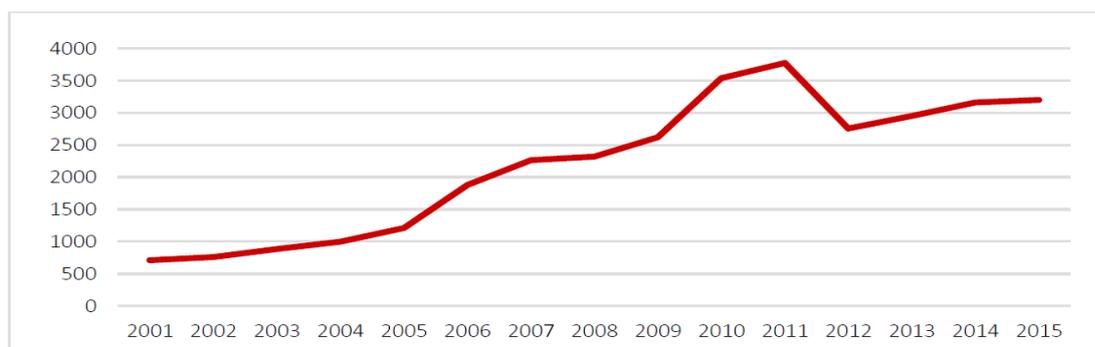




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**Fig. 8. Number of hospitality establishments for the period 2001-2015**



Source: National Statistics Institute (NSI, 2019)

The total of night stays in the country for 2019 were 27 154 791 (17 479 846 of which were made by foreign visitors). The total income from the hospitality sector amounts to BGN 1.5 bln (EUR 0.75 bln.). The average stay per visitor is 3.5 days and the average income per tourist is BGN 186 (EUR 93). An average night-stay costs BGN 56 (EUR 28) which situates Bulgaria within the less expensive destinations in Europe (according to Eurostat, 2019).

Tourists in Bulgaria spend mostly for accommodation services, food and beverages. The third biggest consumption item is transportation. The cultural services rank 4<sup>th</sup> with BGN 471.56 mln. The Table below summarize the internal tourism consumption by products and types of tourism in 2018 (the latest data available)

**Table 1. Internal tourism consumption by products and type of tourism in 2018**

Products	Visitors final consumption expenditure in cash		Internal tourism consumption-total
	Inbound tourism consumption	Domestic tourism consumption	
<b>Total Consumption products</b>	<b>8 467.49</b>	<b>1 126.30</b>	<b>9 593.79</b>
<b>Tourism characteristic products</b>	<b>5 827.14</b>	<b>1 053.87</b>	<b>6 881.01</b>
Accommodation services	2 153.79	456.56	2 610.35
Food and beverage serving services	2 061.18	231.96	2 293.14
Passenger transport services	772.11	207.96	980.07
Travel agencies and other reservation services	176.28	98.94	275.22
Cultural services	425.97	45.59	471.56



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Products	Visitors final consumption expenditure in cash		Internal tourism consumption-total
	Inbound tourism consumption	Domestic tourism consumption	
Sports and recreational services	237.81	12.86	250.67
<b>Other consumption products</b>	<b>2 640.35</b>	<b>72.43</b>	<b>2 712.78</b>

Source: National Statistics Institute, Dec.2020

The data show that both BSB eligible regions in Bulgaria (North-eastern and South-eastern) rely heavily on tourism and hospitality, mainly because of their proximity to the Black sea coast. As discussed above, the service sector represents a share of 66,8% and 54,1% respectively of the total Gross Added Value in the regions. The both regions also host many important historical site and cultural resources, due to their ancient history and a number of cultural artefacts preserved on their territories.

Both regions account for the biggest share of tourists' accommodations in the countries. More than 71% of the hotel beds in the country are situated either in North-Eastern or in South-Eastern planning region (EUROSTAT, 2021). This area has attracted 57% of the tourists in the country and accounts for 72% of the tourism receipts in 2019. The Table below shows the economic performance of North-Eastern and South Eastern regions compare to the whole country (NSI, 2019)

**Table 2. Overview of the tourism industry in Bulgaria, including North Eastern, South Eastern regions of planning**

Region	Accommodations	Beds	Night stays (in mln.)	Visitors (in mln.)	Tourism receipts (in mln.)
<b>North-Eastern</b>	<b>735</b>	<b>103 763</b>	<b>7 888 370</b>	<b>1 784 731</b>	<b>465 919 010</b>
Varna	468	71 550	5 526 625	1 231 463	326 422 781
Dobrich	180	29 788	2 223 237	476 364	133 884 857
Targovishte	17	683	45 740	23 961	2 115 612
Shoumen	70	1 742	92 768	52 943	3 495 760
<b>South-Eastern</b>	<b>1 140</b>	<b>141 229</b>	<b>10 565 610</b>	<b>2 089 330</b>	<b>576 950 103</b>
Bourgas	994	134 411	10 080 396	1 874 375	554 375 806
Sliven	66	2 181	88 011	53 627	3 676 979
Stara Zagora	58	3 912	356 454	140 622	17 180 905

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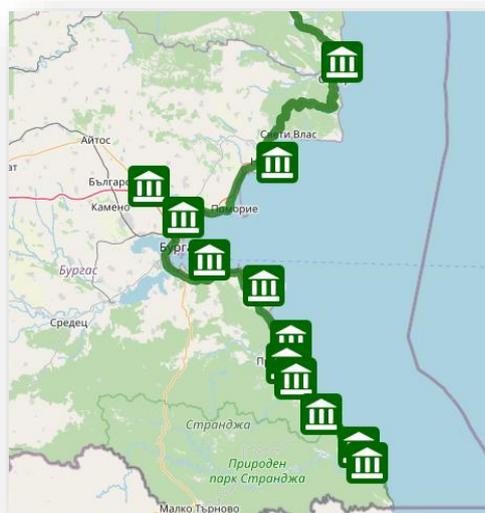


Yambol	22	725	40 749	20 706	1 716 413
<b>Bulgaria (total)</b>	<b>3 664</b>	<b>341 506</b>	<b>27 154 791</b>	<b>8 187 634</b>	<b>1 521 865 800</b>

Source: National Statistics Institute, 2020

### 3. Tourism management in Bulgaria

On national level, the travel, tourism and hospitality industry in Bulgaria is governed by the Ministry of Tourism with the National Tourist Council as a consultative body. On local level, tourism policy is implemented by the county municipalities. A number of professional, regional, citizen and non-government organizations are also involved in the decision making process such as Bulgarian Tourism Chamber, Regional tourist chambers, Bulgarian Hotel Association, Bulgarian Association for Alternative tourism, etc. The most important legislative documents concerning tourism and hospitality are The Tourism Act, The Ordinance for categorization of the lodging and restaurant establishments, the Ordinance for regulation of the activities of the chalets, huts and tourist dormitories and their adjacent restaurant areas.



The sustainable tourism development, thus including a modern approach such as experiential tourism offering, has been outline as a priority in the work of the Ministry of Tourism and as a result the National Strategy for Sustainable Tourism Development for 2014-2030 has been prepared and proposed for a public debate. The Ministry of Tourism has designed and developed tourists' routes for culture and heritage tourism. There is a route called "The Bulgarian Sea Fortresses" which spans from North to South Black sea coast and includes 22 various sites and places of interests. Another tourist route goes around the old Bulgarian capitals and is called "Capitals and cities of Bulgarian kings and patriarchs". The majority of the 19 sites here are in the North East

region. "The rose valley and the Thracian kings" route is situated mainly in the South East region and provides for 17 places of interest to be viewed and appreciated by the tourists (Ministry of Tourism, 2020).

Despite the genuine efforts made by the government to promote the development of HCBET activities, there is, however, insufficient cooperation between the stakeholders and the various management bodies to implement a consistent and uniform policy regarding the quality and sustainability of tourism. Moreover, the dialog and interaction between the NGO's and the public administration is often ineffective.

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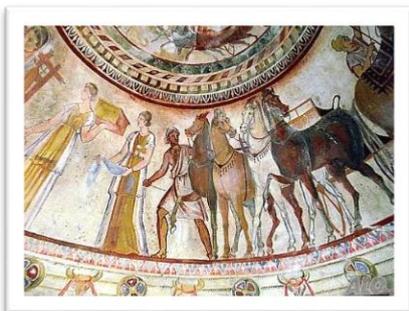
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## 4. Resources for development of heritage and culture-based experiential tourism in Bulgaria and the eligible regions

### 4.1. Cultural resources and heritage sites

As mentioned above, Bulgarian boats with more than 40 000 heritage sites. Due to its ancient history and being on the cross road of many



civilizations, Bulgaria hides remnants, artefacts and ruins from many



various époques, most notably: Pre-Historic, Thracian, Roman, Early Christian, Medieval, Ottoman and Renaissance. In the North -Eastern region of Varna and Dobrudzha, the world's oldest gold was discovered dating

more than 4000 B.C. Both Eastern regions are rich in ancient sacral sites and tombs such as the Thracian rock sanctuary Kabile (near Yambol), the Kazanlak Tomb, the rock monastery near Onogur village in Dobrudzha region, etc. There are a number of unique heritage sites which reveal the glory of the past, such as the ruins of the first Bulgarian capitals in Pliska and Preslav, Tzar Simeon Golden church, The Madara horseman (a rock-crafted sculpture) near Shoumen or villa Armira near Ivailovgrad which is an example of fine mosaic art. The sea villages of Nessebar (ancient Messabria) and Sozopol (ancient Apolonia) are a living museum of Roman, Thracian and Bulgarian medieval heritage, hosting centuries of history on every corner. The regional centers of Varna, Bourgas and Stara Zagora have been inhabited since the Bronze age and offer open-space exhibitions of ruins, remnants and artefacts throughout their territories. The regions also have many monasteries, churches and other religious and worship sites some of which are both, cultural and historic heritage, such as the rock Aladzha monastery near Varna. Other sites include ancient fortresses (such as Ovech near Provadia), museums and memorial



complexes, archeological sites (such as Kaliakra cape near Shabla and the ancient town of Marcianopol near Devnja), castles such as Exinograd near Varna and Romanian Queen Maria' castle in Balchic.

Bulgaria is proud with its 10 sites protected by UNESCO. Two of them are situated in the North-Eastern region: The Madara Horseman and the Srebarna Nature



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reserve. Another two can be found on the territory of South Eastern Region, namely: Ancient city of Nessebar and Thracian Tomb of Kazanlak.

All those sites are suitable for observation, visitation and first-hand experience of immersion in the ancient, traditional atmosphere. Often, the sites are enriched with adjacently museum with artefact exhibitions and plenty of additional information.

There are also purpose-built heritage attractions, such as the Historical park near the Village of Neophit Rilski. This park reproduces the Bulgarian history from the creation of the first Bulgarian kingdom in 681 A.D. to our days. It encompasses many attractions and activities (such as archery games, horse riding etc.) and provides for a unique visitors' experience through the use of traditional and modern technologies, such as augmented reality (Historical Park, 2020).



#### 4.2. Intangible cultural and heritage resources



Bulgarian traditions and folklores are colorful and diverse, varying from region to region. Our customs and traditions are well preserved and kept. The revival of traditional fest becomes more and more popular these days, thus including Christian and pagan rites and celebrations such as Name days celebrations (celebrating people named after a certain saint as per the Eastern Orthodox Christian

calendar), *Kukery* (pagan masquerade -like festival in which people dress like monsters to chase away evil spirits), *Lazarki* ( a rite practice during Palm Sunday when young girls gathers and visit neighbor homes, sing songs and receive eggs as a gift from the hosts which they place in wicker baskets), *Kolderari* (young men's bands visiting homes and singing bless-giving songs during Christmas).



*Martenitzi* are another wide-practice ritual where people exchange home - made "martenitzi" (originally - a bracelet or brooches made from white and red threads given with a blessing for health and longevity).



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Another unique rite is that of the “*nestinarstvo*” or fire walking, when young men and women dance on the embers of an extinguished fire. This tradition is especially popular in Strandzha region (South-Eastern region of planning) but nowadays is widely practiced as a tourist attraction. Traditionally, the *nestinars* are ritual dancer who would perform a sacred rite in a trance while emerging in an intense prayer for a particular, social need

(such as rain during draught season). The profanation of this custom is an example of a possible negative side effect of tourism development - such of the “staged authenticity” and the “commodification” of the ritual, when the event loses its initial meaning and symbolism and is turned into a good for sale. Such practices can be potentially harmful for both tourists and the host population, since they build a false identity of the destination and could evoke lapses in the national memory and heritage preservation.

Bulgarian folk song and dances are recognized internationally for their uniqueness and polyphony. Many of them are an example of traditional, ethnic masterpieces which depicts the wealth of our Bulgarian spirituality, quest of beauty and harmony. It is worth mentioning that this heritage was kept and preserved during the darkest moment of our country’s history and to great extent is a reason for the conservation of our national conscience and identity. One of the most popular Bulgarian group dances include “*horo*” and “*rachenitza*”. Those are known in many varieties and are practiced widely today in various folk group and in other settings for entertainment or fitness.



There and many other traditional folk and ethnic activities that are especially suitable for experiential tourism development, since they can easily be included into the product offering, providing with opportunity for active participation, creativity, social interaction, education and cultural exchange between the tourists and the host destination. Some examples include traditional arts and crafts such as bread or wine making, carpentry, tapestry, embroidery, icon painting etc.



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### 4.3. Bulgarian cuisine



Bulgaria is known for its healthy and delicious traditional meals based on fresh produce, herbs and spices and prepared with cooking techniques which are economic efficient, health-minded and eco-friendly. Many recipes are passed from generation to generation and are considered a part of our ethnic heritage. Bulgarian cuisine is a wonderful blend of original and unique products as well as influences from abroad, reflecting its historical and social development. It combines Oriental tradition as well as

West European adaptations of French, Italian, Austrian-Hungarian and Anglo-Saxon gastronomy. Our cuisine is traditionally free of preservatives, additives and chemicals.

The HCBET demands for active involvement of all the senses, therefore the taste of the country (or the region) is a vital part in every memorable tourism experience. The HCBET-related culinary activities should focus not only on consumption of tasty authentic and unique for the region food products and dishes, but also on the whole process of preparation, serving and social interactions before, during and after meals. Culinary classes in traditional regional Bulgarian recipes could be an excellent way to understand better the country and to involve some learning-by doing activities where tourists could actually use their hands to



prepare food and gain knowledge and skills they can later use. Thus, culinary activities could be all: socializing, educative, relaxing, transformative and fun. Some hospitality providers offer to their tourists activities such as traditional canning of fruits and vegetables which involves tourists and creates an unique atmosphere of sharing with the hosts.



Some of the authentic dishes for the North-and South-Eastern regions include *kavarma* (meat and vegetable stew dish), *gjuvetch* (stew prepared in a special clay pottery), *rose jam* (jam of Bulgarian rose petals from the rose valley region), *pastarma* (raw-cured meat delicacy coated with herbs and salts).

Bulgarian wines, alcoholic and non-alcoholic beverages are also an essential part of experiencing the country. Our wines are well recognized. The South-Eastern region due to

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its milder climate has better conditions for vineyards growing and wine making, while in North-Eastern regions (especially in Targovishte) both wines and brandy (Bulgarian *rakia*) are produced. In Sliven and Bourgas regions (South East region) there are several wine chateaux which provide for a wholesome wine-tasting experience and observation of the processing and bottling of the wine.

#### 4.4. Events, festival and exhibitions

The events calendar in Bulgaria is enriched every year. In 2017 there were more than 120 various group activities that the visitors could participate in throughout the territory of the country (Ministry of Tourism, 2020). Those events vary from music and dance fests to culinary competitions or carnival parades (Festivali.eu, 2020). Some of the most notable cultural events which takes place annually in Bulgaria is the so-called “*July Morning*”:



a rock music festival started a decade ago on the shore of the picturesque Kamen Briag. The festival is held in the early morning of 1<sup>st</sup> of July and attracts thousands of participants and spectators from all over the country. They usually spend the night camping in tents on the shore and sing along the popular Bulgarian and foreign bands. Recently, the festival is held in several other locations such as Silistra (on the shore of the Danube river) and Bourgas.



Another important heritage event is the *National folk costume festival* in Zheravna which showcases various costumes of the different regions in Bulgaria. It is a meeting point of many like-minded people who cherish the Bulgarian tradition and care for preserving the national pride and spirit. The festival is also visited by many foreign tourist, since it is a good opportunity for social interaction and for experiencing the Bulgarian authentic atmosphere. The festival is accompanied with traditional dances.

The *Pottery Fest* in Kroushary (North East region) is another good example of the possible application of the experiential tourism approach. This is a culinary event where participants are expected to bring a dish cooked in a traditional Bulgarian pottery (usually a meat and vegetable stew). The ready dishes are displayed in a buffet style and all visitors can taste and rank the best of them. The festival has a slight competitive element, where at the end the best dish is awarded. The event was created and organized by several volunteers with the help of the local municipalities. It is



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aimed at increasing the awareness of the tourist to the region by providing an unique and memorable experience.



The *Rose picking festival* is another major attraction that brings tourists to the Rose valley (near Kazanlak in the South-east region). The oil-bearing rose is the national symbol of our country, since it is traditionally one of the most exported good, for which we are known internationally (Bulgaria is the second world' exporter of rose oil). The rose oil is distilled from a special breed of rose, called *Rosa Damascena*. The festival takes place mid-May

and is a wonderful occasion for all perfume-lovers to take part in it or to observe the rose picking process and to learn some more about the rose growing and rose oil production in the nearby rose museum.

There are many other meaningful and memorable events and activities in which tourists can participate during their stay in Bulgaria. For example, the numerous re-creations of historic events such as battles and celebrations can help immerse fully into the atmosphere of the past. Those events are often staged by local drama groups or volunteers and include specific settings, decors, costumes etc.



## 5. Rationale for development of experiential tourism in Bulgaria/eligible BSB areas

Despite the overall significant progress registered by the Bulgarian tourism industry over the past few decades, it also faces a number of challenges for its future development. Due to the inherited negative image of a “mass tourism destination”, Bulgaria has difficulties to successfully position itself on the tourist markets as a place for special interest or experiential tourism. Despite its numerous resources for alternative tourism development, the country is mostly known as a cheap, all-inclusive sea-sun-sand destination. The problem is exacerbated by the lack of an effective national branding strategy (Ministry of Tourism, 2014).

Another challenge represents the high seasonality in the tourism demand which leads to financial losses, ineffective use of the hotel super structure and a high turnover rate of the staff. As the data reveals, Bulgaria is mainly preferred as a holiday destination with peaks of demand in July and August.

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The hospitality sector is unevenly distributed with the highest concentration on the Black sea coast (71% of the total beds). This reflects the imbalance in the tourism offering and leads to disproportions in the regional development. During the high season, the regions with the greatest demand suffer ecological and social stress and the natural resources are overused. The over-construction mainly in the South-east region creates both environmental and social challenges. The increasing flow of mass tourists exerts a stress upon the infrastructure and the everyday life of the locals who experience negatives such as overpricing of land and residential homes, utility services, groceries and the commodities of all sorts, higher taxes, increased criminal rate, noise, waste, pollution etc.

Another setback of the Bulgarian tourism sector is the low average income per tourist and per night stay. Being one of the cheapest destinations in Europe is a price competitive advantage, but it limits the opportunities of the country to attract wealthier tourists and to increase the demand from the more income generating visitors' segment. The low price levels that the hotels are forced to maintain in order to keep their competitiveness leads to low reimbursement of the hotel staff and thus to poor quality of the services. Moreover, a substantial number of tourist activities are performed in the so-called "shadow economy", without the required licenses and registrations thus leading to unfair competition, lack of regulations and losses for the budget from taxes and fees. It also compromises the quality of the hospitality product and hence ruins the image of the country.

In the recent years, Bulgaria has made a considerable progress towards diversification of the tourism offer. More green forms of tourism have been promoted on national level in attempt to establish a sustainable approach for tourism development. It is still the case, however that the most important tourism-related income for Bulgaria comes from the so-called "mass" tourism (more than 70% of the total tourism earnings).

Despite the richness of natural and man-made resources, Bulgaria ranks relatively low by its Travel and Tourism Competitive Index according to World Economic Forum (WTTC, 2019). the Index measures the set of factors and policies that enable the sustainable development of the travel and tourism sector, which in turn, contributes to the development and competitiveness of a country. One of the reasons for this might be the lack of adequate valorization of the tourist resources which are not recognized as assets for the industry. As a result, potential competitive advantages for the country are lost and the tourist resources do not receive proper appreciation, care and attention they deserve.

The experiential tourism development with a focus on the holistic and memorable visitor's experience by emphasizing different aspects of the local life, such as history, culture, traditions, culinary, crafts, social life could be a remedy to most of the problems listed above. Since experiential tourism is low-impact, low- volume and high-yield, it is a sustainable form of tourism that could be beneficial for all the stakeholders involved (Chang, 2018):

- ✓ the tourists (by providing a personalized, emotional and unique travel, leading to self-discovery and transformation);

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- ✓ the tourism businesses (by giving them the opportunity to interact more closely with their customer and to respond in an adequate manner to their target markets);
- ✓ the local population (by enhancing the quality of their lives, providing a better cultural and social interaction with the visitors )
- ✓ the destination (by improving the image of the country or the region on the global tourism market).

The culture and heritage based experiential tourism (HCBET) is based on the principal of balancing the needs of the tourists with the local communities. It promotes respect of the socio-cultural authenticity of the host destination, conserves and enhance its built and living cultural heritage and traditional values and contributes to the inter-cultural understanding and tolerance. In response to the challenges listed above HCBET could be used for:

- 1) an integrated approach towards sustainable tourism development
- 2) improvement of the image of Bulgaria as a tourism destination on the global tourist market (escaping the “mass tourism” image trap)
- 3) Inclusion of special interests’ tourism products in the country’s offering aiming at increasing the share of the individual tourists and thus decreasing the “mass tourism demand”, counterbalancing the seasonality and raising the average income per visitor.
- 4) Diversification of tourism product by developing new forms of tourism such as culinary, heritage, wine, events, festival, adventure tourism
- 5) Preservation, protection and quality improvement of current tourism resources.
- 6) Valorization of the natural and cultural resources which can be implemented for HCBET development
- 7) Increasing the competitiveness of the tourism and hospitality offering by ensuring superior quality of the services thus leading to high level of visitors’ satisfaction
- 8) Attracting qualified, experienced, knowledgeable and motivated providers of HCBET activities and services thus enhancing the professional skills and competences of the human resources on the labor market
- 9) Diversification of the channels of distribution: the service providers should be more active in seeking alternative ways to maximize their sale potential, including on-line direct sales, inclusion in web-based distribution systems, social media, etc.



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## 6. Study on the stakeholders' attitudes and perceptions on the cultural and heritage-based experiential tourism development in Bulgaria and the eligible region

In the framework of the present Needs Assessment Analysis, a primary study was designed and conducted. The study is two-fold and includes a survey on the perceptions and attitudes of the actual and potential visitors and consumers of the experiential-based tourism products and services, as well as a semi-structured interview with various stakeholders. The research goal is to analyze in depths and from every aspect the various problematics of the experiential tourism development in Bulgaria and most specifically in the North Eastern and South Eastern regions of planning.

### 6.1. The Methodology of the study

The study is based on:

#### A) Questionnaires-based survey on the visitors' perceptions and attitudes towards experiential tourism offering

The questionnaire was designed to include seven multiple-choice or open questions related to the purpose of visit, consumption of cultural or heritage products and services, preferences, buying and decision making patterns and demographic questions.

The questionnaires were prepared in Bulgarian language with the use of Google form, and distributed to a wide sampling via existing contact data base, social media platforms, internet sites etc. The expected time for completing the questionnaires was 5 minutes.

The number of person contacted was 300, while the number of filled-in forms was 80, accounting for 27% of responsiveness rate.

The questionnaires were analyzed via Google form platform and basic statistics methods were employed to retain some quantitative results.

#### B) Semi-structured interviews with representative of various stakeholder groups:

- ✓ services providers (hotels and restaurant managers and tour guides)
- ✓ intermediaries (Tour agents and Tour operators)
- ✓ representatives of governmental and non-governmental organizations
- ✓ representatives of the research and academia

Each interview was especially tailored towards the specific stakeholder's segment. The interviewees were contacted via e-mail, phone or personal meeting. Most of the interviews

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are made in written form, while one of them was recorded in an audio format and later transcribed in writing.

More than 50 potential stakeholders were approached with kind request to participate in our study. Since the interview required stronger commitment in terms of time and efforts, it is not a surprised that the process of finding volunteer participants was a challenge. As a result, 16 filled in interviews were gathered and analyzed. The respondents' distribution is as follows:

- ✓ 4 representatives of accommodation establishments
- ✓ 1 representative of a restaurant/ dining establishment
- ✓ 4 tour guides
- ✓ 2 representatives of tour agent/tour operator company
- ✓ 3 representative of public/ non-governmental institution
- ✓ 1 representative of management/governmental institution
- ✓ 1 representative of educational institution

The interviews' answers were recorded and gathered in a unified Excel sheet table. The various stakeholders were analyzed both individually and in a total data base. Their answers were translated into English language and were included in the content analysis below.

A transcript of the full answers of the respondents is given in a table form in the Appendix attached to this document.

## 6.2 Results

### 6.2.1. Qualitative study: survey results

The survey suggests that the major motivators for the tourists when planning a trip is the quest of knowledge of other people and cultures (90%), followed by recreation and relax (61,3%). The third important motivator is to experience local culture and style of life. Very few answers were obtained for study/ personal development- 13.8%, business activity (6,3%) medical reasons (8,8%) and other (1.3%)

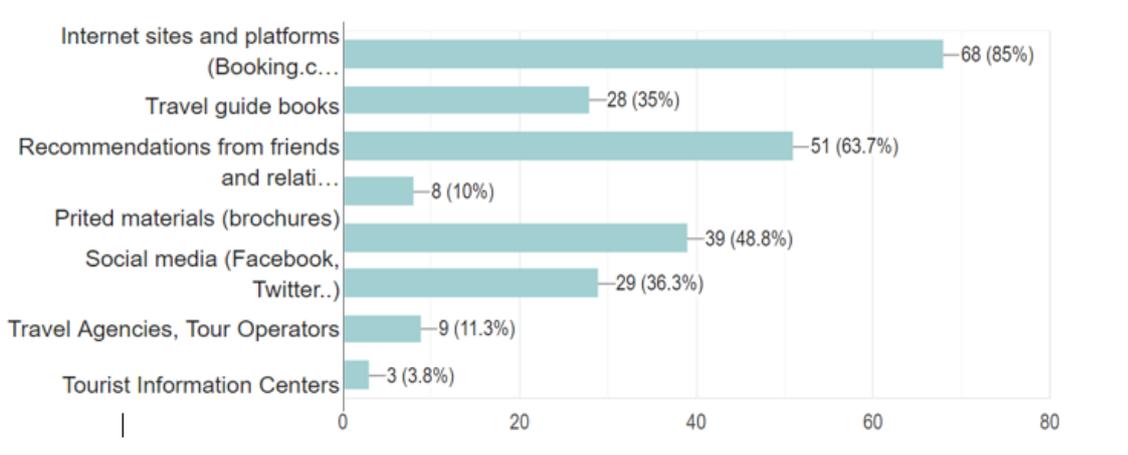
The most reliable sources of information concerning the trip, are internet sites and booking platforms (85%) and personal recommendations from friends and relatives (63.7%). A considerable promotional importance has the social media (48.8%) as well as tourist intermediaries (agencies and tour operators) - 36,3%. It is evident that the potential experiential tourists use rarely print materials (in 10% of the cases) or Tourists Information Centers (11,3%)



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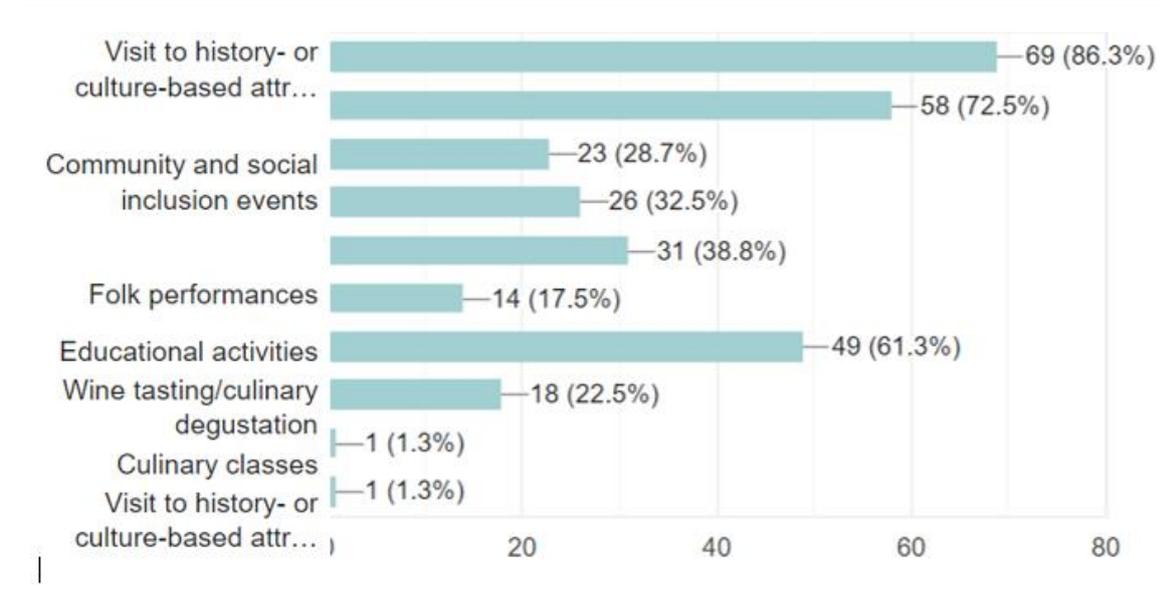


Fig. 9. What source of information do you use when planning a trip?



The tourists are most likely prone to visiting history and culture-based sites and attractions (86,3% of the cases). They also would like to participate in events and other activities (72,5%). Culinary and wine degustation ranked third with 61.3% of the votes. Folk performances, crafts and community events were desired by 29-32% of the survey participants. Some of the less popular activities were cooking classes (22.5%), educational activities (17,5%), festivals and fairs (1,3%).

Fig. 10. What are the heritage-based and cultural-based activities that you would like to participate in during your visit?



Concerning the decision making and consumption patterns of the tourists, the majority claims that they always or sometimes plan every detail of their trip. Just one out of 80 give “never” as an answer to this question.



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The responses related to preference of organize or individual travel are more or less equally distributed and vary between 16-21. Almost all of the respondents (90%) wants to experience something new when travelling, outlining once again the importance of the well-designed tourism experience. Similar response is given to the next questions about trying new food products, typical of the region. 62 out of 80 always like to try new tastes, while 15 more would like sometimes.

Most of the visitors like to socialize with local people and make friends with them (75%). They also would preferably participate in enriching and stimulating activities (36 - sometimes, and 21 - always).

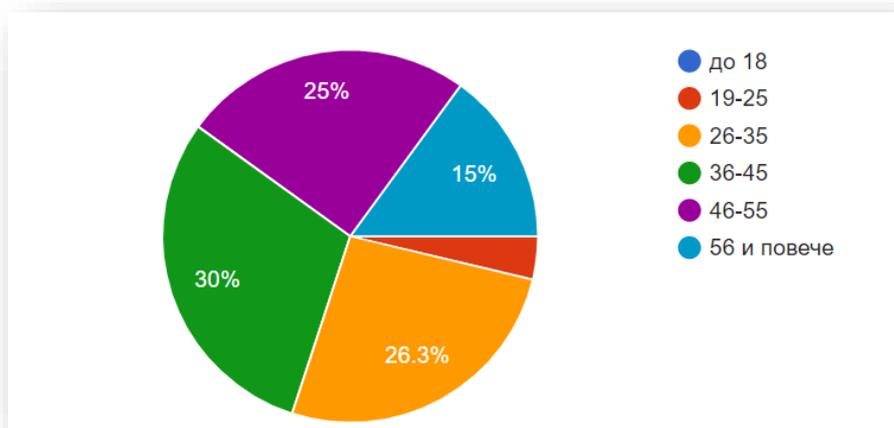
60% of the participants are interested in visiting cultural and heritage sites. 30 of them want to participate sometimes in local rite, custom or tradition.

Tourists' opinion about whether the technologies add value to the tourism experience is quite diverse. Most of them stated affirmative (either "always" or "sometimes") but there are those who would not like to exchange (or augment) real experience for artificially generated one.

The majority of the respondents are ready to make sacrifices in terms of higher costs or less convenience in order to have more fulfilling and meaningful experience (roughly 68% are the affirmative answers).

The demographic distribution of the respondents is in favor of female participants over the males (82,5% vs. 17,5%). Participants represented various age groups, ranging from 19 to 56+.

Fig. 11: Age of the participants.



All of the respondents were residing in one of the both eligible regions of planning (South Eastern or North Eastern)



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### 6.2.2. Content analysis of the semi-structured interviews

The content analysis shows that all of the respondents hold a decision-making, managerial or expert position in their organization and are fully competent and knowledgeable to answer the questions. The responsiveness rate was greater for accommodation representatives and tour guides, followed by representatives of public organizations and tour operator/tour agents.

The content analysis of the interview questions is as follows:

#### Q1. How do you understand the term "culture and heritage-based experiential tourism (HCBET) "?

It is evident that most of the respondents understand in essence the notion behind "culture and heritage- base experiential tourism (HCBET)". Some of them define it as *"...a type of tourism, which is based on different types of experiences, emotions, tasting local food and drinks, getting to know the local way of life and culture"*

or

*"....this is tourism, which is associated with the reproduction of historical events, folk customs and cultural events. I think that this type of tourism is extremely promising, because the emphasis is on sharing and creativity, as well as self-knowledge on the part of the tourist, and not just consuming one or another type of tourist service"*

or

*"For me personally, it means emphasizing history, the old parts of the city, to get to know and touch the past and then visit new and modern places to compare both and experience the whole stage of culture and history. You can always find the small charms of a city and this in the essence is the idea of such tourism, the specific tastes and traditions of culture, for me is a mixture of everything like 3 in 1. Remembering a spirit and experiencing it instead of watching it on TV because it's different"*

These are some of the most often used words associated with the definition of HCBET: memorable, positive emotions, authentic, immersion into destination, sharing, passion, meeting new people, tasting food, interactivity, participation, community -based tourism, gaining knowledge, getting to know history and culture of the destination

One of the participant claims that the idea of HCBET is not very developed in Bulgaria and that only few people know what it is and one sees this notion as an opposite to "consumerism", where tourists not just consume, but actively participate in the production of their experience.

#### Q2. How do you see the role of your organization for HCBET development?

Most of the respondents which are representatives of service providers like hotels, lodging establishments, restaurants, tour agencies see their role in:

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- ✓ adding value to the final product
- ✓ providing comfort, different experience, removing tension and stress from the everyday life,
- ✓ coordinating efforts with other stakeholders
- ✓ participating more actively in the cultural life of the community
- ✓ organizing events, festivals, wine and food tasting, celebrations of holiday
- ✓ organizing training in traditional crafts and cooking techniques
- ✓ creating unforgettable memories and designing original products by utilizing unknown or new tourist sites and resources

The public and governmental institutions see their role as:

- ✓ informative
- ✓ showing the little known part of the destination (as the old city)/ reviving the spirit of certain sites
- ✓ enhancing the access and promoting historical and archaeology sites
- ✓ organizing events and attracting international awareness

One of the respondent states that since their hotel is seasonal, there is no possibility for them to be involved in HCBET development.

The representative of the educational institution was asked if they have a special designed classes in HCBET, in which she answered that they don't, but they somehow integrate discussion on this matter in other similar academic subjects.

### Q3. What kind of culture-based experiential activity you can organize for your tourists?

The answers here depend on the stakeholder's main activity.

The accommodation sector representatives offer theme dining experiences; delicious home-made food, many activities such as fishing, sailing, rural tourism. Some of them offers preserved Bulgarian traditional houses in which the guests are accommodated (which can also add value to their authentic experience), some see an opportunity to organize events.

Tour guides, TOs and TAs suggest:

- ✓ doing online presentations,
- ✓ delivering talks and narrating stories, as well as engaging in discussion with the tourists (replying to their questions related to the destination);
- ✓ entering in the role of a specific historic figure to present the story in a more attractive manner;
- ✓ distributing printed materials with photos,
- ✓ playing games of seek and hide and finding a given item or an artefact with the tourist;
- ✓ delivering prizes for active participation in a quest or a game;



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- ✓ presenting the cultural calendar of the destination and encouraging tourists to participate more actively in the events;
- ✓ using holograms and other high-tech solutions for storytelling and visualization.
- ✓ Partnering more actively with local DMOs
- ✓ Organizing demonstration of local crafts

One TO managers refuses to give a detailed answer to this question, since it is a matter of professional know-how and part of the company's branding strategy

The public organizations can assist in staging exhibitions related to history and important events; restoration of historic sites; showcasing the unusual and unexpected faces of the city (apart from the famous and known tourist attractions)

#### **Q4. What kind of cultural-based or other animations/activities do you organize for your tourists?**

The answers here are quite similar to the previous question. It is evident that the stakeholders are already doing what they think they should do, for example staging theme dining with folklore programs; engaging tourists in rural and farm activities (where applicable); organizing games, events, competitions and celebrations.

A guest house is organizing an annual concert which is visited by locals and international tourists. A restaurant is staging drama, music events, poetry recitals, national and religious holiday celebrations to promote the Bulgarian-Russian intercultural exchange.

A tour operator offers excursions which have a cultural and cognitive focus. Another tour operator has designed over 1000 products/ tourist packages which are related to experiential tourism to one degree or another with an emphasis on local traditions and crafts and the everyday life of the host community

The public organizations offer re-creation of traditional customs, literature readings and exhibitions; creative art installations throughout the city to provoke people to explore the unknown cities; hiking and walks with an element of fun.

One organization declared that due to the Covid19 pandemic all their activities are suspended.

#### **Q5. What kind of resources do you need to enhance the culture and heritage - based experiential tourism development?**

The answers of this question include:

- ✓ Material resources: ex. theme food and beverages, costumes etc.
- ✓ Human resources
- ✓ Multimedia/equipment/technical support



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- ✓ Financial resources/ funding
- ✓ Support from the state, local communities, municipalities
- ✓ Tourist resources: crafts, sites, historical and cultural sites and events
- ✓ Improved infrastructure
- ✓ Know-how and skills of all providers and suppliers involved
- ✓ Networking with relevant organizations and decision makers
- ✓ Sound strategy and management

#### **Q6. What kind of communication marketing strategies (technologies) do you use?**

This question was addressed only to certain respondents such as the providers of accommodation, food and beverages and tour operators/ tour agents. Their answers show that they mainly use internet (including their company sites and other on-line platforms) and social media for advertising or rely on peer-to-peer reviews (word of mouth). Several utilize also printed materials (brochures, leaflets) and mass media advertising. One of the establishment advertises their folklore program on the hotel reception.

One tour operator shared the following: *“...We have a very big marketing strategy, we have lots of different partners in Bulgaria and abroad. And we are a technologic company - this means that we have developed our own artificial intelligence, which is throughout all our websites, in order to know everything for the customer even before the customer actually clicks the “book now” button or browse a specific tour.”*

#### **Q7. What kind of skills do you (you and your employee) need in order to be more experiential for tourists?**

Answers include:

- ✓ Creativity/ Innovations
- ✓ Unconventional thinking
- ✓ Commitment and enthusiasm
- ✓ Communication, marketing
- ✓ Artistic/performance skills
- ✓ Professionalism
- ✓ Personal touch or “being human”

Two respondents have answered that no special skills are needed to provide HCBET products.

#### **Q8. Do you organize trainings for your staff? What kind of training do you organize?**

The analysis of this question reveals that only few of the stakeholders dedicate time and resources for some type of training activity related to HCBET for their personnel

Some answers state: *“At this stage, our team is small, mainly composed of family members and I have not organized training for them or for myself.”*



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A tour operator has organized lately a training in digital marketing, SEO optimization and copywriting as well as training for providing innovative and specific services.

One tour operator confirms the importance of staff training and claims that it happens on a daily basis, integrated in other operational activities. He refuses to specify, since this is a private (classified) information.

### **Q9. How do you see the future of heritage and culture-based experiential tourism development in Bulgaria and in general?**

Most of the respondents agree that experiential tourism has huge potential, is growing and developing, and will be more and more considered a priority sector in the future. Some see it as an antidote against the disastrous consequences of the Pandemic crisis. Most of the replies sound like this one: *“I think, this is a very promising form of tourism offering and is a chance for our country to gain competitive advantage and to be recognized on the market with a new image”*

Some respondents share their vision about the future of HCBET: *“More opportunities for tourists to be involved in the cultural and historical heritage. For example, museums may have 3D images / holograms of historical figures and events from the past....Also the opportunity for tourists to participate as observers or participants in historical reconstructions of important events of the past”* or *“It is mandatory to use all kinds of innovative technologies to attract and facilitate tourists.”*

There is only one respondent who is more pessimistic about its future. He shared: *“Honestly, I don't see it, because I see how the old buildings that are used for the benefit of the community are being demolished, and I don't know why they are not appreciated and why we don't use the resource we have”*

### **Q10. What kind of risks do you see in experiential tourism development for your company/ organization and in general?**

The majority of the respondents don't see any risk for their organization/company related to HCBET development.

Some, however noted that there might be an opportunities costs or costs of switch. For example, a restaurant might actually loose customers if decide to give stage for more intense performance of music, drama, loud celebrations etc. because not everyone might enjoy it. A tour operator cited as risks the possible creation of staged authenticity: *“Offering fake, pseudo-experiences based on non-existent, fictional stories / traditions or offering a credible product but presented in an unprofessional way.*



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Other risk for the tour operators is the fact that the experiential tourist might organize more often their trips by themselves and cut the intermediaries, which will directly lead to loss of business and profit.

Another group of risks are related to the infrastructure deficiency such as inaccessible sites, bad roads, poor signalling system, lack of public WCs etc.

A respondent noted as a risk the shadow (unobserved) economy or business activities that are not regulated by the state. They may not only incur losses for the budget and create unfair competition, but also pose danger for the wellbeing and prosperity of the local communities

#### **Q11. How do you see the role of State/Government of Bulgaria in heritage and culture-based experiential tourism development?**

According to the respondents, the government should promote and finance the cultural heritage of the country. Other functions of the government include construction and maintenance of the infrastructure, education and training of the personnel, crime reduction, ensuring safety and security

A provider says that the government role is important but not fundamental and businesses themselves should be responsible for offering high-quality services and sustain competitive advantage

Most of the respondents find that the government does not support enough those types of activities and might do a better job by organizing (funding) public cultural events, promotes and advertises sites and destinations and cooperates more intensely with private and public institutions

#### **Q12. How do you see the role of the locals/ stakeholders on heritage and culture-based experiential tourism development in Bulgaria?**

According to the respondents, the locals directly or indirectly participate in the creation of the experiential tourism products, so they role is by all means important. *“The local people with their customs and traditions, folklore, with their dishes, crafts are always attractive for the tourists, especially foreign tourists, and in this sense their role is extremely important”*. Moreover, the host community can create an atmosphere or friendliness and welcoming for the newcomers

The role of the other providers such as hotels, restaurants and tour operators is also important (according to the public organizations). They support and provide for the activities of the latter and the quality of their services reflect on the entire visitor’s experience



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**Q13. What kind of challenges do you see for heritage and culture-based experiential tourism development?**

*“The main challenge is to keep the interest of tourists to the extent that they want to return again.”*

*“There is a long way still to be taken before we can be successfully positioned on this market. First, the image the country has as a mass tourist destination has to be altered. This means a whole new marketing and branding strategy on a national level. Second, the valorisation of the resources is a must. We have so much, we don’t value it, we don’t even know it”*

*“Poor infrastructure, repulsive poverty and destruction in most Bulgarian regions.”*

*“.....difficult access, uncoordinated actions (e.g. higher tax burden, despite governmental declarations to support the tourist industry), not enough advertising”*

*“Lack of state policy and lack of governmental support”*

Some respondents claim that Bulgarian tourist is not yet ready to be or to act as an experiential tourist. Others see marketing barriers for promoting this type of products. Other challenges might include finding the right providers and suppliers or involving the local communities.

**Q14. What kind of opportunities do you see for culture-based experiential tourism development in Bulgaria?**

Most of the respondents confirm, that Bulgaria has a huge potential to be developed and positioned as a desirable destination for HCBET. It needs however, coordinated efforts of all stakeholders involved and a sound national policy. Often the respondents use phrases such as: “limitless possibilities, amazing opportunities, huge potential, promising type of tourism”

**Q15. How your organization can benefit from or assist the tourism sector in the present COVID-19 crisis?**

On this question, most of the respondent reply in terms of finding a way to adapt to the new reality as for example by offering of a diversified products and services or redirecting to a different market segments (ex: domestic tourists and neighbouring countries residents).

Some declare that the pandemics has increased the demand for private, individual lodging and small guest houses were actually more advantageous.

Few respondents don’t see any positives from the Covid19 crisis but still remain optimistic about the future.



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A restaurant owner expects that despite the disastrous consequences there might be some compensations after the businesses renew their operations and there will be higher than normal rate of consumption

A tour operator see solution in new technology and digitalization by organizing on-line virtual tours. Developing a niche tourism product is the answer for another tour operator.

Another provider expects better market share after the redistribution of the market as a consequence of the bankruptcy of many competitors

In conclusion, here is what an educator has shared: *“Tourism is in a big crisis, but this cannot last forever. Even if the crisis continues, the tourism supply and demand will be altered and adjusted to the new situation. The tourism will be modified, but it won’t disappear. Our Institution is trying to forecast what will be the future of tourism in these new predicaments and to educate our students of how to adapt to the new conditions. We believe, there is a room for new type of products and new ventures. So, in some extent it is easier to enter in the market if you know you have to do things differently”*

#### **Q16. What business models for HCBET does your company employ? / What managerial or strategic models are suitable for heritage and culture-based experiential tourism development?**

Most of the respondents didn’t describe their specific business or strategic model for development of the HCBET. A company owner refuses to reveal their business model because of a possible industry espionage.

A group of respondents emphasize on the need of adequate promotion and communication strategies. For example, developing an informational portal. Others underline the importance of implementing new technologies like 3D visualisation, stereo sound systems in the museums and on site, holograms etc.

One restaurant owner reveals that the essence of their business model is organizing events and celebrations to entertain, educate and engage their visitors.

Some confirm, that big changes are needed and that the approach should be to aspire for long-term benefits, rather to seek short-term solutions. Others think that the key to success is in the cooperation between all stakeholders involved including local communities, government, public organizations and providers of services.



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## 7. Conclusion

The analysis of the needs assessment confirms that the culture - and heritage based experiential tourism (HCBET) has high potential for future development and should be considered as a priority in the state policy making as well as in the company marketing and operational strategies.

Bulgaria, in particular, can take advantage of its abundant tourist resources, cultural, and historical sites, artefacts, preserved traditions, folklore and unique cuisine to promote (HCBET) on the global and domestic market.

The desk research revealed that our country has all the predicaments to be a HCBET destination. On one hand, Bulgaria has strong traditions in providing tourism services. It has a well performing industry with a developed tourism system, including a number of established providers in all stages of the tourism product production, marketing and distribution. On the other hand, the government has made genuine efforts to develop a strategic policy framework towards more sustainable, niche tourist offering and to work in coordination and partnership with the private and public companies and organizations. It is also evident that the richness of the Bulgarian cultural heritage is underutilized and Bulgaria remains “terra incognita” or “the best kept secret” for most of the international and even domestic tourists. There is an urgent need to diversify the structure of the tourism offering and to prioritize greener, community-friendly and higher-income generating sustainable forms of tourism. Creating a new image of the country is another important task if we want to renounce the association with a mass, cheap tourism destination.

The primary study confirmed that both demand and supply sides are ready to welcome and support HCBET development. The tourists are seeking for new, meaningful activities. They want to participate more actively in the life of the local community. They are ready to sacrifice convenience and comfort and to pay more in order to gain insightful and transformative experiences. The visitors show genuine interest in participating in most of the suggested activities such as crafts, folklore dances, visits to sites of cultural and historical importance. The biggest motivator to undertake a travel is to get to know new places and people and to stimulate personal growth.

The tourism stakeholders, including providers of services, intermediaries, public and private organizations and educational institutions are eager to embark on this form of tourism. They regard it as promising, high-yield and a potential remedy of the recent global crisis. All of them believe that the country has an unleash potential for HCBET development and it should be given a priority in the policy and decision making initiative of the government and the private sector. The success, however could be achieved only by coordinated efforts and partnership between all stakeholders involved.



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## Appendix

### Transcripts of the semi-structured interviews

A	stakeholder/ representative	Accommodation
B	name of the company/organization	HVD Hotels
C	respondent's name	Stanislav Ivanov
D	respondent's title	Manager
E	location	Varna, Golden Sands
F	legal status	Ltd
1	How do you understand the term "culture and heritage-based experiential tourism"?	I think in the last years there is a growing interest from Bulgarians and international tourists towards the cultural heritage of our country. We should invest more in such tourist products and programs
2	How do you see the role of your organization for ET development?	Our hotel is season, that is why I don't see it possible for us to participate in ET
3	What kind of culture-based experiential activity you can organize for your tourists?	More theme dining events
4	What kind of cultural-based or other animations/activities do you organize for your tourists?	As above mentioned - more theme dining events. Every week in a certain evening we, with a help of entertainers present Bulgarian folklore dance program.
5	What kind of resources do you need to enhance the culture and heritage - based experiential tourism development?	Theme dishes, foods and beverages
6	What kind of communication marketing strategies (technologies) do you use?	The folklore program is advertised by the hotel reception
7	What kind of skills do you (you and your employee) need in order to be more experiential for tourists?	no special skills are required
8	Do you organize trainings for your staff? What kind of training do you organize?	We don't train our staff
9	How do you see the future of heritage and culture-based experiential tourism development in Bulgaria and in general?	none
10	What kind of risks do you see in experiential tourism development for your company and in general?	none
11	How do you see the role of State/Government of Bulgaria in heritage and culture-based experiential tourism development?	The government should promote and finance the cultural heritage of the country
12	How do you see the role of the locals/ stakeholders on heritage and culture-based experiential tourism development in Bulgaria?	none
13	What kind of challenges do you see for heritage and culture-based experiential tourism development?	none
14	What kind of opportunities do you see for culture-based experiential tourism development in Bulgaria?	none
15	How your organization can benefit from or assist the tourism sector in the present COVID-19 crisis?	they should be redirected to new type of offering with focus on domestic tourists and guests from the neighbouring countries
16	What business models for ET your company employs?/ What management or strategic models are suitable for heritage and culture-based experiential tourism development?	none



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A	Accommodation
B	Complex "Saint George"
C	Angelina Deneva
D	Manager
E	Miladinovzi, Dobrich
F	-
1	Tourist service aimed at preserving and promoting the historical and cultural heritage of a country / region, which includes some kind of activity performed by or for the tourist.
2	To add value to the tourism product
3	Fairs, exhibitions, trade shows, farm markets, gatherings
4	Involvement of tourists in the work on the farm, organization of competitive games, farmers' exhibitions
5	Human resources and multimedia
6	internet ads
7	none
8	none
9	Experience tourism has great potential, especially against the backdrop of the pandemic and the ensuing lockdown - people will have an increasing need for activities and experiences
10	none
11	Yes, from the point of view of promoting and subsidizing for increased demand for Bulgaria as a tourist destination aimed at cultural and historical tourism of experiences.
12	Direct or indirect participators in the formation of tourism products
13	Quick wear / fading of the visitors' interest in an already experienced experience.
14	With a coordinated regional or national policy, Bulgaria can become a preferred destination, as it has potential and rich cultural heritage, but in the absence of organization private companies could hardly attract foreign tourists, which predetermines job opportunities mainly for Bulgarian citizens.
15	The pandemic has increased interest in accommodation of the type of renting an entire property, which in this case is beneficial for us, but in terms of organized events has a negative impact because people do not gather in large groups and therefore do not use our services at all.
16	None



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A	Accommodation
B	Guest house Mimi
C	Maria Dimitrova
D	Manager
E	Ezeretz, Dobrich municipality
F	none
1	This is a type of tourism, which is based on different types of experiences, emotions, sports / most often extreme /, tasting local food and drinks, getting to know the local way of life and culture.
2	The role of accommodation should be, in addition to offering accommodation, to be able to offer either independently or in cooperation with other organizations and tourism opportunities - in any form.
3	We offer an alternative type of rural tourism, delicious homemade food, unique nature and fresh air, beautiful sea views, fishing, diving, sailing... In general, almost everything a tourist wishes we could provide.
4	Everything that the tourist wants we can offer both as an experience and as amenities.
5	Every tourist is different, unique. The resources, apart from natural and climatic ones, which do not depend on me, are the financial ones. Maybe with financial support from the state or other types of funding bodies to support small businesses are needed.
6	We do not use a specific strategy or technique. Most often we rely on the recommendations of our tourists who have visited us once, they always come back or recommend us to their relatives and friends. This is the best and safest ad. In addition, we make great use of the opportunity to advertise on social media and the Internet.
7	This type of skills are specific to each business engaged in the field of tourism. Specifically, for our place the most valuable skills are related to innovation, different and unconventional thinking and uniqueness of the products we offer to our tourists.
8	At this stage, our team is small, mainly composed of family members and I have not organized training for them or for myself.
9	In my opinion, this type of tourism has a huge prospect for development in Bulgaria and has the potential to attract more and more tourists. What I have to rely on in the future is a national support provided through wide advertising, promotion of small corners of the country, which are unknown, but with potential for development.
10	none
11	Yes, it is important, but not fundamental. Everyone offering tourist services must first determine for himself whether he offers quality services, whether he is fair to the tourists he welcomes, whether the prices he has set are affordable, how to further develop and modify his services in order to adapt to the new conditions - all this does not depend on the State.
12	The local people with their customs and traditions, folklore, with their dishes, crafts are always attractive for attracting tourists, especially international, and in this sense their role is extremely important, especially in the regions of Bulgaria with preserved such traditions and way of life.
13	The problems are related to the not so well-developed infrastructure / at least for our region /, perhaps the lack of promotion and advertising of the opportunity for experiences. On a global scale, this type of tourism cannot be unaffected by the global pandemic, but I hope it will be short-lived.
14	As I have already written, this type of tourism has a huge potential for development in Bulgaria, as long as it is well enough promoted and offered.
15	No, at the moment the industry is really stagnant because of the Pandemic, but all that will change. I am an optimist.
16	None



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A	Accommodation
B	Terra house
C	Nevena Atanasova
D	Manager
E	Mindya village
F	none
1	For me, this is a deep insight into Bulgarian spirit. Memory and experience of old traditions, combined with a wonderful holiday and emotions.
2	This is a change of setting, a change of place, a new experience. Freeing the mind, removing tension from everyday life
3	Walk in view of the old Bulgarian style, preserved old Bulgarian houses, traditions.
4	Concert, which is organized every year, the last weekend of August. A wonderful event that brings together people from all over the country, including neighbouring countries. The village of Mindya is a beautiful old Bulgarian village with fresh air, which has preserved the spirit of the Bulgarian with its old houses and wonderful traditions.
5	Maybe from improvements in terms of guest comfort, but the emotion and experiences are there, everything is made authentic and preserved.
6	Internet site, advertising on the Internet in various sites
7	There are no specific skills, everyone is looking for attention and a good word. That, I think, is enough.
8	none
9	I think that Bulgarian spirit will never die, on the contrary. People are looking for and want to feel their old, Bulgarian, roots. I see a very good development.
10	none
11	Sure, we all are required to keep the laws
12	There are different traditions in every part of Bulgaria. A person who came from another end, another place, is interested to see how people live. Although we are all people and citizens of one country, our traditions are different. This opens curiosity, curiosity in people, so we rediscover ourselves!
13	none
14	more publicity with a focus on the Bulgarian spirit
15	Strongly said. But in the case of the setting, maybe a lot of people have turned to smaller guest houses, which is good.
16	none



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A	Restaurants
B	"Gardenia" - Italian food and pizzeria
C	Nikolay Dimitrov
D	co-owner
E	Dobrich
F	Ltd
1	In my opinion, this is tourism, which is associated with the reproduction of historical events, folk customs and cultural events. I think that this type of tourism is extremely promising, because the emphasis is on sharing and creativity, as well as self-knowledge on the part of the tourist, and not just consuming one or another type of tourist service.
2	We could participate more actively in the cultural life of the community, to organize celebrations of holidays (such as are already organized in the restaurant), courses on various topics related to cooking, tasting, art classes, etc.
3	As I mentioned in the answer to the previous question - restaurant managers and owners can be more actively involved in organizing various cultural events, celebrations of events, educational and art classes, etc. They could also be more active in supporting organized by the municipality or from third party organizations to be sponsors or providers of catering services.
4	The management of our restaurant is an active member of the Russophile local organization. For example, we sponsor and chair the Berezka Club, which was created with the idea of promoting Russian culture and arts and promoting peace and understanding between Bulgaria and Russia. It involves a large part of the Russian expatriates living in the town of Dobrich and the surrounding area together with their families, as well as many Bulgarians who love Russian life, music, folklore and culture. The club organizes annual celebrations of the Russian New Year (January 14), Victory Day (May 9) and Russian Independence Day (November 4). Some of these holidays are announced publicly and are open to the general public. The club often performs musical and poetic recitals in front of the guests of the restaurant or organizes karaoke evenings with mostly Russian pop and folk songs
5	Of course, funding is an essential element here. Most of the above activities are done on a voluntary basis and the costs of materials / costumes / equipment / technical support are covered by the restaurant (as a charity). For some specific events, we receive support from the Russian Embassy, the municipality or other non-profit organizations. We would also be happy if there were more volunteers, cultural figures and professionals in the field of arts and marketing communications to improve the image and popularity of the events we organize.
6	Most often print advertising (posters and brochures), publications in the media and radio, publications on the Facebook page of the restaurant and direct marketing
7	They have to be committed to the cause, to be enthusiastic about their work, to attract both volunteers and guests to the events we organize. In addition, they must have good communication, marketing and, of course, artistic skills (albeit unprofessional).
8	The main staff of the restaurant works in the culinary production and service area. These employees receive an introductory one-week internship when entering work and we usually use the principle of mentoring: a newly appointed employee initially has more intensive contact with the so-called "Mentor", who gives explanations, advice, monitors the quality of work tasks and provides timely feedback if necessary.



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9	I believe that this is a very promising niche for development, which will become more and more relevant in the future. Especially after the Covid19 pandemic, the expediency of many tourist trips will be reconsidered and only those that are really important and have real added value for tourists will be realized. In this sense, I envisage more and more trips for self-knowledge and self-realization and less and less for pleasure or for the pleasant pastime (killing).
10	Organizing events takes resources and limits the usual clientele of the restaurant (not everyone wants to attend a show with loud music, noise and effects while eating) and this cannot be done too often. Events are profitable only for a certain number of participants / guests of the event - so there may be a problem with the scale and attendance: with too few guests they are at a loss, and with too many - lead to overload and deterioration of the participants' experience. Lack of a professional approach to organizing and promoting events.
11	Small for the moment. The government (in particular municipalities / town halls) should support public cultural events, including in catering and entertainment establishments. It may be possible to subsidize events that have a proven beneficial social or educational effect, or those that help preserve historical memory or folklore. A catalogue of restaurants in the region could be made to present them with a calendar of events they organize or participate in. Cooperation between private business and public institutions needs to be improved in general.
12	The local population must be actively involved in cultural events. In addition, it should participate in the promotion of the region as an attractive tourist destination. Tourists should feel welcome and the locals should play the role of a good host.
13	Lack of state policy in this area at local or national level. Lack of support from private business institutions in trying to organize events, activities or animation activities aimed at locals and guests / tourists.
14	Great if this industry is prioritized. Bulgaria has a lot to show in terms of its culture, historical heritage and folklore. Unfortunately, tourists do not always manage to see the true face of our country, the variety of experiences it has to offer. Perhaps if purposeful work is done for this purpose, more aware, educated (and solvent tourists) will be attracted.
15	The crisis is particularly devastating for the restaurant business. The restaurants remained closed for several months. Staff reductions had to be made. This inevitably leads to losses. However, there is a trend of some compensation for consumption - the periods in which the restaurant was still open, attendance was many times higher than usual.
16	Organizing cultural, folklore and educational events and celebrating national and international holidays. What we do is described in more detail in the answers to the questions in points 8 and 9.



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A	Tour guides
B	NR
C	Kremena Ilieva
D	tour guide
E	NR
F	NR
1	The tourist should be part of the "preparation and implementation of the tourist service"
2	NR
3	online presentations
4	NR
5	Local traditions from different regions of the country.
6	NR
7	NR
8	NR
9	The quest for "different" by the tourists themselves can be assisted
10	NR
11	NR
12	NR
13	Poor infrastructure
14	Promotion of unknown sites and those with a difficult access
15	They can organize on-line excursions and trips
16	none



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A	Tour guide
B	NR
C	Christina Petrova
D	tour guide
E	NR
F	NR
1	Experience tourism can bring additional satisfaction to tourists. The modern tourist experiences less and less information needs - he could satisfy them via the Internet without visiting the museum or the respective cultural site. For him, the contact with the authentic cultural "object" is important. But even this is not always enough for him - he will enjoy it and take an interest in it, will keep a vivid memory of it when this object is presented to him as an element of a fascinating story, as a kind of proof of some attractive, fascinating legend. It is no longer enough for the tourist to be brought to authentic cultural and historical relics. It is necessary for the tourist to meet the museum exhibit in such a way that he can experience the history. Experience tourism provides an opportunity for action and concrete satisfaction with the experiences during the trip, by involving tourists in a specific theatrical practice. This concept can help to differentiate the services of a company from competitors.
2	NR
3	Delivering talks involving tourists with specific questions and searching for their answers; entering the role of a specific historical figure from the past in order to present more attractively
4	NR
5	Guides, museum and sites with cultural and historical heritage
6	NR
7	NR
8	NR
9	More opportunities to involve tourists in the cultural and historical heritage. For example, museums may have 3D images / holograms of historical figures and events from the past. This, together with the guide's talk, could help tourists empathize with the story. Also the opportunity for tourists to participate as observers or participants in historical reconstructions of important events of the past.
10	NR
11	NR
12	NR
13	Tourists' perceptions of this type of tourism
14	The experience tourism has a development in Bulgaria, because for the modern tourist it is no longer enough just to visit a museum and get to know its exhibits. He needs nothing new and different to be emotionally involved in the cultural and historical heritage, and this can be done through experiences that are attractive and memorable. Experiential tourism has the potential to promote the cultural and historical heritage of Bulgaria. However, it is important to find the right ways to integrate it among tourists.
15	Creating virtual tours on the Internet in order to present the cultural and historical heritage in Bulgaria, both for Bulgarians and foreigners. The tours can be thematic or related to certain periods in the history of Bulgaria.
16	Implementation of visual sound systems in museums and sites for cultural and historical heritage - 3D holograms of historical figures telling stories



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A	Tour guide
B	NR
C	Zornitsa Racheva
D	tour guide with 9 years of experience
E	NR
F	NR
1	The experiences of the cultural tourist product are memorable. They must accept the philosophy that experiences are cultural events turned by contact staff into positive emotions. Therefore, one of the most valuable superstructure knowledge and skills of the modern tourist professional in the field of cultural tourism is to turn his communication with tourists into an unforgettable experience.
2	NR
3	For Bulgaria in particular, it seems a bit imaginary given the general profile of tourists. For example, the talk in a given site should be with the distribution of a brochure with photos and during the talk and the tour the tourists should be involved in finding the object / vase, sculpture, find, sword, etc. / . Have something like a prize, a post on a social network and a site page for the visit. The guide can present the annual cultural calendar for a site or city, to direct the interest of tourists to a specific event. Holograms are very attractive offers for tourists.
4	NR
5	Creating thematic festivals, holidays, involving participants in a field, for example: participation in reconstructions, participation in archaeological research;
6	NR
7	NR
8	NR
9	It must be developed. It is mandatory to use all kinds of innovative technologies to attract and facilitate tourists. If the emphasis is not on the experience as a whole, tourism will certainly suffer. You can find everything everywhere, but the experience is important.
10	NR
11	NR
12	NR
13	Bulgarian tourists, in my opinion, have not yet upgraded this feeling of experiencing the trip. The information about the sites is in many places, different in volume and content. There is no common portal / site that offers exactly this type of ideas for experiencing
14	In Bulgaria there is always something to show - history, traditions, crafts that can be practically presented and involve tourists in doing something related to the theme of the visit.
15	Participating in webinars, online tours of museums, galleries, cities, tours to enhance your general culture
16	In my opinion, each municipality should have its own information portal / site, which would acquaint the interested parties with sites of both national and local importance. Also to offer alternative ways to reach the places: bicycles, scooters, etc.



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A	Tour guide
B	NR
C	Martin Marinov
D	Hospitality - 10 yeas of experience
E	NR
F	NR
1	To me, this is the (already not recent) trend of tourists looking for not only a vacation / traveling, but for an (authentic) experience and immersion into the destination. Traveling, discovering new places and meeting new people is becoming a passion for more and more people. Life is so much more when you share with others. It's this sharing of ideas, opinions, moments and experiences that has made experiential tourism so on the rise.
2	NR
3	They could create special programs tailored to the resources available in the respective region where the tour guide operates. They could also partner with local authorities and tour boards, as well as with NGOs, to better develop experiential tourism in their region.
4	NR
5	Bulgaria has rich cultural traditions and deep history – all that combined with various natural/culinary resources. What’s more, Bulgaria is still a terra incognita for many tourists.
6	NR
7	NR
8	NR
9	Bulgaria has definitely a high potential to fully develop experiential tourism and I hope that all interested parties (tour agencies, hotels, the government, NGOs, etc.) will take steps to promote and develop this kind of tourism so as to have a stronger, synergetic effect.
10	NR
11	NR
12	NR
13	Missing or undeveloped infrastructure, difficult access, uncoordinated actions (e.g. higher tax burden, despite governmental declarations to support the tourist industry), not enough advertising
14	We have to work together with the government to develop experiential tourism. We also need to cooperate with each other (the tourist industry) to unveil the potential of Bulgaria as a tourist destination. What’s more, NGOs and local actors need more support from tour agencies and from local authorities.
15	I don’t think that tour guides alone could really support tourism in regards to the Covid19 crisis.
16	I don’t have a solution to that question, sorry.



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A	Tour operator/ Tour agent
B	E-tours
C	Pavlina Alexieva
D	Manager
E	Varna
F	Ltd
1	Providing a tourist service that leaves an unforgettable, unique memory. The main feature is interactivity. The tourist is not just an observer, but a participant in the events. For example, when visiting a cultural-historical site, to be given the opportunity to put on the typical for the people of the respective era clothing, to practice their activities, to prepare / taste food as they ate
2	We see our mission in creating original, interesting and undeveloped routes in Bulgaria, and not only in Bulgaria. We rely on the unconventional, the different, visits to little-known, non-commercialized, but attractive sites. In this way we promote the cultural heritage of lesser-known destinations, which means a livelihood for the local population, new jobs, economic prosperity for the region.
3	Organizing demonstrations of local crafts, recreating local customs and holidays, reconstructions of traditions, way of life and culture.
4	The excursions offered by E-TOURS are mainly with cultural and cognitive orientation.
5	Joint efforts of the state, local government, local communities - maintained infrastructure; organizing festivals, fairs, chants and other cultural events that attract tourists; engaged local population, hospitable and friendly;
6	We advertise on the company's website and on our FB page. We send regular e-newsletters by e-mail. We have a contract for radio and online advertising in local media, where we advertise our products.
7	Communication skills and excellent professional training.
8	The latest trainings organized for the employees of E-TOURS in 2020 are: trainings in digital marketing, SEO optimization and copywriting; specific training for working with specialized software; training for innovations in the provision of aviation services; trainings for novelties in the offer of tourist services
9	The tendency is for tourists to increasingly look for unique cultural experiences and to prefer to travel alone. In this regard, it is assumed to increase the demand for tourism experiences with a focus on cultural and historical heritage.
10	Offering fake, pseudo-experiences based on non-existent, fictional stories / traditions or offering a credible product but presented in an unprofessional way. Difficult accessibility of the area, bad roads, lack of signs and plates, lack of basic conditions on site, such as WC. Tourists who are interested in experience tourism often prefer to organize their trips themselves, without the intervention of TO - this is a risk for TO.
11	Construction of infrastructure and improvement of the existing one, maintenance of the sites in good condition, provision of qualified personnel. Crime reduction. Ensuring security and safety. Advertising.
12	Knowledge, preservation and restoration of traditions. Maintaining the "Bulgarian" in Bulgaria. Manifestation of friendliness and hospitality towards tourists.
13	Poor infrastructure, repulsive poverty and destruction in most Bulgarian regions.
14	The potential is huge, but a concerted effort is needed by all stakeholders, both public institutions and businesses, as well as local communities.
15	Redistribution of the market after expected bankruptcies / termination of activity of a number of tour operators.
16	none



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A	Tour operator/ Tour agent
B	VIP Sliven (Visit-Sliven)
C	Hristo Yanev
D	founder
E	Sliven, Bulgaria
F	LTD
1	This is something that is very underdeveloped in Bulgaria, first. A lot of people do not know what heritage means and what - culture-based experiential tourism. Basically, put sprightly - this is experiential tourism, that is related... a tourism of experiences that is related to community-based tourism, exploring the culture, the heritage of the community, of the region, of the country. Products like this are very rare in Bulgaria and this notion, this term is regarded often as to cultural-historical tourism, which is something completely... not completely, but quite different
2	Yes, the role is actually... they are the motors of this industry - not the government, not the non-profit organisations. They are the motors, they need to package, they need to create, to package and to distribute those types of experiences to potential customers on a BTB basis. Most of the tour-operators in Bulgaria are concentrated for selling, for creating and selling or reselling mass-tourism products, which actually.... which we all saw in 2020 that displayed them, because they had no other products to offer, even for the domestic market.
3	Well, this is the know-how of the tour-operators. I am not going to present to you our know-how on doing this, but this depends on the people, who create and who work with the local communities and also this depends on the target customers using this specific tour. Those specific experiences are not for the mass market in any way. Those specific experiences are for very experienced travellers, travellers who know what they exactly want and how they want it. And they just need to see something familiar in terms of alternative type of activity or experience that they can actually do in Bulgaria.
4	We have over 1000 products in Bulgaria related to activities, experiences and so on. Depending on the type of customer and the country the customer is coming from, we propose different activities. In general, our culture-based activities are related to the local population, to their traditions, to their own heritage, to the heritage of the region and to showing their lifestyle, because this is very, very important for the development of this type of tourism in Bulgaria.
5	The main resource that you need (if this answers this question) is the know-how of the people doing that. I've seen a lot of people dealing with mass tourism and when asked to do something more specific than their day-to-day mass operation selling (Greece, Turkey and so on), they just can not, because their thinking is not in this direction. The main asset and the main resource that you need for this is and are the people and their know-how - the people who actually create those types of experiences and tours. And also you need the help of the local community because most of the local communities are very unaware of the opportunities, but myself and my team in the company have, because we're dealing with such types of tourism since 2010 and we have over 10 years of experience in this field. And we are actually the largest tours and activities creator and operator in Bulgaria. So, the main asset are the people, but after that you need to have the know-how how to operate how to market this. Because it's not... the simplest way is to create it basically, but then it starts more difficult ways in order to distribute, to sell and to have returned customers. This is so, so important... for every business.



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6	<p>Well, we use... we have a very big marketing strategy, we have lots of different partners in Bulgaria and abroad. And we are a technologic company - this means that we have developed our own artificial intelligence, which is throughout all our websites, in order to know everything for the customer even before the customer actually clicks the “book now” button or browse a specific tour. We are quite a tech-company and we use already robotics in some of our tours. We have a lot of technology, we implement the technology in all our tours in order to make them more efficient, cheaper and also to make them easier pre, during and post the trip or the experience itself. This is very important because what I see in Bulgaria is - most of the tour operators do not cater so much for the pre and post... I mean they cater a lot for the pre (when they are selling the activity), but actually the big portion and part of the work comes during the activity and post the activity and this is so important, as well.</p>
7	<p>Well, first of all the number one skill is to be human. Humanity... actually 2020 was the year of humanity - a lot more people were... actually people started looking around themselves and started to think what they can do, how they can do it and so on. And this is so, so important. First of all - to be human. The interactions human to human are becoming much more, more, more important than never before. In the era of vast communication, of advertisements everywhere, of robotics and so on, the human, the personal touch to the things will be vital for every business. The second skill, that we as a company have - we are very technologically advanced. We are very, very technologically advanced. We have our own IT company as well and this helps us a lot in order to implement, test and... actually test and after that implement everything. The experiential element for the tourists also comes pre (so at the time of booking), before the trip, we told - the communication and so on, during the trip and after the trip and actually technology helps a lot. Also the human touch helps a lot because we haven't missed the single call, we haven't missed the single email or any kind of human-to-human contact that every customer wants to have. How we do that, I cannot share with you, because again this is know-how. But this is something that everybody should think about very carefully.</p>
8	<p>Yes of course, without trainings every business is like... is like running on autopilot. Every day, in this sector there are new and new things and we organise trainings for the staff internally (only internally!) and we keep this information absolutely private. Because we... we have values and we have different... things that we are the only ones doing in Bulgaria. But training is crucial, I must say</p>
9	<p>Well the future is in the hands, completely in the hands of the people actually creating and implementing those trips. We see that the government in 2020 gave a hand to alternative tourism, ascertained and little bit motivated the people, the Bulgarians to travel in the destination, so the domestic tourism was with a huge share, by the way, in 2020 all the alternative types of tourism was with a huge increase - over 40%, I was reading the stats the other day. So, I see the future... I see that this is the future - the future is in the alternative types of tourism and experiential tourism, heritage-, culture-based experiential tourism is one of the types of tourism that will be flourishing in the next years. And again - this all depends from the agencies and tour operators actually doing that their part and motivating travellers basically and spreading the word.</p>
10	<p>Well, here my answer to this question should be that risks are everywhere and mainly the risks are coming from the local communities, because the grey economy in Bulgaria in these areas is quite a lot. And this makes it actually not... This actually does not work for the tour operators, because they do not receive documents, they do not receive invoices and so on and I think this is one of the risks. Because in those types of areas, in those types of tourism experiences this is very, very important... this is very, very important. So, the other risks that I see in this sector is that I see a lot of people will go into the sector, like with the mass tourism and actually the product will not be tailored, it will not be completely set according to what the market wants, but it will be made in a certain shape and style, just to have something and to say “yes we are offering this type of tourism”. So, actually the unique product and the unique marketing of this product is what makes it a real challenge. And also the people staying in the office and implementing it on sport are crucial.</p>



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11	Bulgarian state was targeting the mass tourism until recently and 2020 showed that this was the year for domestic and nature-based activities and so on, and so on. So, I think we will have a positive shift towards the perceptions in this sense. But I'm never relying on what any state is doing. I again repeat - what's important are the people, who create, and who actually implement the experiences.
12	This is cultural, this is one of the main factors, actually. Without them this type of tourism is gone, it's not the same, it cannot be the same. So, their role is significant and they should be regarded as real players in the industry. No matter, they speak any foreign languages and they have some computer knowledge or not, they are a big factor. Without them a product is halfway done and not implemented at all.
13	First of all, I would like to elaborate on the... on the two terms - tour operators and agencies. Tour operators are the ones who matter, because they make the product. Agencies in the 21st century - I don't see big, big... big future for them, because of the fact that the customer is looking for the creator, for the initiator or for the organiser, or for the owner of the activity, the hotel, the guest house, the experience and everything. And this makes a big gap and big difference in the development of those two. What matters here is the creator and the originator of the idea, of the activity, of the product. The problems - I see these as opportunities basically. Opportunities in the tourism industry are vast and are many everyday. And when we were starting back in 2010, a lot of people were laughing at me, at us, at my team and at what we were doing, because I said "Look guys, I am not going to sell 99.9 (percent) of the agencies and tour operators in Bulgaria do. I'm not going to sell mass-tourism products, developed by the top 10 of the biggest tour operators and my only purpose is to re-sell them and to actually do that to be in the business... No, I'm going to create specific products, specific experiences and I'm going to actually to be in the movement for changing the image of Bulgaria". Because we work with a lot of international travellers, changing the image and the perceptions for our country - of a not achieved destination, but of a destination which is extremely beautiful, which has got everything to offer and which really has unique products to be experienced only here. So, all those are opportunities, so, being in different niches, is an opportunity, like being the heritage- and culture-based experiential tourism activities. This should not be regarded as problems. I said - one of the issues will be the local population, another one will be the grey economy that's actually in those off the beaten path areas. It's reported to be like this and there are villages where you can also go on and check that for yourself. So, this actually restricts the operators from creating and selling this product, because all tour operators, as you know in Bulgaria should work with licensed providers, with licensed local people, with companies or being part of a company, offering a specific product or specific service. What we do is to find those people and actually to create product with their help, with our know how, because they don't know how to do that, and they've never known that, maybe they will never know, and to offer this exclusively with us.
14	The opportunities are amazing, actually the whole world is moving towards autonomous vehicles, towards individual tourism, towards not being in the group and so on. The opportunities are really fast and I cannot... you know, I cannot explain everything in detail, but it depends on the region, it depends on the area, on the specific destination and so on and so on. So what matters here is that... the... actually the opportunities are all around us and we need just to to find way and to find experienced people to work with, in order to actually utilise, utilise the opportunities.



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15	<p>Yes, basically our business... well, “benefited” is not... it's not the right word, because to benefit from something, you need to put a lot of work before certain event or situation happens. I'm not a person that makes the last-minute things and anyway, there is always a risk in something happening in the world. COVID-19 crisis is one of them, before that was the financial crisis and so on. So, you always need to be prepared in the way that you need to have the options and to be in the specific niche that guarantees at least more business for you than for anybody else. So here “benefiting” I regard this word as a something that needs to do with the strategy, with marketing, with... with... with developing certain niche, like what we did and to explore all the opportunities that you have. This is not a one night stand and it cannot be run as from today to tomorrow. This is something that it's... it has to be developed throughout the years and it's a no it's not an overnight success.</p>
16	<p>Well, this is a very private company confidential question. You understand that I cannot share with you our business model. Our business model is complex, that... that's what I can say about that. And our business model is one that relies on a complete know-how, relies on exploring everyday the opportunities and actually acting quick, fast and actually tapping niches by the time people even think about that. So this is - in a world... in nowadays world you need to be really proactive about this. This is only working business model - to be proactive. We are also giving consultancy work to companies in which we develop their own... their own models with our know-how</p>



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A	Public organization
B	Dobrich municipality
C	Dimitrina Dimitrova
D	senior expert
E	Dobrich
F	NR
1	Satisfying the need to gain new knowledge and empathize with events related to the visited destination.
2	Informative
3	Visit to RIM for a touch of exhibitions related to the history and way of life of famous events.
4	Recreation of national and traditional customs, literary readings and exhibitions reconstructions.
5	Supplementing with new trained experts in the field of tourism
6	NR
7	NR
8	NR
9	growing and developing
10	I don't understand the question
11	NR
12	The role is essential, as their support further contributes to the development of tourism and in particular the cultural and historical tourism of experiences.
13	In the last year, the pandemic of COVID-19 has had a negative impact on tourism in general. People's need for new experiences was locked and limited to the impossibility of carrying out tourist events.
14	Creation and development of online and video platforms, giving a new look at destinations, cultural values and historical events.
15	by providing individual support in case of requested assistance.
16	Making flexible decisions for the development and promotion of tourism.



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A	Public organization
B	Joint venture "Taljana"
C	Milena Miteva
D	founder
E	Varna
F	NR
1	For me personally, it means emphasizing history, the old parts of the city, to get to know and touch the past and then visit new and modern places to compare both and experience the whole stage of culture and history. You can always find in the small charms of a city and this in the essence and idea of such tourism, the specific tastes and traditions of culture, for me is a mixture of everything like 3 in 1. Remembering a spirit and experiencing it instead of watching it on TV because it's different.
2	In general, we are focused on showing the old part of the city and making it more attractive, the cultural centre of Varna, etc., last year 10 different businesses developed in this part of the city thanks to our help. The idea is to bring people back to this old place with these businesses to bring the spirit back to this old place. Several business development projects and walking through the old streets you touch the atmosphere and cultural historical areas of the city. You can develop a current business that is attractive and have synergies with each other. So as not to interfere
3	Most of the activities were related to Taliana, the development and revival of the concept of Taliana, as the restoration of the historic part of the city, which includes a series of events of a historical nature.
4	Outdoor exhibitions in different places in the historical part and most often in the businesses there, events in different places, restaurants around such as: the teahouse, innovator, Jasmine, etc. Forum Taliana in the old town was also one of the very successful events in order to involve more people there, attracted people, various speakers from Varna, orphanages, concerts, Joan de doc- as an event, banks, puzzles with hearts and riddles / puzzles, installations at the roots of the trees, provoking more people to enter the neighbourhood. Shared crossing of cars and pedestrians.
5	First of all, from normal people who care about cultural wealth with contacts and partnerships, because with the right people the right results are achieved, because we have great potential, which is not used much.
6	NR
7	NR
8	NR
9	Honestly, I don't see it, because I see how the old buildings that are used for the benefit of the municipality are being demolished, and I don't know why they don't appreciate it, we don't use the resource we have, the potential of Rome, Italy, Greece, etc. and that's what we have, a preserved culture and identity.
10	To find new places for the development of these locations and to preserve what is part of the cultural and historical place. , the formation of new areas in Taliana sea garden, beaches, should not be an annual experience. Our values are not developed to their full potential.
11	NR
12	Yes, definitely, because in order to accommodate some people, you have to provide a place that is nice, in the centre, and a hotel near those places where they will experience such moments. Businesses here really need to be interested, because there will be more people, and bigger business and everyone benefits from all the work, otherwise we only raise the prestige of the city by making people's tourism better.



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13	Yes, they can succeed with these activities that the municipality does, but they must keep the interest of their tourists, to raise it year-round, not just seasonally. It can be done by exploring the city in different tourism and choosing a certain group of people who will like it and what you will offer afterwards. The more different groups we catch there will be different things that will develop everything and at the moment decide where to lead them or be flexible, a kind of choice of difference.
14	The opportunities are many and inexhaustible and the business to focus on this and notice the advantages of this cultural heritage. It's actually a cycle, the more you get to know it, the more you want to take care of it in such a whole process. The idea is to get to know people and care for the heritage, after appreciating it and passing it on to generations.
15	Tours we organized, otherwise our tours were tailored to be with small groups to touch the small businesses in the area
16	Helping each other, businesses, tour agencies, tour guides and working together is a strategic model and preserving these cultures. B2B will probably be the best model and have a large business community to see the pros in others and develop.



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A	Public organization
B	Joint venture " European Youth Capital"
C	Sergei Petrov
D	Managing director
E	Varna
F	NR
1	For me, it means that people come and see the cultural heritage of the city, the museums, the historical part of the city, visiting city routes and getting to know the culture and history of the city. The purpose of tourism is to get acquainted with the cultural and historical part of the city.
2	Our organization achieved an increased presence of young people from Estonia for prom groups, we managed to attract foreign guests for MTV Varna Beach holiday, along with the closing event of the Youth capital people from over 28 countries managed to visit , FUN CITY managed to attract participants from 30 countries, and also during the implementation of youth projects we had quite a large international participation.
3	We have big inquiries about these excavations in the city of Varna and to organize organized groups for these routes, which will be realized again and not only there, but in the whole city. For example, in other neighbourhoods, restaurants to show the work of different businesses, the idea, purpose, cafes, restaurants with zero face, Brazilian coffee and other different that you can find, so we gather small activities and initiatives in a small place, but always a different thing, you can always touch in different places.
4	Due to the pandemic conditions, the activities of our organization have been suspended.
5	Our organization needs funding and a voice in strategy decision making.
9	My opinion is that Bulgaria is quite rich in cultural heritage, especially for the heritage of the Roman / Byzantine era. In the event of a serious restoration, it would attract a large number of tourists. We can take the example of Greece and Italy
10	The risks that I see are that the state is trying to keep casino tourism, some restrictions on boutique services may be imposed. Example of AirBnb categorization, etc.
11	
12	The problem with travel companies is this, they offer more entertainment than cultural history, but things are connected because they are not complete for tourism, which makes them unsuitable and unattractive to tourists. Which produces a vicious circle. Restaurants are better in this respect because they offer atmosphere, accessibility and variety. Travel agencies are conservative, which prevents them from reorienting themselves in another segment and in other markets.
13	In Bulgaria the potential is great and there is a base that can be used, but it is necessary to invest in infrastructure, improve the condition, the type of tourists and the necessary, comprehensive, changed in the Strategy, including external or internal!
14	If there is an established infrastructure and they are maintained in an appropriate form, our organization has a large and wide network of partnerships in Europe and a youth network with a great culture in Europe, among which it can promote cultural and historical tourism in Bulgaria. Western Europe has an image and everything else to attract tourists, we are lagging behind in this regard.
15	It is very difficult for our organization to help in this area, because there is no budget and decision-making authority in this area.
16	It should be clear that there is a long-term strategy and investment in which the return is much later, unlike normal tourism. But they lead to more sustainable results in the long run. Our tourism is seasonal, which is a big problem and the business model of B2C as an option is the most suitable because it reaches people who choose such activities and are more familiar and do not like group organized things from agencies.



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A	<b>Public organization</b>
B	Joint Venture "Know Varna"
C	Albena Marinova
D	CEO
E	Varna
F	NR
1	In cultural tourism there is an aesthetic experience, spiritual enrichment and a sublime attitude to the cultural and historical heritage. It provides an opportunity for direct communication between people and respect for foreign culture in various tourist destinations. It is important for us to combine these three factors to leave an unforgettable emotional experience in people.
2	Our organization is very young and still in its infancy. Our goal is to make accessible, famous and visited, historical and archaeological sites in the city of Varna, which are neglected and forgotten.
3	The overall concept of our events is to promote places that are little known, and at the heart of these events is a very important point. They are absolutely free for visitors. Here our care is focused on that part of society that could not afford to visit a historical or archaeological site.
4	Hiking to the marked places, which contribute to the good spirit and mood.
5	At this stage, our organization relies solely on its own resources and efforts to provide a quality and unforgettable experience to tourists. Perhaps, if we were not with such limited opportunities, we would be more productive and would contribute greatly to the development of this type of tourism that we offer - exploring the city of Varna and the region, forgotten historically and archeologically significant places.
9	I don't have opinion on this issue
10	There is a risk in every sector. It is important that it is measured and designed to be kept to a minimum.
11	
12	I wouldn't say it's key, but it's important. Our organization does not provide services such as accommodation, restaurants, tour operators and agencies. Each event is one day and once a month. The organization is entirely our concern. we realize
13	The main challenge is to keep the interest of tourists to the extent that they want to return again.
14	The possibilities are limitless. The topic is long and extensive and requires more in-depth analysis. I will mention only one exemplary possibility - a more abstract view. Understanding the stereotype.
15	We could not help the tourism sector to overcome the KOVID-19 crisis. We experience the same difficulties with one small difference. We do it for people's pleasure, not to report income and profits. Currently, only the people who are looking forward to the next hike to a place unknown to them are the only ones affected.
16	I could not give a specific answer. A general change is needed, both in the management model and in the strategy that are in place at the moment.



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A	Educational Institution
B	Varna University of Management
C	Miroslava Dimitrova Ph.D.
D	senior Assistant Professor
E	Varna
F	NR
1	An approach of tourism with focus on the visitor's experience related to culture and heritage tourist products and services. This tourism can be an opposite of the consumeristic traditional approach of mass tourism. In experiential tourism, the visitors participate actively in the co-creation of the tourist experience. They are not mere consumers who take whatever the providers give them but also take part in building their own memories. Thus this tourism is very personalized, unique and more meaningful. It is not just about spending nice time and relaxing, but also about learning, feeling, understanding, transforming and growing personally. It also involves much closer interaction with others - whether locals or service providers
2	We don't have specially designed modules in experiential tourism, but we do have subjects as "Special interests tourism" or "Management and marketing of the tourist destination" or "Special Events" where some aspects of this approach are being discussed.
3	NR
4	NR
5	Bulgaria has a rich cultural, ethnic, religious and historic heritage. The territory of our country was inhabited for thousands of years and many remnants and artefacts of great value are found here - for example wheat is believed to be the oldest processed gold, 4000 BC was found in this exact region of Varna. We have resources for pilgrimage and spiritual tourism monasteries, churches, ancient sanctuaries of Thracians and Celts can be found here. All of them, if approached right can be transformed into experiential tourism. Our ethnic and folklore heritage, song, dances, story-telling, rites, traditions, celebrations, food and tasty dishes - all can be used for enriching the experience and involving the tourist to participate actively and to interact more meaningfully with the people and the destination.
6	NR
7	NR
8	NR
9	I think, this is a very promising form of tourism offering and is a chance for our country to gain competitive advantage and to be recognized on the market with a new image. After all, Bulgaria is the third richest country in terms of cultural heritage sites in Europe. It is high time for it to be known for this, and not only for the Black sea coast.
10	NR
11	NR
12	NR



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13	<p>There is a long way still to be taken before we can be successfully positioned on this market. First, the image the country has as a mass tourist destination has to be altered. This means a whole new marketing and branding strategy on a national level. Second, the valorisation of the resources is a must. We have so much, we don't value it, we don't even know it. Recently I visited a cite of archaeological excavations in South Bulgaria. It was found in the 1970s and was acclaimed as one of the biggest discoveries of the centuries. There was a Bulgarian-Japanese archaeology team working on it and the site (ancient city, sanctuary and tombs) was visited even by the Japanese emperor. Many valuable artefacts were found and transported to museums, but some of them were lost. Now the site was totally neglected. The ruins, the stones, the building were overgrown with weeds and plant, you can hardly say there used to be something before. This type of neglect is a crime - to us, to our children, to the mankind as a whole. And in Bulgaria, there are sites like this almost everywhere. It is not just question of money, but also of awareness and entrepreneurship approach on every level to take a heritage like this and to turn it into a resource for tourism. With suitable infrastructure, management and marketing of those type of resources, their popularization in the global space, their inclusion into tourist routs - everything can be different.</p>
14	<p>As I already stated, it is a very promising type of tourism. We have the resources. They were gifted to us by our ancestors - we just have to manage them wisely and use them for good.</p>
15	<p>Tourism is in a big crisis, but this cannot last forever. Even if the crisis continues, the tourism supply and demand will be altered and adjusted to the new situation. The tourism will be modified, but it won't disappear. Our Institution is trying to predict what will be the future of tourism in these new predicaments and to educate our students of how to adapt to the new conditions. We believe, there is a room for new type of products and new ventures. So, in some extent it is easier to enter in the market if you know you have to do things differently</p>
16	<p>Tourism providers should work in a closer interaction with the tourists. The tourist is no longer a child that needs to be entertained, amused and care for. He/she is an informed adult who knows what he/she wants and is ready to make sacrifices to obtain something valuable. Experiential tourists won't seek the cheapest or more comfortable options for their trip, but they will look for something meaningful and authentic which goes beyond the "post card" view of the destination. They will prefer small family hotels (or even private rooms) over standardize hotel chains for their stay. They would be glad to spend more time feeling, experiencing and sensing all the destination can offer, instead of rushing to visit site after site (as an opposite to the standard tourist packages offered by the Tour operators). Slow tourism will be a key word. Tourism that is tailored to the individual interest and intensity of interaction. Tourism that allows room and time for contemplation and transformation of the tourism experience.</p>

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Joint Operational Programme Black Sea Basin 2014-2020

Culinary Arts and Hospitality Association

January 2021

Joint Operational Programme Black Sea Basin 2014-2020 is co-financed by the European Union through the European Neighbourhood Instrument and by the participating countries: Armenia, Bulgaria, Georgia, Greece, Republic of Moldova, Romania, Turkey and Ukraine. This publication has been produced with the financial assistance of the European Union. The contents of this publication are the sole responsibility of Culinary Arts and Hospitality Association and can in no way be taken to reflect the views of the European Union.