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REPORT

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Kladara Foundation, Burgas/ Bulgaria

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ABSTRACT

Tourism is a tool for supporting and promoting reconstruction and economic development and improvement the quality of life for tourists and local communities. Bulgaria and Turkey have significant potential for the development of tourism in the network of cultural, historical and natural values.

The purpose of the research is to determine current touristic products of Edirne&Burgas, which is a destination accepting many tourists by means of cultural, historical and natural heritage, the survey for the information needs of tourists visiting the Burgas&Edirne and to make suggestions for providing a sustainable touristic development through diverse touristic products. Accordingly; a survey was conducted for the tourists visiting the cities of Edirne &Burgas, participators consisting of representatives from public sector, private sector, non-governmental organizations were interviewed. Based on the results of the analysis, main needs of tourists defined and provided recommendations for improvement of services and products provided in tourism.

Utilization of cultural, historical and natural heritage by paying regard to protection-use balance, presentation the existing traditional treasure to tourists after transforming them into touristic product varieties to find modern, innovative ways and means of fully leisure time, recreation, sports and extreme entertainments, taking joint action by all actors relevant to tourism will be in favour destination for sustainable tourism development.

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2017

"INTERNATIONAL YEAR OF SUSTAINABLE TOURISM FOR DEVELOPMENT"

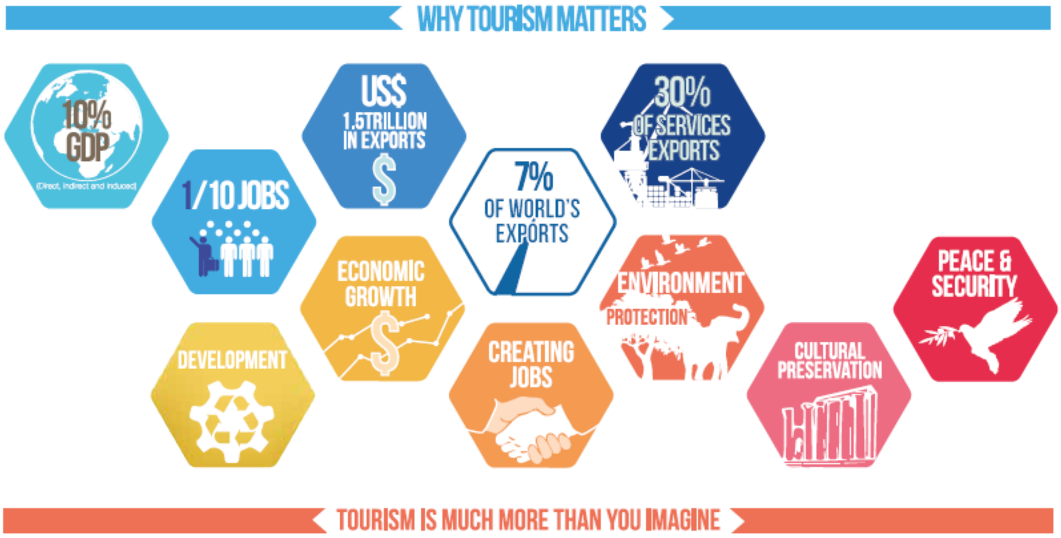
In December 2015, the United Nations General Assembly declared 2017 as the International Year of Sustainable Tourism for Development. This important celebration comes 50 years after the International Tourist Year on Tourism - Passport to Peace (1967) and fifteen years after the International Year of Ecotourism (2002).

This is a unique opportunity to raise awareness of the contribution of sustainable tourism to development among public and private sector decision-makers and the public, while mobilizing all stakeholders to work together in making tourism a catalyst for positive change.

The International Year shall explore and highlight tourism's role in the following five key areas:

1. Inclusive and sustainable economic growth
2. Social inclusiveness, employment and poverty reduction
3. Resource efficiency, environmental protection and climate change
4. Cultural values, diversity and heritage
5. Mutual understanding, peace and security

WHY TOURISM MATTERS?



1- **Inclusive and sustainable economic growth**

- 4% or more annual increase in international tourist arrivals since 2009
- 7% of total world exports and 30% of world services exports
- US$ 1.5 trillion in exports from international tourism in 2016
- 10% of world GDP

2- **Social inclusiveness, employment and poverty reduction**

- One in every ten jobs globally
- Largest export category in many developing countries
- 57% of international tourist arrivals in 2030 will be in emerging economies
- Almost twice as many women employers as other sectors

3- **Resource efficiency, environmental protection and climate change**

- Committed to reducing its 5% of world CO2 emissions
- Raises financing for conservation of heritage, wildlife and the environment

- Can be a vehicle for protecting and restoring biodiversity
- Must sustainably manage an expected 1.8 billion international tourists in 2030

4- Cultural values, diversity and heritage

- Revives traditional activities and customs
- Empowers communities and nurtures pride within them
- Promotes cultural diversity
- Raises awareness of the value of heritage

5- Mutual understanding, peace and security

- Breaks down barriers and builds bridges between visitors and hosts
- Provides opportunities for cross-cultural encounters that can build peace
- A resilient sector that recovers quickly from security threats
- A tool for soft diplomacy

THE RISE OF TOURISM

Tourism is one of the world’s fastest growing industries. For example, there were around 25.3 million international tourist arrivals in 1960. By 1990, this figure had risen to 425 million, 17 times the earlier figure. By 2000, it had risen by more than half again to 682 million and in 2008 it was 982 million – the number of international tourists has more than doubled in less than 20 years. The World Tourism Organisation forecasts that this figure could rise to 1.6 billion people by 2020 (more than 370 million of these will be long-haul travellers).

Key factors in this growth include:

- Rising living standards and, especially, increased leisure time, has allowed many people in the North to take longer holidays and to travel to distant parts of the world. Many in the industrialising countries of Asia and Latin America are also becoming international tourists.

- Advances in transport technology following the introduction of the first passenger jet services in the 1950s and the development of the jumbo jet allow for relatively inexpensive long-distance travel.
- Long periods of relative political stability have made people feel safe venturing to new and unknown places.
- Television, movies and other media have stimulated interest in other parts of the world by showing attractive and exciting images of distant places.
- Increased leisure time and regular holidays are encouraging the growth of in-country or domestic tourism industries.
- The tourism industry has become highly professional and has promoted travel and holidays through well-financed advertising campaigns.

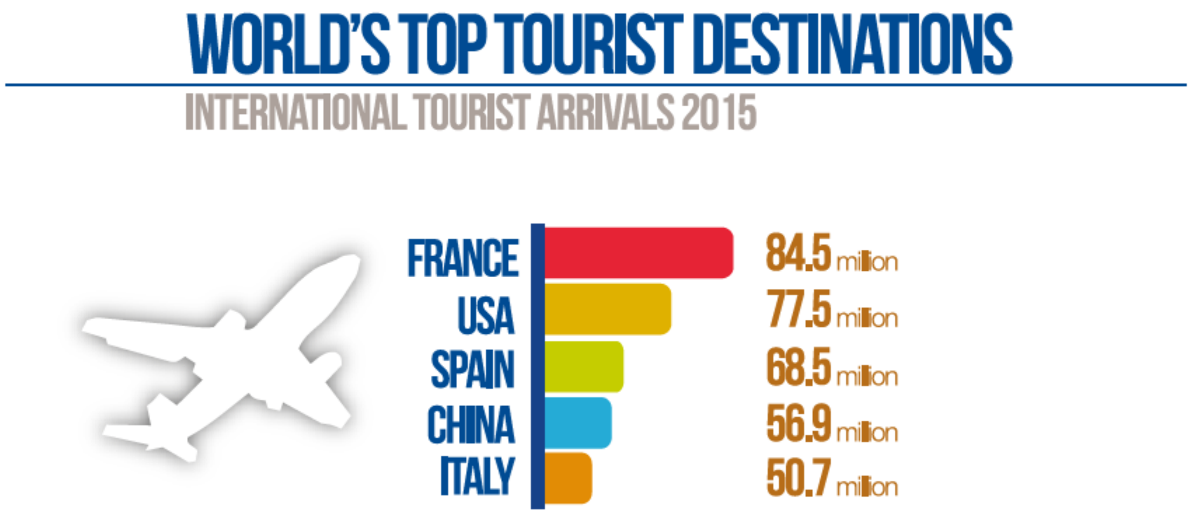
SITUATION ANALYSIS

According to data from the World Tourism Barometer of World Tourism Organization (WTO), in 2016 the number of tourists worldwide reached 1,235 million, which is 46 million more in comparison to the same period of 2015, implementing growth of 4 % on an annual basis. The strongest growth was recorded in the Africa and Asia and the Pacific regions. Despite the ongoing economic challenges in Europe and the world, the predictions of WTO are for continuing the trend of increase in the number of trips for tourism in the world.

Leading Tourist Destinations

According to the World Tourism Organization (World Tourism Barometer), in 2016 France was the most visited destination in the world – 84.5 million tourists, followed by the United States – 77.5 million tourists , Spain – 68.5 million tourists, followed by China – 56.9 million tourists and Italy 50.7 million tourist.

In 2015 the United States were the leaders of the world in income from international tourism – USD 246 billion, followed by Spain - USD 56 billion and France – USD 54 billion. (http://data.worldbank.org/indicator/ST.INT.RCPT.CD)



SUSTAINABLE TOURISM

Tourism is one of the world's fastest growing industries and is a major source of income for many countries. Being a people-oriented industry, tourism also provides many jobs which have helped revitalise local economies. The business volume of tourism today equals or even surpasses that of oil exports, food products or automobiles, offering millions of direct entry points into the workforce, particularly for youth and women, and a diversity of investment opportunities for young entrepreneurial talents.

However, like other forms of development, tourism can also cause its share of problems, such as social dislocation, loss of cultural heritage, economic dependence and ecological degradation. Learning about the impacts of tourism has led many people to seek more responsible holidays. These include various forms of alternative or sustainable tourism such as: 'nature-based tourism', 'ecotourism' and 'cultural tourism'. Sustainable tourism is becoming so popular that some say that what we presently call 'alternative' will be the 'mainstream' in a decade.

All tourism activities of whatever motivation – holidays, business travel, conferences, adventure travel and ecotourism – need to be sustainable. Sustainable tourism is defined as "tourism that respects both local people and the traveller, cultural heritage and the environment". It seeks to provide people with an exciting and educational holiday that is also of benefit to the people of the host country.

What is sustainable tourism?

While mass tourism is considered a supplementary revenue source for countries and local communities, it has nevertheless caused degradation in social and natural environment in some destinations through indiscriminate and non-planned practices. In some other destinations, mass tourism has not progressed to create positive impact on the local people, tourism factors and local values. Thus the concept of sustainable tourism has emerged to respond to the problems entailed by mass tourism. The basic purpose of sustainable tourism is simply to ensure that tourism activities are sustained in the longer term by prioritising natural and social values as the primary resources of tourism.

While increased transport means and advanced information technologies enable larger masses to engage in tourism, such growth is accompanied by a destruction of natural, environmental and cultural assets in destinations without right planning. It is possible to observe examples ranging from destroying natural beauties for such needs as accommodation and infrastructure to focusing on tourism-oriented economic activities for short-term gains to the detriment of local values.

We can propose a basic definition of sustainable tourism as an approach to tourism which considers the needs of host communities as well as visitors; protects natural, environmental and cultural values; and thereby aims to create not short-term but permanent benefits.

Through sustainable tourism, it is possible to;

• Sustain ecological processes, protect natural heritage and bio-diversity, and hand down environmental resources to future generations through optimal use;

• Respect the socio-cultural values and assets of host communities, preserve cultural heritage and foster inter-cultural understanding;

• Create socio-economic returns that are equitably distributed through lasting employment and income means in host communities, create lasting and scalable development models at local level; and through egalitarian participation models, create income sources benefitting women, rural and poor communities;

• Ensure that visitors explore the local habitat, wildlife, local cultural values and traditions and respect the local culture;

• Create awareness on the part of local people for natural, historical and socio-economic values, develop social capital and ultimately encourage the preservation of such resources.

GLOBAL TRENDS

Global trends affecting the development of international tourism can be summarized as follows:

- Newly emerging markets, especially those in Asia (India and China), as well as Brazil, maintain the high growth rates, both for inbound and outbound tourism;
- Economic indicators show strong performance of the largest European economies - Germany, Great Britain and France, which also affects the results of most destinations, which have registered growth from these markets
- Russia is still a major generating market for most destinations in Europe, although during the first months of the year most destinations reported a decline of overnight stays and tourists from this market. The expectations are that the tourism performance from this market will be significantly negatively affected by the ongoing shrinking of the Russian economy and the devaluation of the ruble and the ongoing political conflict.
- The slowdown of the growth rate of the Chinese economy does not affect the willingness of Chinese tourists to travel around the world, while a reduction in demand in tourism is expected in Japan due to declining purchasing power.
- The incoming tourism from India still represents a relatively small part of journeys in Europe, but the long-term expectations are that India will catch up China as a distant generating market.
- The expectations are that the Asian economies will continue the trend of increasing rates in their outbound tourism.
- A tendency towards demand for effective public-private partnerships and transnational collaboration between European destinations in order to maintain their competitiveness in the conditions of continually growing competition and a dynamic market environment.
- Growth of tourists from America in most European destinations;
- There has been a reduction of trips in Europe as a whole and preference to cheap inner-European destinations;
- The demand for hotels is weaker, indicating interest in the other cheaper accommodation;

- The share of individual trips is increasing, which tour operators have responded to with the introduction of the service "do-it-yourself". Dynamic packages have developed;
- The trend for shorter trips continues, however with greater frequency within a calendar year;
- Increased influence of the mass media;
- Penetration of social networks and planning trips by their use;
- Rapid development of information technology, mobile platforms;
- Changes in the demand for and the type of tourism products and services because of the increase of the share of market segments, such as the group "50 +", working women with their own income, single men and women in active age etc.;
- The share of travelling Europeans over the age of 65, who have leisure time and money, is increasing. This makes them an important market for tourist packages, which are preferred by this age group;
- Business trips have marked a decrease in exchange for the steady growth in travel for holidays and vacation;
- Decrease in the share of classic journeys of the type of "sun, sea, beach" in exchange for increased mobility and frequency of trips, interest in the topic "health and fitness", visits to sports and cultural events, visits of friends and relatives, adventure trips, search for authenticity and immersion in the local culture;
- Increase in the awareness and interest of customers in the environment;
- There is a tendency towards "escape" from the strenuous everyday life;
- Increased sensitivity towards the quality of life on a whole and health.

"TURKEY, HOME OF POETRY"

TURKEY

Turkey is at the northeast end of the Mediterranean Sea in southeast Europe and southwest Asia. To the north is the Black Sea and to the west is the Aegean Sea. Its neighbors are Greece and Bulgaria to the west, Russia, Ukraine, and Romania to the north and northwest (through the Black Sea), Georgia, Armenia, Azerbaijan, and Iran to the east, and Syria and Iraq to the south. The Dardanelles, the Sea of Marmara, and the Bosporus divide the country.

- **Land area:** 297,591 sq mi (770,761 sq km);
- **total area:** 301,382 sq mi (780,580 sq km)
- **Population (July 2014 est.):** 81,619,392 (growth rate: 1.12%); birth rate: 16.86/1000; infant mortality rate: 21.43/1000; life expectancy: 73.29
- **Capital (2011 est.):** Ankara, 4.194 million
- **Largest cities:** Istanbul, 11.253 million; Izmir, 2.927 million; Bursa, 1.713 million; Adana, 1.468 million, Gaziantep 1.198 million.
- **Monetary unit:** Turkish lira (TL)

As the 6th most popular tourist destination in the world and well on its way to attracting more than 40 million tourists annually within the next couple of years, Turkey continues to present vast investment opportunities in both the established and newly-developing subsectors of the industry.

With its favorable location, existing potential, mega projects, and ambitious targets set for 2023, the tourism sector continues to grow at a rate that outstrips its bed capacity. Even though there has been a surge of investments in the last several years, there is still ample room for new ventures. Eastern and Southeastern Anatolia both have untapped potential for culture tourism as well as the increasingly popular boutique hotel concept, which blends well with the characteristic nature, history, and culture of the regions.

Here are some essential facts and figures about the Turkish tourism sector:

- Turkey is currently the 6th most popular tourist destination in the world, attracting more than 30 million tourists annually and continuing to show positive growth year-on-year.
- The tourism sector has set annual targets of 50 million tourist arrivals and revenues of USD 50 billion by 2023.
- According to the Ministry of Culture and Tourism, the number of foreign travelers arriving in Turkey in 2015 was 39.4 million, while total turnover of the tourism industry that same year was USD 31.4 billion.
- Growth in the Turkish tourism industry has been above the global average in recent years, and the direct contribution of the industry to the current account deficit in 2015 was 80 percent, while its contribution to GDP reached 4.37 percent the same year.
- By the end of 2015, there were 13,615 registered accommodation facilities. 9,188 of these facilities were licensed by their respective municipalities, while the remaining 4,427 held tourism operation licenses. The combined total bed capacity of these facilities exceeds 1,250,000.
- There are currently 281 projects in the pipeline that would add 74,130 much-needed beds to Turkey’s short supply.
- Antalya is the most preferred city in Turkey based on the number of incoming foreign visitors. Visited by 34 percent of the foreign tourists in 2014,

Antalya has over 500 4-star and 5-star hotels in its center and surrounding towns such as Kemer, Belek and Kas.

- In 2015, there were more than 165 hotel chains in Turkey, with 15 percent of these hotels being owned by international investors.
- Turkey has 7,200 km of coastline and ranks 2nd among 38 countries with its 436 blue-flag beaches; only Spain has more blue-flag beaches than Turkey with 578. There are also 22 blue-flag marinas in Turkey.
- In terms of geothermal tourism potential, Turkey is among the top seven countries in the world and ranks 1st in Europe with its 1,500 thermal springs. Bed capacity in the various thermal spa resorts has reached a combined 55,140.
- Turkey is also an emerging destination for golf tourism with 15 tourism operation-licensed golf resorts. Most golf courses in Turkey use Bermuda grass, which is perfect for a Mediterranean climate and can be used for more than a decade.
- Based on 2015 tourism figures, Euromonitor International has ranked the world's top 100 most-visited cities, with Antalya coming in 10th place with 11.1 million foreign visitors.
- Owing to its increasing global connectivity, due in no small part to its favorable geographical position, Istanbul is very much the center of attention with its recent rise to the 5th most visited city according to MasterCard Global Destinations Cities Index 2015 with over 11.8 million foreign and domestic visitors annually.
- The International Congress and Convention Association's (ICCA) Country and City Rankings Report for 2014 saw Istanbul maintain its top 10 position as a global congress destination. Ranking 8th in the world in 2014 with 130 congresses, Istanbul has now held a top 10 position since 2010.

The Turkish government offers incentives and pursues policies that offer reduced utility prices and reduced tax rates while decisively eliminating any bureaucratic barriers that may hinder growth in the tourism sector.

1- Tourism in the Economy

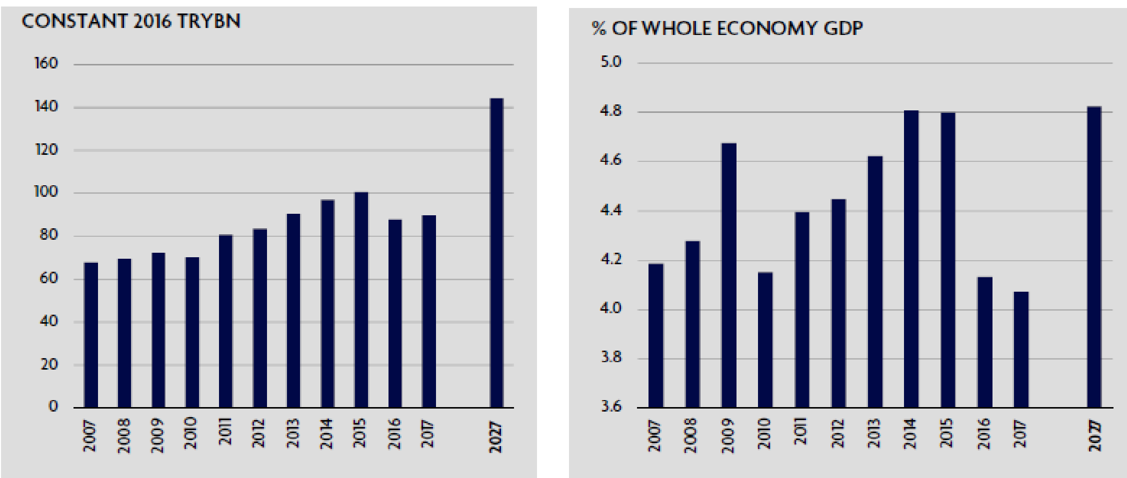
The direct contribution of Travel & Tourism to GDP in 2016 was TRY87.9bn (4.1% of GDP). This is forecast to rise by 2.0% to TRY89.7bn in 2017.

This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported by

tourists.

The direct contribution of Travel & Tourism to GDP is expected to grow by 4.9% pa to TRY 144.3bn (4.8% of GDP) by 2027.

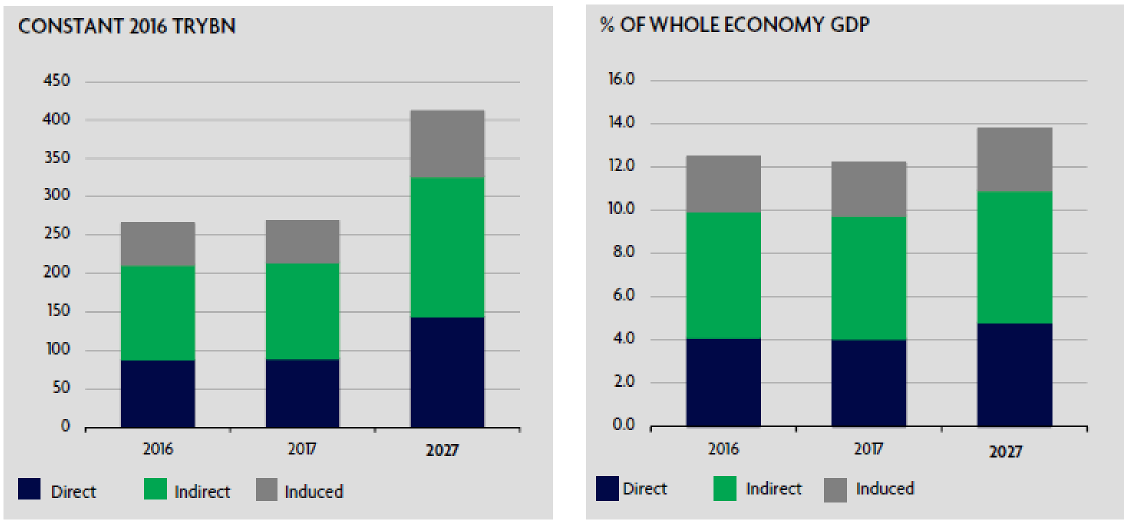
TURKEY: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP



The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impactsY) was TRY265.7bn in 2016 (12.5% of GDP) and is expected to grow by 1.0% to TRY268.4bn (12.2% of GDP) in 2017.

It is forecast to rise by 4.4% pa to TRY 411.3bn by 2027 (13.8% of GDP).

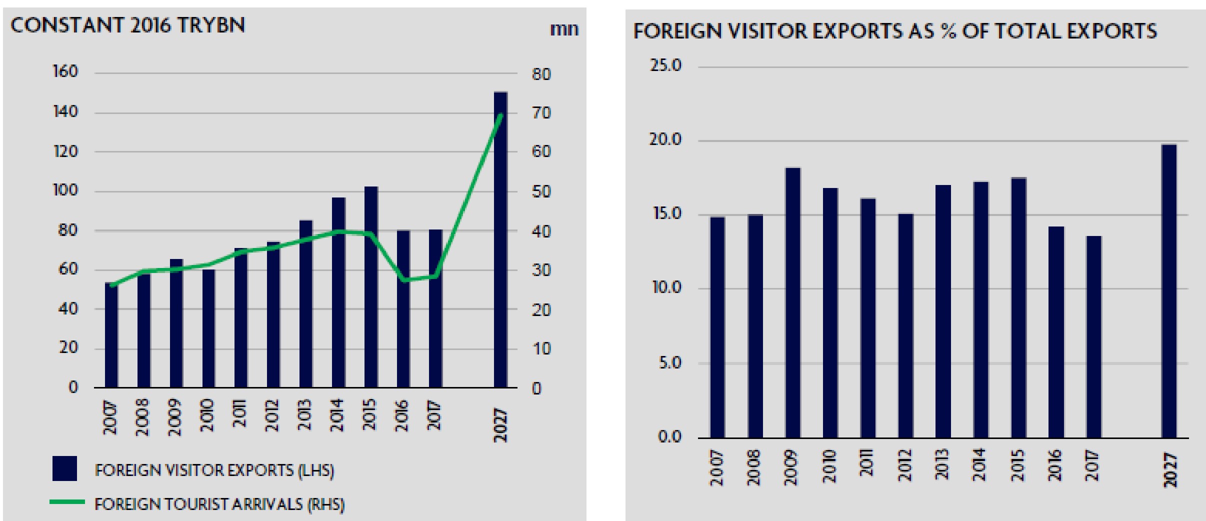
TURKEY:TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP



Visitor exports are a key component of the direct contribution of Travel & Tourism. In 2016, Turkey generated TRY80.0bn in visitor exports. In 2017, this is expected to grow by 0.7%, and the country is expected to attract 28,472,000 international tourist arrivals.

By 2027, international tourist arrivals are forecast to total 69,432,000, generating expenditure of TRY150.7bn, an increase of 6.5% pa.

TURKEY:VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS



2- Turkish Tourism Industry Overlook

Turkey is one of the most popular tourist destination in the world. In 2014, 41,4 million tourists visited Turkey and spent 34,3 billion USD and the average yield per tourist is around 828 USD. Last decade these numbers are just 16,3 million tourist, 13,8 billion USD and the 850 USD.

The year 2003 and 2014 the number of tourism revenue increase around 249%, the number of tourist increase around 253% and the average yield per tourist less around 3%.

Table 1. Turkish Tourism Revenue, Number or Tourist and Average Yield 2003-2014

YEARS	TOURISM REVENUE (1000 $)	NUMBER OF TOURISTS	AVERAGE REVENUE ($)
2003	13 854 866	16 302 053	850
2004	17 076 606	20 262 640	843
2005	20 322 112	24 124 501	842
2006	18 593 951	23 148 669	803
2007	20 942 500	27 214 988	770
2008	25 415 067	30 979 979	820
2009	25 064 482	32 006 149	783
2010	24 930 997	33 027 943	755
2011	28 115 692	36 151 328	778
2012	29 007 003	36 463 921	795
2013	32 310 424	39 226 226	824
2014	34.305.904	41 415 070	828

Source: http://www.tursab.org.tr

In 2014 the half of the total tourist number from Europe. Europe is the biggest tourism market in the world each year hundred millions of European tourist visit the world. Because of cheap prices, geographic advantages (3-4 hours by air) and quality service facilities Turkey is still popular in European Tourism market. Commonwealth of Independent

States (CIS) countries Russia, Ukraine etc. is important market for Turkish tourism industry. 17% total tourist visited Turkey from CIS countries. CIS tourists prefer Turkey because of free Visa, cheap and quality service and geographic advantages 2-4 hours by air. From Asia 15% mostly for culture tourism, from continental America 3% and Africa 2%. The regions percentages are the almost same last 3 years.

Table 2. Regions of Tourists Visited in Turkey 2012-2014

Regions	2012	%	2013	%	2014	%
European Union	16.956.795	53,35	17.432.370	49,94	18.099.117	49,13
Total Europe	18.230.104	57,36	18.778.272	53,79	19.443.455	52,78
Commonwealth of Independent States (CIS)	5.061.869	15,93	5.933.143	17,00	6.258.188	16,99
Asia	3.839.852	12,08	4.830.935	13,84	5.708.656	15,50
North and South America	956.785	3,01	1.031.517	2,95	1.012.531	2,75
Africa	713.399	2,24	807.484	2,31	888.107	2,41
Total	31.782.832	100,00	34.910.098	100,00	36.837.900	100,00

Source: http://www.tursab.org.tr

3- SWOT Analysis Of Turkey Tourism Industry

Strengths:

- Cheap workforce: Turkish minimum base rate is around 350 USD in 2015. This rate is 743 in Greece, 1500 in France. Low base rate is competitive workforce for tourism industry.
- Rich of History: Land of Turkey is full of history from Troy to Roman, from Urartu’s to Hittites. Anatolia is one the oldest living place for human and it gives competitive advantage for the industry.
- Nature: Turkey is one the most touristic place from sea you can go for skiing or mountain to river.

- Hotel: The age of the hotels is new to compare competitors.
- Strong airline fleet: Turkish charter and major airline fleet is one the biggest in Europe. And it give advantage for tour operators and other countries charter airlines to the industry.
- Well educated workforce: Turkey population around 75 million and mostly young. This young and well educated workforce hell to improve service quality of the industry.
- Close to market: almost 70% of tourist coming from 3-4 hours fly to Turkey. It positive effects both ticket of price and time left for free for tourist.
- Strong brand: Turkish brand is getting well known many countries for rest and holiday. It gives better price for tours and individual holidays.
- People: residents of Turkey know that tourism is important for them and make good communication for tourist.
- Cheap: Shopping in Turkey especially clothes, jewelry, carpets, towels, etc. cheap for tourist, it is also positive effect for the industry.

Weakness:

- Geography: The location is Turkey is near unsteady regions, south of the country the neighbors are Iran, Iraq and Syria which last almost last two decades some kind of conflicted still have.
- Average yield: The average yield per tourist not growth but down even inflation and all goods price is up last decade. It means you discount every year or work for just work.
- Transportation facilities: Between tourists place no air nor good highway systems in Turkey. It effects negative for tourist transportation. For example, if a tourist want to visit Cappadocia from Antalya no direct flight, it must go 7-8 hours by bus one way and return again same day.
- Share of Packed tour: Most of the tourist visiting Turkey coming with all-inclusive tours, and not to go out from hotel. It effects negative for yields and small enterprises around the hotels.
- No planning: There is no tourism planning, some popular points like Bodrum, Antalya, etc. full of tourist investments but 20-30 km away just villages. Or much more building effects negative tourist and not to visit again.

- Tourism season: Turkey tourism season start last of May and finish end of September. After most of the hotels closed until next year. This 5 mouths tourism season must be longer alternative tourist attractive like conferences or spas or others.
- Disharmony between 5 star hotels and arounds: because of unplanned extension of touristic areas, near 5 stars hotels slummy places and it impact negative tourist.

Opportunities:

- THY : Turkish Airlines one the biggest in Europe has expansion fleet from 100 to 350 and getting bigger day by day. It is hub Istanbul is not enough, and make 3th airport which is one of the greatest in the world has positive effect Turkey tourism industry. THY is the airline which has the most extensive route network in the world.
- Alternative tourism: most of the tourist visit Turkey for sun and sea. But Turkey has great historical places, spas, conference hall, etc. tourism can diversify and also can join others cities for tourism.
- Diversify regions: Almost 70% of tourist from EU or CIS countries. Tourism from Asia or America can be stimulate.
- Building new airports: New Istanbul airport has positive effect for Turkish tourism industry because many airline cannot make operation to Istanbul because of lack of slots.
- Tourism should improve other regions of Turkey: Istanbul, Antalya and Muğla tourism rate is around 80%. Other regions like Bursa, Trabzon, Mardin, Gaziantep, Şanlıurfa, etc. can be promoted.

Threats:

- Any time can war in Middle East: Nature of the region any time any war or conflict can arise.
- Terrorist attacks: Because of the nature of region terrorist attacks can hit the country in 2015 2 big attacked made and many people deaths and injured.
- New destinations in Mediterranean cost: New destinations in Mediterranean region like Croatia or Montenegro can be attractive for tourist.
- EU politics for tourism: EU promote tourism in the countries of EU and it can impact negative Turkish tourism industry.

Strengths	Weakness
- Cheap workforce - Rich of History - Nature - New Hotels etc. - Strong airline fleet - Well educated workforce - Close to the market - Strong brand - People know how tourism is important - Cheap for shopping (gold, clothes etc.)	- Geography - Average yield per tourist is less - Bad transportation facilities between touristic places - Packed tour share is much - Expansion without planning - 5 mouths tourism - disparity of local life and high quality hotels
Opportunities - THY new big hub Istanbul - Alternative tourism opportunities - Can increase USA, Asia and Africa market - Building new airports - Tourism should improve other regions of Turkey	**Threats** - Any time can war in Middle East - Terrorist attacks - New destinations in Mediterranean cost - EU politics for tourism

4- UNESCO World Heritage List Turkey

Cultural (15)

- Archaeological Site of Ani (2016)
- Aphrodisias(2017)
- Archaeological Site of Troy (1998)
- Bursa and Cumalıkızık: theBirth of theOttomanEmpire (2014)
- City of Safranbolu (1994)
- Diyarbakır FortressandHevselGardensCulturalLandscape (2015)
- Ephesus (2015)
- Great MosqueandHospital of Divriği (1985)
- Hattusha: theHittiteCapital (1986)
- Historic Areas of Istanbul (1985)
- Nemrut Dağ (1987)
- Neolithic Site of Çatalhöyük (2012)
- Pergamonandits Multi-LayeredCulturalLandscape (2014)
- Selimiye MosqueanditsSocialComplex (2011)

- Xanthos-Letoon (1988)

Mixed (2)

- Göreme National Park andtheRockSites of Cappadocia (1985)
- Hierapolis-Pamukkale (1988)

Tentative List (71 properties**)**

Aizanoi Antique City	13/04/2012	
Akdamar Church	13/04/2015	
Alahan Monastery	25/02/2000	
Alanya	25/02/2000	
Anatolian Seljuks Madrasahs	15/04/2014	
Ancient Cities of Lycian Civilization	06/02/2009	
Ancient City of Anazarbos	15/04/2014	
Ancient City of Kaunos	15/04/2014	
Ancient city of Kibyra	13/04/2016	
Ancient City of Korykos	15/04/2014	
Ancient City of Stratonikeia	13/04/2015	
Archaeological Site of Arslantepe	15/04/2014	
Archaeological Site of Assos	15/04/2017	
Archaeological Site of Kültepe-Kanesh	15/04/2014	
Archaeological site of Laodikeia	15/04/2013	
Archaeological Site of Perge	06/02/2009	
Archaeological Site of Sagalassos	06/02/2009	
Archeological Site of Zeugma	13/04/2012	
Ayvalık Industrial Landscape	15/04/2017	
Çanakkale (Dardanelles) and Gelibolu (Gallipoli) Battles Zones in the First World War	15/04/2014	
Eflatun Pinar: The Hittite Spring Sanctuary	15/04/2014	
Eshab-ı Kehf Kulliye (Islamic-Ottoman Social Complex)	13/04/2015	
Esrefoglu Mosque	15/04/2011	

Gordion	13/04/2012	
Güllük Dagi-Termessos National Park	25/02/2000	N
Haci Bayram Mosque and its Surrounding Area (the Haci Bayram District)	13/04/2016	
Haci Bektas Veli Complex	13/04/2012	
Harran and Sanliurfa	25/02/2000	
Hatay, St. Pierre Church	15/04/2011	
Historic Guild Town of Mudurnu	13/04/2015	
Historic Town of Birgi	13/04/2012	
Historical Monuments of Niğde	13/04/2012	
Ishak Pasha Palace	25/02/2000	
Ismail Fakirullah Tomb and its Light Refraction Mechanism	13/04/2015	
Ivriz Cultural Landscape	15/04/2017	
İznik	15/04/2014	
Karain Cave	01/02/1994	
Kekova	25/02/2000	N
Kızılırmak Delta Wetland and Bird Sanctuary	13/04/2016	
Konya-A capital of Seljuk Civilization	25/02/2000	
Lake Tuz Special Environmental Protection Area (SEPA)	15/04/2013	
Mahmut Bey Mosque	15/04/2014	
Mamure Castle	13/04/2012	
Mardin Cultural Landscape	25/02/2000	
Mausoleum and Sacred area of Hecatomnus	13/04/2012	
Medieval City of Beçin	13/04/2012	
Mount Harşena and the Rrock-tombs of the Pontic Kings	13/04/2015	N
Mountainous Phrygia	13/04/2015	
Nuruosmaniye Complex	13/04/2016	
Odunpazari Historical Urban Site	13/04/2012	

Seljuk Caravanserais on the route from Denizli to Dogubeyazit	25/02/2000	
Sivrihisar Great Mosque	13/04/2016	
St. Nicholas Church	25/02/2000	
St.Paul Church, St.Paul's Well and surrounding historic quarters	25/02/2000	
Sultan Bayezid II Complex: A Center of Medical Treatment	13/04/2016	
Sümela Monastery (The Monastery of Virgin Mary)	25/02/2000	
The Ancient City of Sardis and the Lydian Tumuli of Bin Tepe	15/04/2013	
The Archaeological Site of Göbeklitepe	15/04/2011	
The Bodrum Castle	13/04/2016	
The Bridge of Uzunköprü	13/04/2015	
The Malabadi Bridge	13/04/2016	
The Theatre and Aqueducts of the Ancient City of Aspendos	13/04/2015	
The Tombstones of Ahlat the Urartian and Ottoman citadel	25/02/2000	
Tomb of Ahi Evran	15/04/2014	
Trading Posts and Fortifications on Genoese Trade Routes from the Mediterranean to the Black Sea	15/04/2013	
Tushpa/Van Fortress, the Mound and the Old City of Van	13/04/2016	
Vespasianus Titus Tunnel	15/04/2014	
Yesemek Quarry and Sculpture Workshop	13/04/2012	
Yıldız Palace Complex	13/04/2015	
Yivli Minaret Mosque	13/04/2016	
Zeynel Abidin Mosque Complex and Mor Yakup (Saint Jacob) Church	15/04/2014	

"Bulgaria – Discover and Share"

BULGARIA

With a size of 111 000 sq. km and a population of 7 mln inhabitants, Bulgaria is a medium sized European country. Located in the Balkan peninsular it borders Romania to the North, Serbia and Macedonia to the West, Greece and Turkey to the South and the Black sea to the East.

The World Tourism Organization describes Bulgaria as one of the most appealing "new faces" in the tourism industry today, and it is true that this industry in particular has gone to riches over recent years.

The tourist industry is certainly one of the most dynamic sectors of the Bulgarian economy. The recent strategy of the Ministry of Economy, Energy and Tourism of Bulgaria includes the tourism, together with the manufacturing industry and the Small and Medium Size sector, in the group of the most competitive sectors of the Bulgarian economy. The tourist sector is important also from macroeconomic point of view. It's one of the few sectors, generating foreign trade surpluses and hence contributing to the external equilibrium of the Bulgarian economy.

The tourism industry in Bulgaria plays a critical role in the country's economy. Accession to the EU has made a positive impact on the market, due to the improved facilities and hotels, great affordability and accessibility, and increased exposure. The seaside summer resorts on the Black Sea coast and the winter mountain resorts are the main attractions. Alternative streams such as art, wine, spa-based travel, and a wide range of archaeological, historic, scenic and recreational attractions represent good potential. Building golf courses, marinas, and luxury spa facilities aims to shift a greater percentage of tourists away from low revenue package tours and into more luxurious and upscale resorts. The Bulgarian Government would like to increase off-season tourism, attracting higher spending travelers by further developing its convention and festival markets. New developments are making Bulgaria more attractive.

Bulgaria is an attractive destination for tourists. Beautiful weather, sandy beaches, delicious cuisine, homely atmosphere and many tourist attractions offered at reasonable prices attract more and more visitors from different countries. Due to huge investment in tourism, Bulgaria presently offers modern infrastructure and equipment as well as good services for tourists, which further contribute to the increasing interest in visiting this country.

Tourism has received sufficient investment in recent years and proceeds to be the most dynamic item of Bulgaria's economy that provides new workplaces as well as constant income for the State Treasury. For tourists Bulgaria is a cheap and easy-to-reach country and that is why the interest on their part is quite obvious.

1- Introduction

Bulgaria has become one of the leading tourist destinations in Europe over the last couple of years. The youth is drawn by great beaches and, not least, the possibilities of partying all night long at reasonable prices, while the grown-up segment enjoys the same beaches but also the beautiful nature and the exciting history. Bulgaria benefits from a geographical position, which allows the country to offer skiing in winter and sunbathing at the beach and exploring the nature in summer. Even though tourism at present is the strongest drive for the Bulgarian economy, the sector is facing new challenges such as attracting new segments and improving the infrastructure.

During the last couple of years, the tourism sector of Bulgaria has boomed and the potential for growth continues to be huge. Bulgaria is one of the most rapidly growing tourist destinations in Europe. Tourists have also discovered how beautiful the Black Sea Coast is, the stunning nature, and the vast cultural and historical heritage. The majority of visitors come from the UK, Germany, Russia and Scandinavia. No matter where they are from, tourists are drawn to Bulgaria by the comfortable climate and the price level that, despite EU accession, is still very low, especially compared to traditional destinations in Western Europe.

Alternative forms of tourism have also gained strength to the point that they began to enter the focus of mass tourists. Furthermore, there exists a number of tour agencies in Bulgaria that focus exclusively on organising alternative tourism trips, including cultural tourism, as well as sports like bicycling, rafting and trekking. Village tourism also grew in popularity, with organised groups of French and German tourists visiting small villages in the Bulgarian countryside.

A new trend is also the sector's refocus on local tourists, through several campaigns for attracting the attention of Bulgarians to Bulgarian resorts. Bulgarians become important. They, however, tend to travel abroad as a result of the global price drop on tourist services.

Bulgaria also begins exploration of opportunities in more untraditional holiday types. The country has a programme for development of health and wellness tourism that aims at benefiting from a large worldwide tourist segment interested in experiencing the ancient Bulgarian spa tradition. A bundant natural resources provide excellent possibilities for treatments all year round.

Also there is a market within cultural experiences as many different civilizations have put their marks on the Bulgarian landscape. Seven culturel sites are listed in the UNESCO World Heritage List. It is believed that Bulgaria has about 40,000 sites of archaeological interest, and in recent years many findings have been drawing attention. The government is therefore prioritising to support this part of the sector which means cultural tourism could hold larger share in the years to follow.

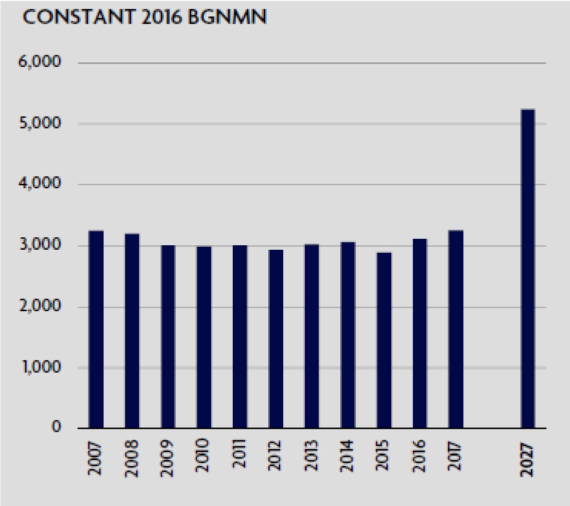
2- Tourism in the Economy

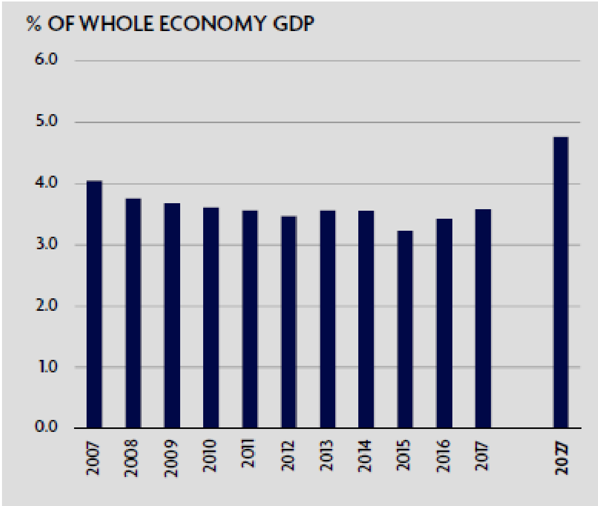
The direct contribution of Travel & Tourism to GDP in 2016 was BGN3,115.9mn (3.4% of GDP). This is forecast to rise by 4.6% to BGN3,258.7mn in 2017.

This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportationservices (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

The direct contribution of Travel & Tourism to GDP is expected to grow by 4.9% pa to BGN5,237.6mn (4.8% of GDP) by 2027.

BULGARIA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP

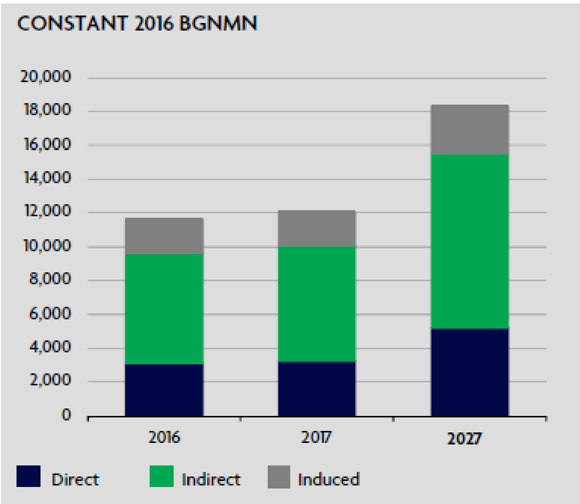


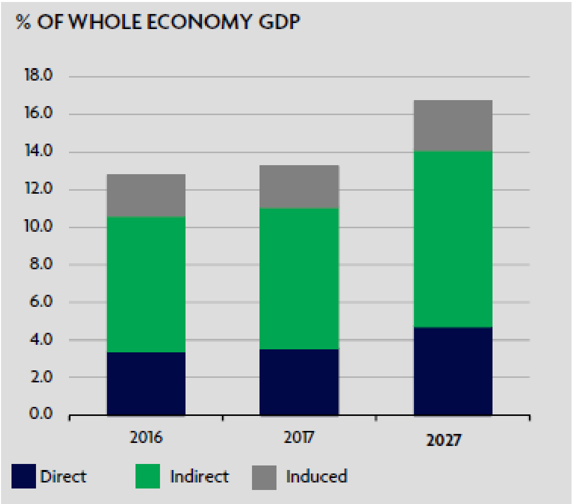


The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts) was BGN 11,617.8mn (USD6,583.7mn) in 2016 (12.8% of GDP) and is expected to grow by 3.9% to BGN 12,068.8mn (13.3% of GDP) in 2017.

It is forecast to rise by 4.3% pa to BGN 18,344.7mn (USD10,395.7mn) by 2027 (16.7% of GDP).

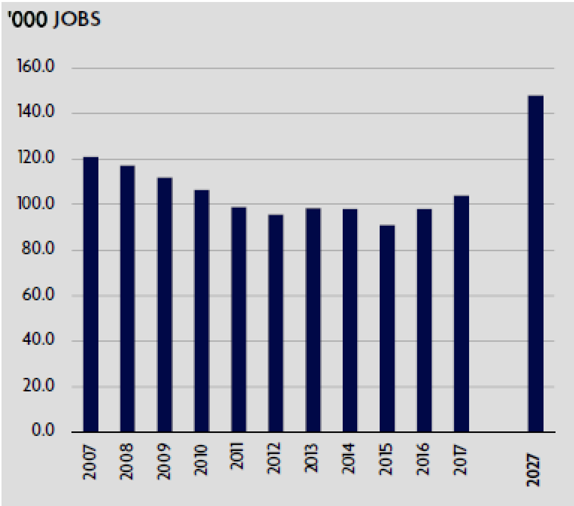
BULGARIA:TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP

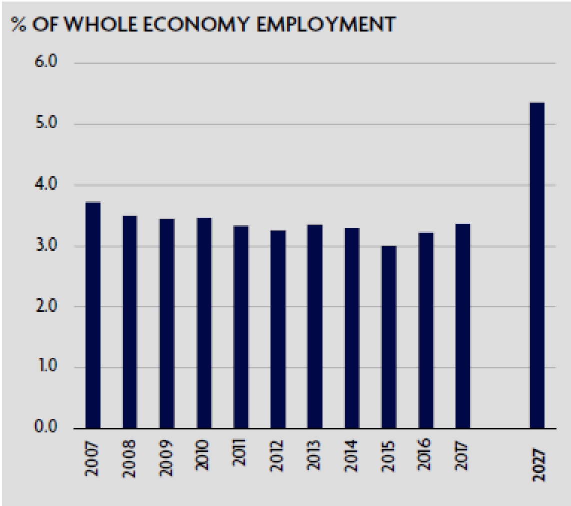




In 2016 Travel & Tourism directly supported 98,000 jobs (3.2% of total employment). This is expected to rise by 6.2% in 2017 and rise by 3.6% pa to 148,000 jobs (5.4% of total employment) in 2027.

BULGARIA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

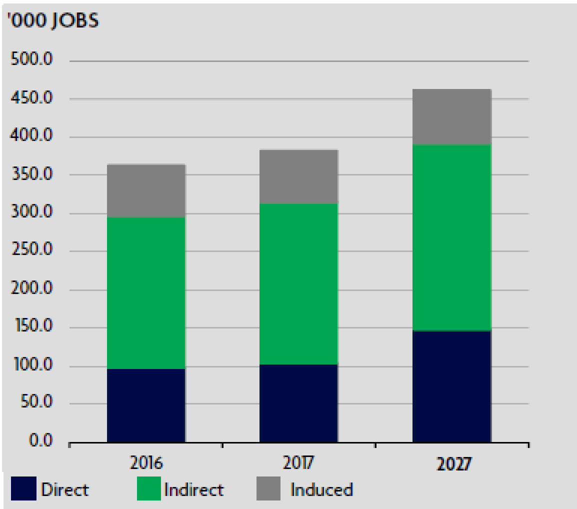


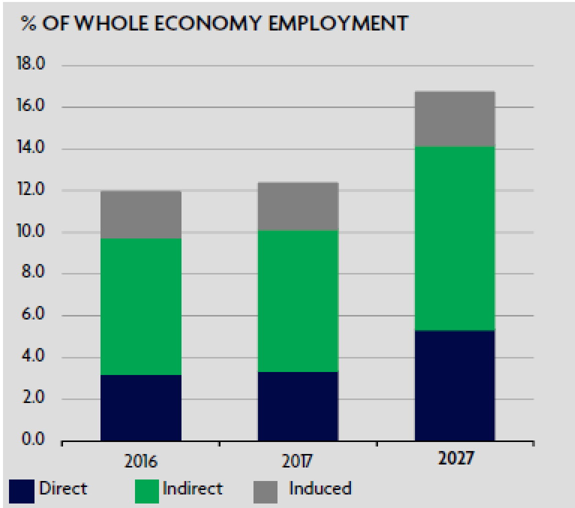


In 2016, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was 11.9% of total employment (363,000 jobs).

This is expected to rise by 5.3% in 2017 to 382,500 jobs and rise by 1.9% pa to 462,000 jobs in 2027 (16.7% of total).

BULGARIA:TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

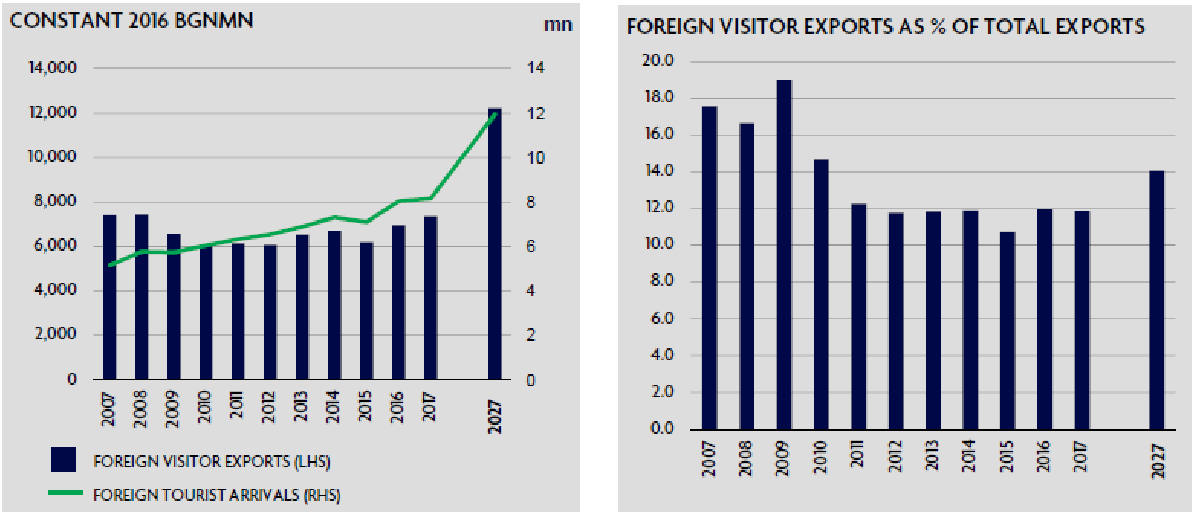




Visitor exports generated BGN6,962.0mn (USD3,945.3mn), 12.0% of total exports in 2016.

This is forecast to grow by 5.7% in 2017, and grow by 5.2% pa, from 2017-2027, to BGN12,224.1mn (USD6,927.2mn) in 2027, 14.1% of total.

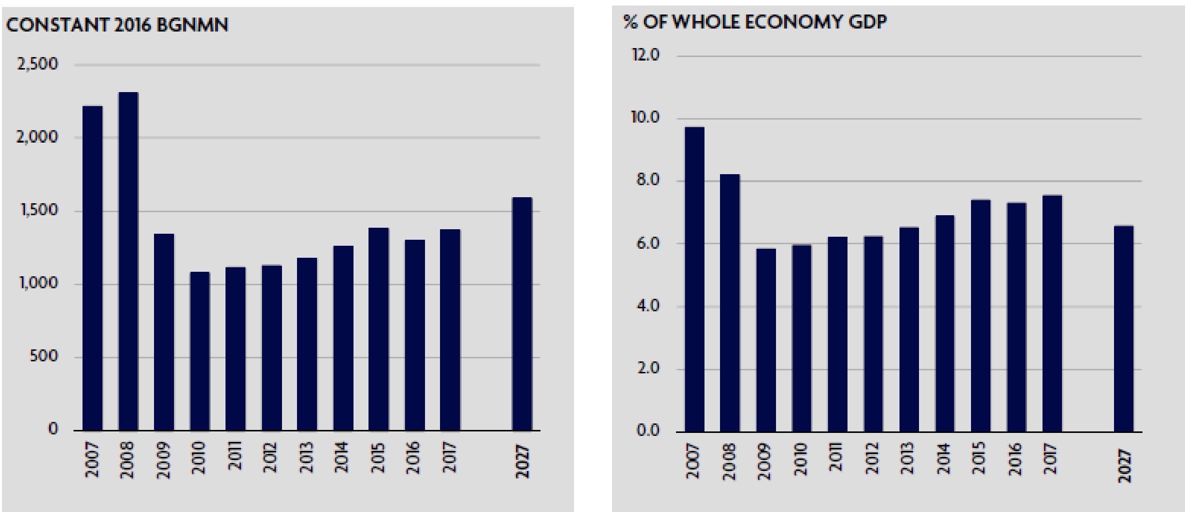
BULGARIA:VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS



Travel & Tourism investment in 2016 was BGN1,294.2mn, 7.3% of total investment (USD733.4mn).

It should rise by 5.8% in 2017, and rise by 1.5% pa over the next ten years to BGN1,586.8mn (USD899.2mn) in 2027, 6.6% of total.

BULGARIA:CAPITAL INVESTMENT IN TRAVEL & TOURISM



3- Tourism Statistics

Most of the leisure tourists came from the EU countries which had a 58 % share. It is not surprising that the major tourist generating markets were the neighbouring Romania (1.743.697 arrivals or 16,43% of all arrivals in Bulgaria for 2016) and Greece (1.157.062 arrivals or nearly 10,87%). Germany contributed to 9,45% of tourist arrivals (1.003.030), the UK generated 281.777 (2,64%). Tourists come to Bulgaria predominantly for vacation.

ARRIVALS OF VISIORS FROM ABROAD TO BULGARIA BY COUNTRY OF ORIGIN IN 2016

Country of origin	Total	Months											
		I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII
TOTAL	**10604396**	**410085**	**361908**	**395038**	**558116**	**808258**	**1354982**	**1872429**	**1917542**	**1192256**	**678576**	**524125**	**531081**
EU	**6208793**	**173642**	**143627**	**179720**	**310928**	**506286**	**831865**	**1147127**	**1165204**	**771993**	**387739**	**296650**	**294012**
Of which:													
Austria	**204489**	6619	5902	6295	9669	8424	7470	36756	54453	42516	11680	6496	8209
Belgium	**119429**	2279	2720	1947	1996	4847	9879	30518	32901	21006	6550	2904	1882
Croatia	**23464**	887	952	1900	1710	1715	3243	3128	1690	1984	3654	1108	1493
Cyprus	**22181**	564	809	468	2453	2070	584	5790	3448	2601	592	1431	1371
Czech Rep.	**219349**	2921	2730	3355	3069	6324	22742	54951	70988	37810	6589	2715	5155
Denmark	**74125**	412	655	537	1093	1620	6268	29621	22972	6614	1457	1906	970
Finland	**30332**	210	476	484	862	2786	6114	8631	5683	2670	1409	767	240
France	**195571**	4228	3385	4752	6145	8050	13929	54423	45335	36215	6652	7418	5039
Germany	**1003030**	11392	11125	11394	19812	50387	160162	211793	269831	181303	41159	17413	17259
Greece	**1157062**	87297	29145	48147	75436	102959	177909	117253	138113	97151	98582	90970	94100
Hungary	**118805**	1345	1904	2834	3965	7260	12100	28152	35492	16944	4003	2435	2371
Ireland	**25388**	104	845	1234	895	2133	3316	7723	4827	2191	907	651	562
Italy	**152078**	8031	6053	6308	10688	12319	14652	22639	19890	19134	15687	8949	7728
Malta	**4868**	249	647	410	476	345	389	559	478	500	118	238	459
Netherlands	**147882**	1353	2833	1541	3674	4456	9115	57085	37676	18308	4694	3739	3408
Poland	**388833**	3903	2330	4685	8463	9853	40039	102272	126199	58841	21442	5313	5493
Portugal	**11817**	64	387	654	757	484	729	4134	1550	1623	606	460	369
Romania	**1743697**	26056	47491	65319	137395	238427	271705	247050	188002	145836	134611	120768	121037
Slovakia	**78167**	907	804	943	2679	3181	5970	29791	18426	8061	3728	2327	1350
Slovenia	**22591**	492	596	991	1612	1782	2512	4613	4773	2463	1257	768	732
Spain	**63497**	1819	2614	2427	4103	2472	4257	11753	7971	12655	4112	6207	3107
Sweden	**48066**	740	792	1265	1121	3623	5646	17056	8704	4611	1793	1310	1405
United Kingdom	**281777**	11346	17566	10800	10554	23779	41189	42313	51141	39753	14813	9485	9038
Other countries from EU	**72295**	424	866	1030	2301	6990	11946	19123	14661	11203	1644	872	1235
Other European countries	**3378927**	**198060**	**178137**	**172479**	**191979**	**232626**	**382354**	**547795**	**564811**	**315577**	**224720**	**179466**	**190923**
FYROM	**562365**	63339	45214	42270	45385	38675	37072	50216	51454	43152	57380	43768	44440
Norway	**46899**	125	366	454	747	2192	11591	17074	10488	2343	776	364	379
Russian Fed.	**589844**	10023	8830	7704	10710	31272	137113	160811	138380	60704	9476	5714	9107
Serbia	**490668**	30999	41822	33028	37169	38927	40899	54298	58068	41764	39172	35795	38727

Switzerland	**34042**	1041	730	774	2248	1444	5937	8712	5196	3597	2453	906	1004
Turkey	**1312895**	81391	71754	76350	81076	100711	91426	187160	232362	129789	97477	79855	83544
Ukraine	**342214**	11142	9421	11899	14644	19405	58316	69524	68863	34228	17986	13064	13722
Other countries	**298718**	**9736**	**12017**	**12373**	**17169**	**24216**	**39666**	**53877**	**52454**	**33229**	**21481**	**11206**	**11294**
Canada	**17395**	510	414	650	1058	1767	2532	3104	2764	2238	1269	617	472
Israel	**183846**	6312	8295	7594	9270	11892	22044	36380	37193	21031	11246	5627	6962
Japan	**15012**	313	395	670	920	2007	3094	1699	1610	1356	1729	750	469
USA	**82465**	2601	2913	3459	5921	8550	11996	12694	10887	8604	7237	4212	3391
Rest of the world	**717958**	**28647**	**28127**	**30466**	**38040**	**45130**	**101097**	**123630**	**135073**	**71457**	**44636**	**36803**	**34852**

In 2016 Bulgaria received 10.604.396 visitors, 5.117.472 of which (48,25 %) came for holiday and recreation, 1.421.109 (13,40 %) - business travellers, and the rest 4.065.815 (38,33 %) came for other purposes - they were transit travellers, visiting friends and relatives or with other motivations.

ARRIVALS OF VISITORS FROM ABROAD TO BULGARIA BY PURPOSE OF VISIT IN 2016

		Purpose of visit		
Months	**Total**	**Holiday and recreation**	**Profesional**	**Others**
1	410085	191497	60760	157828
2	361908	161120	65314	135474
3	395038	152871	75399	166768
4	558116	238645	112010	207461
5	808258	303381	121524	383353
6	1354982	705571	214062	435349
7	1872429	1091130	121024	660275
8	1917542	1105911	139529	672102
9	1192256	572625	184141	435490
10	678576	242439	118544	317593
11	524125	166073	108164	249888
12	531081	186209	100638	244234
TOTAL	**10604396**	**5117472**	**1421109**	**4065815**

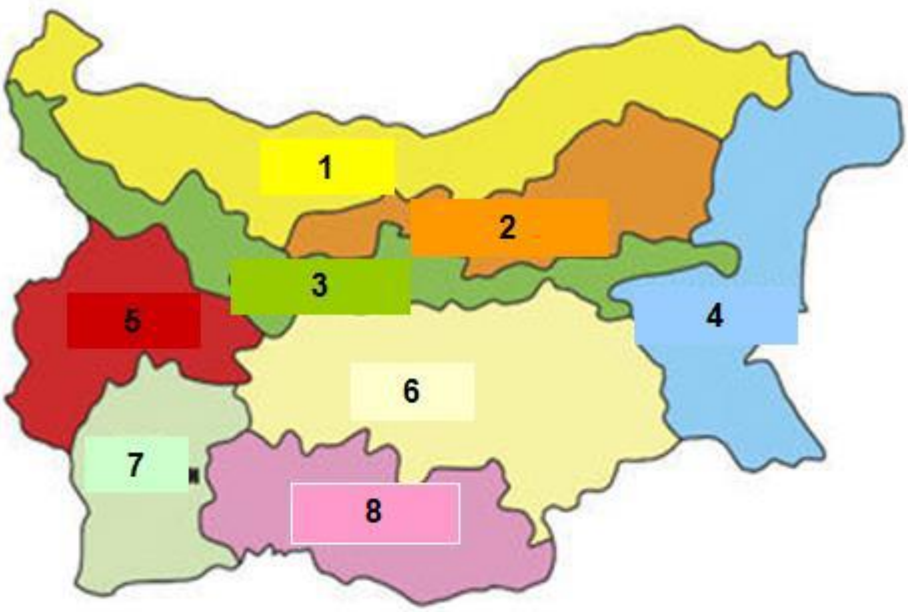
In 2016, Bulgaria boasts 3331 accommodation establishments (hotels, motels, resorts, chalets) with total 328.264 beds. The bed capacity is concentrated predominantly on the Black sea coast and the capital city Sofia. In 2016 Bourgas comprised 38.71 % of the total bed numbers in accommodation establishments. The category structure of the accommodations is nearly equally distributed among 1-2 stars, 3 stars and 4-5 stars. In 2016, there were 1899 establishments with 101.594 beds categorised as 1-2 stars (or 30.95 % of the total number of beds), 1022 3-star establishments with 92.688 beds (28.24 %), 410 4-star and 5-star hotels with 133.982 beds (40.82 %).

Statistical zones Statistical regions Districts	Accommodation establishments - number	Bed-places - number	Available bed-nights - number	Nights spent - number		Arrivals in accommodation establishments - number		Revenues from nights spent-levs	
				Total	Of which: by foreigners	Total	Of which: foreigners	Total	Of which: by foreigners
Total	**3331**	**328264**	**65169474**	**25185996**	**16150666**	**7196397**	**3386932**	**1229073306**	**891829042**
North and South-East Bulgaria	**2074**	**254714**	**42993155**	**18686579**	**13593509**	**4112581**	**2274753**	**901988375**	**721732861**
North-West region	**200**	**8843**	**2835164**	**548076**	**61597**	**302076**	**29380**	**19106358**	**2943297**
Vidin	33	904	277103	51090	11925	38704	7960	1967913	491009
Vratsa	28	936	318977	95703	17992	39467	5571	2492763	718313
Lovech	86	4519	1388835	256549	11480	147087	6337	9213643	541191
Montana	27	1199	421479	63772	5266	30582	2552	1886000	254419
Pleven	26	1285	428770	80962	14934	46236	6960	3546039	938365
North Central region	**257**	**12084**	**3942327**	**757047**	**144400**	**448634**	**87248**	**28123404**	**7595567**
Veliko Tarnovo	114	5297	1788454	320395	65652	195504	45730	11951463	3409381
Gabrovo	66	3516	1151631	218128	21441	117198	10553	6235220	933468
Razgrad	16	866	201140	41863	5302	25116	2793	1377047	205954
Ruse	44	1801	618492	145759	45691	89491	24301	7307377	2751660
Silistra	17	604	182610	30902	6314	21325	3871	1252297	295104
North-East region	**663**	**98696**	**17213246**	**7617426**	**6056321**	**1577437**	**1036651**	**391119500**	**329022857**
Varna	415	67561	12408209	5536090	4542446	1109311	773075	282540236	246443663
Dobrich	164	28422	3937756	1955934	1490141	392893	252888	104276674	81520299
Targovishte	22	934	303489	48546	10579	26769	3912	1725221	484928
Shumen	62	1779	563792	76856	13155	48464	6776	2577369	573967
South-East region	**954**	**135091**	**19002418**	**9764030**	**7331191**	**1784434**	**1121474**	**463639113**	**382171140**
Burgas	804	127076	16779661	9261486	7246331	1579150	1088150	444434233	377056873
Sliven	69	2264	684909	84259	14537	48850	6769	3162150	822332
Stara Zagora	58	4692	1285155	367388	57124	134272	22805	14074219	3659567
Yambol	23	1059	252693	50897	13199	22162	3750	1968511	632368
South-West and South Central Bulgaria	**1257**	**73550**	**22176319**	**6499417**	**2557157**	**3083816**	**1112179**	**327084931**	**170096181**
South-West region	**634**	**44327**	**13175191**	**4041675**	**2039840**	**1973893**	**921087**	**226315252**	**142766582**
Blagoevgrad	289	19350	4991772	1353443	596452	553468	193065	62836702	31552116
Kyustendil	78	3342	1073565	158764	22943	92149	12872	5120319	1046812
Pernik	17	757	219123	32892	6569	18041	3193	748981	249570
Sofia	125	8968	2671003	712582	240881	284963	62420	27151601	10510370
Sofia cap.	125	11910	4219728	1783994	1172995	1025272	649537	130457649	99407714
South Central region	**623**	**29223**	**9001128**	**2457742**	**517317**	**1109923**	**191092**	**100769679**	**27329599**
Kardzhali	36	1163	352696	82897	15090	54486	9325	2611229	634428
Pazardzhik	60	4427	1471798	604884	56425	238800	15005	28702862	3824380
Plovdiv	192	9588	3220304	1009478	306172	487449	118021	43601276	16702031
Smolyan	295	12457	3467921	648281	111520	264975	30706	21705588	4924861
Haskovo	40	1588	488409	112202	28110	64213	18035	4148724	1243899
[1]In use									

[2] Since January 2012 the survey is carried out monthly in compliance with the Regulation 692/2011 of the European Parliament and of the Council concerning European statistics on tourism.

4- Tourist regions (destinations) in Bulgaria

1. Danube region
2. Ancient Bulgarian capitals region
3. Balkan ridge region
4. Black sea coast region
5. Sofia region
6. Thrace region
7. Rila-Pirin region
8. Rhodopes region



The main products that currently attract tourists are:

- Sea/Sun/Sand – in Sunny beach, Nessebar, Obzor, Sozopol to the South and Golden Sands, Albena, St. Constantine and Helena resort, Riviera, Kavarna, Balchik to the North Black sea coast.
- Winter Ski– in Pamporovo, Chepelare, Bansko, Razlog, Dobrinishte, Borovets.
- Eco/ Rural – in the mountain areas like Rhodopes, Pirin, Rila, Stara planina.
- Cultural – in the capital Sofia, the large cities like Varna, Bourgas, Plovdiv, Rousse, but also historical places like Veliko Tarnovo, Pliska, Preslav, Vidin, Koprivshtitsa, Karlovo, Kalofer, Panagyurishte, Batak etc.
- Gambling – in Sofia and the seaside and mountain resorts.

- Balneology, Spa and Wellness – Kyustendil, Hissarya, Banya, Narechen, Mihalkovo, Velingrad, Varshets, etc.
- MICE tourism– Sofia, Plovdiv, Varna.
- Cruise – Varna and Nessebar are popular ports of visit.

New forms of tourism are emerging in Bulgaria. Among them one may cite wine tourism, golf tourism and communist heritage tourism.

5- SWOT analysis of Bulgaria as a tourist destination:

Strengths

- Government investment in the industry is relatively high.
- Well-developed summer and winter holiday resorts
- Rich and diverse natural and cultural heritage
- Nine entries in the UNESCO World Heritage List
- Relatively high quality of the tourist superstructure
- Price competitiveness of the destination
- Political stability
- EU membership (since 1st January 2007)
- Geographical proximity to traditional tourist generating countries

Weaknesses

- Regional rivals such as Greece and Turkey better established as destinations.
- Unrestrained hotel construction activity has damaged the natural environment and put a strain on the country’s electricity supply.
- Collapse of Alma Tour1 in September 2011 could damage consumer confidence.
- Poor infrastructure
- Unfinished highways
- Concentration of tourism supply and demand on the Black coast, few ski resorts and the capital Sofia
- Regular international flights to only 3 airports
- Overconstruction in resorts
- Outdated tourism legislation
- Poor destination management on national and regional level
- Lack of regional planning

- Lack of financial incentives for tourism
- Dependence on foreign mass tour operators
- Lack of social tourism

Opportunities

- The low cost of land and lack of luxury accommodation is a good investment environment for international hoteliers.
- Spa tourism could become a key growth area, particularly for the Russian market.
- Meetings, incentives, conferences and exhibitions tourism could be another growth area.
- Availability of EU funds for tourism and infrastructural development
- Increasing demand for special interest tourism in main tourist generating countries
- International hotel chains entry to the destination
- Cross-border collaboration between Bulgaria, Greece and Romania in field of tourism
- EU entry of West Balkans countries
- Increased social status and quality of tourism education in Bulgaria
- Increasing welfare of CEE countries

Threats

- A shortage of skilled workers in the tourism sector.
- Underdeveloped infrastructure.
- Global economic crisis
- Competition from other Balkan and Mediterranean countries
- Strict Shengen visa restrictions for some generating markets – Macedonia, Serbia, Russia, Ukraine, Belarus
- Negative natural growth of population in Bulgaria
- Political instability of the Balkan peninsula

6- Tourism Organization and Governance in Bulgaria

The National Tourist Council (NTC) is a governmental consultative body under the authority of the Minister of Tourism. It aims to assist in the implementation of the national tourism policy.

The members of the National Tourist Council are representatives of the tourism-related ministries and institutions, national, regional, local and branch tourist associations, associations of air, land and water carriers, nationally represented associations of the consumers in the Republic of Bulgaria. The consultative tasks and activities of the NTC are as follows:

- To approve the national funding support for tourism marketing including the annual program for national tourist advertisement;
- Coordinating the implementation of the national tourist advertisement;
- Analysis of the implemented promotional activities and appraisement of the efficacy of tourist seasons;
- Making recommendations on designed concepts and programmes for tourism development, as well as proposing measures for improving the control in tourism sector with respect to raising the overall quality of the whole range of tourist services in Bulgaria;
- Giving opinion on draft regulations with regard to provision of tourist activities;
- Discussing the issues related to tourist infrastructure, foreign investments in tourism, fulfillment of charter programmes, consumer protection.

Major national tourist associations in Bulgaria Name	**Year of establishment**	**Members**
Bulgarian Association of Tourist Agencies (BATA)	1992	- tour operators (TOs); - travel agencies (TAs); - others (associated members)
Bulgarian Association of Tour operators and Travel agencies (ABTTA)	1996	- TOs and TAs
Bulgarian Tourist Chamber (BTC)	1990	- destination organisations and tourist councils; - hotels; - restaurants; - TOs and TAs
Bulgarian Hotel and Restaurant Association (BHRA)	1993	- hotels; - restaurants; - others (associated members)
Bulgarian Association for Alternative Tourism (BAAT)	1998	- national and regional tourist councils; - natural parks; - TOs;

		- hotels, guesthouses; - individuals
Bulgarian Union of Balneology and Spa Tourism (BUBST)	not avail.	- hotels; - TOs and TAs; - others
Bulgarian Association of Rural and Eco tourism (BARET)	1995	- regional and local councils; - natural parks; - nongovernmental organisation; - different tourism businesses
Association of Bulgarian Guides (ABG)	2002	- travel guides
National Hotel Management Club (NHMC)	2003	- owners and general managers of hotels and restaurants
Bulgarian Convention and Visitors Bureau (BCVB)	2004	- hotels; - convention and congress centres

7- UNESCO World Heritage List Bulgaria

Cultural (7)

- Ancient City of Nessebar (1983)
- Boyana Church (1979)
- Madara Rider (1979)
- Rila Monastery (1983)
- Rock-Hewn Churches of Ivanovo (1979)
- Thracian Tomb of Kazanlak (1979)
- Thracian Tomb of Sveshtari (1985)

Natural (3)

- Pirin National Park (1983)
- Primeval Beech Forests of the Carpathians and OtherRegions of Europe (2017)
- Srebarna Nature Reserve (1983)

Bulgaria Unesco Tentative Lists

- Central Balkan National Park (10/10/2011)

- Extension to theJoint World Heritage Property “Primeval Beechforests of the Carpathians (Slovak Republic and Ukraine) and the Ancient Beechforests of Germany (Germany)” (27/01/2015)
- Frontiers of the Roman Empire –The Danube Limes in Bulgaria (01/04/2016)
- Pobiti Kamani Natural Monument (10/10/2011)
- Rocks of Belogradchik (10/10/2011)
- The Ancient Plovdiv (14/09/2004)
- The ancient town of Nicopolis ad Istrum (01/10/1984)
- The Bachkovo Monastery (01/10/1984)
- Thelate ancient tomb of Silistra (01/10/1984)
- The Magouracave with drawings from the bronz eage (01/10/1984)
- The Roussensky Lom National Park (01/10/1984)
- The royal necropolis of the Thracian city of Seuthopolis – a serial site, extension of the Kazanlak Thracian tomb (26/02/2016)
- Thetown of Melnikand the Rozhen Monastery (01/10/1984)
- Thracian Tomb with Wall Paintings beside Alexandrovo village (14/09/2004)
- Two neolithic dwellings with their interior and household furnishings and utensils completely preserved (01/10/1984)
- Vratsa Karst Nature Reserve (10/10/2011)

BURGAS REGION

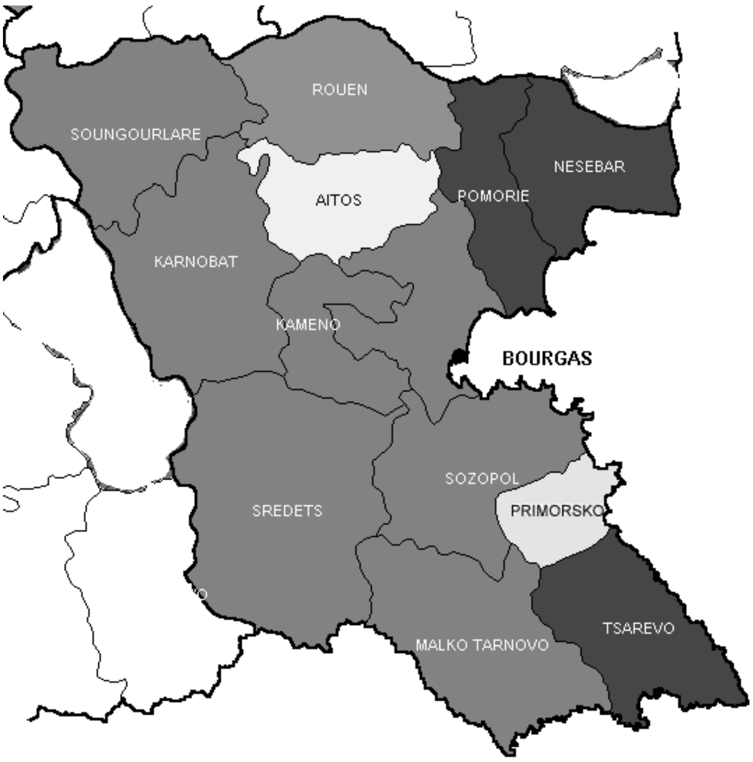
The region of Burgas is not only said to be a “crossroads of ancient civilizations” because of its invaluable archeological finds and rich cultural and historical background, but it is also unique for its tourist present. It is one of the leading regions in economic development in Bulgaria, and the main industry responsible for its prosperity is precisely tourism.

The region features beautiful beaches, easily accessible mountains with unique flora and fauna and one-of-a-kind historical monuments, traditions and customs.

Quick facts about District Bourgas

In Bulgarian (Native transliteraion): Област Бургас
Other transliteration(s): Burgas, Bourgass
Region: South-Eastern planing region of Bulgaria
District: Bourgas district
Area Size: 7747 km2
Population: 412.684 (31.12.2016)

http://www.nsi.bg/en/content/6704/population-districts-municipalities-place-residence-



http://www.guide-bulgaria.com/se/bourgas

31.12.2016 Population

Burgas	**412684**
Aytos	28242
Burgas	209331
Kameno	10071
Karnobat	23830
Malko Tarnovo	3460
Nesebar	27273
Pomorie	27399
Primorsko	6234
Ruen	28170
Sozopol	12738
Sredets	14842
Sungurlare	11759
Tsarevo	9335

1- Location:

Burgas region is one of the biggest ones in Bulgaria - with square surface of about 7.750 sq.km and around 413.000 people populations. There are thirteen municipalities within Burgas region- Aytos, Burgas, Kameno, Karnobat, Malko Tarnova, Nesebar, Pomorie, Primorsko, Ruen, Sozopol, Sredets, Sungurlare, Tsarevo.

Burgas region differs from the other regions in Bulgaria with its location on the Black sea coast. The geography situation of Burgas region provides an opportunity for developing of tourism. The main tourists' season is during the summer period.

2- Marine Tourism:

The territory of Burgas are the most famous Bulgarian sea resorts - Sunny Beach, Primorsko, Ahtopol, St. Vlas and others. They offer luxury, comfort and excellent conditions for water sports.

Nesebar is one of the most popular sea resorts for vacation. It combines wonderful opportunities for sea tourism, rich cultural heritage.

The old town was declared a cultural monument of world significance in the protection of UNESCO. With such a historic charm is surrounded another old resort town as well - Sozopol.

Sandy beaches in Nesebar, Sozopol and river Ropotamo are spacious with large-grained sand and dunes. There are 5 small islands in this part of the coast- St. Anastasia, St. John, "" Snake Island "," St. Peter and St. Kirik.

There are thermal mineral springs in the region with varied temperature and chemical composition which are important for sea tourism and spa. Northwest of Burgas is one of the oldest mineral springs in Bulgaria- Burgas Mineral Baths, where springs of water at 41.5 degrees. There are salt production In Atanasovo and Pomorie lakes, and at the bottom parts near Burgas as well has rich deposits of mud.

3- Cultural and historical heritage:

Burgas region is endowed with rich cultural heritage. During the period of antiquity to develop four major economic, political and cultural centers along the coast - Messembria (Nesebar) Anhialo (Nurses) Debelt and Apollonia (Sozopol). Today it is one of the most picturesque and well preserved historical places in Bulgaria.

4- Natural Resources:

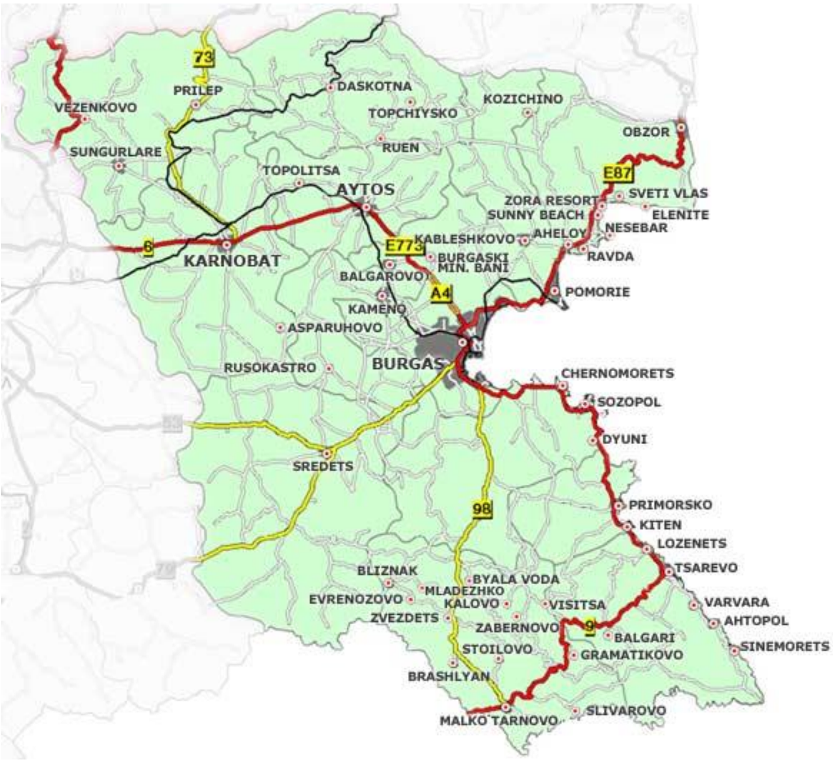
It has a spa and bioclimatic resources, forest resources, sandy beaches and dunes for development of recreational activities. Here are 4 nature reserves of international importance - Uzunbodzhak, Silkosia, Ropotamo and Atanasovsko lake. Among the attractions is a natural bay Alepu. Protected areas are defined estuary Veleka Vaya lake floor and which are points of bird watching. In architectural reserve situated in the village of Ivy and folklore reserve - Bulgari village. The place is interesting and remains of an ancient Roman settlement.

20 km north of Burgas is situated Pomorie lake which is surrounded by salt water- and sanatoriums. Atanasovo lake is north of town. It is home to many marsh and sea birds that migrate from Gibraltar and the Bosporus. In Burgas lake does nesting pelicans, ibises and herons. 10 km south of Burgas is located Mandra lake - an ornithological reserve.

Along the river Ropotamo was created a picturesque reserve, which can be seen very interesting animal and plant species. In the area there are numerous monuments of interest - ancient church, which is located on the island of St. Anastasia, 3 nautical miles from Burgas, the fortress in the village of Pyrgos Kraimorie south of Bourgas and park Otmanli near Cape Chokalya.

5- Burgas Municipality

Burgas Municipality covers the area of 514.362 acres and is the biggest municipality in Southeastern Bulgaria. It is situated on the Black Sea Coast surrounding the largest bay area - the Bay of Burgas. To the North it borders with Pomorie Municpality, to the South – with Sozopol Municipality and to the West – with the municipalities of Aytos, Kameno and Sredets. Part of the municipal territory bordering with the Black Sea is covered by several lakes – Atanasovsko, Mandrensko and Burgasko (Vaya) that together with the Pomorie Lake make-up the biggest group of salt lakes in Bulgaria. The biodiversity in these lakes is impressive. Via Pontika – one of the main migratory routes for European migrating birds goes above them.



http://en.journey.bg/bulgaria/map.php?region=12

The total population of Burgas Municipality is 209.331 people. (31.12.2016) Burgas is important industrial, commercial, transportation and tourism centre. Some industries are characteristic for Burgas and are structural for the country like light and dark oil products manufacturing, chemical fibre, plastics and other chemical products production, ship-building, ventilation and climatic equipment, cargo carriages, fish processing.

The extended school network as well as the targeted educational policy to include all children and schoolchildren, who are subject to mandatory education, increasing the quality of education at all stages and improving the facilities are an important prerequisite for increased access to education.

Significant efforts are being focused to improve healthcare and offer innovative social services that are major factors for increasing the quality of life in the municipality. The municipality has an active policy towards development of sports and sports culture of the citizens and improvement of the physical infrastructure. Burgas Municipality is the 3 most important cultural centre in Southeastern Bulgaria with long cultural traditions in the area of music, poetry, theatre and fine arts.

Burgas is the fourth largest city in Bulgaria, situated in the south-eastern part of the country, right at the Black sea coast. The Port of Burgas is the biggest sea port in the country and the Burgas Airport is the second largest airport where most of the international flights caring tourists are landing. Despite its location on the seaside, the city is not famous as a beach resort, but more as a turning point to the southern resorts like Sunny Beach, Pomorie, Sozopol, Elenite, Dyuni, etc.

Burgas is an important industrial center in Bulgaria, and the city also invests considerable resources in tourism. What attracts people here is mostly the sea. But the municipality supports multiple art and culture venues. One of the biggest is “The spirit of Burgas” 7-days music festival attracting some of the biggest local and international musicians.

ACCOMMODATION ESTABLISHMENTS BY STASTISTICAL ZONES, STATISTICAL REGIONS AND BY DISTRICTS IN 2016 [1,2]

Statistical zones Statistical regions Districts	Accommodation establishments - number	Bed-places - number	Available bed-nights - number	Nights spent - number		Arrivals in accommodation establishments - number		Revenues from nights spent-levs	
				Total	Of which: by foreigners	Total	Of which: foreigners	Total	Of which: by foreigners
Total	**3331**	**328264**	**65169474**	**25185996**	**16150666**	**7196397**	**3386932**	**1229073306**	**891829042**
South-East region	**954**	**135091**	**19002418**	**9764030**	**7331191**	**1784434**	**1121474**	**463639113**	**382171140**
Burgas	804	127076	16779661	9261486	7246331	1579150	1088150	444434233	377056873
Sliven	69	2264	684909	84259	14537	48850	6769	3162150	822332
Stara Zagora	58	4692	1285155	367388	57124	134272	22805	14074219	3659567
Yambol	23	1059	252693	50897	13199	22162	3750	1968511	632368

ACCOMMODATION ESTABLISHMENTS BY STASTISTICAL ZONES, STATISTICAL REGIONS AND BY DISTRICTS IN JUNE 2017[1]

Statistical zones Statistical regions Districts	Accommodation establishments - number	Bed-places - number	Available bed-nights - number	Nights spent - number		Arrivals in accommodation establishments - number		Revenues from nights spent-levs	
				Total	Of which: by foreigners	Total	Of which: foreigners	Total	Of which: by foreigners
Burgas	585	112013	3245750	1771803	1532073	291696	231132	84381317	76410628

	Name:	Short Description	Web link
Attraction 1	Sunny Beach Resort	Sunny Beach is a seaside resort on the Black Sea coast of Bulgaria, located 35 km north of Burgas in Nessebar municipality. The biggest and most popular holiday resort in Bulgaria is home to over 800 hotels, 130 restaurants and numerous live music bars, pubs, nightclubs, discos, cafes.	http://www.sunnybeach-bulgaria.net/
Attraction 2	Nessebar Old Town	Nesebar is an ancient town and one of the major seaside resorts on the Bulgarian Black Sea Coast. Its abundance of historic buildings prompted UNESCO to include Nesebar in its list of World Heritage Sites in 1983.	http://www.visitnessebar.org/en/
Attraction 3	Sozopol Old Town	Sozopol is an ancient seaside town located on the southern Bulgarian Black Sea Coast. Today it is one of the major seaside resorts in the country, known for the Apollonia art and film festival.	http://www.sozopol.com/
Attraction 4	Strandzha Park	Strandzha is a mountain massif in southeastern Bulgaria and the European part of Turkey. Strandzha Natural Park, established in 1995 in the Bulgarian part of the massif, is the largest protected area in Bulgaria.	https://www.bg-guide.org/en/destinations/the-mystical-strandzha-mountain

Attraction 5	Pomorie balneo resort	Pomorie is a town and seaside resort, located on a narrow rocky peninsula in Burgas Bay on the southern Bulgarian Black Sea Coast. Pomorie is an ancient city and today an important tourist destination. The ultra saline lagoon Lake Pomorie is used for mud therapy all the year round.	http://pomorie.org/web

TOP 5 COUNTRY OF ORIGIN OF INTERNATI-ONAL TOURISTS	**Name of the country:**	**Number of tourists (2010):**	**Average stay of tourists (2010):**	
Country 1	Romania	917 950		
Country 2	Greece	905 083		
Country 3	Germany	713 980		
Country 4	Russia	378 382		
Country 5	FYR Macedonia	309 906		
MAIN TOURISTIC ACTORS OF THE REGION	**Name of the organisation:**	**Role of the organisation:**	**Web link (if possible to English version):**	
Organisation 1	BRTA	Regional tourist organisation	www.brta.eu	
Organisation 2	Union of Hotel Owners Sunny Beach	Hotels owners branch organisation in Sunny Beach tourism resort	http://uhsb.net/	
EXTERNAL BORDER CROSSING POINTS OF THE REGION	**Name of the border crossing point:**	**Type of border crossing point (international, bilateral):**	**Opening hours of the border crossing point:**	**Web link**
Airport	Bourgas Airport	international	24 h	http://www.bourgas-airport.com/
External	Malko Tarnovo cross-border check point	bilateral	24 h	
External	Bourgas Port	international	Upon request	http://www.port-burgas.com/index.html

EDİRNE

Having been the capital city of many civilizations from the Ancient Greeks to the Romans and the Ottomans, Edirne, according to some historians, is also a strategic city that had faced many conquest attempts. It is also the birth place of Fatih Sultan Mehmet, conqueror of Constantinople.

Along with being one of the compulsory geographical passages for migrating civilizations, Edirne is a center of attraction with its fertile farmland, water springs and other natural resources. Especially its partly living history and culture inherited from Ottoman Empire (most important evidence for this is the production of the foods used in the imperial cuisine, and oil wrestling which have been held since 1362) are elements that increase the value of Edirne.

Edirne is a city of tourism with its history and cultural assets, and also an agricultural city with its vast arable lands. Although there is only one Organized Industrial Zone in Edirne, rate of occupancy is very low there. Agriculture-based industry, especially food industry has a significant share in the city's industry.

Edirne has important touristic advantages. For example, Edirne is the most settlement that attracts the most tourists in the Region. It is a unique center of tourism with its border gates with Bulgaria and Greece, an old Ottoman capital city, the host of one of the oldest sports organizations in the world, that is Kırkpınar Oil Wrestling, and foods from the imperial palace kitchen. The elimination of fundamental problems such as still having unearthed places including the palace and the city's lower level of national and international promotion compared to its competitors will contribute significantly in developing the tourism potential of the city.

In Edirne there is a successful tourism application, namely The Health Museum which draws the greatest number of visitors in Turkey. It is a fact that Edirne has recently deserved a treatment similar to that making Istanbul a city of history and culture. Edirne has historical and cultural assets at least as important as those of Istanbul.

Agricultural production in Edirne resembles the average agriculture structure in Thrace. Wheat and sunflowers are among the most produced products. Besides these and different from the other two provinces, there is intensive rice cultivation around Ipsala and the vicinity which have wetland areas. There is a group of farmers in the town of Havsa and the surrounding area involved in fruit growing; however, the amount of fruit and vegetables produced in Thrace is less than 5% of the overall agricultural production. The fact that the agricultural and husbandry revenues constitute one third of the overall provincial revenues which is a relatively high rate emphasizes the importance of agriculture for Edirne.

As applicable in Thrace in general, Edirne is a province with a high population of immigrants from Greece and Bulgaria. Trakya University - the oldest university in the Region - adds a significant colorfulness to the demographic structure.

POPULATION									
2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
396.462	394.644	395.463	390.428	399.316	399.708	398.582	400.280	402.537	401.701

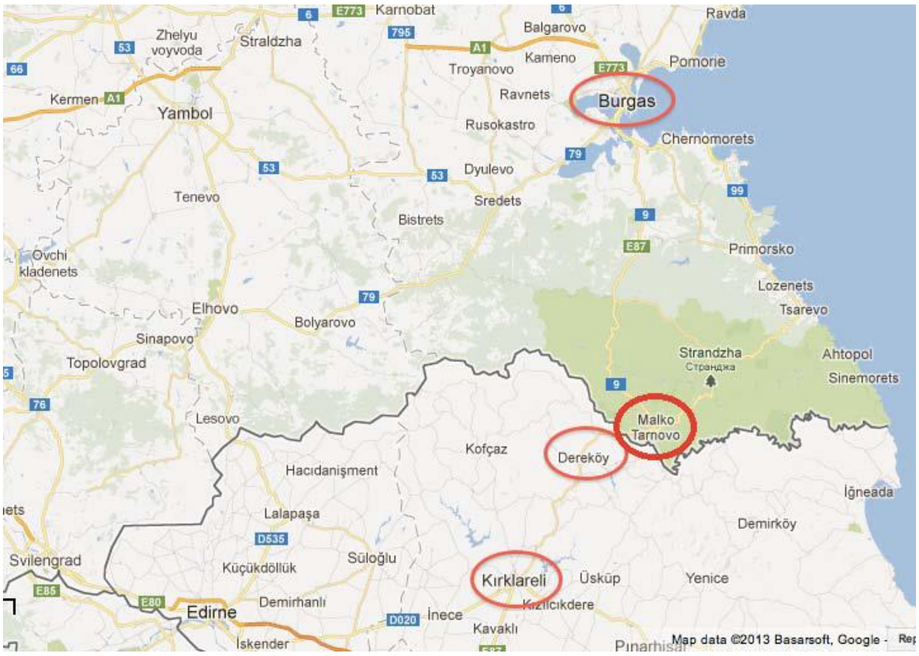
Accommodation Establishments' Rooms and Beds by Types

Ministry Licenced Establishments	Establishments	Room	Bed
5 *****	1	160	332
4 ****	1	118	236
3 ***	8	431	839
2 **	9	316	606
1 *	1	49	88
Other	4	60	119
Total	24	1.134	2.220

Municipality Licenced Establishments	Establishments	Room	Bed
City center	55	1.444	2.861
District	54	999	2.569
Total	109	2.443	5.430

TURKEY- BULGARIA CROSS-BORDER REGION

The length of the border between Turkey and Bulgaria is 269km (126km – river border). There are three border crossing points: Svilengrad- Kapıkule (Edirne) (train, road), Lessovo- Hamzabeyli (Edirne), Malko Tarnovo- Dereköy (Kırklareli). The border between Turkey and Bulgaria was drawn by the Balkan Treaty of 1912- 1913 and approved in Lausanne, July 24. 1923.



In Bulgaria, Turkey ranked as the 1st country that Bulgarian tourists visited in 2004, 2005, 2006 and 2007; the 2nd country, after Greece, in 2008 and 2009, and the 1st country again in 2011, 2012 and 2013. The number of Bulgarian tourists visiting Turkey was 925,795 in 2002; 1,659,217 in 2005; 1,217,189 in 2008; 1,266,543 in 2010; 1,044,405 in 2012. Among the number of foreign tourists visiting Bulgaria, Turkey ranked as the 6th country in 2004 and 2005; the 7th country in 2006; the 5th country in 2007; the 7th country in 2008; the 8th country in 2009, and the 9th country in 2010- 2011. Turkey moved up to the 6th rank in 2012 and 2013.

KIRKLARELİ: Kırklareli province has a natural beauty. It offers many possibilities for sea and cultural tourism. The main tourism resources of city of Kirklareli are: Hizirbey complex (Hizirbey mosque, Hizirbay bath, Arasta) and Dupnica cave. On the Black Sea coast the lake of Saka, the Longoz forest, Kastros, Kiyiköy and its surroundings, Iğneada and its neighbourhood have beautiful natural features.

On the other hand, Kırklareli is not a major and attractive touristic destination in the country. Kırklareli has 60 kilometre- long coast with the Black Sea. However, in terms of sea tourism facilities and transport connections, Kırklareli receives fewer investments than the Mediterranean and Aegean coastal areas. The weather conditions are a strong determinant for the low popularity of Black sea in terms of sea tourism at the country level. Due to the climate and environment, Black sea coasts of Turkey are deemed less worthy of investment. Additionally, Kırklareli is surrounded by larger cities such as Tekirdağ, Edirne and Istanbul, 54 which are considered more attractive than Kırklareli. The distance between Kırklareli and Istanbul is only 200 kilometres, which takes two hours by car or bus. Compared to these cities, Kırklareli remains less effective and developed. For most foreign tourists, Kırklareli is not a final destination but only a transit city. In most cases, foreign tourists visit the city only for a few hours and do not get accommodations there. In Kırklareli, there is only one hotel whose quality and service is quite poor. Transborder tourism in Burgas province is not very developed but they do exist. It is not uncommon for Bulgarians to go across the border for short- term (usually daily and over- the- weekend) trips to Kırklareli. Some, especially from Malko Tarnovo, go on a weekly basis, as Kırklareli is closer than Burgas, as mentioned during our interviews conducted on the Bulgarian side. The fact that the Dereköy- Malko Tarnovo border crossing point is a small gate eases and encourages Bulgarian people to cross the border daily.

On the Turkish side, the mobility of Bulgarian people is called as KİPA- tourism. The Bulgarian people from Varna and Burgas cross the border on daily basis, do shopping for their household consumption and return to Bulgaria in the same day. They visit supermarkets, small shops and grocery markets which are open every Wednesday and Saturday. They mostly buy cheese, laundry powder and a traditional local desert (helva), which contribute to the sales of small business owners on the Turkish side of the border.

Similarly, some Turkish people, those who hold double citizenship and green passports, prefer to go to Burgas for short- term vacations on the Black Sea resorts, enjoying the city's entertainment and visiting the casinos. However, such possibilities are limited for

Turkish citizens due to visa requirements from the Bulgarian side. In the vast majority of interviews and surveys conducted on the Turkish side, visa requirements are mentioned as an obstacle of transborder tourism. It was mentioned that Turkish people would prefer to go to Burgas for vacation because it is in closer proximity than the touristic destinations of the Western coast and of the Mediterranean. It was also stated that the visa regime has gotten very restrictive after the accession of Bulgaria to the EU. The application for a visa is quite expensive; the visa is usually issued for single entrances and periods of time.

Most foreign tourists and Bulgarian people use the Dereköy- Malko Tarnovo border crossing point as a gateway to the larger cities of Turkey, mainly Tekirdağ, Edirne and Istanbul. Our observation of border traffic supports the fact that the Dereköy- Malko Tarnovo border crossing point is not an attractive touristic route for countries other than Turkey and Bulgaria.

CROSS-BORDER TOURISM

Cross-border cooperation and partnership have been specified as the basis for sustainable tourism development in the EU.

- The tourism crossborder cooperation is an integrated model of cooperation, as it is at a common point of several crossborder fields of activity determined by social and economic phenomena, environmental processes,and territorial planning strategies as well as by cultural manifestations

- Cross-border partnerships are increasingly important when the natural assets around which tourism is developed are shared between the bordering states

- The tourism cross border cooperation involves-productive use of the common tourism resources, the harmonization of transport and Access infrastructure, accommodation, as well as a common policy concerning the organizing of cultural events

The establishment of the cross-border cooperation is based on the analysis and evaluation of numerous topics:

- The analysis of the bordering tourism attractions and their utilization.

- The harmonization of the judicial background between the neighboring countries in favor of the developments.
- The survey of the common utilization of natural, cultural areas and other protected units.
- The harmonization of the coordination of investments for example in the case of transnational destination the creation of an international TDM (Tourism Destination Management) organization.

Cross-border Tourism –Major Priorities

- The creation of transnational products and product packages.
- The creation of sustainable mobility and transportation conditions in the cross border areas utilized by tourism.
- Tourism attraction and destination development among the countries.
- Development of common tourism services, products and transnational thematic routes.
- Strengthening of the tourism management activities;
- Strengthening the regional identity

QUESTIONNAIRE

Project No: CB005.1.22.063

Project Name: Support for Promotion of Sustainable Tourism

Subject: "Study of the tourists' demand and needs of information in the field of tourist services and products"

The subject of this research is information requests of tourists for tourist services and products in the cross-border region.

1. Analytic – study of the tourists' demand and needs of information, analysis and assessment of the results of the study.

2. Statistical – procession of the obtained results of the developed questionnaire, allowing research of connections and dependences, study of asymmetric information (if any) and others.

3. Questionnaire

A questionnaire with open and closed questions was elaborated. It was contain three sections: 1st determing the profile of the respondents, 2nd: tourist' needs of information and 3rd: demand of type of tourist services and products.

The major questions this study attempted to answer included: what are some of the demographic characteristics of people visiting the Edirne and Burgas area? What is their main purpose for visiting? Where are they from? What type of information sources are they using, both for deciding where to visit and planning their trips?

A total of 160 questionnaires from both side of the border were during the months of the survey, August and September 2017. The target groups for the survey were selected by different nationality. Questionnaires were handed out to tourists in Edirne and Burgas. The questionnaires were prepared in English language.

SPSS (Statistical Program For Social Scientists) program was used in the analysis of the data obtained by the questionnaire. In this context, the results are analyzed.

In addition, travel agencies, tourism offices, public institutions, municipalities and NGO in the cross-border region were visited and face-to-face meetings were conducted in order to examine the preferred ways of presenting tourist information and products.

As a result of the questionnaires and interviews a report was elaborated, giving summarised information on tourists' demands and needs of information. Based on the results of the analysis and the study, main needs was defined and was provided recommendations for improvement of services and products provided in tourism.

1- EDİRNE

Just over half (66,3%) of the visitors interviewed were women.

Gender

	Frequency	Percent	Valid Percent	Cumulative Percent
Female	53	66,3	66,3	66,3
Male	27	33,8	33,8	100,0
Total	80	100,0	100,0	

The largest age group was 35-50, which accounted for over 42% of visitors.

Age

	Frequency	Percent	Valid Percent	Cumulative Percent
18-25	18	22,5	22,5	22,5
26-34	14	17,5	17,5	40,0
35-50	34	42,5	42,5	82,5
51+	14	17,5	17,5	100,0
Total	80	100,0	100,0	

Around 28,7% of the respondents were employed private sector with an additional 23,8% of respondents were students and % 21,3 reporting as being self-employed.

Occupation

	Frequency	Percent	Valid Percent	Cumulative Percent
Self-employed	17	21,3	21,3	21,3
Public Service	13	16,3	16,3	37,5
Private Sector	23	28,7	28,7	66,3
Retired	6	7,5	7,5	73,8
Student	19	23,8	23,8	97,5
Other	2	2,5	2,5	100,0
Total	80	100,0	100,0	

Respondents were most likely from adjacent states within driving distance to Edirne. Bulgaria entered the top two states with 55% of respondents reporting from there, and second was Greece (30%).

Country

	Frequency	Percent	Valid Percent	Cumulative Percent
Bulgaria	44	55,0	55,0	55,0
Greece	24	30,0	30,0	85,0
Germany	3	3,8	3,8	88,8
Austria	4	5,0	5,0	93,8
Kosova	1	1,3	1,3	95,0
Romania	1	1,3	1,3	96,3
Russia	1	1,3	1,3	97,5
USA	1	1,3	1,3	98,8
Mexico	1	1,3	1,3	100,0
Total	80	100,0	100,0	

Majority of the respondents (58,8%) were married or in a relationship and the rest (41,3%) were single.

Marital Status

	Frequency	Percent	Valid Percent	Cumulative Percent
Single	33	41,3	41,3	41,3
Married/in a relationship	47	58,8	58,8	100,0
Total	80	100,0	100,0	

Visitors to the Edirne reported a high level of education with 82,6% having post-secondary education. The highest percentage (71,3%) reported having a University Degree with the second highest number having a Masters Degree and PhD(%11,3). Another 13,8% were High School graduates.

Education

	Frequency	Percent	Valid Percent	Cumulative Percent
Secondary school	2	2,5	2,5	2,5
High school	11	13,8	13,8	16,3
University	57	71,3	71,3	87,5
Master	8	10,0	10,0	97,5
Phd	1	1,3	1,3	98,8
Other	1	1,3	1,3	100,0
Total	80	100,0	100,0	

About 46,3 % of visitors reported having a monthly income of EUR 501-1500 and approximately 28,9% of visitors have a household income of EUR 1501 or more.

Monthly Income

	Frequency	Percent	Valid Percent	Cumulative Percent
500 EUR or less	20	25,0	25,0	25,0
501-1500 EUR	37	46,3	46,3	71,3
1501- 3000 EUR	21	26,3	26,3	97,5
3001- 5000 EUR	1	1,3	1,3	98,8
5001 EUR or more	1	1,3	1,3	100,0
Total	80	100,0	100,0	

A significant proportion of visitors (83,8%) had visited the region previously. %16,2 of visitors stated said this was the first visit to the region. The highest frequency of repeat visit was five and over occasions at 50% and 33,8% of visitors had visited the region between two, three and four times, respectively.

How many times have you visited this destination (including this most recent one)?

	Frequency	Percent	Valid Percent	Cumulative Percent
First time	13	16,2	16,2	16,2
2	10	12,5	12,5	28,7
3	11	13,8	13,8	42,5
4	6	7,5	7,5	50,0
5+	40	50,0	50,0	100,0
Total	80	100,0	100,0	

Visitors were asked the number of days they had stayed in the Edirne during their current visit. The most frequent response from 47,5% of respondents visited for less than 24 hours; second-highest was 41,3% of visitors staying 1-3 days and 7,5% of visitors staying 4-7 days.

How many nights did you stay this trip?

	Frequency	Percent	Valid Percent	Cumulative Percent
1-3 nights	33	41,3	41,3	41,3
4-7 nights	6	7,5	7,5	48,8
2-3 weeks	1	1,3	1,3	50,0
More	2	2,5	2,5	52,5
Daytrip	38	47,5	47,5	100,0
Total	80	100,0	100,0	

Visitors prefer to vacation in the summer season is predominantly.

When do you prefer to travel?

	Frequency	Percent	Valid Percent	Cumulative Percent
Spring	32	40,0	40,0	40,0
Summer	45	56,3	56,3	96,3
Autumn	1	1,3	1,3	97,5
Winter	2	2,5	2,5	100,0
Total	80	100,0	100,0	

The largest number of visitors was travelling with family members (32,5%) or friends (32,5%). Another 8,8% adults were travelling alone and 21,3 % adults were travelling with spouse or partner.

Who did you travel with during this trip?

	Frequency	Percent	Valid Percent	Cumulative Percent
Alone	7	8,8	8,8	8,8
Spouse/ Partner	17	21,3	21,3	30,0
Family members	26	32,5	32,5	62,5
Friends	26	32,5	32,5	95,0
Relatives	1	1,3	1,3	96,3
Organized tour	3	3,8	3,8	100,0
Total	80	100,0	100,0	

When visitors were asked the primary information source they used to plan their visit to the Edirne, 72,5% indicated their information source was advised by family and friends; 22,6% had searched for information via the Internet and social media. Relatives and friends are the most widely used information source.

In which way you get information about the place that you prefer to visit?

	Frequency	Percent	Valid Percent	Cumulative Percent
Relatives and friends	50	72,5	72,5	72,5
General tourism/travel internet web pages (Tripadvisor, Booking, Expedia, Travelocity etc.	11	13,8	13,8	86,3
Social media (Facebook, Twitter, Instagram, etc.) and web blogs	7	8,8	8,8	95,0
Online search engines (Google, Yahoo, etc.)	1	1,3	1,3	96,3
Local tourism offices	1	1,3	1,3	97,5
I already know and my past experiences	2	2,5	2,5	100,0
Total	80	100,0	100,0	

In the survey, the respondents were asked to indicate how important certain factors influenced their decision to visit the Edirne area. Edirne's nature, environmentally, history and historic sites and gastronomy were rated the higher among all the factors, following by shopping.

Nature, environmentally/ ecologically protected

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	3	3,8	3,8	3,8
not very important	4	5,0	5,0	8,8
somewhat important	20	25,0	25,0	33,8
important	25	31,3	31,3	65,0
very important	28	35,0	35,0	100,0
Total	80	100,0	100,0	

Historical and culturel attractions

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	1	1,3	1,3	1,3
not very important	2	2,5	2,5	3,8
somewhat important	9	11,3	11,3	15,0
important	32	40,0	40,0	55,0
very important	36	45,0	45,0	100,0
Total	80	100,0	100,0	

Gastronomy

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	4	5,0	5,0	5,0
not very important	2	2,5	2,5	7,5
somewhat important	8	10,0	10,0	17,5
important	17	21,3	21,3	38,8
very important	49	61,3	61,3	100,0
Total	80	100,0	100,0	

Spiritual/Religion

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	21	26,3	26,3	26,3
not very important	12	15,0	15,0	41,3
somewhat important	17	21,3	21,3	62,5
important	16	20,0	20,0	82,5
very important	14	17,5	17,5	100,0
Total	80	100,0	100,0	

Health

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	21	26,3	26,3	26,3
not very important	13	16,3	16,3	42,5
somewhat important	15	18,8	18,8	61,3
important	16	20,0	20,0	81,3
very important	15	18,8	18,8	100,0
Total	80	100,0	100,0	

Sport facilities

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	31	38,8	38,8	38,8
not very important	16	20,0	20,0	58,8
somewhat important	14	17,5	17,5	76,3
important	10	12,5	12,5	88,8
very important	9	11,3	11,3	100,0
Total	80	100,0	100,0	

Business

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	32	40,0	40,0	40,0
not very important	13	16,3	16,3	56,3
somewhat important	9	11,3	11,3	67,5
important	11	13,8	13,8	81,3
very important	15	18,8	18,8	100,0
Total	80	100,0	100,0	

Shopping

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	1	1,3	1,3	1,3
not very important	1	1,3	1,3	2,5
somewhat important	4	5,0	5,0	7,5
important	18	22,5	22,5	30,0
very important	56	70,0	70,0	100,0
Total	80	100,0	100,0	

In all, this data suggests that the Edirne area’s nature, history, culture and historic attractions have remained and will presumably continue to be the most important factor in visitors’ decision to visit Edirne. Of course, local foods and shopping activities continue to positively affect visitors’ decision.

For these tourists, good value for money spent, beatiful scenery, natural, cultural and historical attractions, local food, hygiene, feeling safe, friendships and personal relationships are top of the list of very important factors in their happiness about Edirne visit.

This destination I havejust visited …

Give good value for money spent

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	1	1,3	1,3	1,3
Disagree	1	1,3	1,3	2,5
Neutral	15	18,8	18,8	21,3
Agree	22	27,5	27,5	48,8
Strongly Agree	41	51,2	51,2	100,0
Total	80	100,0	100,0	

Has beautiful scenery and natural attractions

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	6	7,5	7,5	7,5
Neutral	9	11,3	11,3	18,8
Agree	32	40,0	40,0	58,8
Strongly Agree	33	41,3	41,3	100,0
Total	80	100,0	100,0	

Has interesting cultural attractions and historical heritage

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	4	5,0	5,0	5,0
Neutral	11	13,8	13,8	18,8
Agree	27	33,8	33,8	52,5
Strongly Agree	38	47,5	47,5	100,0
Total	80	100,0	100,0	

Has high quality and suitable accommodations

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	1	1,3	1,3	1,3
Disagree	8	10,0	10,0	11,3
Neutral	29	36,3	36,3	47,5
Agree	27	33,8	33,8	81,3
Strongly Agree	15	18,8	18,8	100,0
Total	80	100,0	100,0	

Has appealing local food (cuisine).

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	2	2,5	2,5	2,5
Neutral	8	10,0	10,0	12,5
Agree	22	27,5	27,5	40,0
Strongly Agree	48	60,0	60,0	100,0
Total	80	100,0	100,0	

Has quality infrastructure(inc. Telecommunication and transportation)

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	12	15,0	15,0	15,0
Neutral	32	40,0	40,0	55,0
Agree	26	32,5	32,5	87,5
Strongly Agree	10	12,5	12,5	100,0
Total	80	100,0	100,0	

Is a safe tourism destination

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	1	1,3	1,3	1,3
Disagree	1	1,3	1,3	2,5
Neutral	6	7,5	7,5	10,0
Agree	24	30,0	30,0	40,0
Strongly Agree	48	60,0	60,0	100,0
Total	80	100,0	100,0	

Has high standard of hygiene

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	2	2,5	2,5	2,5
Disagree	10	12,5	12,5	15,0
Neutral	18	22,5	22,5	37,5
Agree	27	33,8	33,8	71,3
Strongly Agree	23	28,7	28,7	100,0
Total	80	100,0	100,0	

Has quite organized urban settlement

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	1	1,3	1,3	1,3
Disagree	15	18,8	18,8	20,0
Neutral	21	26,3	26,3	46,3
Agree	29	36,3	36,3	82,5
Strongly Agree	14	17,5	17,5	100,0
Total	80	100,0	100,0	

Local people/residents are friendly and amiable

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	2	2,5	2,5	2,5
Neutral	4	5,0	5,0	7,5
Agree	22	27,5	27,5	35,0
Strongly Agree	52	65,0	65,0	100,0
Total	80	100,0	100,0	

Sector employees are experienced and good at their works

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	6	7,5	7,5	7,5
Neutral	19	23,8	23,8	31,3
Agree	22	27,5	27,5	58,8
Strongly Agree	33	41,3	41,3	100,0
Total	80	100,0	100,0	

Is relatively economic and affordable relative to others

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	5	6,3	6,3	6,3
Neutral	13	16,3	16,3	22,5
Agree	33	41,3	41,3	63,7
Strongly Agree	29	36,3	36,3	100,0
Total	80	100,0	100,0	

Offers good shopping facilities and firms/employees are friendly

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	2	2,5	2,5	2,5
Neutral	9	11,3	11,3	13,8
Agree	24	30,0	30,0	43,8
Strongly Agree	45	56,3	56,3	100,0
Total	80	100,0	100,0	

Available and reliable tourist information

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	15	18,8	18,8	18,8
Disagree	10	12,5	12,5	31,3
Neutral	26	32,5	32,5	63,7
Agree	14	17,5	17,5	81,3
Strongly Agree	15	18,8	18,8	100,0
Total	80	100,0	100,0	

Opportunities for socialization

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	10	12,5	12,5	12,5
Disagree	11	13,8	13,8	26,3
Neutral	20	25,0	25,0	51,2
Agree	25	31,3	31,3	82,5
Strongly Agree	14	17,5	17,5	100,0
Total	80	100,0	100,0	

Support of guide(s)

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	18	22,5	22,5	22,5
Disagree	12	15,0	15,0	37,5
Neutral	20	25,0	25,0	62,5
Agree	22	27,5	27,5	90,0
Strongly Agree	8	10,0	10,0	100,0
Total	80	100,0	100,0	

Offers excellent night life and entertainment

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	13	16,3	16,3	16,3
Disagree	16	20,0	20,0	36,3
Neutral	18	22,5	22,5	58,8
Agree	19	23,8	23,8	82,5
Strongly Agree	14	17,5	17,5	100,0
Total	80	100,0	100,0	

It is reported a very high level of satisfaction with 92,5 % of respondents.

I am satisfied with this destination.

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	74	92,5	92,5	92,5
No	6	7,5	7,5	100,0
Total	80	100,0	100,0	

Likelihood of returning to Edirne almost 93,8% indicated it was ‘Very likely’ they would return.

I will visit this destination again

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	75	93,8	93,8	93,8
No	5	6,3	6,3	100,0
Total	80	100,0	100,0	

I will encourage my friends and relatives to visit this destination

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	78	97,5	97,5	97,5
No	2	2,5	2,5	100,0
Total	80	100,0	100,0	

When asked to describe Edirne from the visitors;

It has been seen that they make use of the words: "cheerful, terrific, beautiful woman, tasteful, perfect, pleasant, very good, friendly, peaceful, comfortable, interesting, amazing, good and old friend, gentle face, safe, inspiring, cute".

The most used word to describe is “friend".

2- BURGAS

Just over half (55%) of the visitors interviewed were man.

Gender

	Frequency	Percent	Valid Percent	Cumulative Percent
Female	36	45,0	45,0	45,0
Male	44	55,0	55,0	100,0
Total	80	100,0	100,0	

The largest age group was 35-50, which accounted for over 45% of visitors.

Age

	Frequency	Percent	Valid Percent	Cumulative Percent
18-25	17	21,3	21,3	21,3
26-34	16	20,0	20,0	41,3
35-50	36	45,0	45,0	86,3
51+	11	13,8	13,8	100,0
Total	80	100,0	100,0	

Around 26,3% of the respondents were employed public sector with an additional 21,3% of respondents were self-employed and % 18,8 reporting as being private sector.

Occupation

	Frequency	Percent	Valid Percent	Cumulative Percent
Self-employed	17	21,3	21,3	21,3
Public Service	21	26,3	26,3	47,5
Private Sector	15	18,8	18,8	66,3
Retired	7	8,8	8,8	75,0
Student	13	16,3	16,3	91,3
Other	7	8,8	8,8	100,0
Total	80	100,0	100,0	

Respondents were most likely from adjacent states within driving distance to Burgas. Turkey entered the top three states with 25% of respondents reporting from there and second was Russia (17,5%) and third was Poland (%13,8).

Country

	Frequency	Percent	Valid Percent	Cumulative Percent
Greece	1	1,3	1,3	1,3
Germany	2	2,5	2,5	3,8
Austria	2	2,5	2,5	6,3
Romania	7	8,8	8,8	15,0
Russia	14	17,5	17,5	32,5
Poland	11	13,8	13,8	46,3
England	8	10,0	10,0	56,3
Holland	2	2,5	2,5	58,8
Belgium	1	1,3	1,3	60,0
Ireland	2	2,5	2,5	62,5
Scotland	2	2,5	2,5	65,0
Czech Republic	4	5,0	5,0	70,0
Norway	1	1,3	1,3	71,3
Israel	3	3,8	3,8	75,0
Turkey	20	25,0	25,0	100,0
Total	80	100,0	100,0	

Majority of the respondents (63,7%) were married or in a relationship and the rest (36,3%) were single.

Marital Status

	Frequency	Percent	Valid Percent	Cumulative Percent
Single	29	36,3	36,3	36,3
Married/in a relationship	51	63,7	63,7	63,7
Total	80	100,0	100,0	

Visitors to the Burgas reported a high level of education with 75,1% having post-secondary education. The highest percentage (58,8%) reported having a University Degree with the second highest number having a Masters Degree (%16,3). Another 21,3% were High School graduates.

Education

	Frequency	Percent	Valid Percent	Cumulative Percent
Secondary school	2	2,5	2,5	2,5
High school	17	21,3	21,3	23,8
University	47	58,8	58,8	82,5
Master	13	16,3	16,3	98,8
Other	1	1,3	1,3	100,0
Total	80	100,0	100,0	

About 45 % of visitors reported having a monthly income of EUR 501-1500 and approximately 36,3% of visitors have a household income of EUR 1501 or more.

Monthly Income

	Frequency	Percent	Valid Percent	Cumulative Percent
500 EUR or less	15	18,8	18,8	18,8
501-1500 EUR	36	45,0	45,0	63,7
1501- 3000 EUR	22	27,5	27,5	91,3
3001- 5000 EUR	5	6,3	6,3	97,5
5001 EUR or more	2	2,5	2,5	100,0
Total	80	100,0	100,0	

A significant proportion of visitors (55%) had visited the region previously. % 45 of visitors stated said this was the first visit to the region. The highest frequency of repeat visit was five and over occasions at 15% and 40,1% of visitors had visited the region between two, three and four times, respectively.

How many times have you visited this destination (including this most recent one)?

	Frequency	Percent	Valid Percent	Cumulative Percent
First time	36	45,0	45,0	45,0
2	20	25,0	25,0	70,0
3	7	8,8	8,8	78,8
4	5	6,3	6,3	85,0
5+	12	15,0	15,0	100,0
Total	80	100,0	100,0	

Visitors were asked the number of days they had stayed in the Edirne during their current visit. The most frequent response from 36,3% of respondents visited for 4-7 days, second-highest was 26,3% of visitors staying 8-13 days and 18,8% of visitors staying 1-3 days.

How many nights did you stay this trip?

	Frequency	Percent	Valid Percent	Cumulative Percent
1-3 nights	15	18,8	18,8	18,8
4-7 nights	29	36,3	36,3	55,0
8-13 nights	21	26,3	26,3	81,3
2-3 weeks	8	10,0	10,0	91,3
More	5	6,3	6,3	97,5
Daytrip	2	2,5	2,5	100,0
Total	80	100,0	100,0	

Visitors prefer to vacation in the summer season is predominantly.

When do you prefer to travel?

	Frequency	Percent	Valid Percent	Cumulative Percent
Spring	16	20,0	20,0	20,0
Summer	61	76,3	76,3	96,3
Autumn	2	2,5	2,5	98,8
Winter	1	1,3	1,3	100,0
Total	80	100,0	100,0	

The largest number of visitors was travelling with family members (32,5%). Another 28,7 % adults were travelling with spouse or partner and 20% adults were travelling with friends.

Who did you travel with during this trip?

	Frequency	Percent	Valid Percent	Cumulative Percent
Alone	10	12,5	12,5	12,5
Spouse/ Partner	23	28,7	28,7	41,3
Family members	29	36,3	36,3	77,5
Friends	16	20,0	20,0	97,5
Organized tour	2	2,5	2,5	100,0
Total	80	100,0	100,0	

When visitors were asked the primary information source they used to plan their visit to the Burgas 62,5% indicated their information source was advised by family and friends; 35% had searched for information via the Internet, social media, web sites, online search engines. Relatives and friends are the most widely used information source.

In which way you get information about the place that you prefer to visit?

	Frequency	Percent	Valid Percent	Cumulative Percent
Relatives and friends	50	62,5	62,5	62,5
General tourism/travel internet web pages (Tripadvisor, Booking, Expedia, Travelocity etc.	23	28,7	28,7	91,3
Destination specific online web sites	1	1,3	1,3	92,5
Social media (Facebook, Twitter, Instagram, etc.) and web blogs	1	1,3	1,3	93,8
Online search engines (Google, Yahoo, etc.)	3	3,8	3,8	97,5
Travel Agencies	2	2,5	2,5	100,0
Total	80	100,0	100,0	

In the survey, the respondents were asked to indicate how important certain factors influenced their decision to visit the Burgas area. Burgas's nature, environmentally, history and historic sites and gastronomy were rated the higher among all the factors.

Nature, environmentally/ ecologically protected

	Frequency	Percent	Valid Percent	Cumulative Percent
not very important	4	5,0	5,0	5,0
somewhat important	15	18,8	18,8	23,8
important	18	22,5	22,5	46,3
very important	43	53,8	53,8	100,0
Total	80	100,0	100,0	

Historical and culturel attractions

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	3	3,8	3,8	3,8
not very important	7	8,8	8,8	12,5
somewhat important	18	22,5	22,5	35,0
important	17	21,3	21,3	56,3
very important	35	43,8	43,8	100,0
Total	80	100,0	100,0	

Gastronomy

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	3	3,8	3,8	3,8
not very important	9	11,3	11,3	15,0
somewhat important	21	26,3	26,3	41,3
important	30	37,5	37,5	78,8
very important	17	21,3	21,3	100,0
Total	80	100,0	100,0	

Spiritual/Religion

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	19	23,8	23,8	23,8
not very important	20	25,0	25,0	48,8
somewhat important	17	21,3	21,3	70,0
important	17	21,3	21,3	91,3
very important	7	8,8	8,8	100,0
Total	80	100,0	100,0	

Health

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	11	13,8	13,8	13,8
not very important	17	21,3	21,3	35,0
somewhat important	15	18,8	18,8	53,8
important	19	23,8	23,8	77,5
very important	18	22,5	22,5	100,0
Total	80	100,0	100,0	

Sport facilities

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	13	16,3	16,3	16,3
not very important	18	22,5	22,5	38,8
somewhat important	22	27,5	27,5	66,3
important	17	21,3	21,3	87,5
very important	10	12,5	12,5	100,0
Total	80	100,0	100,0	

Business

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	29	36,3	36,3	36,3
not very important	17	21,3	21,3	57,5
somewhat important	17	21,3	21,3	78,8
important	12	15,0	15,0	93,8
very important	5	6,3	6,3	100,0
Total	80	100,0	100,0	

Shopping

	Frequency	Percent	Valid Percent	Cumulative Percent
not important	11	13,8	13,8	13,8
not very important	11	13,8	13,8	27,5
somewhat important	22	27,5	27,5	55,0
important	21	26,3	26,3	81,3
very important	15	18,8	18,8	100,0
Total	80	100,0	100,0	

In all, this data suggests that the Burgas area's nature, history, culture and historic attractions have remained and will presumably continue to be the most important factor in visitors' decision to visit Burgas. Of course, local foods and shopping activities continue to positively affect visitors' decision.

For these tourists, good value for money spent, beatiful scenery, natural, cultural and historical attractions, accommodations, local food, shopping facilities, friendships and personal relationships are top of the list of very important factors in their happiness about Burgas visit.

This destination I have just visited …

Give good value for money spent

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	9	11,3	11,3	11,3
Neutral	17	21,3	21,3	32,5
Agree	31	38,8	38,8	71,3
Strongly Agree	23	28,7	28,7	100,0
Total	80	100,0	100,0	

Has beautiful scenery and natural attractions

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	4	5,0	5,0	5,0
Neutral	9	11,3	11,3	16,3
Agree	30	37,5	37,5	53,8
Strongly Agree	37	46,3	46,3	100,0
Total	80	100,0	100,0	

Has interesting cultural attractions and historical heritage

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	2	2,5	2,5	2,5
Disagree	4	5,0	5,0	7,5
Neutral	20	25,0	25,0	32,5
Agree	18	22,5	22,5	55,0
Strongly Agree	36	45,0	45,0	100,0
Total	80	100,0	100,0	

Has high quality and suitable accommodations

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	6	7,5	7,5	7,5
Neutral	13	16,3	16,3	23,8
Agree	45	56,3	56,3	80,0
Strongly Agree	16	20,0	20,0	100,0
Total	80	100,0	100,0	

Has appealing local food (cuisine).

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	4	5,0	5,0	5,0
Disagree	5	6,3	6,3	11,3
Neutral	19	23,8	23,8	35,0
Agree	38	47,5	47,5	82,5
Strongly Agree	14	17,5	17,5	100,0
Total	80	100,0	100,0	

Has quality infrastructure(inc. Telecommunication and transportation)

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	3	3,8	3,8	3,8
Disagree	9	11,3	11,3	15,0
Neutral	32	40,0	40,0	55,0
Agree	26	32,5	32,5	87,5
Strongly Agree	10	12,5	12,5	100,0
Total	80	100,0	100,0	

Is a safe tourism destination

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	2	2,5	2,5	2,5
Neutral	22	27,5	27,5	30,0
Agree	32	40,0	40,0	70,0
Strongly Agree	24	30,0	30,0	100,0
Total	80	100,0	100,0	

Has high standard of hygiene

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	4	5,0	5,0	5,0
Disagree	11	13,8	13,8	18,8
Neutral	33	41,3	41,3	60,0
Agree	22	27,5	27,5	87,5
Strongly Agree	10	12,5	12,5	100,0
Total	80	100,0	100,0	

Has quite organized urban settlement

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	1	1,3	1,3	1,3
Disagree	5	6,3	6,3	7,5
Neutral	33	41,3	41,3	48,8
Agree	33	41,3	41,3	90,0
Strongly Agree	8	10,0	10,0	100,0
Total	80	100,0	100,0	

Local people/residents are friendly and amiable

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	3	3,8	3,8	3,8
Disagree	10	12,5	12,5	16,3
Neutral	11	13,8	13,8	30,0
Agree	27	33,8	33,8	63,7
Strongly Agree	29	36,3	36,3	100,0
Total	80	100,0	100,0	

Sector employees are experienced and good at their Works

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	1	1,3	1,3	1,3
Disagree	5	6,3	6,3	7,5
Neutral	25	31,3	31,3	38,8
Agree	40	50,0	50,0	88,8
Strongly Agree	9	11,3	11,3	100,0
Total	80	100,0	100,0	

Is relatively economic and affordable relative to others

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	2	2,5	2,5	2,5
Disagree	5	6,3	6,3	8,8
Neutral	23	28,7	28,7	37,5
Agree	33	41,3	41,3	78,8
Strongly Agree	17	21,3	21,3	100,0
Total	80	100,0	100,0	

Offers good shopping facilities and firms/employees are friendly

	Frequency	Percent	Valid Percent	Cumulative Percent
Disagree	5	6,3	6,3	6,3
Neutral	23	28,7	28,7	35,0
Agree	29	36,3	36,3	71,3
Strongly Agree	23	28,7	28,7	100,0
Total	80	100,0	100,0	

Available and reliable tourist information

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	4	5,0	5,0	5,0
Disagree	7	8,8	8,8	13,8
Neutral	29	36,3	36,3	50,0
Agree	27	33,8	33,8	83,8
Strongly Agree	13	16,3	16,3	100,0
Total	80	100,0	100,0	

Opportunities for socialization

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	2	2,5	2,5	2,5
Disagree	1	1,3	1,3	3,8
Neutral	20	25,0	25,0	28,7
Agree	37	46,3	46,3	75,0
Strongly Agree	20	25,0	25,0	100,0
Total	80	100,0	100,0	

Support of guide(s)

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	3	3,8	3,8	3,8
Disagree	11	13,8	13,8	17,5
Neutral	27	33,8	33,8	51,2
Agree	31	38,8	38,8	90,0
Strongly Agree	8	10,0	10,0	100,0
Total	80	100,0	100,0	

Offers excellent night life and entertainment

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	1	1,3	1,3	1,3
Disagree	5	6,3	6,3	7,5
Neutral	16	20,0	20,0	27,5
Agree	31	38,8	38,8	66,3
Strongly Agree	27	33,8	33,8	100,0
Total	80	100,0	100,0	

It is reported a very high level of satisfaction with 93,8 % of respondents.

I am satisfied with this destination.

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	75	93,8	93,8	93,8
No	5	6,3	6,3	100,0
Total	80	100,0	100,0	

Likelihood of returning to Burgas almost 92,5 % indicated it was ‘Very likely’ they would return.

I will visit this destination again

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	74	92,5	92,5	92,5
No	6	7,5	7,5	100,0
Total	80	100,0	100,0	

I will encourage my friends and relatives to visit this destination

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	78	97,5	97,5	97,5
No	2	2,5	2,5	100,0
Total	80	100,0	100,0	

When asked to describe Burgas from the visitors;

It has been seen that they make use of the words: “friendly, beautiful, wonderful, interesting, different but wonderful, fascinating, amazing, excellent, good, fun, crazy, attractive".

The most used words to describe are "fun" and "crazy"

QUESTIONNAIRE

DearParticipant,

This study will help to assess needs of information and demand of the tourist towards tourist services and products in the Cross Border Region (Edirne-TR/Burgas-BG).

This questionnaire should take about 10-15 minutes to complete.We would greatly appreciate it if you answer all the questions carefully.

Thank you so much in advance for your time and help!

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1. **Gender:** ❑ Female ❑ Male

2. **How old are you?** ❑ 18-25 ❑ 26-34 ❑ 35-50 ❑ 51+

3. **How would you descripe your occupation?**

❑ Self- employed ❑ Public Service❑ Private Sector❑ Retired ❑ Student❑ Other…………

4. **Country of Residence:** ....

5. **Marital status:** ❑ Single❑ Married / in a relationship

6. **What is your level of education?**

❑ Secondary school ❑ High school ❑University ❑ Master ❑ Ph. D. ❑ Other

7. **Monthly income (EUR)?**

❑ 500 EUR or less ❑ 501-1500 EUR ❑ 1501- 3000 EUR

❑ 3001- 5000 EUR ❑ 5001 EUR or more

8. How many times have you visited this destination (including this most recent one)?
❑ First time ❑ 2 ❑ 3 ❑ 4 ❑ 5 +

9. How many nights did you stay this trip?

a) ❑1-3 nights
b) ❑4-7 nights
c) ❑8-13 nights
d) ❑2-3 weeks
e) ❑More
f) ❑ Daytrip

10. When do you prefer to travel? (multiple choices allowed)

a) ❑Spring
b) ❑Summer
c) ❑Autumn
d) ❑Winter

11. Who did you travel with during this trip?

❑Alone ❑Spouse/ Partner ❑Family members ❑ Friends

❑ Relatives ❑ Organized tour ❑ Other (please specify)…………….

12. In which way you get information about the place that you prefer to visit? (multiple choices allowed)

a) ❑Relatives and friends
b) ❑General tourism/travel internet web pages (Tripadvisor, Booking, Expedia, Travelocity etc.
c) ❑Destination specific online web sites
d) ❑Social media (Facebook, Twitter, Instagram, etc.) and web blogs
e) ❑ Online search engines (Google, Yahoo, etc.)
f) ❑Audio visual media (TV, radio, etc.)
g) ❑Print media (newspapers, journals)
h) ❑ Local tourism offices
i) ❑Travel Agencies
j) ❑Map, brochures, guide etc. (printing material)
k) ❑Smartphone and Mobile application (mobile touristquide)
l) ❑I already know and my past experiences
m) ❑Other – please specify ……………………………………………….

13. What is the importance of the following themes when choosing this destination? (using the scale (1-5), where 1=not important and 5=very important)

Special Interest Tourism Themes	How important are these themes for you when choosing your holiday destination?				
a) Nature, environmentally/ ecologically protected	1	2	3	4	5
b) Historical and culturel attractions	1	2	3	4	5
c) Gastronomy	1	2	3	4	5
d) Spiritual/Religion	1	2	3	4	5
e) Health	1	2	3	4	5
f) Sport facilities	1	2	3	4	5
g) Business	1	2	3	4	5
h) Shopping	1	2	3	4	5

14. This destination I have just visited …

1- **Stronglydisagree** 2- **Disagree** 3- **Neutral** 4- **Agree** 5- **StronglyAgree**	1	2	3	4	5
a) Give good value for Money spent					
b) Has beautiful scenery and natural attractions					
c) Has interesting cultural attractions and historical heritage					
d) Has high quality and suitable accommodations					
e) Has appealing local food (cuisine).					
f) Has quality infrastructure(inc. Telecommunication and transportation)					
g) Is a safe tourism destination					

h) Has high standard of hygiene					
i) Has quite organized urban settlement					
j) Local people/residents are friendly and amiable					
k) Sector employees are experienced and good at their works					
l) Is relatively economic and affordable relative to others					
m) Offers good shopping facilities and firms/employees are friendly					
n) Available and reliable tourist information					
o) Opportunities for socialization					
p) Support of guide(s)					
q) Offers excellent night life and entertainment.					

15. This destination was much better than what I expected and; overall, I am satisfied with this destination.
❑ Yes ❑ No

16. I will visit this destination again.❑ Yes ❑ No

17. I will encourage my friends and relatives to visit this destination ❑ Yes ❑No

18. If this destination were a person, how can you describe it?..

CONCLUSION

Perspectives of Cross -border tourism in Bulgaria-Turkey CB Region

Cross-border tourism has good potential for BG-TR region. Cross-border tourism opportunities can be explored in following spheres:

- Cultural / Heritage Tourism -CROSS ROAD OF CIVILIZATIONS (Turkey-Bulgaria) -ALL IN ONE package
- Eco-tourism and Agro-tourism Eco-tours / Rural tours, hunting & Fishing, mountain tourism etc., Cross-border tours – Kırklareli, Edirne, Burgas
- Wine & Cuisine -Wine and Gastronomy tours in Cross Border area
- MICE tourism
- EVENT based tourism –International cultural events, concerts, festivals

Weekend tour-packages-this can be excellent solution for cross-country tourism-Burgas- Edirne, Burgas-Kırklareli, Burgas-Kırklareli- Edirne etc.

- Weekend packages can be important tool also for-familiarization of tourism potential of each country and later it can stimulate tourism demand for longer stay and for other tourism products in each country
- Weekend packages–can be good solution during off-season periods
- Weekend packages–will be marketed to both tourists of cross-border regions' countries and to international tourists.
- Weekend packages can be promoted viatour-agencies,tour departments,nationa and regional tourism platforms

MICE Tourism-another major direction for cross-border tourism between countries.

- MICE conferences, congresses, fairs –can be actively promoted within the regional (cross-border countries) and jointly beyond the region –to highlight region’s MICE potential.
- Creating Regional high quality MICE events

Cultural/Heritage Tourism– Traditional cultural heritage (customs, folkcostumes, folk dances, folk songs, old farm houses, traditional crafts,etc.) forms an especially attractive base for the development of original tourist products of the border areas.It can have several directions:

- Tours to historical-cultural places
- Ethnography and folklore

Eco-tourism and Adventure Tourism-one of the main area for cross-border tourism opportunities. Both regions have lot possibilities to offer tourist–nature, wonderfull and scapes, protected areas etc.

- Tours in various eco-tourist sites–mountain areas, lakes, waterfalls etc.
- Protected areas–BG-TR CBR have several national parks and protected areas, accordingly one of thematic packages can be developed around protected areas theme.
- Bicycle tourism–it can have cross-country or cross-regional approach
- Rafting, kayaking-cross-regional events can be established
- Birdwatching-as CB region is one of the best places to watch migrating raptors, birdwatching has excellent potential for cross-border tourism.

Rural tourism-The geographical and ethnographical characteristics of the both region's rural area are worth to be taken into consideration by the great majority of tourists wishing to spend a holiday in the country side.

- By offering combined cross-border rural tours–tourists will have opportunity to see CB region's rural areas, participate in agricultural activities and at the same time make familiar with local culture, traditions etc.

Wine&Gastronomy–is always essential part of tourism in any regions.

- CBR have very interesting and diversified culinary offering region specific meals–so,gastronomy can be considered as important tourism offering in combination with rural, eco or any other type of tourism. Even can be developed specific Cross-border tour product-"CBR Gastronomy Tour"
- Wine–majority of CBR have wine industry and well-planned combined wine tours have a good potential for cross-border tourism.

Joint Marketing and PR opportunities for region-with long-term, strategic approach regional countries can benefit from joint Marketing/ PR of tourism products. From this point of view following steps can be identified:

- Joint Marketing and PR strategies
- Co-branding
- Joint Tour products
- Joint promotion onTourism fairs

Joint Marketing and PR strategies

- Joint PR materials–highlighting major tourism potentials and cross-border tour products
- Active promotion of cross-border tour products in each country– to stimulate cross-border tourism
- Exchange of information on major MICE, Cultural events in each country-to stimulate cross-border tourism

Joint tour products: Cross-selling–tour-operators of each country offering joint Cross-border tour products to international tourists. Also–each country via its major tourism online platforms will highlight and promote joint cross-border tour products

Branding-in case of development of good marketing strategy (based on in-depth analyses of existing potential, international market demand and tourists needs) can be gradually developed CBR as a major brand for joint Tourism Products.

This can help to increase the VISIBILITY of region, More information on each countries 'tourism potential and cross-branding of all CB region’s tourism products.

Tourism Fairs–as a tool for joint promotion, the participation with a common booth in the domestic and main international tourism fairs at a European level as well as in some specialized fairs–forex: Adventure tourism, Eco-tourism, MICE tourism etc.

- International and Regional Fairs in major target countries Poland, Berlin, London etc.

Establish Online Collaborative Marketing Platforms:

- Web-platform to promote joint tour products–it will feature: **http://bgtrdestinations.eu**
- Network Database to facilitate contact amongst stakeholders;
- Resource Centre including Image, video Library, access to relevant news, researches etc.

- Social media integration– Facebook, youtube, Instagram/ Flickr, Twitter–to utilize efficient internet/ social media outreach
- Mobile applications–focusing on cross-border tourism
- Blogs and Travel Websites-using travel blogs and popular blogger as promotional tool is widely used in the tourism industry
- Info tours/Fam trips for tour companies-each region can do several info tours for invited tour companies to make them familiar with local tourism potential and together with local partners develop new tour packages.
- Press tour for Media and joint Media/PRcoverage–to promote cross-border tourism potential and joint tour products, each region can work closely with media and invite them on regional press tours,to create special TV programs etc.

International tourism organizations and online marketing platforms-For effective development of cross-border tourism will be important too cooperation with various international tourism organizations, already existing/ developing regional tourism initiatives and marketing platforms:

Capacity Building and coordination tools:

- Creating Cross Border Tourism Council/Board-involving National Tourism Administrations, Tourism Associations, Private sector and tourism experts (local and international). It will be responsible for coordination of–strategy creation, marketing and PR actions, joint tour products and tour-routes etc.
- Coordinate Sub-Regional Capacity Building Seminars- Establish a set of sub-regional capacity building workshops addressing Cross Border tourism policy and governance issues, stimulating best-practice exchange of know-how between National Tourism Administrations.
- Annual (or semi-annual) stakeholder conference– The aim of conference-to promote the Cross-border tourism, share experience and best practices, lobbying with governments and active involvement of international organizations/ experts.
- Education links–active networking with tourism schools/ institutions in region, student/ researchers exchange for specific projects (for example: botanical gardens, national parksetc.)

EDİRNE- BURGAS TOURISM ACTIVITIES AND MEETING RESULTS WITH TRAVEL AGENCY

1- Day trips from Burgas region to Edirne and Edirne&Kırklareli to Burgas are available.

2- Most of the tours to the Edirne and Kırklareli from the Burgas Region are mainly day-trip and shopping.

3-Burgas Region, Kırklareli and Edirne travel agencies and tour operators do not opt for cooperation.

4- Edirne and Kirklareli travel agencies are planning a destination in the Burgas Region, which usually includes the sea and history points such as Sozopol and Nessebar.

5- Travel agencies and tour operators from Bulgaria visit Edirne and Kırklareli either on their way to southern provinces of Turkey or they are visited as a stopping point to Istanbul-based tours.

6- Burgas travel agencies cooperate with Istanbul travel agencies.

7- For the time being, efforts to market about cross border tourism of tour operators and travel agencies in Burgas, Edirne and Kırklareli region for third country tourists are not much.

8- In both countries, destination planning involving cross-border cooperation is not sufficient.

9- Travel agencies are experiencing local tour guide problem in tour planning. Some of them do not prefer to work with tour guide because they are increased their costs.

10- The number of accommodation nights-spent in Edirne and Kırklareli is very few. Tourists from Burgas and other regions who travel to Cappadocia, Kuşadası, İstanbul, Akdeniz, do not stay in Edirne and Kırklareli.

11- Tourists from Edirne and Kırklareli generally visit and stay in Burgas.

12- Tourists from Edirne and Kirklareli mostly visit the Burgas region for summer and sea tourism by their car. These tourists ask for help from local Turkish travel agencies from time to time. But it is difficult to reach a definite statistic about Turkish tourists and their purpose of visit Bulgaria.

13- Tourists from Bulgaria Burgas-Yambol-Haskovo and other regions come from Edirne and Kırklareli mainly for shopping and history-culture trip. When these tourists go to other places in Turkey, it is difficult to obtain accurate statistics.

14- Especially during the summer months, there are waiting at the border gates because of the vehicles coming and going from Europe to Turkey. So between June and September, Bulgaria and third country tourists are negatively affected by these wait at the border Gates. Moreover, visa restrictions for Turkish tourists are preventing the tourism movement from increasing.

SUGGESTIONS

1- Bulgarian and Turkish tour operators and travel agencies should league together from time to time and projects should be made to increase the spending the night organizations from Burgas Region to Edirne and Kırklareli - Edirne Region to Burgas in the scope of mid term and long term strategy.

2- Studyings should be done to include the thematic packages of the future tour plans that includes the region. The thematic tours that include festival, gastronomy, nature and culture, lifestyle, agriculture of both countries should be presented as packages to agencies. Nature, gastronomy, agro tourism, festival, Thracian tourism, thematic tours should be approached with priority because they are unique.

3- Both countries' tour operators and agencies should organize cross-border tour organizations that include neighbour cities of the partner country, and there should be marketing initiatives for at first tourists of the partner countries and then third countries.

4- Introductory materials like banners, booklets, brochures, maps etc. of the both sides of the border for the third country tourists visiting the Burgas Region with long stayings and Kırklareli should be provided in the tourism consultancy offices, agencies, provincial culture and tourism directorates and local administrations.

5- For sustainable cross-border tourism, the ministries, local tourism authorities and sector representatives of the both countries should periodically league together to develop short and long term strategies, apply them for common gains and follow the results.

6 - Destination plannings that can be offered to international markets under the name of like 'One country one destination', 'Three countries one destination' and so on should be shared in the internet environment and fairs in various languages to be accessible to other countries' operators.

7- Precautions to facilitate the passing especially for third country tourists on border gates should be taken quickly. Studyings should be done to reduce the transit time of a tourist at the border crossing.

8- Questionnaires and surveys measuring the wishes and expectations of the tourists in the both regions should be conducted to encourage accommodation in the hotels of the of the two countries.

9- These similar cross-border projects should be increased and information tours based on incentive should be organized especially with agency and tour operators.

10-Sofia-Thessaloniki-Istanbul and France-Germany and Central European countries, cooperation, participation and sharing should be increased.

11 - International signs showing historical touristic and natural places on both sides of the border should be reconsidered and they should include facilitating international language to encourage pass-byer tourists.

12- A web portal can be created for the sector representatives who support sustainable tourism and coorporation, on both sides of the border, and contact informations can be present there.

13-Tourist guides who know well both sides of the border can participate in various informal tours and seminars with the aim of improving themselves in Turkish-Bulgarian-English language.

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