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The Tourism Potential of the Bulgarian Danube Region

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Abstract: Successful performance on potential tourism markets requires that regions which are both sufficiently large and easily recognizable to Bulgarian and foreign tourists be presented. It is a common objective of the European Commission and the governments of the fourteen EU countries along the Danube to enhance the cooperation and communication between local citizens by designing a Danube Strategy that will integrate the markets within the EU and promote interregional and international cooperation. Sustainable tourism development, which has become a major priority for Bulgaria, requires the efficient exploitation of the tourism potential of the country and active intercultural collaboration. It also entails developing integrated cross-border and transnational projects to design a common Danube Tourism Strategy, develop a common tourism market and initiate a range of initiatives to promote Danube tourism products in different spheres of tourism - cultural, wine, agricultural, cruise, balneo, spa and wellness, biking and hiking. Some of the key activities within the framework of the Danube Tourism Strategy include improved infrastructure planning and development; establishing the Danube region as a European tourism brand and a major destination; promoting cultural tourism and cultural exchange; developing eco-tourism and active tourism. The Concept about Tourism Zoning of Bulgaria has identified nine tourism regions in the country. One of them is the Danube region where more than a quarter of all Bulgarian municipalities are situated. This paper studies the dynamics of the major indicators of tourism development in the Danube tourism region in the period from 2010 to 2015. We review current trends and conduct a factor analysis of changes in receipts from overnight stays. We also identify key factors which contribute to or hinder tourism development in the region. The paper compares the indicators of the region with the indicators of the other tourism regions in the country and highlights a major strategic issue, i.e. the noticeable contrast in the development of different regions in Bulgaria.

Keywords: *tourism; regional development; trends.*

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1. Introduction

The Danube River has always been an attractive tourist region and the Danube River is used as a reference for the wealth of tourist opportunities and resources. The development of a sustainable regional tourist brand, its promotion and enforcement in the consumer consciousness is based both on the available tourism resources in the destination as well as on the market research and analysis of the tourist potential of the region, the possibilities and the degree of its effective use [1].

The study covers exploration of the tourist potential of the Danube tourist region in Bulgaria, by analyzing the dynamics of the main indicators of tourism development of the region for the period 2010-2015. The existing trends and a factor analysis of the change in the realized revenues from overnight stays were monitored. The main stimulating and impediments to the tourist development of the region are identified. The comparison with the indicators related to the other tourist regions in the country makes it possible to clearly outline the existing asymmetry in the regional tourist development of Bulgaria.

The territory of Bulgaria is divided into nine tourist regions: the Danube Region (TR1); Stara Planina area (TR2); District Sofia (TR3); Trakia area (TR4); Rose Valley Area (TR5); Rila-Pirin area (TR6); Rhodope Region (TR7); Varna Black Sea area (TR8); Burgas Black Sea Coast (TR9). Each of these areas is characterized by its basic and expanded tourist specialization, highlighting their own identity. The main specialization is a combination of two types of tourism, which in their combination define the uniqueness of the regions. Extensive specialization includes besides the main and up to four complementary types of tourism. In accordance with the requirements of the Law on Tourism, the new tourist areas outlined in the Bulgarian Tourist Zoning Concept cover the entire territory of the country and the minimum territorial unit is the municipality.

2. Theoretical Background

The main specialization of the Danube region is cultural and cruise tourism. Compared to other tourist regions of Bulgaria, it covers the largest territory and is made up of the largest number of municipalities - 67 of the 265 municipalities in the country. Its center is Ruse and the other district towns within it are Vidin, Montana, Pleven, Razgrad, Targovishte and Silistra. The promotion focuses on the promotion of cultural and historical tourism, river cruise tourism, adventure and ecotourism, urban

entertainment and shopping tourism, wine and culinary tourism and religious and pilgrimage tourism.

Table 1 presents information on the dynamics of several key area indicators over the period 2010-2015, whose systematic analytical engagement and study allow for the reporting of its tourist development: P1 - Accommodation (number); P2 - Accomplished nights (thousand); P3 - Overnight residents in the country (thousand); P4 - Structure of tourists (relative share of tourists in the region from the total number of tourists in the country - in%); P5 - Overnight residents in the area (Thousandths); P6 - Average number of nights per tourist; P7 - Average price per night (BGN); P8 - Revenues from overnight stays (BGN thousand); SGP ($\Delta P8$) - the dynamics of the revenues from overnight stays in BGN thousand (absolute change compared to the previous year).

Table 1. Key indicators for the development of tourism in the Danube Region

Period	<i>P1</i>	<i>P2</i>	<i>P3</i>	<i>P4</i>	<i>P5</i>	<i>P6</i>	<i>P7</i>	<i>P8</i>	$\Delta P8$
2010 r.	257	427	4 412	5.5	241	1.8	37.75	16 134	X
2011 r.	296	451	4 965	5.0	247	1.8	35.15	15 847	-287
2012 r.	186	479	5 395	4.7	252	1.9	41.57	19 920	4 074
2013 r.	209	474	5 755	4.3	250	1.9	37.89	17 942	-1 978
2014 r.	193	414	5 826	4.1	237	1.7	40.23	16 647	-1 295
2015 r.	196	428	6 155	4.0	246	1.7	41.10	17 574	927

The analysis of the data in the table shows:

- The number of accommodation places in the Danube Region (P1) decreased by 23.7% (from 257 in 2010 to 196 in 2015);
- The number of nights spent in the region (P2) is kept at a relatively constant level - from 427 thousand. In 2010 to 428 thousand. In 2015, with the only significant drop (12.6%) recorded in 2014 compared to the previous 2013;
- The number of people in the country in 2015 compared to the beginning of 2010 registered a significant increase of 39.5% (from 4 412 thousand to 6 155 thousand), the rate of change of the indicator in the period falls from 12.5% in 2011/2010 to 5.6% in 2015/2014, the increase being relatively weakest in 2014 compared to the previous 2013 (1.2%);

- The relative share of tourists in the region from the total number of tourists in the country gradually drops from 5.5% in the beginning of 2010 to 4.0% in 2015. The rate of decrease of the indicator gradually drops from 8.7% in 2011/2010 To 1.6% in 2015/2014;
- The number of persons in the area in the region in 2015 compared to the beginning of 2010 registered an increase of 2.1% (from 241 thousand to 246 thousand), with the most significant decrease of the indicator being observed in 2014 Compared to the previous 2013 - 5.5%. Significant is the growth of tourists in the region in 2015 - 4.4%;
- The number of nights spent on average by one tourist in the region registered a slight increase in 2012 and 2013 compared to the previous ones and in the last two years of the survey remained at the level of 1.7. Nights, which is below the level of the initial two years (1.9%);
- Unbalanced dynamics is reported for the average cost per night indicator, increasing by 8.9% in 2015 compared to the beginning of 2010 (from 37.75 BGN to 41.10 BGN);
- Revenues from overnight stays, which increase from BGN 16,134,000 in 2010 to BGN 17,574,000 in 2015 (8.9%), increase with the same percentage. For this general dynamics, the significant growth of the indicator in 2012 is markedly influenced by an increase of BGN 4,027 thousand (25.7%) compared to the previous year. Over the next two years, the revenues from overnight stays gradually decreased to almost the level From 2010, and in 2015 they registered an increase of BGN 927 thousand (5.6%).

3. Argument of the paper

Table 2 presents information on the average value of tourism development indicators in Bulgaria during the period 2010-2015 - in tourist regions of the country. The following designations are used in the table: P1 - Accommodation (no.); P2 - Accomplished nights (thousand); P3 - Overnights (thousand); P4 - Tourists structure (%); P5 - Average number of nights per tourist; P6 - Average price per night (BGN); P7 - Revenue from overnight stays (BGN thousand); SGP ($\Delta P7$) - the dynamics of the revenues from overnight stays in thousands of BGN (absolute change compared to the previous year).

Table 2. Average value of tourism development indicators for the period 2010-2015 in tourist regions of Bulgaria

Indicators		<i>P1</i>	<i>P2</i>	<i>P3</i>	<i>P4</i>	<i>P5</i>	<i>P6</i>	<i>P7</i>	$\Delta P7$
Tourist regions	<i>TP1</i>	223	445	246	4.6	1.8	38.95	17 344	1 440
	<i>TP2</i>	332	702	403	7.4	1.7	33.43	23 529	10 640
	<i>TP3</i>	179	1 421	811	15.0	1.7	74.46	104 985	21 686
	<i>TP4</i>	230	696	377	7.0	1.8	46.45	32 353	7 952
	<i>TP5</i>	122	437	183	3.4	2.4	39.62	17 303	11 137
	<i>TP6</i>	335	1 462	586	10.8	2.5	38.30	56 307	29 980
	<i>TP7</i>	424	1 027	417	7.7	2.5	36.92	38 142	20 931
	<i>TP8</i>	562	6 177	1 222	22.6	5.1	41.57	257 477	131 855
	<i>TP9</i>	825	7 349	1 173	21.6	6.3	41.20	304 607	138 035
Total / average country		3 232	19 715	5 418	11.1	2.9	43.43	852 048	373 657

The comparative analysis of the data in Table 2 shows:

- The analysis of the averaged values of the surveyed tourism indicators for the period shows that the ratio between the largest and the smallest region in the country by the indicators "Income from nights", "Accommodation places", "Realized nights" and "Overnight tourists" is in the range 7-18 times. These disproportions are conditioned by the highly dominant role of maritime tourism in the tourism industry in Bulgaria. A comparatively higher degree of balance is observed in the indicators "Average number of nights spent by a tourist" and "Average price per night".
- The places of accommodation in the largest in the territory of the Danube Region, comprising a quarter of the municipalities in Bulgaria, account for only 6.9% of the total number of tourist sites in the country on average during the surveyed period. Approximately the same relative share was reported for the sites in the regions of Sofia (5.5%) and Thrace (7.1%). Relatively the highest share is occupied in the two Black Sea regions (17.4% for the Varna Black Sea area and 25.5% for the Burgas Black Sea coast);
- Even lower is the relative share of the nights spent in the Danube Region in the total number of nights in the country - 2.3%. Their

share can be compared to those related to the Rose Valley (2.2%) and Stara Planina (3.6%). The average value of this indicator in the other tourist regions of the country is significantly higher - from 5.2% in the Rodopi region to 31.3% in the Varna Black Sea area and 37.3% in the Burgas Black Sea coast;

- The distribution of the average value of the arrivals for the surveyed period was similar - only 4.6% of the total number of tourists stayed in the Danube Region. Only the tourists in the Rose Valley have a lower share - 3.4% and the total relative share of tourists in the two Black Sea regions is 44.2%;
- The comparatively lowest average number of nights spent by one tourist is registered in the regions of the Danube, Stara Planina, Sofia and Thrace (1.7-1.8). In the regions of the Rose Valley, Rila and Rhodope Mountains, an average value of 2.5 was reported. And this indicator shows a significant difference in the Black Sea regions - 5.1. In the region of Varna Black Sea coast and 6.3 in Burgas region;
- The average price per one night during the surveyed period is approximately equal in eight of the nine tourist regions of the country - 39.55 BGN, with the value in the Danube Region BGN 38.95. There is a significant difference in the region Of the capital - 74,46 leva.
- The share of tourists' overnight stays in the Danube and Rose Valley is the lowest, each accounting for only 2.0% of the country's total value. Two thirds of the revenues were realized on the Black Sea coast and the distribution of the indicator in the other tourist regions is as follows: 2.8% in the Stara Planina region; 3.8% in the Thrace region; 4,5% in the Rhodope region; 6.6% in the Rila region; 12.3% in Sofia region;
- The increase in the income from overnight stays in the country during the period 2010-2015 is BGN 373 657 thousand, with the share of the Danube Region's growth being comparatively the lowest and distinct from that for other tourist regions - only 0.4 %. A significant part of the overall trend (72.2%) is due to the growth of revenues in the two Black Sea regions and the values of the indicator in the other tourist regions are in the range of 2.1% to 8.0%.

4. Arguments to support the thesis

The conducted analysis of the dynamics of the tourist development indicators of the Danube Region during the period 2010-2015, the analysis

of the factor influences on the realized income from overnight stays and the comparison with the other tourist regions in the country give the following main conclusions and inferences:

Firstly, although during the period a decrease in the number of accommodation places in the area was reported, the nights spent are kept at a relatively constant level. This means that the available tourist sites have the necessary capacity and capacities to accommodate visitors and that the registered decline has no significant impact on the development of tourism in the area.

Second, the growth of the number of tourists in the country during the period does not affect the same positive degree of the tourist development of the region as in most other tourist regions. Its influence is largely offset by the registered decrease in the relative share of tourists in the Danube Region from the total number of tourist visitors in Bulgaria.

Thirdly, in the Danube Region, as well as in the other tourist regions of the country, which do not develop summer tourism, during the period there were mainly short-term tourist stays within one or two nights.

Fourth, the increase in realized overnight accommodation during the period is mainly due to the growth of the total number of tourists in the country, as well as to the increased average price per night. These are the two main factors that have a positive impact on the development of the region. Their impact should be stimulated in the future. Fifth, the decline in the relative share of tourists in the Danube Region, the total number of visitors to Bulgaria, as well as the decrease in the average number of nights spent by the tourist are the factors hindering the tourist development of the region. It is imperative that joint efforts be made by all parties interested in the development of the region in the search for opportunities to limit their impact.

5. Conclusions

Recent years have shown that local and private interests in tourism are almost always accompanied by a real inability to offer a sufficiently attractive and quality product that highlights the need for regional interaction and complementarity of opportunities and efforts. Responding to the expectations, requirements and interests of different market segments, regionalization of national marketing is required [2]. Effective reaching the potential tourist markets requires the deployment of sufficiently large areas that are recognizable to Bulgarian and foreign tourists. In this sense, the updating of Bulgaria's tourism zoning is a necessary step towards developing

and offering a diverse and competitive tourist product. The performance of periodic analyzes helps to reach the root causes of the development of the different territories and the destination of Bulgaria as a whole. The development of a clear vision of the effect of incentives and tourism development limiting factors is related to the application of the methodological apparatus and the technical tools of the analysis. The complex of these actions will enable real state support for the individual tourist regions - in the form of methodological and logistic assistance and targeting part of the national marketing and advertising funds to those regional levels in which such investments will prove to be effective and appropriate.

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