TOURISM SUSTAINABILITY: A COMPARATIVE ANALYSIS OF BULGARIA AND THE NEIGHBOURING COUNTRIES

Petya Ivanova[1],

e-mail: p.ivanova@uni-svishtov.bg

Abstract

The main aim of this paper is to analyze some key indicators determining the degree of tourism sustainability. It studies tourism sustainability indicators in Bulgaria compared with its neighbouring countries and uses an established methodological apparatus for studying tourism sustainability, developed by the World Economic Forum. The research places emphasis on an analysis of the balance in the triple bottom line of economic-environmental-social goals determining sustainability. The research methodology includes theoretical-methodological analysis, comparative analysis, empirical analysis, systemic approach. Based on the analysis carried out, the strengths of the offered tourist product in Bulgaria are highlighted, as well as the weaknesses regarding sustainability, which need improvement measures.

Key words: travel business, tourist destination, sustainable tourism, sustainability indicators.

JEL: L83; Q56.

Introduction

A number of studies have shown that the operation of travel businesses and destinations will increasingly be tied to the ability to manage and operate in the presence of environmental threats. Among the main global risks are climate change (Peeters, et al., 2024), extreme weather conditions and biodiversity (World Economic Forum, 2022). It is clear that these risks represent a serious challenge to the development of the tourism sector (Filipova, 2008).

Measuring countries' progress towards sustainability through selected indicators allows to assess the status and identify areas of improvement needing interventions.

The **main aim** of this paper is to study, analyze and assess the degree of sustainability in the development of tourism in Bulgaria (BG) based on a comparison with Greece (GR), Romania (RO), Turkey (TR), Serbia (RS) and North Macedonia (MK), and on this basis to highlight as a result those areas in which the country has competitive positions and to outline the areas that need improvement.

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[1] Associate Professor, Ph.D. Department of Tourism Economics and Management, Dimitar A. Tsenov Academy of Economics, Svishtov, Bulgaria, ORCID 0000-0002-7268-0442.

Literature review

The topic of sustainable development is the subject of a number of studies, strategies and policies and is considered an open concept with many interpretations and context-specific perspectives (Hussain, et al., 2023). Conceptually, the author adheres to her understanding that the sustainable tourism development of tourism is a *philosophy for its development and management, committed to the search for methods and means for long-term resource planning, achieving good economic, social and cultural development preserving the environment, improving the well-being of local communities and bringing high consumer satisfaction* (Ivanova, 2015).

The widespread use of the concept of sustainable tourism in scientific research among business and policy makers is defined as "one of the great success stories of tourism research and knowledge transfer" (Hall, 2011, p. 649). A recent bibliometric study found a major evolution of research on sustainable tourism development (Bruyn, et al., 2023).

A substantial body of research focuses on sustainable tourism policies, including in times of crisis (Schonherr, et al., 2023). A leading goal of most public policy analyses is to assist management in making the right decisions (Ivanova & Stankova, 2021). In order to do this, they must have the systematically collected information that allows them to assess the actions taken. Sustainable tourism indicators are measurement tools widely used in planning and decision-making processes (Blancas, et al., 2023). Measurements and analyses of the degree of sustainability are most often found when taking into account the economic, environmental and social aspects that determine it (Lu & Nepal, 2009). Indisputably, on the basis of an objective analysis using reliable data on sustainability, realistic, measurable goals can be outlined, with specific results to be achieved.

Materials and Methods

Data collection and data analysis

Data from published official reports of the United Nations World Tourism Organization (UNWTO), World Economic Forum (WEF) and World Travel & Tourism Council (WTTC) are used as an information base of the paper.

The period for which the tourism sustainability indicators are analyzed is 2019 - 2021. The latest available data at the time of writing the paper are for 2021.

The method of comparison is used to highlight the strengths and weaknesses in terms of the sustainable tourism development in Bulgaria. A basic assumption when applying this method is to compare objects that work under the closest conditions, for the same users and offer similar products and services. Therefore, for the purposes of this paper, the neighbouring countries are selected for comparison in terms of sustainable tourism. The arguments for choosing this method and objects of comparison are: (i) sustainability is associated with the trinity between economic, environmental and social goals, and in this sense the territorial proximity of the

destinations is essential for the interrelationship between these three dimensions; (ii) the development of mainly domestic and regional tourism in recent years under the influence of global factors determines the fact that, to a large extent, the selected destinations compete for the same tourists.

Construct measurements

There is an adequate apparatus for studying the problem that allows for systematic assessment. Sustainability is one of the four main subindices within the Travel & Tourism Development Index measured by the WEF. The pillars and indicators forming the Subindex: Travel and Tourism Sustainability are presented in Table 1.

Table 1. Travel and Tourism Sustainability

Pillar: Environmental Sustainability (ES)	
Climate Change Exposure and Management	Greenhouse gas (GHG) emissions per capita Renewable energy Global Climate Risk Index Investment in green energy and infrastructure
Pollution and Environmental Conditions	Particulate matter (2.5) concentration Baseline water stress Red List Index Forest cover loss Wastewater treatment Clean ocean water
Preservation of Nature	Number of environmental treaty ratifications Adequate protection for nature Oversight of production impact on the environment and nature Total protected areas coverage Average proportion of key biodiversity areas covered by protected areas
Pillar: Socioeconomic Resilience and Conditions (SRC)	
Poverty rate Social protection basic coverage Social protection spending Not in education, employment or training (NEET) ratio	Equal workforce opportunities Workers' rights Gender Inequality Index
Pillar: Travel and Tourism Demand Pressure and Impact (TDPI)	
Travel and Tourism GDP multiplier Inbound length of stay Seasonality of international tourist arrivals Concentration of interest in cultural attractions	Concentration of interest in nature attractions Geographically dispersed tourism Quality of town and city centres

Source: Word Economic Forum. Travel & Tourism Development Index 2021. Rebuilding for a Sustainable and Resilient Future. Insight report, May, 2022. https://www3.weforum.org/docs/WEF_Travel_Tourism_Development_2021.pdf

For the purposes of analysis and drawing conclusions, the paper uses the presented construction of indicators, based on a logical-methodological foundation and on the systemic approach. The availability of data for 117 countries, including those subject to the present analysis, allows the use of the comparison method.

Results and Discussion

Differences in the tourism development of the studied countries

Tourism is known to have multifaceted significance for economies and societies. Tourist visits, the contribution to the gross domestic product and the ability to generate employment are of key importance for its contribution to the development of the countries' economies. Table 2 presents data on these indicators by country.

Table 2. Key indicators of country's tourism development

Country / Indicator	BG	RO	GR	TR	RS	MK
International tourist arrival, *thousands*	9312	453	7217	15894	446	118
International tourism inbound receipts *(inbound US$, millions)*	1624.1	1434.6	4932.9	10229.0	1248.7	252.1
Travel and Tourism Industry GDP, *US$ million*	862.4	1845.4	5892.2	12287.6	498.5	147.8
Travel and Tourism Industry share of GDP, *% of total GDP*	1.3	0.8	3.0	1.7	1.0	1.2
Travel and Tourism Industry Employment, *1000 Jobs*	96	129	244	666	35	15
Travel and Tourism Industry share of Employment, *% of total employment*	3.1	1.5	6.4	2.5	1.6	1.9
Domestic Travel and Tourism spending, % of International Travel and Tourism spending	26.8	75.3	54.4	47.2	34.7	47.1
Overall Rank	41	53	28	45	70	87

Source: UNWTO, Database, latest available data

According to the Travel & Tourism Development Index (WEF), Bulgaria ranks 41st among the 117 countries monitored. Compared to our neighbouring countries, only Greece has a higher overall rank – 28. Turkey (45th place) and Romania

(53rd) are a little behind. The data show a strong dependence of the Bulgarian economy on tourism development – 1.3% of GDP (Greece and Turkey have higher values for this indicator). In terms of employment, the tourism sector accounts for 3.1% of the jobs (the indicator is higher only in Greece). In addition to this, tourism in Bulgaria is most dependent on international tourists, with the indicator Domestic Travel and Tourism spending, % of International Travel and Tourism spending being the lowest (26.8%) compared to the neighbouring countries.

Comparative analysis of tourism sustainability in Bulgaria compared to the neighbouring countries

According to the WEF methodology, measuring tourism sustainability is decomposed into the following three pillars: Environmental Sustainability (ES); Socioeconomic Resilience and Conditions (SRC); Travel and Tourism Demand Pressure and Impact (TDPI) (see Table 1).

The first pillar measures the ***overall sustainability of the economy's natural environment***, the protection of its natural resources and climate change vulnerability and preparedness. The importance of natural resources in providing an environment for tourism is undeniable, so policies and actions enhancing environmental sustainability are a significant aspect in ensuring the country's future attractiveness as a destination. The state of water resources, air pollution, forest loss and the degree of risk of extinction of certain species characterize the state of the environment in a given country. In addition to the care of protected areas, the ratification of international environmental treaties show the extent to which the government and the private sector preserve the natural assets that generate an environmentally-friendly tourism industry. Indicators related to greenhouse gas emissions, the use of renewable energy, investments in green infrastructure are important for understanding how exposed and ready a country is in its intentions to deal with climate change, which in itself is one of the biggest long-term threats facing the sector.

Within this measured aspect, Bulgaria increases its rating from 4.5 in 2019 to 4.6 in 2021, and goes up from 23rd to 19th place (Table3.1). Greece (Table 3.3) and Romania (Table 3.2) come next in the rating regarding this pillar among the countries studied. All countries subject to the analysis register an improvement related to this rating pillar in 2021 compared to 2019, with the exception of Turkey (Table 3.4).

Table 3. Sustainability indicators of Travel and Tourism – by country

Table 3.1. **Bulgaria** *(Score:1-7 best), (Rank: 117-1 best)*

	ES		SRC		TDPI		Tourism Sustainability *Total*	
	Rank	Score	Rank	Score	*Rank*	*Score*	*Rank*	*Score*
2019	23	4.5	35	4.7	83	3.7	42	4.3
2021	19	4.6	35	4.8	82	3.8	36	4.4

Table 3.2. **Romania** *(Score:1-7 best), (Rank: 117-1 best)*

	ES		SRC		TDPI		Tourism Sustainability *Total*	
	Rank	Score	*Rank*	*Score*	*Rank*	*Score*	*Rank*	*Score*
2019	41	4.3	46	4.3	70	3.9	49	4.1
2021	34	4.3	47	4.4	62	4.0	47	4.3

Table 3.3. **Greece** *(Score:1-7 best), (Rank: 117-1 best)*

	ES		SRC		TDPI		Tourism Sustainability *Total*	
	Rank	Score	*Rank*	*Score*	*Rank*	*Score*	*Rank*	*Score*
2019	36	4.3	44	4.4	115	3.2	68	4.0
2021	33	4.4	36	4.8	110	3.4	51	4.2

Table 3.4. **Turkey** *(Score:1-7 best), (Rank: 117-1 best)*

	ES		SRC		TDPI		Tourism Sustainability *Total*	
	Rank	Score	Rank	*Score*	*Rank*	*Score*	*Rank*	*Score*
2019	93	3.6	69	3.8	105	3.5	100	3.6
2021	102	3.6	77	3.7	103	3.5	104	3.6

Table 3.5. **Serbia** *(Score:1-7 best), (Rank: 117-1 best)*

	ES		SRC		TDPI		Tourism Sustainability *Total*	
	Rank	Score	*Rank*	*Score*	*Rank*	*Score*	*Rank*	*Score*
2019	84	3.7	50	4.2	94	3.6	72	3.9
2021	78	3.8	51	4.4	93	3.7	73	4.0

Table 3.6. **North Macedonia** *(Score:1-7 best), (Rank: 117-1 best)*

	ES		SRC		TDPI		Tourism Sustainability *Total*	
	Rank	Score	*Rank*	*Score*	*Rank*	*Score*	*Rank*	*Score*
2019	94	3.6	66	3.9	95	3.6	92	3.7
2021	91	3.7	56	4.2	113	3.3	93	3.7

Source: WEF, Travel and Tourism Development Index

Socio-economic resilience and conditions covers the socio-economic aspects within the scope of an economy's sustainability. Equality between the sexes, the inclusion of different categories of labour force, greater rights of the employed are salient features of this aspect. This is particularly significant for the tourism sector, as it is known that women and young people work predominantly in it. Investment and stronger social protection, such as child and maternity support, unemployment and disability benefits, are also key to making the labour market more resilient under the conditions of economic downturns and other shocks. Moreover, combined with access to basic resources as measured by poverty levels, all of the above factors play a role in the wider social and economic stability, which affects tourism investment.

The set of indicators forming this aspect of sustainability for Bulgaria ranks it 35th among the 117 countries studied in the two indicated years (Table 3.1). Compared to its neighbouring countries, our country has the best position again, followed by Greece which ranks 36th (Table 3.3), and Romania – 47th (Table 3.2). Data for 2021 compared to 2019 show that only Greece and North Macedonia improve their positions.

Travel and Tourism Demand Pressure and Impact measures factors that may indicate the presence of risk related to demand concentration and volatility, as well as the quality and impact of tourism. Uncontrollable tourism development can lead to overcrowding of certain destinations, resulting in the destruction of natural and cultural resources, overburdened infrastructure, increased housing prices and a generally reduced quality of life for local residents. Such problems can lead to a negative reaction of residents to tourism, reduced tourist satisfaction and lower overall attractiveness of the destination, all of which having a negative impact on tourism development. The measured aspects related to this pillar include length of stay of visitors, seasonality of tourism, indicators of tourism diffusion and distribution of economic benefits. The problems can be mitigated by reducing the carrying capacity of the destination, promoting a variety of possible travel destinations and markets, and enriching travel experiences.

Regarding this measuring line, Bulgaria ranks second in terms of overall rating, after Greece, which rose from the 70th place in 2019 to the 62nd, increasing its rating from 3.9 to 4.00. Bulgaria also improves its position, going from 83rd place

in 2019 to 82nd in 2021. Only North Macedonia deteriorated its positions, going from 95th place to 113th in 2021.

The overall sustainability of tourism in Bulgaria is ranked 36th in 2021, which puts it in first place among neighbouring countries. In addition, a positive finding is that the country increases its rating compared to 2019. Romania and Greece also register improvements in terms of tourism sustainability, while for Turkey, Serbia and North Macedonia there is a decrease in ratings and respectively a negative change in their ranks.

Conclusion

Based on the above analysis, it can be summarized that Bulgaria is a country with a strong dependence of the economy on the development of tourism, confirmed by indicators such as share in the gross domestic product and employment provision. The comparison with neighbouring countries also shows the strongest dependence of Bulgarian tourism on international, compared to domestic tourists. An accurate assessment of the state is the first step towards building an appropriate managerial policy.

The findings regarding sustainability are generally favourable. The country's positions regarding the overall sustainability of the natural environment and socio-economic resilience are competitive. The overall analysis of the sustainability of tourism in Bulgaria in comparison with neighbouring countries unequivocally forces the conclusion that the problematic moments in Bulgarian tourism practice can be sought within the framework of the third pillar – uneven demand, loading the resources in the high season, product quality and the impact on the lives of local residents.

The present study contributes to the more complete interpretation of the quantitative data and the related assessments of the main indicators forming sustainable tourism in the context of the specifics of national tourism.

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