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UNSOLVED ISSUES IN BULGARIAN TOURISM

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Abstract

Bulgartia is a country that has a multitude of touristic resources – picturesque coastline, high snowy mountains, hundreds of mineral springs, multiple cultural monuments, unique folklore, modern accommodation facilities and others. All of these suggest a flourishing development of Bulgarian tourism. Unfortunately, during the last 10 years the results do not estimate over the humble 3-3.5 billion EUR. An attempt to discover the reason for these mediocre results and to formulate the basic problems – mismatch between demand and supply, overbuilding, lack of labor force, worsened service level and others is made and some measures have been suggested for overcoming the mentioned weaknesses.

Key words: *Bulgarian tourism, overdevelopment, overbuilding, level of service, leisure programs*

INTRODUCTION

The subject of the following research are some unsolved problems of Bulgarian tourism and hospitality above all, which hinder the successful and sustainable development of tourism and the generation of enough revenue from tourist activities, which would allow the return of the investments to be made within an acceptable time frame.

At the very end of 20th century, after the privatization of the accommodation facilities in Bulgaria, extensive building of new hotels began as well as a complete reconstruction and modernization of the existing ones. The construction boom continued until the economic crisis of 2008, but it is still a fact today, although it is moving at a slower pace with around 100 to 150 hotels going into exploitation yearly. According to the experts, 20 billion EUR were invested between 1999 and 2019 in the creation of new and modernized accommodation facilities. At the same time, despite the modern accommodation facilities, the revenue from international tourism for the last 10 years has remained unchanged - between 3 and 3.5 billion EUR. With the low level of average annual occupancy of the accommodation facilities – 35-39% according to NSI, tens of years will be necessary for a return of the investments.

The purpose of the present work is to find the main reasons for those unsatisfactory results, to formulate the main issues of the Bulgarian tourism and to target some measures, which would help to solve at least some of those issues.

We currently consider the great mismatch between demand and supply as a major issue restraining the normal development of the Bulgarian tourism. According to expert assessments there are 1.5 million hotel beds. At the same time according to the NSI the foreigners, who visited Bulgaria for tourism in 2018 were around 9 million people [4]. This formally means, that if they arrive at the same time they would occupy the bed capacity for 6 days and during the remaining time of the year it would be idling, which is almost the case in real life.

This major issue leads to a number of others like low occupancy rate, short season, insufficient revenue, low pay and lack of personnel.

MATERIALS AND METHODS

A quantity analysis of various statistical parameters, qualifying the development of the

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Bulgarian tourism, has been made in order to fulfill the aim of the current work. Besides the statistical analysis of the official data with NSI and EUROSTAT as a source, various other expert assessments, observations, polls, polls and interviews with specialists from the tourism practice mostly from the southern Bulgarian sea coast have been gathered and analyzed, an analysis of data from ministries, municipal administrations, police offices and others has been made.

Table 1. Travel receipts and expenditure in balance of payments, 2011–2016

	Receipts (million EUR) 2011 2016		**Relative to GDP 2016 (%)**	**Expenditure (million EUR) 2011 2016**		**Relative to GDP 2016 (%)**	**Balance (million EUR) 2016**
EU-28 n	86, 767	112,299	0.8	87,031	99,054	0.7	13,246
Belgium	9,154	10,492	2.5	14,804	17,614	4.2	-7,122
Bulgaria	2,669	3,285	6.8	647	1,227	2.5	2,058
Czech Republic	5,822	5,703	3.2	3,435	4,447	2.5	1,256
Denmark	4,887	6,373	2.3	7,209	8,283	3.0	-1,910
Germany	27,930	33,818	1.1	61,686	72,085	2.3	-38,267
Estonia	897	1,345	6.4	579	1,048	5.0	297
Ireland	3,010	4,685	1.7	4,817	5,619	2.0	-934
Greece	10,505	13,207	7.6	2,266	2,006	1.2	11,201
Spain	44,711	54,660	4.9	12,493	17,437	1.6	37,223
France	39,334	38,301	1.7	32,029	36,464	1.6	1,837
Croatia	6,608	8,627	18.6	632	853	1.8	7,774
Italy	30,891	36,358	2.2	20,584	22,547	1.3	13,811
Cyprus	1,835	2,489	13.7	942	1,061	5.9	1,428
Latvia	553	783	3.1	549	628	2.5	155
Lithuania	943	1,090	2.8	616	913	2.4	177
Luxembourg	3,497	3,669	6.9	2,715	2,545	4.8	1,124
Hungary	4,243	5,121	4.5	1,781	1,954	1.7	3,167
Malta	911	1,307	13.2	239	369	3.7	938
Netherlands	9,230	12,697	1.8	14,836	16,336	2.3	-3,639
Austria	14,267	17,400	4.9	7,531	8,799	2.5	8,601
Poland	7,680	9,908	2.3	6,055	7,204	1.7	2,704
Portugal	8,146	12,680	6.8	2,974	3,849	2.1	8,831
Romania	1,019	1,568	0.9	1,408	1,930	1.1	-362
Slovenia	1,974	2,190	5.4	818	854	2.1	1,337
Slovakia	1,745	2,483	3.1	1,567	2,023	2.5	460
Finland	2,745	2,467	1.1	3,502	4,692	2.2	-2,225
Sweden	7,316	11,407	2.5	10,048	13,083	2.8	-1,676
United Kingdom	27,610	37,413	1.6	40,065	58,396	2.4	-20,983
Iceland	-	2,173	11.9	-	1,146	6.3	1,027
Switzerland	12,359	14,692	2.4	9,884	14,926	2.5	-234
Montenegro	:	835	:	:	60	:	775
Former Yugoslav Rep. of Macedonia	172	253	2.6	81	163	1.7	90
Albania	:	1,528	14.2	:	1,139	10.6	389
Serbia	710	1,040	3.0	791	1,085	3.1	-45
Turkey	17,927	16,911	2.2	3,509	4,312	0.6	12,599
Kosovo (2)	532	690	11.5	157	142	2.4	548

Source: Statistics Explained – europa.eu [7].

This is necessary because of a certain imperfection of the NSI's methodology in collecting primary data of the number of beds, tourists who have stayed, overnight stays and others. This is due to the fact that up to 2006 the NSI reports only accommodations above 30 beds, and after 2006 – those above 10. This means that hundreds of thousands of beds in apart-hotels, apart-villages, categorized as individual guestrooms, a great part of the

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family hotels, guest houses, rooms, etc. are not officially counted and do not take part in the analyses and forecasts, which creates unreal picture of the current state and possibilities of Bulgarian tourism.
The multiannual theoretical and practical experience in the area of tourism and hospitality of the author of the paper has been used in analyzing the situation.

RESULTS AND DISCUSSIONS

From the EUROSTAT data can be seen, that in 2016 even countries with less territory than Bulgaria which have no sea outlet a realize much higher revenue than Bulgaria from national tourism: Czech Republic 5,703 mill. EUR, Hungary 5,121 mill. EUR, Luxembourg 3,669 mill. EUR [7] and we cannot even compete with our direct competitors from the region.
If we analyze the EUROSTAT data for the period 2011-2016, we will find out that the revenue from international tourism in Bulgaria was increased from 2,699 million EUR to 3,285 million EUR or for 6 years it increased by 21.7% with 6.8% contribution of the tourism branch to the GDP of Bulgaria.
At the same time the expenses of Bulgarian citizens for travelling abroad increased from 647 mill. EUR to 1,227 mill. EUR, so the increase was 89.6%, which was 2.5% of the GDP for 2016.
The positive balance from international tourism for 2016 equals only 2058 mill. EUR, or mere 4.2% of the country's GDP.
During the same year Croatia contributed 18.6% to its GDP from tourism, Cyprus – 13.7% and Malta – 13.2%[7].

Table 2. Revenue from international tourism in Bulgaria (mill. EUR)

Receipts			Expenditure			Balance
2011	2016	%GDP 2016	2011	2016	%GDP 2016	2016
2,699	*3,285*	*6.8*	*647*	*1,227*	*2.5*	*2,058*

Source: Statistics Explained – europa.eu [7].

If the number of foreign visitors to Bulgaria for tourism and the volume of revenue from foreign tourists are compared, we will see how insignificant the increase in both parameters is, considering the significant amount of beds for tourism in the country:

Table 3. Income from tourism in bill. EUR

Year of income	Income in bill. EUR
2018	*3.7*
2017	*3.5*
2016	*3.3*
2015	*2.9*
2014	*3.2*
2013	*3.1*
2012	*2.9*
2011	*2.85*
2010	*2.75*

Source: Statistics Explained, www.nsi.bg [4].

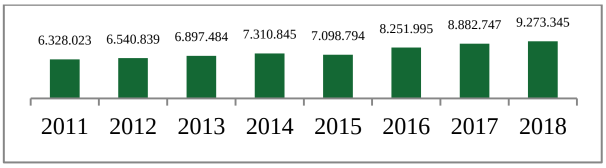

Fig. 1. Tourist visits of foreigners in Bulgaria.
Source: Adapted to www.nsi.bg [4].

It can be calculated from the mentioned data that the receipts from 1 tourist in Bulgaria for 2014 amounts to 438 EUR while at the same time in Greece it amounts to 610 EUR, and in Turkey – 753 EUR.[6]
It is a matter of correlations rather than a comparison of absolute numbers since there are major specific differences in the kind of tourism practiced in the different countries. On the other hand, Bulgaria has much more capabilities compared to the realized business results.
The number of tourists, the revenue and profitability are totally different indicators which are not necessarily directly proportional. For the accuracy of the data regarding the number of the foreign visitors we could rely on the border control statistics. On the other hand, regarding the revenue, the methodology that the NSI uses is uncertain as is uncertain what and how is measured as revenue from tourism. The number of tourists, the average stay of a single tourist, the revenue from a tourist, etc. are important for the rate of profitability. Generally, the higher the number of tourists, the more variable costs there are. The shorter the average stay is, the bigger the costs per tourist are.
What are those low business results of the Bulgarian tourism due to? The problems are

multiple and complex. We will not address the lack of strategy and policies for tourism development and the efficiency of the existing (or planned) ones as far as they exist. We will focus on a few economic, technical and institutional issues.

For us the first and major problem of the Bulgarian tourism at present is the great discrepancy between the demand and the supply of our tourist product.

If we follow the data of the NSI for 2017, we can calculate that with 66,467,503 possible stays (bed-nights) and with 26,054,096 nights spent, the coefficient of the accommodation rate was 39.2%[4]. Even calculated this way, the occupancy rate is low despite the seasonal type of our tourism – the supply is 3 times greater than the demand. However, this percentage has been calculated through the operating period indicator (191 days for 348 728 beds reported for the country) [4]. The operating period as an indicator is suitable for planning the amount of the expected stays (number of beds multiplied by operating period). But it is determined according to the number of days which the accommodation facilities have reported as operational. However, in reporting the number of possible stays should be calculated on the basis of a period of 365 days because of the fixed costs and the term of investment return. Calculated this way it appears that the occupancy rate for 2017 has actually been just 20.47%. This shows us that during 4/5 of the years the beds were empty.

The following questions then arise:

(i)How reliable are the data reported? While the NSI reported for example the availability of 314,257 beds for 2014 for the whole country and 120,217 beds for Burgas Region [4], at the same time a joint inspection of the police and the municipal administration of Nessebar, Burgas Region, reported 600,000 beds only in the territory of the municipality. According to expert assessments the number of beds in the country is around 1.5 million, i. e. five times as big as the one reported. Part of the issue lies in the fact that since 2006 the NSI has been reporting only above 10 beds in a single building, and all apartment villages and hotels are categorized as rooms (up to 5 beds in a building). Part of the persons who have stayed in family-run hotels, guesthouses, rooms, etc. have not been reported, i.e. over half of the beds have not been reported. The number of beds reported by the municipalities is more precise but the percentage of categorized building still remains dubious. The NSI data of the number of beds do not coincide with those of the municipalities and they are not considered in making official analyses and forecasts. The existence of such a big discrepancy between the official and the actual number of beds is really surprising having in mind that while misrepresenting the number of tourists, overnight stays and receipts is comparatively easier, there is such a lot of construction documentation for the buildings, and besides they can be physically counted.

(ii)On condition that according to the reports of the NSI in 2017 Bulgaria was visited by 8, 882,747 foreigners (not counting the transients), and the foreigners who stayed in the accommodation facilities were 3,655,830 people [4], the following question arises: Where did the rest 5,226,917 stays? Is it possible for 59 % of the inbound foreign tourists to stay with friends and relatives, in their own places, in the field, in their cars? The figures show that the unreported numbers of tourists and overnight stays, and therefore receipts, are almost twice as big as the ones officially reported.

(iii)Why is the task of controlling the numbers of beds and tourists, the receipts and service quality assigned solely to the Commission for consumer protection? Their prerogatives include control not only over tourism but on all activities related to trade and services. The members of the commission responsible for the entire southeast of Bulgaria (the regions of Burgas, Sliven and Yambol) are ten in number. With the huge number of establishments in this part of Bulgaria this means that during their entire working lives they would not be able to exert control over each establishment even once. And since the great significance of tourism for our economy is widely proclaimed, why isn't there a quality controlling body functioning under the aegis of the Ministry of Tourism?

The issue of the discrepancy between demand and supply of our tourist product leads to a number of other problems:

(a)**A prolonged term of capital investment return**. According to expert assessments for the past 20 years since 1999 over 20 billion EUR has been invested in constructing and renovating accommodation facilities. With 670 mill. EUR in revenue from the accommodation facilities (for 2017) [4], even at 40% return on sales (although such profitability seems fantastic) it will take 70 years to return the investment made, if the data of the NSI are real.

(b)The insufficient volume of revenue causes **the problem of the low level of remunerations in comparison** with that in destinations that are our competitors on the tourism market. The duration of the season is short, employment is low, receipts are insufficient and instead of directing more adequate efforts towards increasing sales to achieve the needed profit and profitability, the firms choose the easier way of cutting costs. And it is a fact known from practice that expenses and consumables are the easiest to cut. However, these cuts lead directly to a **fall in the level of service.** If we comply with the average international norm of one staff member attending to four guests to achieve a high-performance culture of service, then the establishments in and around the resort of Sunny Beach for example (400,000 beds) will need 100,000 staff, and the number of people employed in them is between 20,000 and 30,000. The low level of remunerations and the short season bring about the high mobility of the personnel. The costs related to hiring and training staff increase, the establishments work with employees who tend to be less and less qualified. There is also the fact that, on the one hand, the majority of the staff are temporary, without trade union protection, and on the other hand, they are confronted by the associated owners of establishments who act as a cartel and keep salaries and social contributions down. In addition, the widely applied all-inclusive plan makes it impossible for the staff to make extra income. While the prices of the main services in the competitor destinations are almost equal to ours, the salaries there are times higher than those in our resorts, and as a result most qualified employees leave the country.

(c)Insufficient receipts lead to **deterioration in service quality** in catering establishments as well. Ingredients of lower quality and cost, sometimes in insufficient quantities, are put in the kitchen produce and as finished products, which causes the tourists' dissatisfaction. The smaller number of sales entails a risk either of having old supplies, or lacking immediate readiness for sale. Therefore the quantities of supplies ordered are smaller, which increases the delivery costs.

The issue that mostly repels both Bulgarian and foreign tourists is the **overdevelopment of the tourist areas**.

The norms for tourism territorial planning in our country comply with the European practice – with 50 % green areas, half of them afforested [2], our resorts should be buried in greenery; with ten square meters per tourist, they should feel comfortable on the beach. However, in reality in some places the tourists are accommodated in 'Chinese walls', and on some beaches there is no room to even sit. For example, the length of the beach in Sunny Beach is 6,000 m with a width of 30 – 60 m. This means that the beach covers about 300-350 decares and it can accommodate around 30,000 people according to the norm [5] - the number of people for which the resort was once designed. Nowadays there are over 350,000 beds in the resort. The same is the situation in Sozopol. With the capacity of the two beaches 'Central' and 'Harmanite' for 7,000 people the beds in Sozopol are over 70,000. And it is not just a matter of beaches. With ten times more newly built beds the technical infrastructure must be changed, and that includes the capacity of substations, switch-yards, water and sanitation installations, ozonators, waste-water treatment plants, landfill sites, etc.

Perhaps this overdevelopment is also the fault of the way of measuring the beaches intended for concession. They are not measured according to the length and width of the usable beach strip, but by the coordinate points of the beach - the curves of the beach strip, river beds, lands of nearby territories, thus including dunes, gravel, green areas, shrubs, trees, etc. [3] The amounts of money paid for these unrealistically large areas are considerable and the concessionaires try to find ways to compensate them. That is why the beach strip is full of establishments, beach umbrellas, sun loungers, etc. However, the concessionaires are formally right. With the vast beach strips thus measured, naturally they fit in the legal requirements. They are not interested in the fact that the beach strip that is actually usable is filled with establishments, chargeable sun loungers and umbrellas, whose price exceeds the price of an overnight stay, that the tourists are dissatisfied, that they move to unguarded beaches, that they would hardly choose this destination again. This way of granting concessions should be changed. The beach strips should be granted under concession in their real dimensions to the owners of beach-side hotels, catering establishments, municipalities, etc. that are interested in finding ways to keep the tourists and make their stay more enjoyable.

A fact that is even more unacceptable is that this way of measuring the beach territories justifies the issuing of numerous permits for construction and overdevelopment, although practically the beach strips used cannot accommodate such an enormous number of tourists.

Disputes between investors and eco-organizations over the overdevelopment of beaches arise all the time despite the legal provisions. Very often due to the lack of cadaster plans, less stringent control, corruption appetites or the desire of some municipalities to increase their revenue from tourism and real estate sales, structures are erected even on natural dunes declared protected areas. Legal disputes then begin whether the construction site is or is not on dunes. The disputes drag on they enter the public domain and turn potential tourists against the controversial place.

The issue whose solution could be expected to solve at least part of the above mentioned problems is related to the **average stay of a single tourist and leisure management.**

The number of realized overnight stays and persons who stayed can be used to calculate that the average stay of a single tourist in the accommodation facilities in our country was 3.65 days for 2014, and for 2017 - 3.49 days [4].

What is behind this figure? First, the short average stay means more tourists with fewer overnight stays, which increases the amount of variable expenses, decreases the the rate of return on sales. The spending on consumables for replenishing and cleaning the rooms is increased as are labor expenses, etc. It is a very frustrating fact that every year the average stay decreases by 1-2 tenths of the day, and converted into money this means around 28 million BGN less in revenue for every tenth of the day. Second, which should make us start thinking seriously, is that the short average stay means lack of diversity, lack of interest on the part of the tourists to extend their stay.

On condition that every year dozens of hotels with thousands of beds go into operation in our country, the average stay and the occupancy rate of the bed capacity cannot be increased by the reported minor growth in the number of tourists. The fact that our hotels are comparatively new and modern and they are sold at low prices does not mean that our competitors would stay in the same place. The tourist is aware of the fact that hotels have beds. And everywhere there are fancy hotels, pools, bars, etc.

The issue of the short tourist season is related to the short average stay of a single tourist and hence the short operation period of the facilities. The curve of the seasonal fluctuations in Bulgarian tourism attests to its pronounced dependence on mass tourism, and largely on recreational beach tourism. For 2017 the NSI reports the existence of 348,724 beds in the country, of which 237,153 are in the regions developing mostly beach tourism - Burgas, Varna and Dobrich have 68% of the total number of beds in the country. Of

26,054,096 nights spent in the country those in the three regions are 17,255,093, which is 66%, and of 1,340,089,000 BGN revenue from overnight stays, they have 905,781,150 BGN, or 68% of the total revenue [4]. The figure also shows how short the peak tourist season is. The main reason for this is the uniformity of supply and the lack of enough leisure options.

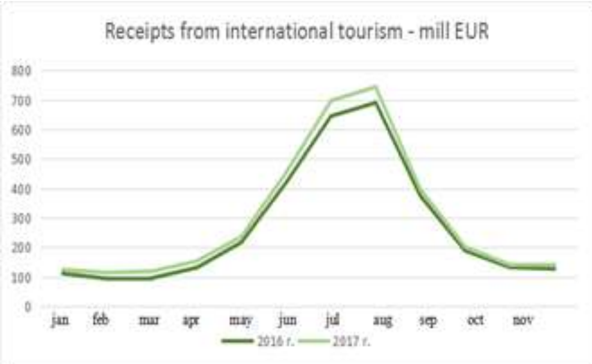

Fig. 2. Receipts from international tourism (million EURO) - annual data.
Source: Adapted to www.bnb.bg [1].

The owners of facilities, state and municipal authorities and non-government organizations must give priority to aiming their joint efforts at improving leisure options, diversifying tourists' stay, making it more attractive in order to extend the tourist season and the average stay.

Perhaps the first thing to be done is to create a single register of attractions. Currently no one knows how many and what kind of attractions there are in Bulgaria, nor whose property they are or who and how manages them. It is necessary to establish an organization for operating them because at present a lot of them are underutilized and due to the insufficient receipts they cannot support themselves, so the level of service deteriorates.

Leisure diversification can undoubtedly happen successfully through developing **alternative types of tourism**. It is a well-known fact that their development is very useful for extending the season and increasing the occupancy rate, average stay, revenue volume, etc. Bulgaria is well endowed in this respect - it is rich in natural and anthropogenic resources. The problem is that if we want to achieve success, the development of these types of tourism must be strategic and integrated, not sporadic; they must be completed and their finished state should satisfy the tourists and provide a competitive advantage.

Unfortunately, Bulgaria is the poorest country in the EU and does not have the necessary funds. The issues that have to be solved are many and the competitive development of each type of alternative tourism will probably cost no less than 10 billion BGN.

Let us take for example the alternative kinds of tourism that are commented on most often:

(i)Rural tourism. Bulgaria is an incredibly beautiful country with unique nature and authentic folklore. But tourism means consumption. One of its advantages is that goods are sold for foreign currency, which is termed as 'hidden export'. However, we import over 80% of the foods we need and what we have is the opposite effect.

A rural family has on average 2-3 decares arable land which does not enable them to be engaged in farming effective enough to meet their own needs, not to mention catering for tourists. Probably the problem of land consolidation must be solved first.

Rural areas are depopulated with an aging population and workforce shortage. It is not possible for one and the same person to be engaged both in tourism and farming. Farms, co-operatives or other forms should be established, effective farming should be organized, livelihoods should be provided to make young people return to the countryside. Only then rural tourism will develop naturally, unlike the present situation in which rural hotels go bankrupt all the time or become hotels in the countryside which are stocked by the big suppliers.

More effort should be made to train the population in customer care - professional skills, hygienic habits, personal touch, tourists' safety, etc. When we advertise environmental cleanliness we should present the necessary evidence - at the moment certificates for ecological foods (people's own produce) are not issued anywhere, there is no research, no air quality certificates, etc.

The building of technical, tourism and social infrastructure at the necessary level in smaller towns and villages requires enormous funds.

(ii)**Cultural and informative tourism**. Although Greece, Italy and Bulgaria are considered to be the countries richest in antique monuments in Europe and despite our unique folklore and other anthropogenic achievements, we cannot say that we have considerable success in developing cultural tourism as a separate kind of tourism. The main reasons for this are that developing it competitively requires a lot of money and the competition is fierce. Our neighbor Greece is lucky that Hellenic art served as a model for the culture of ancient Rome, and during and after the Renaissance - for the culture of the whole of Europe (although among the exhibits there might have been Thracian works of art) The same applies to Turkey and to a lesser degree to the other Balkan countries including Bulgaria. It would be hard to compensate this publicity that evolved over the course of history even with a lot of funds. Currently, due to the fierce competition it is unrealistic to rely on a keen interest taken in this product by our neighboring countries. Markets that are further away do not distinguish Bulgarian culture among the cultures of the Balkan countries. A lot of money is needed to introduce prospective tourists to Bulgarian history and culture, to Bulgaria's contribution to the European and world development.

On the other hand, substantial funds are necessary to build both technical and tourism infrastructures - accessibility, safety, designation, car parks, visitor centers, etc.

(iii)**Spa tourism**. Bulgaria is the second richest country in mineral springs in Europe after Iceland – over 550 fields with 1,600 springs, 90 % of which are curative [6]. By their chemical composition, mineralization, temperatures, gases and microorganisms they are similar to the world's best known mineral springs. We have large deposits of curative firth mud and healing peat. These resources combined with our unique nature and favorable climatic conditions provide opportunities for combining spa and climatic treatments. Then why aren't the results impressive?

Certain success has really been achieved, but mostly in the development of domestic tourism and by means of the social support of the NSSI and the National Health Insurance Fund. However, here, too, we come across certain impediments:

-In reality social spa tourism that could provide a basis for international spa tourism has been monopolized by two firms - „Specialized Hospitals for Rehabilitation – National Complex EAD" and „Prophylaxis, rehabilitation and recreation EAD" and their subsidiaries. This practically takes us back to the conditions of centrally planned economy. Profit is collected from their departments and centralized. Upkeep expenditure increases. The funds for reconstruction and modernization are allocated centrally and the facilities look unkempt. The employment rate and profitability achieved are at the expense of maintenance expenditure and low salaries with big workload and staff shortage. The centralized public procurements lead to the deterioration of the quality of catering and service;

-Extremely limited leisure opportunities. Visitors are usually engaged with procedures until noon, but their afternoons and evenings are free. In most places they rely mainly on eco-trails, but the majority of the guests are elderly people with health problems. After the procedures they need to relax and this is hardly the most suitable way of spending their free time. There are not enough opportunities for quiet games, including gambling. Hotel entertainment, attractions, interest-oriented activities, etc. are not available almost anywhere. There is not even daily press in some places. Excursions, where they are offered, are arranged by unlicensed tour operators, and very often by drivers of passenger vans;

- As the access regime is specialized, and the development of this kind of tourism is monopolized by the two firms, in reality the hotels which have good conditions for spa tourism remain without the support of the NSSI and NHIF. For them this type of tourism is accompanying rather than main activity. Their employment rate and results are low - Bulgaria is in the 92nd place in the world by the population's standard of living and few people can afford their expensive services. Although the health insurance funds of the countries in the EU fund the spa services, in reality this possibility is not used. The share of international tourism in spa tourism is around 10 % with tourists from Greece and Turkey being the most frequent visitors.

It is obvious that large funds are necessary to develop these and other types of alternative tourism successfully, to make them competitive and highly profitable and Bulgaria does not have them. That is why we think that without neglecting the rest of the types of tourism, we must predominantly develop one type. In our opinion this is spa tourism. We have the most favorable conditions for its development - unique natural resources, facilities which are developed to a measure, accumulated skills and traditions, though insufficient, but still it is not like starting from scratch, potential markets, etc.

CONCLUSIONS

The unsolved issues of Bulgarian tourism are so many that it is impossible to cover them in a single article – problems with pricing, revenue management, staff training (due to the lack of state standards each educational establishment includes subjects according to their academic staff, imperfect legal framework and many more.

But we have to somehow start solving them at some point. It is our view that the first thing that has to be done is to establish a center for tourism planning, analyses and forecasts under the aegis of the Ministry of Tourism. Tourism resources have to be identified and SWOT analyses have to be made - analyses, a single strategy for the development of Bulgarian tourism and its types. The practice of selecting specialized teams tasked with developing comprehensive 'leisure projects' in places identified as tourism sites must be introduced.

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