

## LOCALIZATION OF TOURIST BUSINESS IN THE RURAL TERRITORY OF BULGARIA

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### *Abstract*

*The purpose of this publication is to offer an analysis of the possibilities for diversification of the local economy by exploring the attitudes of stakeholders towards the localization of alternative tourism within the territorial scope. The study is based on the following methods and information sources: analysis and summary of literature, graphical and schematic representation of characteristics and trends, comparative analysis, questionnaire survey. Main results - The regional specificities in the individual territories of Bulgaria have been established. Possibilities for stimulating types of tourism specific to individual regions, have been identified. The potential of individual territories for diversifying economic activities have been revealed. In conclusion, it can be said that the development of various initiatives related to alternative tourism is essential for the local economy. Also in view of the general development of other sectors and diverse activities in the municipalities, in order to offer a quality service, respectively to achieve positive effects on local economic development, it is necessary to take into account all aspects of the interrelationships of the various forms of alternative tourism with a number of socio-economic activities at the local level.*

**Key words:** rural areas, alternative tourism, economic diversification, localization

### INTRODUCTION

Interest in the management and development of Bulgarian rural territories has been significant for many years. In the past, these areas were characterized by well-established economic activities, vitality, good social and demographic development. After the industrialization, the migration processes to the urban economy and employment in cities naturally increased. In the current situation of economic system transformations, the interest in rural territories and the opportunities for unleashing their full potential has reawakened. By initiative of the Economic and Social Council, on 24 February 2023, an opinion was issued regarding “Vital and sustainable rural areas in Bulgaria in the context of the long-term vision of the EU”. It emphasizes that the “attention is again focused on rural areas as a place of ecological lifestyle and new opportunities for social and economic revival” [7].

The conceptual foundations of rural management and planning in Bulgaria are

discussed in the publications of a number of Bulgarian authors in Bulgarian and foreign scientific journals. For example, some of the authors are exploring opportunities to improve the economic and social effects of rural development, through alternative employment models and diversification of the sources of income from multifunctional agriculture [4], [6]. The issues related to rural households, income, diversification of agriculture, potential of digital ecosystems, prospects for entrepreneurial initiatives and the benefits of the development of renewable energy sources have been discussed in publications by scientists from the three main economic universities in Bulgaria [11], [29], [2], [26]. Often, the attention is focused on the rural development perspectives in the context of sustainability, as well as the issues of sustainable development of business organizations and their sustainable functioning [12], [8], [10]. The focus is more and more shifted to the alternative options for achieving sustainability in rural areas, through the application of sustainable business models

and diversification of economic activities outside the field of agriculture [22], [16], [20]. At the same time, Nikolova and Linkova study the problematic aspects in agricultural development and the difficulties that small and family farms are facing it terms of selling their production on the Bulgarian market [17], [23]. In the context of increased European funding, in the two periods of the Rural Development Programme - RDP (2007-2013 and 2014-2020), the Bulgarian scientists are studying their development in terms of innovation, strategies, human capital, rural economy, markets, utilization of plant biomass, etc. [33], [13], [31], [32], [14], [15], [30].

In recent years, the fundamental studies have focused the attention on the search of optimal solutions for development of rural territories in the conditions of transformation towards a sustainable economy. The studies examine the theoretical and methodological foundations in the pursuit of increasing their sustainability, as well as the importance of territorial approaches for achieving integrated and balanced regional and local development [18], [24]. The problems of sustainable development of agribusiness and rural areas are covered in the scientific publications of a scientific-research team with an approved for financing project application on the topic "Development of rural territories in the conditions of transformation towards a sustainable economy" (2021-2025). The project is funded by the Bulgarian National Science Fund at the Ministry of Science and Education and the project team includes members from the "D. A. Tsenov" Academy of Economics – Svishtov, the University of National and World Economy – Sofia, and University of Economics – Varna (the three main universities of economics in Bulgaria). In this regard, there is an ongoing analysis and assessment of various aspects that are essential for maintaining high levels of sustainability in local regional development. Some of the studies are related to the NUTS 3 classification of the regions and are focused on utilized agricultural area [19], demographic processes in rural areas [3], analysis and assessment of infrastructure potential in rural

areas [27], added value on farms [5], etc. A comparative environmental risk analysis was carried out for individual planning regions in Bulgaria [34] and a reasoned innovative model of organic farming was proposed as an opportunity for sustainable development of rural areas in Bulgaria [28]. The human capital in rural areas is also a subject of attention, since it is a big problem in the Bulgarian conditions and considering the demographic collapse in recent years [25].

The creative pursuits of the project team are based on the conviction that, despite the growing interest in the analysis and assessment of the consequences and the interaction between authorities and organizations from different sectors of the economy, the research in relation to the change of economic systems and the imposition of sustainable regional models regarding the development and management of rural territories should be more comprehensive and in-depth.

Due to the dynamic development of regions, periodic and systematic studies should be performed in order to harmonize the regional development policy, and in particular – the development of rural territories in the direction of sustainability needs to be achieved on the basis of the implementation of well-thought-out development policies aimed at preserving the environment and biodiversity, including the production of food that is safe for health, etc.

The research is oriented towards the search for answers and possible solutions to certain social challenges with the aim of balanced development of the rural territories and sustainability of the economic, social, environmental and management aspects within its scope. In view of the Horizon Europe Programme [9] established for achievement of the UN's global Sustainable Development Goals by 2030, it should be considered that part of the transformation towards a more sustainable future is directly related to solving a number of problems that are naturally transferred to rural areas as well. A study of Bulgarian authors and the derived classification of regions (NUTS-3) in Bulgaria proves that it is possible to form valid clusters

consisting of certain types of regions, based on indicators for agricultural development and main categories of utilized agricultural areas. The proposed typology can be used for development of sectoral policies that ensure balanced regional development in the field of agriculture. This research approach is universal and can be applied in other EU countries based on a harmonized methodology for collecting statistical data [19].

Our choice of this specific topic and the formulation of its research purpose and tasks was predetermined by the insufficient research on the problems related to management and development of rural territories in the Bulgarian economy, on the background of institutional transformations and discrepancies in the maintenance and support resources available to the targeted programs, as well as the adopted formal rules. The unrevealed potential for development of alternative tourism in Bulgaria determines our interest in view of the possibilities to diversify the economic activities in rural areas, adding an important contribution to the local population and generating revenue from different target groups of tourists.

As mentioned above, the implementation of a fundamental scientific research project, based on which we implement various activities, is still ongoing. The scientific team defends the argument that: *the development of rural territories is predetermined by a variety of factors that have positive and negative impact and therefore adequate policies shall be adopted for their sustainable management and development.*

The main **research objective in this publication** is to offer an *analysis of the possibilities for diversification of the local economy by exploring the attitudes of stakeholders towards the localization of alternative tourism within the territorial scope.*

**The tasks** that are subject of attention in the study are several. These are:

- (i) Analysis of trends in the development and management of rural territories in Bulgaria based on literary sources;
- (ii) Survey of the attitudes of businesses towards the localization of alternative tourism

in individual statistical regions;

(iii) Survey of the attitudes of administrative authorities and NGOs towards the localization of non-mass tourism on the basis of the planning areas;

(iv) Comparison and evaluation of the attitudes of business, administrative authorities and NGOs;

(v) Developing reasoned and systematic conclusions about the localization of alternative tourism as a contribution to the local economy and the community within the territorial scope.

## MATERIALS AND METHODS

The study is based on the following analytical methods: analysis and summary of literature, graphical and schematic representation of characteristics and trends. The strength of the relation in the respondents' answers is measured by the correlation coefficients of Kramer and Pearson. The research model is based on distribution of surveys among representatives of the business, on the one hand, and representatives of the administrative authorities and NGOs, on the other. This allows for the possibility to explore the attitudes in a two-way direction and to provide comparative analysis by including identical questions. The survey was carried out in the period May 2023 – January 2024 and consisted of online forms that were filled in by representatives of different municipalities and districts according to planning regions.

## RESULTS AND DISCUSSIONS

### **Substantial characteristics and trends in the development of rural territories in Bulgaria**

*The Strategic Plan for the Development of Agriculture and Rural Areas in Bulgaria - 2023-2027* is based on achieving long-term impact [35]. On the one hand are the optimal positioning of farmers and the implementation of environmentally friendly agricultural practices with multiple effects, and on the other hand – the development of rural territories in the conditions of transformation

towards a sustainable economy. This foundational document brings to the fore the need to build the necessary conditions for a substantial improvement in the quality and conditions of life in rural areas, as well as for sustainable development and management of the local economy in a long-term temporal aspect. It builds on and further develops the ideas from the 2014-2020 programming period, forming expectations for achieving greater performance.

In the contemporary dynamic environment and conditions of life, despite the efforts of state authorities to support rural development and to minimize the negative factors, the expectations for the implementation of a “top-down” approach are still present. On the other hand, local communities that place greater value on the “bottom-up” approach are much stronger and demonstrate that it has a greater effect on stabilizing the local economy and on the community well-being. This explains also the regional differences between municipalities and the interest in “returning to the village” in some of them, while others remain threatened by depopulation.

In general, rural areas in Bulgaria are characterized by demographic problems, lack of labour force and human potential, population ageing, etc. Nevertheless, due to various factors, including the pandemic crisis of 2020, the increased environmental awareness and responsible attitude of groups of people, as well as the pressure on some professions, etc., there is a surge of young intelligent people who are changing their attitudes towards rural communities and are looking for peace away from the urban environment. As a result of this, an increasing number of families with young children, and not only, choose to live in villages, thus developing various business initiatives of a social, educational and other nature. More important is their conscious attitude to the natural environment and its contribution to the rural economy.

Naturally, in a retrospective look at the development of the Common Agricultural Policy (CAP), its impact should be considered in multiple directions – sustainable agricultural development, income policy,

increasing the competitiveness of the area, implementing incentives for young farmers, maintaining and improving knowledge, developing skills and competences, using environmentally friendly agricultural practices, achieving real measurable environmental and social effects, etc.

According to the old definition in the “National Plan for Development of Agriculture and Rural Areas” based on the RDP, rural municipalities are all municipalities, which do not include a settlement with a population of more than 30,000 people.

In the new National Strategic Plan for the Development of Agriculture and Rural Areas in Bulgaria, what is distinctive about the definition of “rural area” is that it covers only municipalities on whose territory there is no settlement with a population of more than 15,000 people.

In some locations, the diversification of activities in rural areas through the development of tourism has a significant impact on the employment and income of the population, increasing the quality of life and the competitiveness of the Bulgarian economy. In these areas, it is possible to develop non-traditional tourism, which is different from the mass tourism. At this stage, the following types of alternative tourism are subject to most dynamical development in rural areas: *rural, agrarian and ecotourism*. They have a specific impact on local development, and in particular – on the socio-economic environment, the employment opportunities and the income of the population in the typical rural areas. This type of tourism allows farmers to expand their activities and increase their capital by adding value to their products. Diversification of activities in rural areas through development of tourism provides an opportunity for realization of entrepreneurial initiatives and stimulation of food production and local crafts, especially in areas where agriculture is not the main source of income. The strong connection and interdependence between economic actors in these key economic sectors is expressed in the successful combination of the interests of all

stakeholders in the process of governance and development of the specific territory/region [20].

During the COVID-19 pandemic, the tourism sector was subjected to numerous restrictions, which inevitably affected domestic and international travel as well as income from tourism activities. At the same time, there was a tendency for increased visits to small family hotels and guest houses in rural areas.

Despite the above, in recent years there are more and more local initiatives for implementing projects with European funding, for improving the infrastructure potential, community centre activities, guest houses, etc. Successful in this regard are the local action groups applying the Leader approach. These processes have provoked the interest in studying the attitudes of stakeholders in rural territories with an aim to increase their levels of sustainable development. Undoubtedly, a contribution in this respect is also the availability of untapped resource potential in certain territories. Important aspect here is the harmonization and interaction of all stakeholders that add value along the chain in the process of achieving and raising the standard of living of the local population.

**Survey of attitudes of the business, the administrative authorities and the NGOs towards the localization of alternative tourism**

The participants in the process of formation and realization of the agro-tourist product are: *institutions; local authorities and communities; suppliers of tourist package components; “producers” of tourist products; tourists; tour operators and agencies* [21]. In the survey of the attitudes of businesses, administrative authorities and non-governmental organizations (NGOs) towards the opportunities for positioning an alternative tourism business, the question asked was: **“How do you assess the importance of the economic sector of “alternative tourism (including rural tourism, ecological tourism, wine tourism, etc.)” for the strategic development of your municipality?”**.

In surveys, very often a nominal or ordinal scale is used to describe the studied

phenomena and processes, which have more than two definitions (varieties). In such cases, the correlation between the factor and the resultant variable is analysed by the correlation coefficients of interconnection. These coefficients are calculated on the basis of  $\chi^2$  and  $\varphi^2$  – the characteristics between which the following relationship exists:  $\varphi^2 = \frac{\chi^2}{N}$ . The method of chi-squared seeks the answer to the question of whether the alleged relationship is not accidental, but statistically significant, and is manifested in the studied set of units [1].

Chi-squared ( $\chi^2$ ) is calculated with the following formula:

$$\chi^2 = \sum_{i=1}^k \left[ \frac{(f_{ij} - \hat{f}_{ij})^2}{\hat{f}_{ij}} \right] \dots \dots \dots (1)$$

where:

$f_{ij}$  signifies the actual frequencies,  $\hat{f}_{ij} = \frac{\sum f_i \cdot \sum f_j}{\sum \sum f_{ij}}$  expresses the theoretical frequencies, and  $k$  is the number of groups. For the application of the chi-squared method, a two-dimensional distribution was prepared, and for this purpose the units were simultaneously grouped according to the meanings of the answers to the respective survey questions. The correlation coefficients of Kramer and Pearson were used to establish the strength of the relation. They vary from zero to one and are calculated according to the formulas:

Cramer coefficient

$$V = \sqrt{\frac{\chi^2}{\sum \sum f_{ij} \min (k_1 - 1)(k_2 - 1)}}; \dots \dots \dots (2)$$

Pearson coefficient  $C = \sqrt{\frac{\varphi^2}{1 + \varphi^2}} \dots \dots \dots (3)$

Figure 1 represents the distribution of respondents (representatives of the business) according to the planning region and the answers given to the question in the “Strategic Development” section of the questionnaire, about the way they assess the importance of alternative tourism for the strategic development of the municipality in which their business operates.

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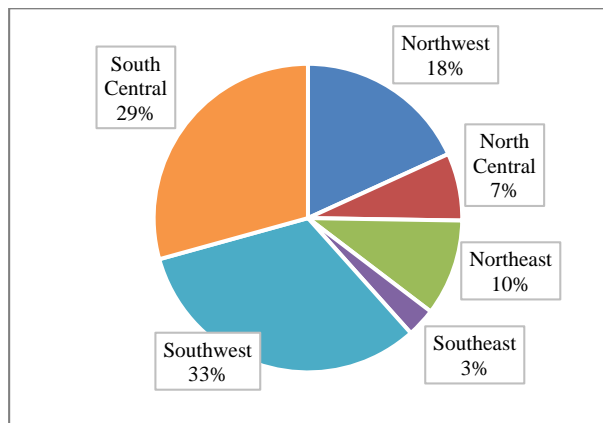


Fig. 1. Distribution of the surveyed representatives of the business, according to the planning region and their opinion on the importance of developing alternative tourism

Source: Authors' own calculations based on survey data.

It is evident that in the six planning regions in Bulgaria (NUTS2) the relative share of respondents representing the Southwest Planning Region is the highest (33%). This is explained by the fact that the development of alternative tourism in the region is favoured by the uniqueness of natural features, as well as by its strategic geographical location.

The potential of spa, cultural and business tourism is widely developed, as well as rural and ecological tourism, especially in the Blagoevgrad region (the villages of Leshten, Kovachevitsa, etc.). Therefore, it is quite logical that the respondents from this region have a larger share, compared to the representatives of the other regions. This region is the object of increased and constant interest from potential tourists of various nationalities. Respectively, the number of business structures is increasing, as well as the interest in developing a business related to alternative tourism (family hotels, guest houses, etc.).

The values for the South Central Region are approximately the same (29%), and a characteristic feature of this region is the perspective for development of alternative

tourism due to the favourable natural resource potential, such as the Central Balkan National Park, the Rhodope Mountains, the ancient Thracian city of Perperikon, the Thracian sanctuaries (Tatul, Starosel, Hisarya, etc.), the mineral springs. This region ranks first among the others in the development of rural and ecological tourism.

It should be noted that the respondents from the Northwest Region occupy an intermediate position and third place (18%) in the relative share of attitudes towards the development of businesses related to alternative tourism. Being a vulnerable region with the least contribution to the country's overall GDP and the most underdeveloped in terms of economics for long period of time, it is of great importance that business representatives show interest in the development of tourism. A probable reason for this is that attention is focused on the resource potential of the given region, which has so far not been used sufficiently to diversify the local economy and to explore potential entrepreneurial niches.

The poor representation of respondents from the Southeast region (3%) can be explained by the intensive construction of hotels on the Bulgarian Black Sea coast and the recent environmental problems associated with Natura 2000. Nevertheless, this region also has the potential to develop alternative tourism (wine, hunting, ecotourism, etc.).

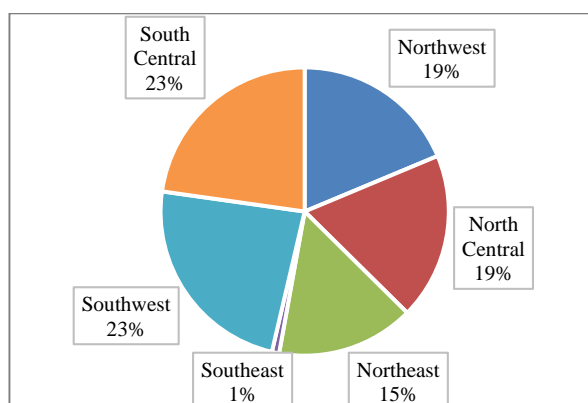


Fig. 2. Distribution of surveyed representatives of the administration and the NGOs according to the planning region and their opinion on the importance of developing alternative tourism

Source: Authors' own calculations based on survey data.

The Kramer coefficient is  $V = 0.26116$ , which indicates a weak correlation between the planning region and the opinion of business representatives on the importance of alternative tourism development. The Pearson coefficient  $C = 0.412141$  implies a moderate correlation between the planning region and the opinion of business representatives on the importance of alternative tourism development.

The second figure (Figure 2) illustrates the respondents representing the administration and the NGOs according to the planning region and their opinion on the important role of alternative tourism and its development.

The trend in the percentage of respondents from administrative authorities and NGOs shows insignificant differences compared to that from the previous visualization representing the attitudes to development of business activities in the individual planning regions. The only significant difference is the higher share of respondents from the North Central Region (19%).

The Kramer coefficient  $V = 0.23746$  indicates a weak correlation between the planning region and the opinion of administration and NGO representatives on the importance of alternative tourism development. The Pearson coefficient  $C = 0.380376$  illustrates a moderate correlation between the planning region and the opinion of administrative and NGO representatives on the importance of alternative tourism development.

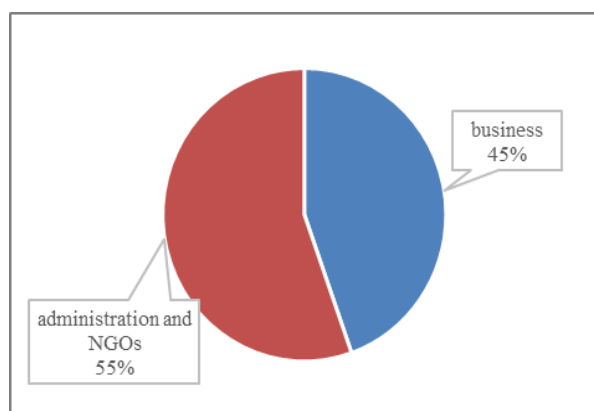


Fig. 3. Distribution of the surveyed representatives of the business and the administration and NGOs according to the planning region and their opinion on the importance of developing alternative tourism  
Source: Authors' own calculations based on survey data.

The distribution of the surveyed representatives of business, administration and non-governmental organizations regarding the importance of alternative tourism and its development in the respective regions is presented in the following figure (Figure 3).

When examining the relationship between the distribution of respondents according to their belonging to a given region and their opinion about importance of alternative tourism development, it was concluded that both correlation coefficients - the Kramer coefficient  $V = 0.126212$  and the Pearson coefficient  $C = 0.125219$  indicate a weak relationship, i.e. between the representatives of the business and the administration and NGOs there are no significant differences in opinion on the importance of alternative tourism development in their municipalities, which means that its development is important and will reveal new opportunities for increasing local economic activity, etc.

In this case, we should add that localization is determined not only by natural, landscape and cultural values, but also by the desire and attitudes of local authorities, entrepreneurs, NGOs and associations, i.e. the will of all stakeholders. The results testify to the urgent need for adoption of adequate policies for implementation of the integrated management plans of each municipality. The goal is to achieve integrated territorial development in accordance with the resource potential and the possibilities for diversification of the rural economy. The possible ways to achieve this are expressed not only in the development of alternative tourism, but also in the use of the maximum possible potential of the territory, as well as the search and implementation of appropriate solutions for business localization and collaboration between all interested parties who can contribute for the development of local communities.

## CONCLUSIONS

In conclusion, it can be said that according to the representatives of business, administration



and non-governmental organizations, the development of various initiatives related to alternative tourism is of essential importance for the local economy. Also in view of the general development of other sectors and diverse activities in the municipalities, in order to offer a quality service, respectively to achieve positive effects on local economic development, it is necessary to take into account all aspects of the interrelationships of the various forms of alternative tourism with a number of socio-economic activities at the local level. The development in the direction of sustainability of rural territories depends to a significant extent on the effective diversification of both industrial activities and economic activities in them. Therefore, it is necessary to trace the aggregate impact of the economic activities, which are characteristic of each region and which contribute to solving significant problems. They are ultimately in direct relation with the current social challenges in the context of changing economic systems, as well as with the integrated development of individual rural territories, through the search and implementation of sustainable solutions.

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