

**Biodiversity Conservation & Economic Growth
(BCEG) Project**

**Bulgarian Ecotourism Development
Outlook**

Survey of the Domestic Market

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Bulgaria Biodiversity Conservation and Economic Growth Project

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Preface

The Biodiversity Conservation and Economic Growth (BCEG) Project is funded by the United States Agency for International Development, (USAID), as part of its strategic support to the Republic of Bulgaria. The Project is sponsored by USAID in conjunction with the Government of Bulgaria – the Ministry of Environment and Waters (MOEW). The Project is governed by a Memorandum of Understanding (MOU) between the two governments, and its implementation covers the period: May 2000 – March 2003.

This Project is a logical evolution of earlier USAID assistance to biodiversity conservation in the country. It follows some 10 years of assessment, technical assistance and financing of Bulgaria's biodiversity conservation strategic development, new protected areas legislation, and new national park institutions. The Project is designed to capitalize on the achievements of the Bulgaria Global Environmental Facility (GEF) Biodiversity Project (implemented during the period June 1995-April 2000), and builds on lessons learned.

The BCEG Project addresses six specific contract themes known as tasks or “contract result packages”. The BCEG Project includes the finalization and implementation of two national park management plans, the development of a new management plan for Rila Monastery Nature Park. It assists in the development of financial mechanisms and strategies to ensure the solvency of national parks. The Project pilots economic growth activities with select target groups around two Bulgarian national parks. And it continues to build on the principles of strong public information and awareness as stepping stones for informed public engagement and promotion of biodiversity conservation and protected area management activities.

This Project is issued as a Task Order (Contract Number LAG-I-00-99-00013-00) under the USAID Global Biodiversity and Forestry Indefinite Quantities Contract (IQC); and is implemented on behalf of USAID by Associates in Rural Development, (ARD) Inc., of Burlington, Vermont, USA.

The Project is implemented through a Project Management Unit (PMU) based in Sofia, and includes a Team Leader, three Bulgarian technical specialists, and support staff. Project activities are coordinated through two mechanisms –

- (a) Project Coordination Group – serves as a steering committee for Project planning and monitors implementation. This consists of the National Nature Protection Service of the MOEW, and national park directors, the PMU and USAID;
- (b) Project Counterpart Team – PMU staff working with MOEW/NNPS counterparts.

The Project is largely implemented through the Directorates for Rila and Central Balkan National Parks. Additional technical assistance is provided by Bulgarian and international consultants, and is based on specific terms of reference.

The first section of this report (1.0 Summary) summarizes the results of the domestic market research program conducted in support of community ecotourism in Bulgaria, which comprises three surveys.

The second section (2.0. Guidelines for the Development of Ecotourist Products in the Areas of Kalofer and Samokov) contains the conclusions drawn from the analysis of the survey results and recommendations for using and putting them into practice. Recommendations include concrete suggestions for the creation of ecotourism products in the two ecotourism pilot regions of Rila and Central Balkan National Parks, as well as for their marketing strategy.

Sections 3, 4 and 5 contain the detailed analysis of the result of each survey carried out within the market study. These sections contain the essential information that has been used to formulate the Guidelines for the Development of Ecotourist Products.

1.0 Executive Summary

1.1 The Research

The consistent development of relevant Bulgarian conservation legislation has enabled the establishment of an extensive network of protected areas. Management plans for Rila and Central Balkan National Parks are being implemented. A management plan for Pirin National Park is in preparation.

An ideal goal of the National Parks, embodied in legislation, is to assist in the development of ecotourism products and activities. This goal, once defined, is consistently implemented through the management plans. However, a much more complex set of reasons determine the primary significance of developing ecotourism. Municipalities and gateway communities around the National Parks are experiencing serious financial troubles. The successful development of ecotourism may not only provide a boost to the local economy, but it may turn environmental conservation into a factor of prosperity.

This research was conducted as part of the development of an operational model for ecotourism associated with protected areas (national parks) in Bulgaria. Two community ecotourism models were developed – one in Samokov municipality for Rila National Park, and one in Kalofer town, for Central Balkan National Park, as part of the implementation of each park's management plan. Additional components of community ecotourism models include support for the coalition of community ecotourism organizations and strengthening of local ecotourism associations, inventories of existing ecotourism resources, services, and opportunities, strategic planning for community ecotourism development, business planning, development of set of success/impact indicators, and ecotourism marketing strategies.

The principal goal of this domestic market research was to identify and define the main categories of leisure travel practices as the basis for developing ecotourism products in the Kalofer area, as the gateway to Central Balkan National Park, and in the Govedartsi area, in the vicinity of Rila National Park. At a later date, it can be used to develop ecotourism products in areas surrounding other protected territories in Bulgaria.

The research was conducted using the following methods:

- **a qualitative study**

- Group discussions with 7-9 participants

- Location: Sofia

- Research period April 2002

- Main criteria for the selection of participants:

- age (3 age groups: 18-30, 20-35 and 36-50)
 - with/without children
 - per capita monthly income (300-600 leva vs. 600+ leva)

- Additional criteria:

- gender
 - principal occupation/profession

- **a representative quantitative (statistical) study**

Research period	April 2002
Target population	1.3 million (The population of Sofia, Plovdiv, Stara Zagora, Bourgas, and Varna aged 15-60)
Sampling method	statistical averaging; selection of respondents using the “next birthday” method
Sample size	450
Data gathering method	Standardized interview
Degree of representation	The findings are seen as representative of the target population

- **interviews among national travel agents**

Survey period	April 2002
Research population	Travel agents in Bulgaria
Sampling method	Typological profiling & sampling
Sample size	21 travel agencies
Research tool	Semi-standardized interview
Degree of representation	Findings are not sufficiently representative of the research population

Research was conducted to obtain authentic and reliable information in response to the following questions:

- What are the predominant practices related to Bulgarian leisure trips?
- What is the role of travel agents in the domestic market?
- What is the outlook for ecotourist products in the domestic and international markets?
- What is the public awareness of/attitude towards the Kalofer and Govedartsi pilot areas? What is their market potential?
- What are the trends in the development and establishment of ecotourist products?

1.2 The Present Situation

The domestic market for ecotourism in this country is still in an embryonic state.

- Ecotourism products offered are based upon existing conditions of destinations and no effort is made to make them a marketable tourist product more in line with customer expectations.
- The role and function of travel agents is marginal or token.
- Trips and journeys, including paid overnights, constitute a little over half of all trips taken.
- The level of satisfaction with hospitality services is low.

1.2.1 The Tourist Services Market: Consumer Characteristics

71.4 percent of the research population traveled for leisure/recreation during 2001. Six groups of leisure travelers have been identified, and can be categorized into:

The Varied Journeys Group

People with a preference for varied journeys are those who show the highest degree of mobility. Depending on the duration of individual journeys, the mean number of trips taken in this group per annum is 20 and 50 percent higher than the research population average. Characteristic of this group are trips taken for mountain hiking, skiing, and visits to churches and monasteries. Leading criteria in the choice of destinations are the attractive price, the presence of scenic natural landmarks and the possibility to ski (Tables 1.1, 1.2 and 1.3).

The Same-Day (No Overnights) and Long Journeys Group

This group also reports relatively high mobility. The mean number of same-day trips per annum is 20 per cent lower; yet the number of journeys of different duration is 10 percent higher than the research population average. Members of this group report different combinations of same-day (no overnight) trips, journeys of 1 to 3 overnights without payment, and longer journeys including larger numbers of paid overnights. Characteristic of this group are trips for a specific purpose, whether hiking or fishing. Leading criteria in the choice of destination are the attractive price and the possibility for quality entertainment.

The Short Trips Group

As a whole, this group displays a lower than average degree of mobility. The mean number of trips, not including overnights, for this group is 30 percent higher, while trips with different numbers of overnights is 10 to 25 percent lower than the research population average. Members of the group report journeys of 1 to 3 paid overnights, as well as longer journeys with free overnights. Characteristic of this group is travel mostly to engage in typical seaside activities: swimming, sunbathing, etc. Leading criteria in the choice of destinations are the attractive price and the opportunity for new experiences.

The Long Journeys Group

This group as a whole is less mobile than the overall research population. The mean number of trips of different duration taken per annum is 10 and 30 percent lower than the population average. Members of this group report journeys of 1 to 3 free overnights, as well as longer journeys with paid overnights. Characteristic of this group is travel mostly to engage in typical seaside activities: sunbathing, swimming/sea bathing. Leading criteria in the choice of destinations are the attractive price and the possibility to take the kids along.

The Free Overnights Group

This group displays a high level of mobility, with the mean number of trips per annum 10 to 30 percent higher than the research population average. Characteristic of this group is that its members do not report any specific activities as the reason for taking the trip. The leading criterion in selecting a destination is price. Most of the people in this group stay with relatives and friends.

The Same-Day Trips (No Overnights) Group

This is probably the least mobile of all groups within the research population. The mean number of trips, not including overnights, is 2.2 per annum, which is 10 percent lower than the research population average. At the same time, this is the only kind of trip respondents from this group will ever take. Characteristic of this group are trips specifically for activities such as walks, mountain hikes, or sunbathing. The leading criterion in the choice of a destination is the attractive price.

1.2.2 Ecotourism Marketers: Domestic Travel Agents Profile

The typical domestic travel agency is a small outfit – up to ten-fifteen personnel. At present, only a small fraction of travel agents run their business solely by selling the products of the domestic tourist market. Most travel agents rely on marketing Bulgarian destinations to foreign clients or foreign destinations to Bulgarians, or a combination of both. In parallel, there is a tendency towards specialization by destinations.

The decision by a travel agent to market any particular destination is based upon whether or not the destination consistently meets the following criteria:

- Profitability;
- Natural landmarks and scenery;
- Accommodation with all conveniences and amenities;
- A variety of eateries and cultural sites;
- Roads in good condition.

The primary function of travel agents is to market tourist packages to established resort destinations. Hotel bookings, guided tours and ticket sales are lower on their lists of services.

Travel agents show little or no sign of any consistent effort at innovation and the development of new tourist products.

- The products on offer are all developed around traditional activities: sunbathing; swimming in the sea, in rivers and lakes; visits to restaurants; visits to churches and monasteries; tasting culinary delicacies, and skiing.
- Travel agents are not markedly pro-active in seeking new information. On the contrary, they seem to share the belief that whatever there is to be known in this line of work is already known.

1.3 The Outlook for the Development of Ecotourism in Bulgaria

The development and market realization of ecotourist practices is faced with a paradoxical contradiction. While there is a significant potential market for ecotourist products, no marketing agent seems interested in investing in its development.

1.3.1. Potential Market – an Urban Target Group

The Varied Journeys Group emerges as a promising target for the marketing of ecotourist products.

Varied Journeys Group Profile

- 25-40 years of Age;
- Minimum monthly income of 600 BGL;
- Minimum of a University Degree;
- Urban residents – mostly residents of Sofia;
- Married, without children;
- High proportion owns and manages their own business;
- High proportion have their own villa
- High proportion own and use a PC at home;
- Regularly engage in some type of sport;
- Majority are Vehicle Owners

- The activities practiced by members of this group, as well as the criteria applied in the choice of destination, approximate considerably the standards of ecotourism (Tables 1.2 and 1.3);
- The group displays a very high level of interest in ecotourism products related to protected areas, and a willingness to buy and use them once they are available;
- The group shows a high degree of sensitivity to environmental conservation issues;
- The varied journeys group numbers no fewer than 140,000 people.
- Turnover - During the year 2001, this group took 300,000 leisure trips in Bulgaria of 1 and 3 overnights (on average 600 000 overnights with an average of 10 leva spent per night on accommodation. This represents an annual turnover of 7,000 000 leva only from

accommodations); 170,000 trips of 4 to 6 overnights (on average 850 000 overnights with an average 10 leva per night creates a turnover of 8,500 000), and 180,000 trips of 7 overnights (1,260 000 overnights generating revenues 12,600 000 leva per annum).

- Tourism Benefits - using these figures, the varied journeys group during 2001 spent at least 28,100,000 leva just for accommodation. This turnover includes all types of travel, not only to ecotourism destinations, but is still significant.

The remaining five groups of leisure travelers are not seen as promising participants in ecotourism, for one or more of the following reasons:

- Lack of interest;
- Lack of willingness to use ecotourist products;
- Preferred activities are inconsistent with the spirit and standards of ecotourism.

1.3.2 Potential Provider

There is a low level of awareness of ecotourism as either a concept or practice among travel agents. Almost two-thirds of all travel agents polled report unfamiliarity with ecotourism. Different responses identify ecotourism as a destination with certain attributes. The travel agents surveyed do not readily recognize the educational/learning and the nature conservation component of ecotourism.

Travel agents are of two minds about the existence of marketable ecotourism destinations. Where conditions are seen as favorable, the hospitality infrastructure is inadequate or missing, and/or the roads are bad.

Typically the interest of travel agents lies, at best, with passively marketing ecotourist products rather than actively developing them.

1.4 The Ecotourism Pilot Areas

Potential providers as well as consumers of ecotourist products have a very different outlook on the possibilities for practicing specific activities in Kalofer and Govedartsi.

1.4.1 The Varied Journeys Group as Potential Consumers of Kalofer and Govedartsi as Ecotourist Destinations

This group, identified as a promising target in terms of ecotourism, sees both Kalofer and Govedartsi as destinations meeting their basic criteria.

Among respondents, Kalofer evokes images of the birthplace of the Bulgarian revolutionary hero Hristo Botev, as a neat, tidy and hospitable town at the foothills of the Balkans. It also evokes expectations of excellent opportunities for activities such as mountain hikes, sunbathing, visits to churches and monasteries, gathering herbs and mushrooms, observing traditional arts and crafts, studying authentic folklore, and cycling.

Govedartsi, in turn, is regarded as a typical mountain township and a winter resort at the foot of Rila Mountain. Respondents see identified opportunities for mountain hikes, sunbathing, gathering of herbs and mushrooms, camping, skiing and extreme downhill sports, and winter hikes.

A visit to either Kalofer or Govedartsi is most likely to take the form of a short trip – one to three overnights, maximum.

If the ecotourism product is developed consistent with market standards, the varied journeys group has the potential to generate between 13,000 and 45,000 visitors annually over a 5-year period to Kalofer and Govedartsi combined. Based on an average expenditure of approximately 50 BGL per person, per trip such a tourist flow is capable of injecting between 700 thousand and 2.5 m leva into the local economy of these two communities every year.

1.4.2 Kalofer and Govedartsi as Potential Tourist Destinations: A Travel Agent's Perspective

Travel agents are ambivalent and generally reserved about the potential of Kalofer and Govedartsi as major tourist destinations.

While Kalofer is largely seen as a suitable destination for cultural tourism, Govedartsi has an image as a winter ski resort.

The natural assets of both places are appreciated. At the same time, travel agents identify their remoteness from established tourist routes, the absence of hospitality infrastructure, the poor level of training of hotel and restaurant staff, the bad roads and insufficient publicity as drawbacks to marketing them as tourist destinations.

Commitments by major travel agencies to establishing Kalofer and Govedartsi as tourist destinations can only come as a result of consistent and purposeful efforts at improving the tourist hospitality infrastructure as such and building market confidence.

1.5 Guidelines for the Development of Ecotourist Products

Establishing ecotourism as a viable, marketable product in Bulgaria relies on the provision of:

- adequate hospitality infrastructure to meet consumer demand in a satisfactory way, and
- attractions and entertainment opportunities that would eliminate the present indifference or skepticism among the most active consumers on the domestic tourist market.

Ideally the development of ecotourist products must be appreciated by local communities as a real opportunity for prosperity. Therefore, ecotourism must be initiated or at least supported by these communities.

- With the combined efforts of their population and local administration, townships offering ecotourist services must become a model of order and cleanliness;
- The responsible government institutions must develop and implement a long-term policy for promoting ecotourism by building and/or renovating, on a priority basis, the transport and communication infrastructure, as well as regulating and encouraging the development of ecotourist products;
- Ecotourist products must be developed with a full view towards market forces and demands;
- Active, consistent, and purposeful marketing efforts must be made to promote ecotourist products and destinations;
- Investments must be made in the hospitality infrastructure to create or improve accommodations, restaurants and attractions. The most promising target group for the conservation of natural and cultural assets identified modest yet cozy, clean and well-kept hotels and restaurants offering varied and healthy food as being important;
- Local hospitality personnel who will be directly involved with ecotourists should undergo proper training not only in basic skills as hoteliers, restaurateurs and (where necessary) emcees, but should become versed in the skills of creating a hospitable, cozy and discreet atmosphere that tourists would grow accustomed to enjoying over and over again.

Table 1.1 Mean Number of Trips for 2000 by Group of Travelers on Leisure Trips

Group	No overnight	1 – 3 overnights		4 – 6 overnights		7 or more overnights	
		paid	free	paid	Free	paid	free
Varied journeys	2.6	2.2	2.2	1.2	1.3	1.3	1.4
Same-day (no overnights) trips and long journeys	2.1	*	2.4	1.2	1.3	1.1	1.2
Short trips	3.2	1.4	1.5	*	1.0	*	1.0
Long journeys	*	*	2.3	1.1	1.2	1.0	1.0
Same-day trips	2.2	*	*	*	*	*	*
Trips not including paid overnights	2.3	*	3.0	*	1.5	*	1.4
Total	2.4	1.5	2.3	1.0	1.3	1.1	1.3

Table 1.2 Typical Activities Practiced by group of Travelers on Leisure Trips

Group	Main Reasons for Trip	Additional Activities
Varied journeys	<ul style="list-style-type: none"> Mountain hikes Skiing Visits to churches and monasteries 	<ul style="list-style-type: none"> Visits to restaurants Sunbathing Bathing in sea etc. Walks Culinary specialties Fishing Camping out
Same-day (no overnights) trips and long journeys	<ul style="list-style-type: none"> Mountain hikes Fishing 	<ul style="list-style-type: none"> Sunbathing Bathing in sea etc. Visits to restaurants Culinary specialties Walks Gathering of herbs and mushrooms
Short trips	<ul style="list-style-type: none"> Sunbathing Bathing in sea etc. 	<ul style="list-style-type: none"> Visits to restaurants Discos Walks Culinary specialties Mountain hikes Camping out
Long journeys	<ul style="list-style-type: none"> Sunbathing Bathing in sea etc. 	<ul style="list-style-type: none"> Visits to restaurants Walks
Same-day trips	<ul style="list-style-type: none"> Walks Sunbathing Mountain hikes 	<ul style="list-style-type: none"> Visits to churches and monasteries Feasting Gathering of herbs and mushrooms Culinary specialties
Trips not including paid overnights		<ul style="list-style-type: none"> Sunbathing Walks Feasting Gathering herbs and mushrooms Visits to restaurants Discos Culinary specialties

Table 1.3 Criteria for Choice of a Destination by Group of Travelers on Leisure Trips

Group	Leading Criteria	Additional Criteria
Varied journeys	<ul style="list-style-type: none"> • Attractive price • Natural landmarks and scenery • Cleanliness 	<ul style="list-style-type: none"> • Rich entertainment opportunities • Possibilities for practicing sports • New experiences • Good accommodation conditions • A variety of restaurants • Good roads
Same-day (no overnights) trips and long journeys	<ul style="list-style-type: none"> • Attractive price • Rich entertainment opportunities • Peace and quiet • Good accommodation conditions 	<ul style="list-style-type: none"> • Natural landmarks and scenery • New experiences • Good conditions for children • A variety of restaurants
Short trips	<ul style="list-style-type: none"> • Attractive price • New experiences • Sea-bathing/sunbathing (beach) 	<ul style="list-style-type: none"> • Rich entertainment opportunities • “Visited by guys just like me” • Possibilities for practicing sports • Good accommodation conditions • A variety of restaurants
Long journeys	<ul style="list-style-type: none"> • Attractive price • Possibilities for taking kids along • “Visited by guys just like me” 	<ul style="list-style-type: none"> • Natural landmarks and scenery • Rich entertainment opportunities • Good accommodation conditions • A variety of restaurants • Good roads
Trips not including paid overnights	<ul style="list-style-type: none"> • Attractive price 	<ul style="list-style-type: none"> • “Visited by guys just like me” • Natural landmarks and scenery • Peace and quiet • New experiences • Good conditions for children • Possibilities for practicing sports • Good accommodation conditions • A variety of restaurants • Good roads
Same-day trips	<ul style="list-style-type: none"> • Attractive price 	<ul style="list-style-type: none"> • Natural landmarks and scenery • Peace and quiet • New experiences • “Visited by guys just like me”

2.0 Guidelines for the Development of Ecotourist Products in the Areas of Kalofer and Samokov

2.1 The Goal

The Bulgarian Protected Areas Act of 1998 provides a sound policy framework for ecotourism development related to biodiversity resources.

The goal of the Biodiversity Conservation and Economic Development Project is the development and proper marketing of ecotourist products related to the National Parks in the areas of Kalofer and Samokov, as a model for the rest of Bulgaria.

Ecotourism offers a variety of nature-related entertainment opportunities, while stimulating a positive attitude towards the conservation of natural assets. In addition, unlike the traditional tourist business that provides primarily accommodation, food and entertainment, ecotourism has the potential to generate economic prosperity for local communities. The experience accumulated in the development of ecotourist products in the areas of Kalofer and Samokov can be utilized on a nation-wide scale as a model for the development of ecotourist products related to protected natural sites and territories.

2.2 The Market

The description and analysis of the domestic tourist market presented here is the result of a comprehensive research program, including a qualitative study using a statistically relevant survey of the populations of Sofia, Plovdiv, Varna, Bourgas, and Stara Zagora. A limited survey of travel agent was also conducted. The research procedures and findings are presented in detail in the summarizing report titled *Bulgarian Ecotourism Development Outlook*.

- *The country's domestic ecotourism market is still in an embryo state.* Ecotourism products offered at the present time include primarily accommodation and eateries. No systematic or planned activities have been recorded aimed at providing attractions other than the natural givens of destinations. Customer satisfaction with the level of hospitality services is very low.
- The number of travel agents and tourist hospitality operations whose primary business activity is to offer *Bulgarian destinations to Bulgarian customers*, is negligible. The typical travel agency is a small outfit with few substantial resources. Travel agents tend to opt for narrow specialization in a limited number of specific destinations, usually described in generic terms. Practically no efforts have been observed to develop new tourist products. Travel agents are reticent about the tourist potential of the Kalofer and Samokov areas.
- In 2001, 71.4 percent of all persons aged 15 through 60 residing in one of the five largest cities in Bulgaria have taken at least one trip for pleasure and recreation. Trips and journeys including paid accommodation constitute a little over half of all pleasure trips. This study identified 6 groups of respondents in terms of types of preferred recreation practices. There are considerable differences among the groups in terms of socio-demographic background; frequency and duration of trips; destinations; activities

practiced during journeys; requirements for accommodation and restaurant facilities; and reported willingness to take advantage of ecotourist products. In terms of mobility, the six groups rank as follows: the group with the greatest mobility is the “*varied journeys*” group, followed, in order by “*same-day (no overnights) and long journeys*”, “*short trips*”, “*long journeys*”, and “*free overnights*” groups. At the very bottom of the mobility scale is the “*same-day trips (no overnights)*” group.

- The “*varied journeys*” group, projected over the entire research population, amounts to no fewer than 140,000 people. It has been identified as a *promising target group* for ecotourist products. Its members can be described as *young, educated, proactive personalities, ranking in the highest national income bracket*. Attitudes and travel practices within this group not only come close to the international standards for ecotourism, but there is a marked kinship of spirit among them. Members of the “*varied journeys*” group identify the Kalofer and Samokov areas as attractive destinations. A visit to one of these areas according to the group would be a short trip of no more than 3 overnights.

2.3 The Ideal Ecotourist Destination

Creating a model of the ideal ecotourist destination is a useful tool for assessing current conditions and directing efforts towards the development and marketing of ecotourist products. The finished ecotourist product can therefore be regarded as a close approximation of the ideal model.

The ideal ecotourist destination model is the creative synthesis of the attitudes and expectations of a promising target group and the internationally established concept of ecotourism.

The development of an ideal ecotourist destination model begins with an understanding that the natural assets of a region are one tool used by the tourist operator for generating actual benefits that culminates in a certain experience for the tourist. The elements of a tourist destination can be viewed from the standpoint of *conditions offered* as well as *experience generated*.

2.3.1 General Characteristics

In every detail of the ideal ecotourist destination there is something that is self-evident and cannot be mixed up with other things: the consistent realization of the principles of *purity*, *discovery*, *simplicity*, and *conservation*.

Purity. A key ingredient for any ecotourist destination, purity has many layers of meaning. Purity is about cleanliness and hygiene. Cleanliness is about order. Cleanliness is about the persistent and systematic imposition and maintenance of good hygiene and order. Cleanliness is about friendliness and hospitality: put bluntly, it is about a host expecting welcome guests. Cleanliness, ultimately, is about putting a place in a festive mood.

Discovery. An ecotourist destination is a discovery for each and every visitor, a different place from what most of us are used to. Discovery is sought not only in the unique natural assets but also in the whole atmosphere and design of the individual components of the tourist service.

Simplicity. An ecotourist seeks the essentials of an area's natural assets as well as in their accommodations and food. Consistent with this ideal, anything superfluous- things a tourist can do without- should be eliminated.

Conservation. People who operate and market a tourist destination should have conservation of the area's natural and cultural assets as part of their mission.

2.3.2 Attributes of a Destination

Experience Attributes	Physical Conditions
<i>Pro-active</i> – never enough time for all possible activities, new and varied	A <i>mountain village</i> , with a well-preserved cultural and historical heritage; availability of mineral waters/river/lake(s), surrounded by scenic landscapes
<i>Trendy</i> – a place that's 'in' with most people I meet and talk to	

2.3.3 Accommodation

Experience Attributes	Physical Conditions
<i>Peace & quiet</i> – no one and nothing can intrude on my personal space without my permission	A <i>family hotel</i> – a place where you stay with a family without having to enter into any closer relationships with them
A <i>care-free attitude</i> – I don't have to make any efforts to get what I want, it's enough just to ask	A <i>room with its own bathroom</i> , large and comfy beds, children welcome, breakfast provided
	<i>Price</i> – corresponding to product offered

2.3.4 Eateries

Experience Attributes	Physical Conditions
<i>Variety</i> – I want to taste more than I can eat	<i>Cozy atmosphere</i> – no one bothers me during my meal
	<i>Healthy food</i> – freshly prepared, quality ingredients, conforms to dietary requirements
	<i>Price</i> – corresponding to product offered

2.3.5 Attractions

Ideally, an ecotourist destination should offer the following attractions, specially packaged for tourist consumption:

- mountain hikes
- bicycle tours
- camping out in the wild
- outings for picking mushrooms and flowers
- culinary delicacies
- visits to churches and/or monasteries
- visits to places of cultural and historical interest
- observing traditional artisans and craftsmen at work
- joining in traditional festivals and festivities
- green schools

2.4 The Kalofer and Samokov Areas: Strengths and Weaknesses; Opportunities and Threats

An analysis of the strengths and weaknesses, and threats and opportunities reveals the objective factors that will inevitably underlie any consistent efforts to develop an ecotourist product in the areas of Kalofer and Samokov. The actual situation is seen and analyzed from the perspective of the world outlook and expectations of the most promising target group. The parameters of the program for the development and marketing of an ecotourist product in these two pilot areas are identified at the cut-off point of the ideal model and actual reality.

2.4.1 Analysis of Strengths and Weaknesses

Strengths	Weaknesses
<ul style="list-style-type: none"> • natural assets • cultural and historical heritage • traditional festivals • local partnerships 	<ul style="list-style-type: none"> • destinations insufficiently established • lack of proper tourist atmosphere in townships and villages • underdeveloped hospitality infrastructure • no attractions

2.4.2 Analysis of Opportunities and Threats

Opportunities	Threats
<ul style="list-style-type: none"> • considerable untapped market potential • absence of any identifiable competitor • partnership with National Parks • availability of expert and financial assistance 	<ul style="list-style-type: none"> • management not up to existing challenges

2.5 Guidelines for the Development of Ecotourist Product in the Areas of Kalofer and Samokov

Ecotourist products developed in Kalofer and Samokov could meet world-recognized standards only at a total destination level, rather than that of individual businesses. This consideration should be borne in mind when designing ways to best capitalize on the strengths and take advantage of the opportunities, while rectifying the weaknesses and avoiding the threats identified in the previous section. Establishing the areas of Kalofer and Samokov as ecotourist destinations would require that all members of the local partnerships look beyond the limits of their own businesses and make efforts to give their places of residence the all-round atmosphere of a tourist destination. These efforts should, by necessity, take two distinct directions:

- 1) Development of destinations, and
- 2) Development of businesses

2.5.1 Development of Destinations

Efforts to establish the areas of Kalofer and Samokov as centers of ecotourism should be resolute and proactive. Developing the all-round tourist profile of these towns is a necessary precondition for developing individual businesses, allowing them to increase their competitive value and market potential. At the same time efforts to optimize the all-round profile of a village or township pose the real challenge, as they require the formation of shared

values and a common willingness for joint action. In a mid-term perspective, the development of the areas of Kalofer and Samokov as tourist destinations would presuppose the attainment of 4 essential goals:

Goal 1. Active involvement of the economically vital part of the community and their commitment to the cause of making the populated place a center of ecotourism.

The absolute minimum effort needed to meet Goal 1 is:

- Definition of the values that underlie the existence of the partnerships. These are values the partnerships will establish by the very nature of their activities.

The effectiveness of partnerships as a tool for the development of ecotourism depends on the extent to which they constitute an integral whole, a body of shared interests. This in turn will depend on the extent to which active members share a common understanding of things of value, those in the name of which they have joined forces and those that brook no compromise.

- Public presentation of the partnership values to the local community

The set of values guiding the partnerships' activities should be shared among its members and with the local community. People who have stayed outside the ecotourist initiative should be made fully aware of the purpose of establishing such partnerships and the guiding goals and principles.

- Involvement of all who share the values by inclusion in the partnership or by establishing relations and forms of cooperation

Goal 2. Joint efforts for common action in developing an all-round tourist profile of the community

- Changing the all-round profile of the pilot areas is a significant challenge that can only be met by the joint efforts of the majority of the local population. The partnerships should draw up a plan for concrete activities aimed at developing the tourist profile that need to be undertaken, and start with those that are likely to be the least problematic. It would be appropriate to involve the entire population in of the community (village or township). One means of accomplishing this would be initiating goal-oriented promotional campaigns in which the members of the partnership publicly declare the goals and the agenda of the campaign and urge everyone to join in.

Goal 3. Strive towards more fully integrated business collaboration between members of the partnership and outside partners

The absolute minimum effort needed to meet Goal 3 is:

- Development of unified standards and codes of practice for the hospitality infrastructure (accommodation and eateries) for every destination.

These unified standards and codes of practice should bring order and transparency into pricing, eliminate unhealthy internal competition, and gain consumer confidence and respect.

- Joint marketing.

A unified advertising, promotional and trade policy is the most effective way of establishing the identity of destinations in the marketplace and ensuring their steady, long-term growth.

Goal 4. Establishment and affirmation of a public image of the Kalofer and Samokov areas

The absolute minimum effort required to meet Goal 4 is:

- Providing information to the media on a systematic and regular basis about activities of the partnership and the development of destinations

Providing current information to the media will help develop the public image of the areas of Kalofer and Samokov in the desired direction. Since such positive examples are a rarity in Bulgaria, any information about the activities of partnerships and the development of these destinations is bound to cause a stir amid the general public. Publicizing the activities of these partnerships will help develop the profile of the respective community as a tourist destination with its own dynamics of development and renewal.

The most promising channels of disseminating information to the media in this case are direct contacts with journalists responsible for the respective desk (a list may be provided by the Biodiversity Conservation and Economic Growth Project) and dispatching notifications. Successful implementation of this approach is bound to result in creating a steady and reliable circle of ‘media lobbyists’.

- Establishment of a common identity

The need to establish a common identity for the pilot areas implies the development and market promotion of a common brand name and trademark. The matter of a brand name and trademark arises from the structure and emotional value of the product itself. Just because tourist products related to protected natural territories are generated in the areas of Kalofer and Samokov does not mean that the brand name or trademark must necessarily include the words “Kalofer” or “Samokov” in it.

The hospitality infrastructure, the accommodation and eating facilities may be located within the respective townships, but the main attractions constituting the essence of the tourist product are located outside of them. In the Samokov area, the issue of a brand name and trademark is additionally complicated by the fact that the hospitality infrastructure is scattered in several townships and villages, while the town of Samokov itself is too closely associated with Borovetz, a resort that falls into a different tourist category altogether.

At the same time the names Kalofer and Samokov, seen as possible keywords for brand names and trademarks, fail to sufficiently communicate the emotional content of the ecotourist products.

The issue of a brand name or trademark to be used for marketing the ecotourist products should not be taken for granted; on the contrary, special efforts must be made to solve it properly.

Possible tools for the announcement and market promotion of the new brand name/trademark may be a slogan, a brochure/flier, and/or a Web page.

- Setting up a database

For the partnerships to perform their functions successfully and to assess the results thereof, they should have all relevant and necessary information at their disposal.

It would be useful from the very outset to gather information from currently existing clients and partners. This information could be used to obtain feedback from visitors and should be made available to prospective clients and partners. Thus, at check-in, guests may be required to supply their mailing or e-mail address. In addition, at check-out they may be given a very brief customer satisfaction questionnaire.

Partnerships ought to maintain a database of all their present and potential partners, including travel agents.

2.5.2 Development of Businesses

The objective of all business development should be the persistent emulation and approximation of an established ideal model of an ecotourist destination. In light of the insufficiently crystallized tourist profile for these destinations and the unlikelihood of positive change in the short-term, expectations for bringing businesses up to the desired ideal as a result of radical restructuring are unrealistic. It may even be unjustifiably risky given the potential for delayed return on investments.

Given the existing circumstances, the optimum business development process should include the following:

Stage 1. *Adoption of the principles of purity, simplicity, conservation, discovery*

Adoption of the principles of purity, simplicity, conservation, and discovery should result in their internalization as criteria for assessing current methods of the providing shelter, food and tourist attractions, and plans for further development. The internalization of these principles is a matter of personal choice for all parties and individuals who have decided to engage in the ecotourist business.

Stage 2. *Implementation of these principles within the framework of existing conditions*

The practical implementation of these principles should afford customers closer contact with the desired experience without the need for large-scale investment by businesses.

Stage 3. *Restructuring the destination and hospitality infrastructure.*

As experience accumulates and the market develops, prerequisites are created for a radical restructuring of the hospitality infrastructure (accommodation and eating facilities), as well as the tourist attractions. This is the time when the ecotourist product in the pilot areas will acquire the infrastructure to allow it to continue developing and operating for decades to come. At the end of Stage 3, the actual ecotourist product in the pilot areas of Samokov and Kalofer is expected to approximate the ideal model at some 70 percent.

Stage 4. *Maximum approximation of the ideal model. This is when the actual ecotourist product is fine-tuned and brought up to 85% of the ideal model.*

2.6 Potential Channels for Marketing, Promotion and Distribution of the Ecotourist Product

Different patterns of product distribution and services can be classified using the direct/indirect and active/passive matrix below:

	Direct	Indirect
Active	Future	*
Passive	Present	Future

The distribution of tourist services offered in the areas of Kalofer and Samokov (excluding Borovetz) can be defined as direct/passive. The proper marketing of ecotourist products presupposes organizing and extending the channels of distribution. Active direct marketing is the most promising principal form of distribution, and passive indirect marketing is an appropriate auxiliary form of distribution.

2.6.1. Active Direct Marketing

The active direct marketing of ecotourist products is a two-phase process:

1. Promotion of destinations by means of purpose-oriented advertising and marketing campaigns;
2. Sales and provision of services via a unified booking and coordination center.

An estimated 80 percent of sales could be realized as a result of direct active marketing.

Purpose-Oriented Marketing Campaigns

Marketing campaigns should focus on eliminating the existing skepticism and reservations among consumers and travel agents alike towards ecotourist products. This would help establish the areas of Kalofer and Samokov as attractive tourist destinations. There is a widespread misconception that the pilot areas lack in tourist attractions. Advertising campaigns should, therefore, seek to employ specific ideas and launch concrete offers to publicize and promote the existing attractions: traditional folk festivals, eco-trails, and hiking routes for example. The aim should be to place Kalofer and Samokov firmly on the map as attractive places to spend a public holiday for which people are normally inclined to take a trip anyway. Possible occasions would be the Lace Festival in Kalofer, the opening of a new eco-trail in Govedartsi, spending Easter in Kalofer, and Christmas in Rila.

Purpose-oriented marketing campaigns should be launched initially in Sofia, and a little later in all other major Bulgarian cities. The optimum period for launching a campaign is two to three weeks prior to the actual event, during which the campaign should proceed with mounting intensity. Each campaign should be dedicated to a specific attraction or entertainment opportunity, and it should explicitly promote contacts with the unified booking and coordination center, while actively publicizing the policy of unified accommodation and restaurant standards.

Setting up a Unified Coordination and Booking Center

A unified coordination and booking center seems to be the most realistic tool for marketing, as well as for day-to-day management of an ecotourist destination. Because different operators provide individual components of the ecotourist product, smooth and effective coordination is necessary to ensure that they are available on time and as needed. Travel agents so far show very little interest in marketing ecotourist products; therefore the partnerships will have to be directly responsible for marketing and sales.

Turning Today's Customers into an Active, Positive Source of Information for Tomorrow

People gather information for organizing pleasure trips mostly by word-of-mouth. Therefore, for Kalofer and Samokov to become established in the market as desired ecotourist destinations, it is essential to get early visitors involved in spreading positive information among their immediate circle of friends, acquaintances and contacts. Cultivating customer loyalty is a necessary first step in this direction. To that end, it would be appropriate to prepare advertising posters, small souvenirs and other promotional items for free distribution. Also, it seems wise for hoteliers and other business operators to send brief letters of gratitude to guests' home addresses thanking them for the patronage and urging them to visit again.

There are several suitable tools for this purpose. One is to print postcards with the destinations' landmark sites and other places of interest and distribute them free of charge among patrons. They could then be asked to send as many as they wish, postage prepaid, to friends and acquaintances. Current patrons may not only receive free promotional booklets, posters and other items, but they may be asked to supply mailing and e-mail addresses of friends, acquaintances and other contacts potentially interested in this form of tourism

It also seems appropriate to systematically monitor the number of visitors and the respective channels of information (recommendation) that led them to pay a visit to the destination. The most active promoters of the destination may be rewarded with a small gift.

Direct Contacts with Significant Potential Patrons

This is a marketing strategy promoting the product among potential corporate clients. Most established businesses organize periodic workshops for their staff or clients. There are also businesses that specialize in training, teambuilding and other similar services. All of these businesses are potential clients for the two pilot areas. Winning them over as actual patrons requires something as simple as preparing a brief, catchy and informative presentation, followed by additional one-on-one contacts and follow-up meetings.

2.6.2 Passive Indirect Marketing

This form of marketing presupposes using the services of a number of travel agents. Establishing cooperative relationships with travel agents is likewise identified as a two-stage process:

1. Sending out promotional material packages that present the destinations and partnerships and offer cooperation;
2. Holding one-on-one meetings with potential partners.

Travel agents may turn out to be particularly effective promoters of a destination and a tool for generating business in the context of major public holidays celebrated nation-wide. Expectations are, however, that about 80 percent of sales will be the result of direct, active marketing.

3.0 Results of a Quantitative Survey of Travel-for-Pleasure Practices and the Potential Market for Ecotourist Products

3.1 Methodology

Research period	April 2002
Target population	1.3 million The population of Sofia, Plovdiv, Stara Zagora, Bourgas, and Varna aged 15-60
Sampling method	statistical averaging; selection of respondents using the “next birthday” method
Sample size	450
Data gathering method	Standardized interview
Degree of representation	The findings are seen as representative of the target population

Typical Categories of Practices During Pleasure Trips: Some Inevitable yet Thankfully Brief Notes on Methodology

The principal goal of this survey was to identify and define the main categories of travel-for-pleasure practices of the population in the five largest Bulgarian cities. This information is to be used as the basis for developing ecotourist products in the Kalofer area as the gateway to Central Balkan National Park, and in the Samokov area in the vicinity of Rila National Park. At a later date, it can be used to develop ecotourist products in areas surrounding other protected territories in Bulgaria.

Organized and purposeful development of ecotourist products, not just in relation to protected territories but in general, is a pioneering effort for the Bulgarian tourist market. It is possible that attempts to develop ecotourism have been made previously by a private person or organization in Bulgaria but if they have, their experiences have been insufficiently publicized, if at all. There is practically no information on tourist practices in this country that is structured in such a way as to be readily available to market agents. Whatever travel-for-pleasure information there is, is analyzed and interpreted from a ‘bird’s eye view’. In the context of the above-described situation, this survey has been designed to identify and describe ‘from scratch’ the categories of travel-for-pleasure practices, based upon a set of reliable facts.

The available information on travel-for-pleasure practices has made it possible to limit the survey’s target population to residents of Sofia, Plovdiv, Varna, Bourgas and Stara Zagora, i.e. the largest regional centers in this country where over two-thirds of the nation’s purchasing power is concentrated.

The motives for undertaking a journey for pleasure have to do with the possibility for practicing certain activities. Individual preferences for those are reflected in the:

- all-round concept of vacationing (“the way it should be”);
- way of organizing trips;
- frequency and duration of trips;
- criteria for selecting and evaluating possible destinations.

Preferences for different activities translate into preferences for different holiday destinations, and the frequency of trips, their duration and organization. Additionally, such differing preferences are motivated by demographic and lifestyle factors.

The practically tested relevance of such assertions provided the starting point for study and analysis not only of trips for pleasure, but of other aspects of people's leisure time in general.

The definition of the main categories of vacation practices is based on the interrelationship among activities, destinations, and the organization of vacations. This study defined these categories by:

1. Gathering detailed empirical data about trips taken in 2001 ranging in duration from same-day-no-overnight trips, through 1-3, 4-6, 7-days-and-over journeys in general, with a separate emphasis on trips including paid overnights
2. Presenting the data grouped by combinations of trips of different duration in general, and separately including paid overnights (Table 3.1)

Table 3.1

Duration of Trips (# of days)	Total Trips (%)	Trips including Paid Overnights (%)
No trips	34.5	28.6
Same day, no overnights	1.6	10.4
No pay, 1- 3 overnights	4.2	7.5
No pay, 4-6 overnights	2.8	2.9
No pay, over 7 overnights	10.4	9.2
No pay, 1-3 & 4-6 overnights	2.0	2.1
No pay, 1-3 & over 7 overnights	4.1	5.7
No pay, 4-6, & over 7 overnights	1.2	1.5
No pay, 1-3, 4-6, & over 7 overnights	1.8	2.7
1-3 paid overnights	3.8	5.3
1-3, 4-6 paid overnights	1.5	2.0
1-3, & over 7 paid overnights	1.1	2.7
1-3, 4-6, & over 7 paid overnights	0.4	1.7
4-6 paid overnights	5.7	6.8
4-6, & over 7 paid overnights	1.8	1.8
Over 7 paid overnights	9.2	9.2

3. Aggregating individual samples with minimal scores on the basis of similarities of content as an essential precondition for validating the data through statistical analysis (Table 3.2)

Table 3.2

Category	Description	%
Non-traveler	Not a single trip	34.5
No overnight	Same day, no overnights	15.6
No overnight and long journeys	No overnight, 4-6 overnights No overnight, over 7 overnights	13.2
Short trips	No overnight, 1- 3 overnights 1-3 overnights	8.0
Miscellaneous journeys	No overnight, 1-3 & 4-6 overnights No overnight, 1-3 & over 7 overnights No overnight, 4-6, & over 7 overnights No overnight, 1-3, 4-6, & over 7 overnights 1-3, 4-6 overnights 1-3, over 7 overnights 1-3, 4-6, over 7 overnights 4-6, over 7 overnights	13.8
Long journeys	4-6 overnights Over 7 overnights	14.9

4. A cross-analysis of the distribution of journeys of different duration in general, as well as by journeys of different duration including paid overnights was performed to attain a higher degree of accuracy in reporting the existing practices of journeys of different duration including free overnights (without payment) (Table 3.3).

In sorting out individual groups, borderline cases have been grouped by prioritizing

- trips including overnights over same-day ones;
- trips including paid overnights over free ones.

Table 3.3

Paid overnights	Non-traveler	No overnight	No overnight, long journeys	Short trips only	Various trips & journeys	Long journeys only
Total						
Non-traveler	82.8					
No overnight	*	66.6				
No overnight, long journeys	*	6.4	84.0			
Short trips only	6.3	21.9	*	89.9		
Various trips & journeys	2.2	5.2	16.0	10.1	100.0	
Long journeys only	8.7	*	*	*	*	100.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

In cases where trips include free overnights only, as well as in combinations between same-day trips and trips including free overnights, the respondents are grouped separately as 'travelers who do not pay for overnights'. So long as such trips have been motivated by a visit to a specific destination (a country estate, relatives' home, etc.), rather than specific other activities, then their duration can be ignored.

5. Aggregation of the data results in the identification of seven categories, or groups, of travelers for pleasure (Table 3.4):

Table 3.4

Group	%
Non-travelers	28.6
Travelers on same-day trips	10.4
Travelers who do not pay for overnights	11.2
No overnights, long journeys	13.2
Short trips only	8.0
Various journeys	13.8
Long journeys only	14.9
Total	100.0

6. Every category has been analyzed in detail and data has been extrapolated for the total target population. In presenting the data analysis for each group, emphasis has been placed on what separates each group from the rest, since common features for all groups become visible in a graphic presentation of the findings.

3.2 The Varied Journeys Group

3.2.1 Who are They?

Some 13.8% of all respondents, i.e. no fewer than 140,000 people in all, mostly residents of Sofia and other major cities, report visiting more places than the average member of the research population. This group has the following socio-demographic profile:

- They are younger: 71% under 39, and 44% under 29.
- They are educated: 60% are university and college grads.
- Most are couples without children (2-person households).
- Most are residents of Sofia
- A higher-than-average proportion run their own business.
- Most belong to a higher-than-average income bracket.
- A higher-than-average proportion own a country house/villa, have and use a PC, and have Internet access.
- A higher-than-average proportion work out or practice solitary or competitive sports: football, skiing, hiking.

3.2.2 Their Travel Records for 2001

People who travel widely normally display a higher degree of mobility. All journeys of this group include an overnight with paid accommodation. Depending on the duration of individual journeys, the average number of those recorded per annum is 20 to 50% higher than the population average.

Characteristic of the people who undertake varied journeys for recreational purposes is that they engage *in similarly varied, even mutually incompatible activities*, some of which are used as the main reason for visiting a particular tourist destination.

Activities constituting the main reason for a visit	Additional activities
<ul style="list-style-type: none"> • Mountain hikes • Visits to churches and monasteries • Skiing 	<ul style="list-style-type: none"> • Eating out • Sunbathing • Bathing/swimming • Strolls around the resort/camp site • Tasting culinary specialties/local delicacies • Angling

The level of satisfaction with the activities identified as the main reason for visiting a particular destination is quite high. Dissatisfaction or disappointment is reported mostly with visits to restaurants and other eateries.

Within the varied journeys group, the proportion of respondents who report visiting all popular destinations is higher than the research population's average. Members of this group are characterized by a marked interest in:

- mountain villages;
- Vitosha;
- Bansko;
- Borovetz;
- Pamporovo;
- spa resorts;
- settlements declared architectural or cultural reserves;
- monasteries.

The main sources of information for selecting a destination and for organizing the trips are friends and relatives, the media, and travel agencies. People who undertake varied journeys are more willing to receive tourist and travel information via the Internet or in the form of mailed leaflets or brochures.

Respondents from the varied journeys group report using the services of travel agencies often to organize their trips, especially when the trips include 1 to 3 or 4 to 6 overnights.

The varied journeys group report using public transportation less frequently than the research population as a whole. While private vehicle is the most widely used means of transportation for the entire population, respondents from the varied journeys group report using it more commonly than the population average.

The average number of persons accompanying each respondent on individual journeys varies between 2.1 and 2.4 and typically these are close friends/spouse/children. A comparative analysis of the research data provides evidence that the most frequent groups of fellow travelers for recreational purposes are:

- A 4-strong group of close friends;
- A couple (whether married or not);
- A family with one child (or, much more rarely, with more children)

3.2.3 The Essentials

A reasonable price, attractive natural scenery, and cleanliness and hygiene are the three main requirements determining the range of possible tourist destinations for the varied journey group. The ultimate choice of destination for any particular journey is a favorable combination of one or more of these criteria.

Main Requirements	Additional Requirements
<ul style="list-style-type: none"> • Reasonable price • Attractive natural scenery • Cleanliness and hygiene 	<ul style="list-style-type: none"> • Entertainment opportunities • Sports opportunities • New experiences • Accommodations with all amenities • Varied and attractive restaurants and watering holes • Roads in good condition

Comparing and assessing alternative destinations as potential competitors to the two pilot areas reveal the criteria for a destination's attractiveness. Favorites with the varied journeys group are resort towns such as Sozopol, Balchik, and Melnik. These destinations are reputedly of good or excellent value for the money, are generally clean and offer good hotels and restaurants, entertainment opportunities, sports facilities, and new experiences. And the roads leading to them are in good condition. Less attractive destinations are Veliko Turnovo, Kranevo, Hisarya. Compared with the better-established, most attractive tourist destinations, Kalofer and Samokov do not rank high on respondents' preferences lists.

Owing to their extensive personal experience, respondents from the varied journeys group display almost professional expertise in assessing the hospitality infrastructure, and more specifically, accommodations and restaurants. Below are some of the more significant considerations that should be borne in mind while developing the pilot project areas:

- The respondents' assessment criteria are markedly eclectic. In assessing any given facility they note not so much the style as the level of execution; hence the lack of any marked preference for a specific type of hotel, whether a resort or a mixed-purpose one.
- The modern/traditional dichotomy is interpreted by our respondents not so much as having to choose between the period houses of Koprivshtitza and the state-of-the-art luxury of the Hilton. They do not see the choice as one between modern hotels with all the amenities, regardless of their style and the blandness of pre-democracy rest homes. Thus modern is understood to mean new, properly maintained, conforming to present-day standards of style and function; while traditional equals old, shabby, threadbare, or plain dull. Hence the marked preference for 'modern'-style attractions, which otherwise clashes with the group's declared interest in churches, monasteries and settlements declared historical and cultural reserves.
- Preferences for twin-bed rooms are to be taken as a reaction to the practice, in many hotels, of advertising regular double beds as king-size. By booking twin beds customers are guaranteed to each have a decent-sized bed, rather than the king-size and be faced with a bed not nearly big enough for two.
- A preference, albeit weak, was expressed for having parents and children put up in the same room; this is probably due to the fact that part of the respondents have infants or very small children.

- Each room must have a bathroom. There should be no pets on the premises, and there are preferences for a bed and breakfast format.
- Accommodations must feature all amenities and conveniences that visitors are used to having and using at home. This expectation should be interpreted in a broader context: the lack of a TV in the hotel room is unlikely to put off a prospective customer. Amenities must be there as options for the guests to avail themselves of or not. Thus, respondents from the varied journeys group indicate that they would appreciate having the option to use air conditioning, an in-house restaurant, and a fitness club or pool.
- Eateries must be pleasant enough for visitors to wish to spend a whole evening in, and must guarantee privacy.
- The combined requirements for a long menu, international cuisine, unfamiliar dishes, and the possibility of sampling more than one main course at one sitting demonstrate one basic expectation: a restaurant menu must offer opportunities for culinary discovery.

Respondents from the varied journeys group display a marked interest in the following types of eateries:

- restaurants proper;
- fast food or take-out places;
- Chinese;
- pizza parlors.

Based on experience they identified the following deficiencies in restaurants and eating establishments:

- lack of vegetarian/vegan dishes;
- insufficient variety of dishes with different kinds of meat;
- lack of international cuisine.

Optimum prices:

Bed and breakfast	12 – 15 leva
Dinner (not including beverages)	9 – 12 leva

Respondents from this group indicate that restaurant staff must be professional, courteous and efficient, keeping their distance and avoiding excessive familiarity with the customer.

In conclusion, good recreation to the varied journeys group means a visit to an unfamiliar place, yet one that is trendy and attracts many visitors while offering opportunities for practicing quality activities.

3.2.4. Ecotourists?

Evidence points to the varied journeys group as the prime target group for ecotourist products, since the level of interest and the willingness among them to immediately avail themselves of ecotourist products is about twice as high as the average reported for the research population as a whole.

3.2.5 The Ecotourist Product: What Should It Be Like?

Respondents from the varied journeys group identify as most appropriate for ecotourist purposes, those destinations that they are likely to visit anyway: mountain settlements, Black Sea resorts, spas, Borovetz.

Respondents from the varied journeys group expect the ecotourist product to reflect and meet their basic requirements of a preferred tourist destination, while avoiding or rectifying any deficiencies in the tourist services currently being offered.

Along with convenience and comfort, staff courtesy and professionalism, there are a number of other criteria that proprietors of hospitality infrastructure facilities should strive to meet to ensure and increase the satisfaction of ecotourists. Conversely there are a range of omissions and deficiencies that usually cause frustration and dissatisfaction among guests.

Accommodation facilities

Satisfying	Disappointing
<ul style="list-style-type: none"> • Conservation of natural and cultural assets • Cleanliness and hygiene • Privacy, peacefulness and possibilities for rest and recreation • Availability of additional services • Attractive prices 	<ul style="list-style-type: none"> • Dirt, grime • Destruction of natural and cultural assets • Staff importunity

Eateries

Satisfying	Disappointing
<ul style="list-style-type: none"> • Wholesome food • Non-polluting • Cozy atmosphere 	<ul style="list-style-type: none"> • Bad food • Staff importunity • High prices

Below are some preferred ways of getting to know natural assets, as well as acceptable costs as reported by the varied journeys group:

- One-day hike - 5 leva
- Visit to a cave - 5 leva
- Photo exhibition - 2 leva

Respondents from the varied journeys group report a 50% higher interest in the extreme guided hikes specialty attraction than the average for the entire research population.

The following cultural attractions are reportedly the most preferred by respondents in the varied journeys group (optimum prices quoted):

- Visits to cultural and historical heritage sites - 5 leva
- Observing craftsmen at work - 3 leva
- Participation in traditional festivals - 10 leva

Decorative textiles are cited as the most sought after artifacts of traditional craftsmen.

Respondents rarely cited folk songs and dances as attractive amenities.

3.2.6 Will They Visit Kalofer?

As a tourist destination, Kalofer certainly meets all the basic requirements of a travel destination and recreation site of the varied journeys group. Not only is Kalofer the birthplace of Hristo Botev; it is renowned as a clean, tidy, welcoming town at the immediate foothills of the Balkan mountain.

A visit to Kalofer is mostly associated with expectations for the following activities:

- mountain hikes;
- visits to restaurants;
- sunbathing;
- visits to churches and monasteries;
- gathering flowers and mushrooms;
- observing traditional arts and crafts and authentic folklore;
- cycling.

A visit to Kalofer is typically seen as a *short trip* with the following parameters:

- up to 3 overnights;
- a party of 3 on average;
- average budget: 135 leva per person.

3.2.7 What About the Area of Govedartsi?

Govedartsi is seen as a *typical mountain village at the foothills of Rila*; in this context, it meets the basic requirements to a travel destination and recreation site as identified by the varied journeys group.

A visit to Govedartsi is mostly associated with expectations for the following activities:

- mountain hikes;
- sunbathing;
- visits to restaurants;
- gathering flowers and mushrooms;
- camping;
- skiing and extreme downhill;
- winter hikes.

A visit to Govedartsi is typically seen as a *short trip* with the following parameters:

- up to 3 overnights;
- a party of 3 on average;
- average budget: 149 leva per person.

3.2.8 What is the Estimated Number of Potential Visitors?

An optimistic estimate of the potential numbers of tourists to both Kalofer and Govedartsi from the varied journey category may range between 29 and 45 thousand visitors over the next five years. This estimate is based upon the following assumptions:

- The declared intentions on the part of respondents to visit either or both of the pilot areas.
- A visit to either Kalofer or Govedartsi would be a typical short trip.
- The ecotourist product in Kalofer and Govedartsi would develop with a full view of market demand and up-to-date consumer requirements.
- Active, persistent and purposeful marketing efforts will be made to establish Kalofer and Govedartsi as favorite ecotourist destinations.

- The establishment of Kalofer and Govedartsi as ecotourist destinations will affect every aspect of their appearance and the pattern of social life within them.
- Once established in the marketplace these two destinations, featuring similar natural assets, are highly unlikely to radically commercialize their tourist attractions.
- Macroeconomically, Bulgaria is expected to retain a steady and predictable course of development in the years to come, similar to that of the past 2-3 years.

A pessimistic estimate puts the potential numbers of tourists to both Kalofer and Govedartsi from the varied journey category at anywhere between 13 and 20 thousand visitors over the next five years. *This estimate is based upon the following assumptions:*

- The declared intentions on the part of respondents to visit either or both of the pilot areas.
- A visit to either Kalofer or Govedartsi would be a typical short trip.
- The ecotourist product in Kalofer and Govedartsi would develop regardless of market demand and up-to-date consumer requirements.
- Some marketing efforts will be made to establish Kalofer and Govedartsi as favorite ecotourist destinations.
- Once established in the marketplace these two destinations, featuring similar natural assets, are highly unlikely to radically commercialize their tourist attractions.
- Macroeconomically, Bulgaria is expected to retain a steady course of development in the years to come.

3.3 The Same-Day Trips and Long Journeys Group

3.3.1 Who Are They?

The group comprised of people taking same-day trips and/or long journeys accounts for 13.2% of the research population, or no fewer than 130,000 people. They are mostly residents of Sofia and the larger cities. This group has the following socio-demographic profile:

- They are predominantly male;
- They are younger: 64% are under 39; 37%, under 29;
- Most have college or university degrees;
- Generally, they are residents of Sofia;
- Their households are typically 3- or 4-strong;
- Their income is above the national average;
- They typically own and use a private vehicle, a PC and have access to the Internet;
- They are not sports buffs; the percentage of those within the group who practice any kind of sport is below the population average.

3.3.2 Their Travel Records for 2001

The group can be described as relatively mobile. The average number of same-day trips reported by respondents in this group is about 20% lower than the research population average; while that of journeys of varying duration is about 10% higher than the population average. Characteristic of this group is that its members combine in their traveling schedule different types of trips: same-day trips (not including overnight); journeys including 1 to 2 overnights without payment; and journeys including more overnights with paid accommodation.

The types of activities reported by this group paint more or less a traditional picture of their recreation preferences:

- a seaside vacation once a year, every year;
- various trips that provide *aesthetic pleasure from contact with nature, while, at the same time, yielding practical benefits* from fishing, gathering herbs, or just good, healthy outdoor picnicking.

As a whole, respondents from this group tend to give socially desirable answers to the questions asked.

Activities constituting the main reason for a visit	Additional activities
<ul style="list-style-type: none"> • mountain hikes • fishing 	<ul style="list-style-type: none"> • sunbathing • bathing in rivers/lakes/the sea • visits to restaurants • walks in the vicinity of the rest home/recreation area • tasting culinary delicacies • gathering herbs/mushrooms • observing traditional arts and crafts • observing traditional folklore • visits to churches and monasteries

The group members report both groups of activities as quite satisfactory.

The interests and preferences of the same-day trips and long journeys group are directed towards *non-resort destinations*:

- other towns and villages
- mountain lodges and chalets (remote and practically wild areas);
- larger cities/regional centers
- Bankya
- Nessebar
- Hot springs and spa resorts

In organizing their trips, respondents from this group rarely use any specific information other than what they already know from experience, or can learn by asking relatives or acquaintances. Nonetheless:

- *use of newspapers/magazines and travel agents as sources of information* is more common among this group than among others; and
- there is a *willingness* to use additional channels of information, such as *the Internet and direct marketing brochures*.

They more commonly use information from a travel agent in preparing for longer journeys.

Depending on trip duration, respondents from the same-day trips and longer journeys group travel for pleasure in two types of company:

- On same-day trips or shorter journeys: with a small number of friends or a friendly couple (no children), an average of 4 accompanying persons;
- On longer journeys: with the family, 2 accompanying persons on average.

3.3.3 The Essentials

The choice of a destination most likely depends on the duration of a planned journey:

- destinations for *same-day trips* and *short journeys* are chosen for: *entertainment opportunities, natural landmarks and scenic landscapes; new experiences*; while
- destinations for *longer journeys* are chosen based on *price and the possibility to include children*.

In both cases, among the leading criteria for selecting a destination are peacefulness and privacy, quality accommodation with all conveniences and amenities, and a variety of restaurants/watering holes.

Main Requirements	Additional Requirements
<ul style="list-style-type: none"> • Reasonable price • A variety of amusements and entertainment opportunities • Peace and calm, privacy • Accommodation offering all conveniences and amenities 	<ul style="list-style-type: none"> • Natural landmarks and scenic landscape • New experiences • Possibilities to include children • A variety of restaurants and bars

Comparing and assessing alternative destinations as potential competitors to the two pilot areas reveal the criteria for a destination's attractiveness. The group's favorites are resorts such as Sozopol, Bansko, Melnik, or any good spot by the sea; respondents cite more than one place, usually two, when they wish to combine a place where they can have a good, satisfying meal and a drink with a place where they can indulge in fishing, mushroom gathering, or a visit to a church or monastery.

The same-day trips and longer journeys group have *expectations of the hospitality infrastructure* that correspond to the average, or characteristic, of the entire research population:

- Resort-type hotels;
- Modern design;
- A marked preference for a double bed in a room for two;
- Children sleep separately;
- Bathroom with every room a must;
- No pets admitted;
- Bed and breakfast;
- Amenities and conveniences similar to what people are used to at home;
- Eateries must offer conditions for a prolonged dinner while guaranteeing privacy and discretion;
- A long menu featuring international dishes; local specialties are not obligatory, but a few surprises would be much appreciated. Locally available ingredients are preferred.

The same-day trips and longer journeys group show almost equal preferences for most all types of eateries:

- restaurants
- taverns
- beer gardens

- bars
- fast food joints
- Chinese restaurants
- pizza parlors

The types of meals respondents from this group most often find missing from the menus are:

- fish/seafood specialties;
- vegetarian/vegan dishes.

Optimum prices:

Bed & Breakfast	9-12 leva
Dinner (not including beverages)	9-12 leva

Regarding staff attitude, respondents from this group likewise prefer hotel and restaurant staff to keep their distance while giving professional and courteous service.

In conclusion, *good recreation* to the same-day trips and longer journeys group means a visit to an unfamiliar place, yet one that attracts many visitors and offers rich entertainment opportunities.

3.3.4 *Ecotourists?*

People who opt for either same-day trips or longer journeys *are not a promising target group* for ecotourist products. True, their professed level of interest in ecotourist products and services is higher than the research population average; however, among this particular group there is a tendency to indefinitely postpone the use of such products and services.

3.3.5 *Will They Visit Kalofer or Govedartsi?*

Members of this group see *Kalofer* largely through the prism of what they learned in school: *the birthplace of Hristo Botev and a town associated with the National Revival*. The degree to which these people associate Kalofer with nature or the Balkan Range is lower than the research population average. A visit to Kalofer is expected to provide opportunities for:

- mountain hikes;
- visits to restaurants;
- tasting local culinary specialties;
- visits to churches and monasteries;
- sunbathing;
- visits to discos;
- observing traditional arts and crafts and local folklore;
- walks in the area.

Govedartsi is seen as a typical *mountain village* at the foothills of Rila and a *winter ski resort*. A visit to Govedartsi is expected to provide opportunities for:

- mountain hikes;
- gathering herbs;
- visits to restaurants;

- camping out;
- skiing and extreme downhill.

A comparison between what one can *actually* do in Kalofer or Govedartsi and the range of activities reportedly preferred by the same-day trips and longer journeys group highlights a number of areas that could motivate members of this group to visit either area. At the same time, attracting visitors from this group seems to be a complicated task for the following reasons:

- *These people are not used to paying for accommodation on short trips.* At the same time, there is no reason to believe that they would opt for either place in lieu of the seaside, which is familiar to them.
- *Their attitude towards nature seems to be purely utilitarian.* They see natural assets as something to be consumed and utilized, which hardly corresponds to the values of ecotourism.

In summary, in order to attract visitors from this group, considerable investment in the pilot areas must be made in building water sports attractions and a hospitality infrastructure of the 'luxury rest home' type. At the same time, conditions for supervised use of natural resources must be provided.

3.4 The Short Trips Group

3.4.1 Who Are They?

The short trips group comprises 8.0% of the entire research population, or no fewer than 72,000 people. This group has the following socio-demographic profile:

- Males form a clear majority;
- They are young: 65% are under 39, while 42% are under 29;
- Most are college and university grads;
- Most are single, from one-person households;
- Most live in the larger coastal cities;
- Their income oscillates around the national average;
- They are above average in terms of car and PC ownership and Internet access.

3.4.2 Their Travel Records for 2001

As a whole, members of the short trips group are less mobile, or less inclined to travel, than the research population average. While the reported number of same-day trips for this group is 30% higher, the reported number of journeys of different duration including overnights is 10 to 25% lower than the population average. *While they willingly undertake journeys with 1 to 3 overnights in paid accommodation, on longer journeys including more overnights, they opt for free accommodation.*

The activities indicated as preferable by respondents from this group paint a markedly hedonistic attitude towards holiday-making: the short-trips group displays *the strongest propensity for discos and night clubs and for celebrating birthdays and other such occasions together.*

Activities constituting the main reason for a visit	Additional activities
<ul style="list-style-type: none"> • sunbathing • bathing/swimming in the sea/rivers/lakes 	<ul style="list-style-type: none"> • visits to restaurants • visits to discos • walks within the recreation area • tasting of culinary specialties • celebrations of birthdays and other festive events • camping out • hiking

The level of satisfaction with activities reported as significant or preferable is high. At the same time, they show ambivalence towards their experiences with restaurants and discos: the share of satisfied and disappointed respondents is about half and half.

The short trips group reports a clear preference for marine destinations and small towns not recognized as major resorts:

- marine resorts
- other settlements
- Kiten
- Nessebar
- Primorsko

Members of the short trips group are much more inclined than the research population as a whole to obtain travel information from friends and relatives or, conversely, believe they do not need any such information at all. They show little or no interest in seeking alternative sources of information.

The members of this group are more inclined than the research population as a whole to use public transportation: bus, taxi or shared fixed-route taxi. The practice of using travel agents is virtually unknown among this group. Typically, members of the short trips group travel for pleasure in small groups of 4 persons on average.

3.4.3 The Essentials

The choice of destination among this group is a function of a desire for a

Main Requirements	Additional Requirements
<ul style="list-style-type: none"> • reasonable price • opportunities for new experiences • sea/beach 	<ul style="list-style-type: none"> • entertainment opportunities • “The place draws the right kind of crowd” • sports facilities • accommodation with all conveniences and amenities • a variety of restaurants/bars

Comparing and assessing alternative destinations as potential competitors to the two pilot areas reveal the criteria for a destination’s attractiveness. Favorite destinations with the short trips group are Sozopol, a marine resort, as well as places like Bankya and Melnik, known for their trendy, ‘right-kind-of-crowd’ image.

In appreciating the *hospitality infrastructure* the members of the short trips group are guided by *a taste for the modern, for what is regarded as trendy, hip and fresh*. Here are some more important considerations about this group:

- Their interest in resort-type hotels, their taste for clean, smooth and modern interiors and their preference for double-bed hotel rooms are more clearly marked than in any other group within the research population;
- A bathroom for every hotel room is a must;
- Bed and breakfast is the accommodation format of choice;
- All matters of accommodation for children and household pets are practically irrelevant to that group;
- Small luxuries like fridge, telephone and air conditioning in every room are highly appreciated; so is a restaurant/coffee bar in the hotel. These requirements, however, should be seen as desirable extras rather than mandatory.
- Eateries must be cozy and comfortable enough for a prolonged dinner; at the same time, they must offer privacy.
- The menu must be varied and rich. Regional specialties and exotic dishes must feature prominently; large portions are preferable to small ones. The origin of ingredients is less important to this group compared with all others.

Below are several types of eating establishments ranked in popularity with the short trips group:

- restaurants
- taverns
- bars
- fast food joints
- Chinese restaurants
- pizza parlors

The types of meals most often found missing from the menus are:

- fish/seafood specialties;
- traditional dishes;
- fruit/desserts;
- local and regional specialties;
- international cuisine.

Optimum prices:

Bed & Breakfast	12-15 leva
Dinner (not including beverages)	9-12 leva

Respondents from the short trips group show a remarkably low tolerance for any liberties or transgressions on behalf of the staff that go beyond the strictest fulfillment of professional obligations.

In summary, *good recreation* to the short trips group means a visit to an unfamiliar place, one that offers opportunities for practicing quality activities and wild entertainment away from the 'wrong' kind of crowd.

3.4.4 *Ecotourists?*

People with a clear propensity for short trips are not a promising target group for ecotourism. Their level of interest and willingness to take advantage of ecotourist products are similar to the respective levels for the research population as a whole. This, combined with their preferred activities and criteria for selecting a destination, rules out the short trips group as a potential target for ecotourist marketing activities.

3.4.5 *Will They Visit Kalofer or Govedartsi?*

The image of Kalofer for this group goes back to what they learned in secondary school: the birthplace of Hristo Botev, a Revival-period town, and in the Rose Valley. At the same time, the short trips group is considerably less inclined to associate Kalofer with nature and the Balkan Range than any other group within the research population. The predominant expectations regarding a possible visit to Kalofer are for:

- visits to restaurants;
- tasting culinary specialties;
- mountain hikes;
- visits to discos;
- observing traditional arts and crafts and local folklore;
- walks.

Govedartsi is seen as a typical mountain village at the foothills of Rila and a winter ski resort. A visit to Govedartsi is expected to provide opportunities for:

- mountain hikes;
- visits to restaurants;
- camping out;
- skiing and extreme downhill.

At the initial stage of establishing Kalofer and Govedartsi as tourist destinations, no significant opportunities emerge for attracting the type of travelers associated with the small trips group.

- A comparison between what one can actually do in the pilot areas and the range of activities reportedly preferred by the short trips group does not reveal any significant similarities to motivate members of this group to visit either area.
- The mandatory requirements for developing an ecotourist product are contrary to the attractions that are among this group's favorites.

However, at a possible next stage, when Kalofer and Govedartsi are expected to generate a considerable tourist flow, this will enable the building of a hospitality infrastructure offering a variety of attractions where even the trendy, hedonistic crowd of the short trips group will be able to find something of interest.

3.5 The Long Journeys Group

3.5.1 Who Are They?

The long journeys group is *14.9% of the research population*, or no fewer than *150,000 people*. This group has the following socio-demographic profile:

- They are younger than average: 69% are under 39; 40% are under 29;
- Most of them have a secondary school education;
- Their households are mostly 3-strong or bigger;
- Most are residents of larger cities: Sofia, Plovdiv, Stara Zagora;
- Their income is about average for Bulgaria;
- They usually own a private car;
- The percentage of those practicing sports is lower than the population's average.

3.5.2 Their Travel Records for 2001

As a whole, the long journeys group is less mobile than the research population as a whole: the average number of trips of any duration per member of this group is 10 to 30% lower than the population average. While they usually undertake journeys with 1 to 3 overnights in free accommodation, on longer journeys including more overnights, they do not mind paying for their accommodation.

People with a preference for longer journeys normally practice a more limited range of activities.

Activities constituting the main reason for a visit	Additional activities
<ul style="list-style-type: none"> • sunbathing • bathing/swimming in rivers/lakes/the sea 	<ul style="list-style-type: none"> • visits to restaurants • walks within the immediate surroundings of the destination area

Members of the long journeys group report satisfaction with the activities constituting the main reason for the visit. They most often cite visits to restaurants as disappointing.

Most popular with respondents from the long journeys group are *marine destinations*. Asked to name a favorite resort, the majority opt for Sozopol, Bourgas and, a little less frequently, Varna. It is important to know that the names of the two largest cities on the Black Sea are often used to denote the southern and northern coastal region, respectively.

The *information* necessary for organizing a vacation is typically obtained from *friends and relatives*. Respondents also report some willingness to use the services of travel agents; however, they presently do not utilize their services. Respondents from this group are relatively more inclined than the research population average to use a private vehicle when traveling for pleasure. More often than not, members of the long journeys group travel in the company of their families.

3.5.3 The Essentials

The leading criteria for choosing a destination are the possibility of negotiating a *good price*, the existence of adequate conditions for *vacationing with children*, and the likelihood of meeting other families with children.

Main Requirements	Additional Requirements
<ul style="list-style-type: none"> • reasonable price • possibilities for holidaying with children • “<i>This place draws people just like me.</i>” 	<ul style="list-style-type: none"> • Natural landmarks • Entertainment opportunities • Accommodation with all conveniences and amenities • A variety of restaurants and bars • Roads in good condition

Comparing and assessing alternative destinations as potential competitors to the two pilot areas reveal the criteria for a destination’s attractiveness. Favorite resorts with this group are Sozopol, Kranevo, Hissarya, and Shipkovo.

The long journeys group report *expectations of the hospitality infrastructure* that correspond to the average, or characteristic, of the entire research population:

- Resort-type hotels;
- Modern design;
- A marked preference for a double bed in a room for two;
- Children sleep separately;
- Bathroom with every room a must;
- A notable difference for this group is a markedly positive attitude towards pets in hotels;
- Bed and breakfast;
- Amenities and conveniences similar to what people are used to at home;
- Eateries must offer conditions for a prolonged dinner while guaranteeing privacy and discretion;
- A long menu, preferably dominated by Bulgarian dishes. A clear preference for locally available ingredients.

Preferred places for eating out are:

- restaurants
- fast food joints
- Chinese restaurants
- pizza parlors

The types of meals respondents most often find missing from the menus are:

- fish/seafood specialties;
- traditional Bulgarian dishes.

Optimum prices:

Bed & Breakfast	9-12 leva
Dinner (beverages not included)	9-12 leva

In terms of staff-guest relations, an emphasis on a professional, courteous and discreet service seems to be the winning formula.

In conclusion, *good recreation* to the long journeys group means a visit to a familiar, popular place that offers opportunities for quiet entertainment and sedentary activities.

3.5.4 *Ecotourists?*

People with clear propensity for long trips are not a promising target group for ecotourism. Their level of interest and willingness to take advantage of ecotourist products is lower than the respective levels for the research population as whole. The potential ecotourism destinations and the typical characteristics of an ecotourism product almost don't comply with the values and preferences of this group.

3.6 The Long Journeys, Free Overnights Group

3.6.1 *Who Are They?*

The group of travelers who do not pay for their overnights while on a journey comprises 11.2% of the entire research population. They account for no fewer than 107,000 people. This group has the following socio-demographic profile:

- They are mostly women;
- 51% are aged 40 or over;.
- Most are residents of Sofia;
- Most have two-member households;
- The proportion of unemployed among them is higher than the population average;
- Their income is about average for the country;
- A larger proportion than the population average owns a country house/villa.

3.6.2 *Their Travel Records for 2001*

This group of travelers is more mobile than the rest of the research population. The reported average number of journeys per annum for this group is 10 to 30% larger than for any other group. They didn't identify any specific activities as favorite or taking precedence over others as reasons for their trips. All activities indicated below are reported as being of equal importance:

- sunbathing;
- walks around the vacation area;
- celebrations of birthdays, etc.;
- gathering herbs and mushrooms;
- visits to restaurants;
- visits to discos;
- tasting culinary specialties.

On the whole, respondents report satisfaction with the activities practiced during trips except their visits to restaurants, which are a source of disappointment and frustration.

Most common destinations for this group are:

- other (non-resort) towns and villages;
- Vitosha;
- mountain villages;
- mountains/mountain chalets;
- regional centers;
- Bankya;
- Nessebar;
- Hot springs and spa resorts.

This group uses their friends and relatives as the main source of information for planning and organizing a trip. At the same time they claim they remain open to any other channels of information. The preferred means of transportation, specifically for the long journeys, free overnights group, is the railroad.

3.6.3 *The Essentials*

Paradoxically, members of the this group, who by definition are spared the choice of destination, have long lists of criteria to show that their own country house or villa is the best destination of all.

Their expectations of *eateries* are, more or less, analogous to those of the rest of the research population:

- modern design;
- conditions allowing a longer stay while guaranteeing privacy;
- a short menu featuring local and international meat dishes;
- preferences for locally available ingredients

Main Requirements	Additional Requirements
<ul style="list-style-type: none"> • Reasonable price 	<ul style="list-style-type: none"> • “<i>This place draws people just like me</i>” • Natural landmarks, scenic landscape • Peace and quiet, privacy and seclusion • New experiences • Accommodation for children • Possibility for practicing sports • Accommodation with all conveniences and amenities • A variety of restaurants and bars • Roads in good condition

On the whole, members of the long journeys, free overnights group are more inclined than the rest of the research population to visit the following kinds of establishments:

- taverns;
- beer gardens;
- fast-food joints;
- Chinese restaurants;
- pizza parlors.

The types of meals the respondents think are most often missing from restaurant menus are:

- various meat dishes;
- traditional Bulgarian dishes.

Optimum prices:

Dinner (no beverages included) 9-12 leva

In terms of staff-customer relations, representatives of the long journeys, free overnights group show a considerably higher degree of tolerance for staff familiarity than the rest of the research population.

In conclusion, *good recreation* to the long journeys, free overnights group means a visit to a remote, isolated place, away from the major tourist routes, yet one that offers entertainment opportunities and stimulates different activities.

3.6.4 Ecotourists?

The long journeys, free overnights group shows some interest in ecotourist products. On the whole, however, its members are quite unprepared to take advantage of them.

3.7 The Same-Day Trips, No Overnights Group

3.7.1 Who Are They?

The same-day trips (no overnights) group accounts for 10.6% of the entire research population. This amounts to no fewer than 100,000 people. This group has the following socio-demographic profile:

- They are mostly women;
- They are older than the population average: 26% are aged 40 to 50, and 41% over 50;
- Most live in Sofia, Bourgas and Varna;
- Their income is about average for the country;
- Relatively few own or use a private car and computer ownership and Internet access are insignificant;
- The proportion of those practicing sports is relatively low.

3.7.2 Their Travel Records for 2001

The same-day trips, no overnights group is among the least mobile within the research population. The average number of trips taken (which, as a rule, does not include even a single overnight) is 2.2, or 10% lower than the population average. Same-day trips are the only kind of trip these people ever take.

Members of the same-day trips group engage in a limited range of activities:

Activities constituting the main reason for a visit	Additional activities
<ul style="list-style-type: none"> • sunbathing • mountain hikes 	<ul style="list-style-type: none"> • visits to churches and monasteries • celebrations of birthdays, etc. • gathering herbs and mushrooms • tasting culinary specialties

The group members report satisfaction with the activities practiced.

Favorite destinations with the same-day trips, no overnights group are:

- mountain villages;
- other (non-resort) towns and villages;
- Vitosha;
- Kiten;
- Pancharevo;
- Primorsko.

The group does not report any need for travel information. The preferred means of transportation is the ordinary public bus. Members of this group like traveling in the company of family and friends.

3.7.3 *The Essentials*

The main criterion for selecting a destination is the desire to get maximum peace and quiet at minimum cost.

Main Requirements	Additional Requirements
<ul style="list-style-type: none"> • Reasonable price 	<ul style="list-style-type: none"> • Natural landmarks, scenic landscape • Peace and quiet, privacy and seclusion • New experiences • “<i>This place draws people just like me</i>”

Comparing and assessing alternative destinations as potential competitors to the two pilot areas reveal the criteria for a destination’s attractiveness. The same-day trips, no overnights group shows a clear preference for resorts like Hisarya and Koprivshitzta.

The expectations of this group for eateries largely correspond to the average, or characteristic, of the entire research population:

- modern design;
- coziness predisposing visitors to a longer dinner while guaranteeing privacy and discretion;
- short menu, featuring a tangible proportion of traditional Bulgarian dishes; grilled meats a must. Locally available ingredients preferable.

Optimum prices:

Dinner (no beverages included) 6-9 leva

In terms of staff-guest relations, an emphasis on a professional, courteous and discreet service seems to be the winning formula.

In summary, *good recreation* to the same-day trips, no overnights group means a visit to an unfamiliar, preferably remote and secluded place that offers a possibility for quiet activities.

3.7.4 Ecotourists?

The same-day trips, no overnights group displays the lowest possible interest in ecotourist products.

3.8 The Non-Travelers Group

3.8.1 Who Are They?

The group of individuals who have not taken a single trip amounts to 28.6% of the research population, or no fewer than 320,000 people. This group has the following socio-demographic profile:

- They are mostly women;
- They are older than the population average: 26% are aged 40 to 50, and 34% are over 50;
- Typically they have secondary education;
- A relatively larger proportion among them, as compared with the rest of the research population, are retired or unemployed;
- Their income is below the national average;
- They are predominantly residents of Varna, Bourgas, Plovdiv, Stara Zagora;
- The proportion owning a private car or country house/villa is much lower than the population average; computers and Internet access are virtually unknown among them.

4.0 Attitudes Towards the Ecotourism Products Offered in the Areas of Kalofer and Govedartsi – Group Discussion Findings

4.1 Main Study Goals

To identify and describe:

- Experiences related to rest, recreation and free time;
- Practical ways of spending free time;
- Reasons for and organization of trips outside place of residence for purposes of rest and recreation;
- Awareness of, and general attitudes towards, ecotourism;
- Feedback on the ecotourist product: benefits and disadvantages;
- Price-sensitivity towards available products and services;
- Attitudes towards the ecotourist product available in pilot areas: Kalofer and Govedartsi;
- Appropriate communication channels for access to potential consumers of the ecotourist product.

4.2 Methodology

- Group discussions with 7-9 participants
- Location: Sofia
- Main criteria for the selection of participants:
 - age (3 age groups: 18-30, 20-35 and 36-50)
 - with/without children
 - per capita monthly income (300-600 leva vs. 600+ leva)
- Additional criteria:
 - gender
 - principal occupation/profession

4.3 Description of Focus Groups

<p><i>I group:</i> Age: 18-30, no income Gender: mixed (men/women) No children</p>	<p><i>II group:</i> Age: 20-35 Monthly income: 600+ leva Gender: mixed (men/women) With/without children</p>
<p><i>III group:</i> Age: 20-35 Monthly income: 300-600 leva Gender: mixed (men/women) With/without children</p>	<p><i>IV group:</i> Age: 36-50 Monthly income: 300-600 leva Gender: mixed (men/women) With/without children</p>
<p><i>V group:</i> Age: 36-50 Monthly income: 600+ leva Gender: mixed (men/women) With/without children</p>	

4.4 Principal Findings

4.4.1 Main Elements of the Concept of “Rest and Recreation”

One purpose of the focus group discussions was to determine what reason the participants used to decide how to spend their free time. The primary reason/goal is related to “resting and recreation”.

The concept of “rest” relates to the following components:

- duration;
- specific location (main advantages and benefits thereof);
- types of activity/pastimes;
- emotional experiences.

The first spontaneous associations evoked by the concept of “rest” relate to:

- a longer period of time (e.g. most frequently the annual vacation);
- a suitable place for recreation other than the place of residence, typically referred to as “seaside” or “the mountains” in the generic reference to a resort area;
- various characteristics of the place visited, defining and rationalizing the need for “an activity other than the everyday routine” and “a change in scenery”.

The dominant first spontaneous association shared by all the groups has to do with the summer holiday and is typically “the seaside”. In rare cases the first spontaneous association relates to a specific experience.

A longer vacation is usually associated with a trip to faraway places, while taking time off during weekends and bank holidays is seen as more passive recreation involving shorter trips - up to 100-150 kilometers from the place of residence.

Experiences relevant to, and defining the way of spending free time

The main emotional experiences reported by the groups have to do with the pleasure of engaging in joint activities other than the everyday routine:

- relaxation, enjoyment of the peace and quiet;
- socializing with people other than the usual everyday circle of friends and relatives;
- specific activities varying from one age or income group to another: sports, walks, mountain hikes, entertainment, gathering herbs and mushrooms.

Several types of behavior were identified related to rest and recreation that involve different experiences:

- The pleasure of the “*journey to another place*” is seen as a value *per se*, therefore the destination is perceived as being of a lesser importance (“*people relax and take pleasure in traveling and the change of the scenery*”).
- The specific destination is seen as valuable because of its clearly defined benefits and advantages and is therefore subject to an informed and conscious choice. The destination,

by way of the activities and entertainment opportunities it offers, defines different types of behavior.

- Types of activities practiced during the vacation:
 - passive rest (*“in bed or on the TV couch”*), or
 - recreation involving more participatory entertainment activities and/or physical exercise.

Respondents emphasized different elements of their holiday experience and organize their recreation activities depending on dominant motives, which differ from group to group, defined by age and income. More differences than similarities in attitudes were observed among the groups.

4.4.2 Differences and Similarities by Age and Income Group

The respondents' preferences for one type of experience and activity during holidays and vacations depend largely on the age group. The frequency of trips for recreational purposes outside the place of residence varies with personal income and with age.

A) Group I: Young people aged 18-30, without children, mostly students and non-working individuals:

- On the whole, this group displayed little motivation for tourist activities;
- Passive in terms of organizing a short trip, yet considerably more active in terms of partaking in activities, for example visits to restaurants, bars and discos.
 - “Oftentimes we end up more exhausted after a vacation than before, as we live life to the max and love to indulge in various activities.”*
 - “With the right kind of activity, even a two-hour break is a good break.”*
- Trips are usually taken once or twice annually for a longer vacation at the seaside, or more rarely in the mountains.
- Respondents in this group travel very rarely outside their place of residence except for a short break (a weekend), and usually on specific occasions (a day or two at Christmas, Bulgarian Students' Day and the like).
- The main reasons this group takes few trips are financial problems, “weekday fatigue”, and the impossibility of organizing a larger group of people to share in the experience.

B) Group II: Young people aged 20-35, having a monthly income of 600+ leva

- This is the most active group in terms of travel and recreational activities.
 - “Staying in bed or meeting with friends are routine everyday activities, they are not part of a holiday. Being on holiday is about being ‘someplace else’, traveling and seeing places, and for more than a day or two.”*
 - “A vacation is all about change.”*
- People in this group love taking shorter trips to faraway places within the country (several times a year).
- This group takes a more proactive attitude to recreational pastimes and activities: visits to historic places or natural landmarks, sports and games. They take a more active interest in locations offering different commercial services, and would even indulge in extreme sports and thrill-seeking activities.
- Their favorite destinations are routine, familiar, or recommended by friends and acquaintances.

- The journey, rather than the destination, is seen as a value in itself, as it offers a break from the everyday routine, as well as opportunities for new experiences and attractions.
- This group can be regarded as a potential target for ecotourist services.

C) Groups III: Young people aged 20-35 with a monthly income of 300- 600 leva

- More passive about organizing short-term holidays and trips compared with the previous group.
“One may as well rest at home in front of the TV, but it’s better to leave the big city.”
- Rarely travel outside their place of residence, except on one-day trips to Vitosha for Sofia residents (*“because it’s closest to home”*). Their main reason for refraining from travel or from taking holidays in faraway places is lack of funds.
- The journey, as well as the destination, is equally important for them. Among their favorite destinations are *“the mountains”* or simply *“out in the open”*.
- Not particularly proactive in terms of activities and pastimes.
“You may want to do something different from your everyday routine, but you wouldn’t want to strain yourself too much.”
- Moderately interested in commercially available natural attractions.
- This group may be regarded as a potential target for ecotourist services, but are less prone to experimenting with new destinations and activities.

D) Group IV: People aged 36-50 with a monthly income of 300-600 leva

- Generally active in terms of travel and experiences.
- Despite their lower income potential, they travel relatively often outside Sofia and the big cities (3-4 times a year), including overnights, but are more likely to take a day trip (mostly to Vitosha or Bankya for Sofia residents).
- Take an active interest in practicing activities to do with nature and visiting places *“where the air is clean”*. A short break is usually associated with, and practiced in, mountain resorts/localities that are easy to organize a day trip to and easily accessible from the place of residence.
- More dynamic in organizing their breaks outside Sofia and the big cities.
“More exercise and a change of activities make for better rest.”
- Tend to visit familiar places.
- The destination, rather than the journey, is of value.
- Favorite short-break (one overnight) destinations are: Semkovo, Borovetz, Pamporovo, Rila Monastery, the Balkan Mountains.
- Also a suitable potential target for ecotourist services.

E) Group V: People aged 36-50 with a monthly income of 600 leva plus

- Active in terms of travel and seeking new experiences. Organize short breaks outside Sofia 3-4 times a year.
- Proactive in their preferences for rest and recreation activities: sports (swimming, mountain trekking, ping-pong, water skiing, extreme sports and thrill-seeking experiences).
- Night-clubbing is a must, even on a short break.
- Very choosy about the destination (*“as close as possible, we don’t want to waste time traveling”*) and the amenities offered (a pool is a big plus);

- Clear preference for luxury and comfort (would hardly opt for a place that offers Spartan accommodation even at a more attractive price or with additional attractions).
“I’d rather go somewhere classy.”
“Better appointments, more entertainment, a nice restaurant.”
- Rather conservative in their attitudes, with a preference for places that are either familiar or recommended by someone they trust.
“No surprises on arrival.”
- Advance booking is a must.
- Favorite short-break (one overnight) destinations are: Ribaritz, Velingrad, Batak, Borovetz, and the villages of Apriltzi and Chiflika in the Troyan section of the Balkan Mountain.
- This group may be regarded as a potential target for ecotourist services, but are less prone to experimenting with new destinations and activities.

While there are differences among the groups by age and income potential, there are some similarities in habits and preferences:

1. In general, even short breaks and holidays are carefully thought out and planned, particularly by people aged 36-50, whereas the younger respondents have a knack for more spontaneity and improvisation.
2. To be attractive, the destination must be “reliable”, whether familiar (especially with older respondents) or recommended by a trusted source.
“Bulgaria isn’t such a big place after all. Nothing is unknown. And we’ve got friends and relatives to tell us where they’ve had a good time.”
3. There is no tendency towards using professional tourist services (e.g. travel agents) in planning a short break in Bulgaria, and respondents are even less likely to use a travel agent to obtain a pre-paid package of services (accommodation, breakfast or additional services).
4. All respondents report that a short break or holiday involves collective activities with friends and family.
5. Travel to a short-break destination is done in most cases using the family car, while specialized transport services are seen more as a burden than a convenience.
6. As a whole, respondents in almost all groups did not identify any special standards for accommodations and catering. The basic requirements are cleanliness and hygiene, as well as choice and variety. The one notable exception is the group of 36-50 year-olds with a monthly income of 600 leva or over who claim that, unless a place has all necessary amenities (in-suite bathroom, fridge, even air-conditioning), they would rather go somewhere else.
7. All groups reported disappointment with one or more of the following:
 - Bad hygiene;
 - Bad service;
 - Rudeness and hostility on the part of hotel and restaurant staff;
 - Misleading marketing information that is at variance with reality.

4.4.3 Attitudes About the Commercial Availability and Use of Ecotourist Services

Almost all respondents in the target groups declared their familiarity with the concept of ecotourism but, when asked, could not explain exactly what is meant by an ecotourist product.

Among many the concept of ecotourism evokes spontaneous associations with “village tourism”, with well-preserved “period” villages such as Kovachevitza, Bozhentzi. Individual respondents (aged 36-50) associate ecotourism with eco-treks and environmental conservation.

As a whole, the ecotourist product considered herein sounds much too abstract to most respondents in the group discussions. Almost all participants had a hard time articulating an opinion or attitude towards the commercial availability of ecotourist services.

While no group polled seems inclined to reject such a product out of hand, their established habits and preferences indicate a lack of interest in ecotourist products and services. The only two groups where ecotourism has managed to stir a mild interest are the 20-35 year-olds with 600+ leva income, and the 36-50 year-olds with 300-600 leva income.

The prevailing opinion among participants in all group discussions is that natural attractions as part of an ecotourist product must involve direct contact with the natural sites and assets. They also expressed an interest in some types of educational programs.

“It’s one thing to listen to a lecture, and another to go there and see for yourself.”
“You go and see nature as such, not a film about nature. You can always watch a film at home.”

None of the natural attractions tested with the respondents was rejected out of hand; however, the following were identified as having greater potential:

- ***Wildlife observation:***
 - Direct contact with natural landmarks;
 - Animal watching, rather than observation of rare plant species
 - Respondents were unanimous that the service must be offered as an ecotourist product
 - Most respondents claim they would take advantage of the service offered
 - Respondents emphasize that such a service should not be too expensive. Suggested prices varied between 2-3 leva, except where the observation trip is guided and offers special attractions (seasonal animals, direct contact: feeding etc.), where the price may reach 5 leva.
- ***One-day hiking trip:***
 - Direct contact with natural landmarks
 - The possibility of a trained guide to provide an enjoyable and illuminating journey.
 - This activity is seen by all groups as core for any ecotourist product, except the group of 18-30 year-olds (without children)
 - Reasonable prices in the opinion of the participants vary between 3-5 leva (including the guide’s fee)
- ***Entertainment-and-education programs for children:***
 - Associated with “green schools”
 - Convenient for parents, interesting to children
 - This service is seen by all groups as mandatory for any ecotourist product
 - Some of the respondents, however, are not convinced of the value and effectiveness of such activities while others have misgivings about entrusting a paid guide the care of their childre.
 - Prices (including guide’s fee) vary between 5-10 leva.
- ***Sale of gifts and souvenirs related to nature:***
 - Indirect contact with natural landmarks;
 - The commercial availability of such services is seen as a routine practice at natural and historical sites and is regarded positively, provided that *“the manufacturing of such items does not cause harm to, or depletion of, natural resources.”*

Lectures during hikes (walks'n'talks), horseback outings and mountain sports evoked considerably less interest among participants in the discussions.

Most respondents also tended to reject services such as short films or interactive multimedia presentations of natural attractions as these are seen as vicarious techniques that prevent active, direct contact with nature. A compromise solution might be a photographic exhibition of natural landmarks.

“People don’t go there to watch films or presentations; they want to see nature as it is.”

Participants in the younger groups have generated additional ideas and suggestions:

- Direct contact with nature: specific conservation activities such as planting trees, cleaning up garbage, or feeding wild animals
- Establish a library of books on nature conservation and publicizing the natural assets of a given place.

The idea of offering basic tourist services (food, accommodation) in a package with some principal ecotourist services was supported by members of some groups (both income categories in the 20-35 age bracket, and the 36-50 year-olds with a 300 to 600 leva income), while extreme sports and thrill-seeking experiences were almost unanimously identified as additional services at an extra cost.

Participants in all groups identified the following marketing techniques as appropriate for publicizing ecotourism services:

- Distribution of promotional materials, e.g. brochures, by mail;
- Internet portals and web pages;
- Commercial advertising in specialized journals (seen as less accessible to potential customers).

4.4.4 Attitudes to the Commercial Availability of Ecotourist Services in Kalofer and Govedartsi

The first spontaneous reaction evoked by the mention of Kalofer as a tourist destination is its association with:

- Hristo Botev (a 19th c. Bulgarian revolutionary);
- The Bulgarian Revival and historical heritage;
- Roses.

The first spontaneous associations evoked by Govedartsi are:

- Peace and quiet;
- Snow;
- Rila Mountain;
- Winter tourism, skiing.

The discussion participants know both of these destinations. Almost all find it easy to locate them on a map. While Govedartsi is more often associated with its proximity to the mountain, Kalofer is seen as an historic site, part of the national cultural and historical heritage.

None of the two pilot areas, Kalofer or Govedartsi, has been shown to provoke any spontaneous negative reactions on the part of participants. Both are seen as suitable for ecotourism.

While Govedartsi is more frequently associated with more active activities, mostly winter sports and tourism, Kalofer is regarded as a location suitable for educational visits and programs, notably in the summer months.

The discussion participants make no differentiation between these two destinations in terms of value and the price factor. They would be prepared to pay an identical price per visit for either.

According to respondents, the warmer months from early spring till fall are most appropriate for ecotourism. Winter is not seen at all as a good season for ecotourism or for short breaks.

Some of the discussion participants (namely the youngest and those aged 36-50 in the high-income bracket) show a demonstrable lack of interest in places offering ecotourist services. (Even the availability of some extra amenities thrown in with the ecotourist package proved insufficient to arouse their interest.)

“Ecotourism is something people do, not a service that can be sold and bought.”

“I don’t think I can stand being very long at such a place.”

“I don’t think anyone would go for this [type of tourism]. People who travel a lot are used to having all kinds of luxuries.”

4.4.5 Detailed Feedback by Group on Basic Ecotourism Products and Services: Natural Attractions, Overnight Accommodations and Catering Characteristics

Description of procedure:

The participants in the group discussions were offered a choice of tourist services (a number of slips of paper with descriptions of services printed on them). The first category of services had to do with natural attractions. Respondents were then asked to classify the services into three groups:

- mandatory for any ecotourist package or site;
- possible but not mandatory;
- inappropriate/unnecessary, i.e. ones that should not be offered.

Then the group identified the groups of services the majority of participants saw as mandatory, possible or inappropriate/unnecessary. The objective was to develop a consensus among the group on the specific services relevant to the localities where an ecotourist product is commercially available.

The procedure was repeated to identify the most important attributes of the hospitality infrastructure: accommodation and eateries. Each group of respondents identified and expressed different preferences in terms of accommodation and catering.

Accommodation:

Almost all the respondents said that the interior design of rooms and the general appearance of building blending nicely into the local traditional style is a principal requirement of all accommodation facilities (hotels, chalets etc.).

The need for a separate bathroom/toilet in every room was discussed. Most groups did not see the absence of such a convenience as extremely off-putting and were ready to accept a compromise solution of having one bathroom/toilet for every floor. However the two groups in the 600+ income category, those aged 20-35 and especially those aged 36-50, were adamant that a hotel room without a separate bathroom/toilet was totally unacceptable.

The attitude of hotel staff was also discussed. Most participants claim they wouldn't stay at a place where they would feel alienated by staff rudeness or hostility. However most respondents said the right balance must be struck between excessive familiarity on the part of hotel staff and an attitude of aloofness or hostility, which they tend to associate with bad service.

Catering:

The composite image of an "eatery" gleaned from the opinions of almost all respondents is one in which the appearance and atmosphere of the establishment is a "*place where one can grab a quick bite or spend a leisurely evening*" (the most frequently used concept for that kind of place was *mehana*, or tavern).

The following sections present detailed results of the selection process by groups and subjects:

Group I: men/women aged 18-30, no children

➤ Natural Attractions:

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Wildlife observations	Horse trek	30-min. film on natural landmarks
Photographic exhibitions of natural sites	Lecture during a short trek	Interactive or multimedia presentation of natural landmarks
Gifts and souvenirs related to nature	Mountain sports	
Educational and entertainment programs for children in the wild	A one-day hike	

- Accommodation characteristics (commonly referred to as “hotel”):

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Bed and breakfast	Full board	Modern style and design
Double-bed rooms	Special children’s rooms	Bathroom/toilet on every floor
Twin-bed rooms	Suites with special amenities for children	Hotel-standard accommodation
Bathroom/toilet in every room	Pets accepted	
Traditional local style	TV	
Local artifacts and hand-made objects	Fridge	
Suitable conditions for a longer stay	Fireplace	
Hospitality that makes one feel at home, among family/friends	Air conditioning	
Phone	Bathtub	
Radio		

The optimum price that most participants would be willing to pay is around 10 leva.

- Characteristics of the eating place (commonly referred to as “cafeteria”):

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Traditional local style	Guests can find privacy	Modern, stylish design
A place where one can just come to eat or spend a leisurely evening	Guests can talk freely among themselves	Staff serve meals without communicating with guests
Staff describe local recipes while serving meals	Tables are close together	Portions big enough for two
Menu includes mostly Bulgarian dishes	One can grab a quick bite	Longer menu featuring more common dishes
Menu includes mostly home-cooking dishes	Portions are small, allowing one to taste more dishes	Mostly short orders served
Short menu of home (the-way- Granny-used-to-make-it) or local dishes	Mostly cooked (as opposed to grilled) dishes	International cuisine
Dishes based on local ingredients	Dishes based on commercially available ingredients	
Music (live or recorded)	Live music and/or floor show	
	Recorded music (from radio, jukebox, etc.)	

The price most respondents are willing to pay for a main course is around 5 leva.

- The suggested price of an ecotourist package based on half-board accommodation is 15 leva per day.

Group II: men/women aged 36-50, disposable monthly income 300 to 600 leva

➤ Natural attractions:

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Wildlife observations	30-min. film on natural landmarks	
Lecture during a short trek	Interactive or multimedia presentation of natural landmarks	
A one-day hike	Photographic exhibitions of natural sites	
Gifts and souvenirs related to nature		
Educational and entertainment programs for children in the wild		
Horse trek		
Mountain sports		

➤ Accommodation characteristics (commonly referred to as “hotel”):

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Bed and breakfast	Hotel-standard accommodation	Special children’s rooms
Suitable conditions for a longer stay	Hospitality that makes one feel at home, among family/friends	Modern, stylish interior
Local artifacts and hand-made objects	Suites with special amenities for children	Pets accepted
Full board	Bathroom/toilet on every floor	Bathtub
Double-bed rooms	TV	
Twin-bed rooms	Fridge	
Bathroom/toilet in every room	Phone	
Traditional local style	Air conditioning	
Fireplace	Radio	

The optimum price most participants would be willing to pay around 10-12 leva.

If there isn’t a bathroom/toilet for every room, participants would be willing to pay a maximum of 7-8 leva (most participants would cancel a reservation for lack of proper amenities).

- Characteristics of the eating place (commonly referred to as “tavern”):

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Traditional local style	Guests can find privacy	Modern, stylish design
A place where one can just come to eat or spend a leisurely evening	Menu includes mostly home-cooking dishes	A place where one can grab a quick bite
Guests can talk freely among themselves	Mostly cooked (as opposed to grilled) dishes	
Staff describe local recipes while serving meals	Portions big enough for two	
Longer menu featuring more common dishes	Portions are small, allowing one to taste more dishes	
Menu includes mostly Bulgarian dishes	Live music or floor show	
Short menu of home (the-way-Granny-used-to-make-it) or local dishes	Recorded music (radio, juke-box, etc.)	
Dishes based on local ingredients		

The price of a main course most respondents are willing to pay is 4-5 leva.

- The suggested price of an ecotourist package based on half-board accommodation with visits to natural attractions and activities is 20-25 leva per day.

Group III: men/women aged 26-35, disposable income 600+ leva per month

- Natural attractions:

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Wildlife observations	Horse trek	
Lecture during a short trek	30-min. film on natural landmarks	
A one-day hike	Interactive or multimedia presentation of natural landmarks	
Gifts and souvenirs related to nature	Photographic exhibitions of natural sites	
Educational and entertainment programs for children in the wild		
Mountain sports		

- Accommodation characteristics (commonly referred to as “eco-complex”):

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Bed and breakfast	Hotel-standard accommodation	Hospitality that makes one feel at home, among family/friends
Full board	Modern, stylish design	
Double-bed rooms	Special children’s rooms	
Twin-bed rooms	Bathroom/toilet in every room	
Bathroom/toilet on every floor	Pets accepted	
Traditional local style	Suitable conditions for a longer stay	
Suites with special amenities for children	Local artifacts and hand-made objects	
Fridge	TV	
Phone	Fireplace	
Air conditioning	Bathtub	
	Radio	

The optimum price most participants would be willing to pay is around 20 leva.

If there is no fridge, phone or air-conditioning for every room they would be willing to pay a maximum of 10 leva.

- Characteristics of the eating place (commonly referred to as “tavern”):

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Guests can find privacy	Traditional local style	
Guests can talk freely among themselves	Modern, stylish design	
A place where one can just come to eat or spend a leisurely evening	Staff describe local recipes while serving meals	
A place where one can grab a quick bite	Portions are large enough for two	
Longer menu featuring more common dishes	Menu includes mostly home-cooking dishes	
Menu includes mostly Bulgarian dishes	Live music or floor show	
Short menu of home (the-way- Granny-used-to-make-it) or local dishes		
Mostly cooked (as opposed to grilled) dishes		
Dishes based on local ingredients		
Portions are small, allowing one to taste more dishes		
Recorded music (radio, juke-box, etc.)		

The suggested price of dinner for one person is 15 leva. The price most respondents are willing to pay for a main course is 5-7 leva.

- The suggested price of an ecotourist package based on half-board accommodation with visits to natural and cultural attractions and activities is around 40 leva per day

Group IV: men/women aged 36-50, disposable income 300 to 600 leva per month

➤ Natural attractions:

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Wildlife observations	Photographic exhibitions of natural sites	30-min. film on natural landmarks
Educational and entertainment programs for children in the wild	Lecture during a short trek	Interactive or multimedia presentation of natural landmarks
A one-day hike	Gifts and souvenirs related to nature	
Mountain sports	Horse trek	

➤ Accommodation characteristics (commonly referred to as “hotel”):

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Bed and breakfast	Full board	Modern, stylish design
Hotel-standard accommodation	Hospitality that makes one feel at home, among family/friends	Bathroom/toilet on every floor
Twin-bed rooms	Pets accepted	Double-bed rooms
Suites with special amenities for children	Local artifacts and hand-made objects	Special children’s rooms
Bathroom/toilet in every room	Fireplace	
Traditional local style	Bathtub	
Suitable conditions for a longer stay		
Air conditioning		
Fridge		
TV		
Phone		
Radio		

The optimum price most participants would be willing to is 20-30 leva. A toilet/bathroom in every room is a must.

If a fridge, phone, TV or air-conditioning in the room is lacking, they would be willing to pay a maximum of 10 leva.

- Characteristics of the eating place (commonly referred to as “tavern”):

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Traditional local style	Modern, stylish design	A place where one can grab a quick bite
A place where one can just come to eat or spend a leisurely evening	Staff describe local recipes while serving meals	Live music or floor show
Guests can find privacy	Portions are large enough for two	
Menu includes mostly Bulgarian dishes	Menu includes mostly home-cooking dishes	
Mostly cooked (as opposed to grilled) dishes	Short menu of home (the-way-Granny-used-to-make-it) or local dishes	
Longer menu featuring more common dishes	Recorded music (radio, juke-box, etc.)	
Dishes based on local ingredients		
Portions are small, allowing one to taste more dishes		
Guests can talk freely among themselves		

The price most respondents are willing to pay for a main course is 5-6 leva.

- A suggested comprehensive ecotourist package includes:
- overnight and some natural attractions at a suggested price of 12-15 leva per day;
 - overnight and some natural attractions and sports activities at a suggested price of 15 leva per day.

Group V: men/women aged 36-50, disposable income 600+ leva per month

- Natural attractions:

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Wildlife observations	Photographic exhibitions of natural sites	30-min. film on natural landmarks
Educational and entertainment programs for children in the wild	Horse trek	Interactive or multimedia presentation of natural landmarks
A one-day hike	Mountain sports	Lecture during a short trek
Gifts and souvenirs related to nature		

- Accommodation characteristics (commonly referred to as “hotel”):

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Bed and breakfast	Full board	Bathroom/toilet on every floor
Hotel-standard accommodation	Hospitality that makes one feel at home, among family/friends	Special children’s rooms
Bathroom/toilet in every room	Modern, stylish design	Pets accepted
Suites with special amenities for children	Double-bed rooms	Local artifacts and hand-made objects
Traditional local style	Twin-bed rooms	Phone
Suitable conditions for a longer stay	Bathtub	
Fireplace	Air conditioning	
Radio		
TV		
Fridge		

The optimum price most participants would be willing to pay is 15-20 leva.

If there were fewer amenities, people would pay around 10 leva, but most would not come.

- Characteristics of the eating place (commonly referred to as “tavern”):

Mandatory	Possible but Not Mandatory	Inappropriate/Irrelevant
Traditional local style	Modern, stylish design	Portions large enough for two
A place where one can just come to eat or spend a leisurely evening	Staff describe local recipes while serving meals	
A place where one can grab a quick bite	Guests can find privacy	
Menu includes mostly home-cooking dishes	Menu includes mostly Bulgarian dishes	
Longer menu featuring more common dishes	Menu includes mostly home-cooking dishes	
Portions are small, allowing one to taste more dishes	Short menu of home (the-way- Granny-used-to-make-it) or local dishes	
Guests can talk freely among themselves	Dishes based on local ingredients	
Live music or floor show		
Recorded music (radio, juke-box etc.)		

The price most respondents are willing to pay for a main course is 3-5 leva.

- The suggested price of an ecotourist package with bed and breakfast accommodations is 10-15 leva.

Comparative table of suggested prices for basic services according to respondents' preferences

	18-30, no children	20-35 300-600 lv.	20-35 600+ lv.	35-50 300-600 lv.	35 – 50 600+ lv.
Overnight (lv per bed)	10	10-12	20	20-30 *without extra amenities, 10 lv.	15-20
Main course (lv)	5	4-5	5-7	5-6	3-5
Preferred tourist package	Bed & breakfast	Half board and natural attractions	Bed and breakfast, cultural and natural attractions	Overnight and natural attractions	Bed & breakfast
Acceptable price (lv)	15	20-25	40	12-15	10-15

5.0 Survey of Attitudes towards the Development and Marketing of Ecotourist Products among Bulgarian Travel Agents

5.1 Methodology

Survey period	April 2002
Research population	Travel agents in Bulgaria
Sampling method	Typological profiling & sampling
Sample size	21 travel agencies
Research tool	Semi-standardized interview
Degree of representation	Findings are not sufficiently representative of the research population

5.2 Corporate Profile of Travel Agents Subject to this Survey

Representatives of **21 Bulgarian travel agencies** were interviewed for this survey. Of these 5 were identified by the **client**, while the rest were selected from members of the Bulgarian Economic Chamber and the Bulgarian Chamber of Commerce and Industry. Those selected are ranked in the top third of listed travel agencies in terms of turnover and revenue.

52 percent of all travel agents interviewed describe their company as about **average in size for the industry**; while 24 percent describe their companies as either larger or smaller than average. The average number of personnel in these agencies is 12. The majority of travel agents surveyed do not own transport vehicles, hotels or restaurants. Only 4 companies have their own mini-van and one has holiday apartments. Two of the companies surveyed are incorporated within larger corporate structures and are thus linked to established Black Sea resorts.

The research population as a whole has an optimistic business outlook for 2002: **62 percent** say that **the current year will be better than the past**.

5.3 Business Profile of Travel Agents Included in this Survey

A quick review of the range business activities within the research population reveals that a **tiny minority of companies focuses on the domestic tourist market**. The travel agents surveyed fall into the following categories:

- Export of tourist product (marketing of Bulgarian products to foreigners): 9 companies;
- Export of tourists (marketing of foreign products to Bulgarians): 7 companies;
- Export of tourist product *and* tourists: 3 companies;
- Domestic market (marketing of Bulgarian products to Bulgarians): 2 companies.

It is important to note that one of the two travel agencies describing their activity as marketing Bulgarian products to Bulgarians specializes mostly in air travel booking and ticketing, while the other agency is part of the corporate structure of a major Black Sea resort.

In summary, the business activities of the agencies included in this survey can be summarized as:

Tourist packages	49%
Accommodation bookings	16%
Guided tours	15%
Ticketing	20%

Practically all travel agents within the research population claim they market resorts and sightseeing tours; two-thirds claim their services feature tourist products related to sports; and half, nature-related programs and adventure tours.

Agents surveyed offer a total of **44 destinations within Bulgaria and 27 foreign destinations**. These can be grouped into 10 categories:

Foreign destinations

Continents	Europe, Asia, Africa
Regions	Western Europe, Northern Africa
Countries	Spain, Turkey, Greece, Italy, Switzerland, Austria, Thailand, France, Germany, Czech Republic, Hungary, Britain, Egypt, Cyprus
Cities	Istanbul, Kiev, Moscow, Rome, Paris, Venice, Vienna, Dubai

Domestic destinations

Black Sea resorts	Golden Sands, Sunny Beach, Ropotamo, Albena, Nessebar, Balchik, Kranevo, Obzor, other resorts; Sozopol, Pomorie, Russalka, the northern seashore, the southern seashore, Varna, Drujba
Hotels, camping sites	Kavatzi, Gradina, Zlatna Ribka, Kavarna, Prostor Chalet, Monaco Chalet
Mountain resorts	Pamporovo, Borovetz, Bansko, other mountain resorts; Rila
Cultural and architectural landmarks	Melnik, Arbanassi, all other cultural and historical sites
Hot spring and spa resorts	Velingrad, other spa resorts
Others	Central Bulgaria, regular tours, extended tours, Rudartzi, mountain climbing, high-mountain treks and hikes, expeditions

This list of destinations closely parallels the lists of destinations that are in highest demand overall, according to travel agents. This is a reflection of their tendency to offer only products that are a sure sell.

Trips and journeys with **1 to 3 overnights** are popular **all year-round**; journeys of **4 to 6 overnights** are **seasonal** (winter and summer) only, while journeys of **7 overnights** or over are mostly **summer packages**.

In most cases a tourist package includes transport, which indicates minimal emphasis on the domestic market, since many Bulgarian travelers use private cars.

Travel agents hire local personnel on a limited scale. They cite the poor skills of locals in the tourist trade as one reason. Travel agents who sell Bulgarian products to foreigners hire locals mostly as support staff, while travel agents marketing foreign destinations to Bulgarians hire Bulgarian guides.

Among the range of **activities** considered in developing a tourist product are:

- sunbathing;
- bathing in sea, rivers, lakes;
- visits to restaurants;
- visits to churches and monasteries;
- tasting culinary specialties;
- skiing.

The **longer the duration** of a tourist product or package, the more likely it is to include **additional services**. Additional services are may also be included when marketing smaller or insufficiently popular destinations.

According to travel agents, customer preferences are for either complete packages or the bed-and-breakfast format.

Travel agents select their destinations depending on whether they consistently meet, fully or in part, the following set of criteria:

- profitability;
- presence of natural landmarks and scenic landscapes;
- accommodation with all conveniences and amenities;
- a variety of restaurants and cultural landmarks;
- roads in good condition.

Travel agents indicated they are confident they have most of the information they need in order to operate a successful business. information about the competition. Included is information on:

- market demand;
- local conditions;
- new tourist destinations;
- travel info;
- pricing info;
- overseas partners.

Agents use direct contacts, the Internet, visits to the site, travel guides, travel markets and fairs as sources of information.

5.4 Awareness of, and Attitudes Towards, Ecotourism

Ecotourism is poorly known either conceptually or practically. Almost two-thirds of the travel agents polled say they are not personally familiar with ecotourism. Based on popular beliefs, ecotourism is seen as a destination possessing some specific attributes and characteristics. **The agents surveyed do not readily recognize the educational component and the environmental regeneration and conservation of natural resources components of ecotourism.** The following quotations illustrate the awareness of travel agents:

- “eco-trails, mountain hikes”
- “tourism in the wild, far from the big cities”
- “vacationing on the go”
- “a place of peace and quiet, with clean air”
- “...being amid pristine natural scenery. Eating ecologically clean, organic food...”
- “tourist activities in nature reserves”

Only two travel agents showed an awareness and understanding of ecotourism consistent with internationally established practices.

The future potential for marketing ecotourist products on the domestic Bulgarian market is seen in a **positive light**. Most respondents are, to a greater or lesser extent, confident that ecotourist products do have a future.

At the same time, ecotourist products are seen, at best, as supplementary to the list of tourist products and services already being offered. Moreover, the interests of travel agents lie with marketing finished ecotourist products, rather than developing new ones. In practical terms this means that ecotourist brochures may be a welcome addition to a travel agent’s office display, yet little effort at active promotion and marketing may be expected.

5.5 Conceptual Framework of the Attributes and Characteristics of the Ecotourist Product

5.5.1 Destinations

The travel agents polled in this survey identified a total of 37 destinations suitable for ecotourism. They can be grouped together in the following categories:

Established tourist destinations	Bansko, Momchilovtzi, Valingrad, Ribaritz, Koprivshitz, Sozopol, Dryanovo, Arbanassi, Melnik, Kovachevitz, Smolyan, Dobrinishte, Pamporovo, Kamchiya, Ropotamo, Borovetz, Sinemoretz, Dospat
Alternative tourist destinations	Kalofer, Trigrad, Govedartsi, Cherni Ossam, Vratza, Tryavna, Gela, Tran, Srebarna, Devon (“ <i>no hospitality infrastructure</i> ”), Rezovo
Regions	Mountains in general; Strandja, Pirin, the southern seashore, Rila
Others	“ <i>no hospitality infrastructure anywhere</i> ” “ <i>any place that’s off the beaten tourist track</i> ”

The travel agents’ concept of an ecotourist destination is a mountain village or township, featuring modern and well-maintained hospitality infrastructure (hotels and restaurants), and that is “*well off the beaten tourist track*”, i.e. does not intersect with the mass-market tourist flow.

However, in this survey, travel agents failed to identify a single marketable tourist destination:

- Respondents misidentified established tourist destinations as ecotourist, since they correspond to their misconceptions of an ecotourist product (see Section 5.4 above).
- In terms of alternative tourist destinations, the opinion prevails that these are sadly lacking in hospitality infrastructure.

5.5.2 *Expectations of Accommodation Facilities*

Based on the concepts and ideas suggested by travel agents, a composite of a hotel that approximates the most ideal for ecotourism would be:

- Family-type establishment;
- Traditional exterior and interior design;
- Twin, as opposed to double beds in most rooms;
- Children are put up in the same room with parents;
- No pets on the premises;
- An in-house restaurant and/or café;
- Bathroom/toilet; radio, TV, fridge, phone in every room;
- Bed & Breakfast format (breakfast included in room price, any other meals at extra cost).
- An optimum price per overnight of 20 leva.

Proprietors of hotels and other accommodation facilities are in a position to increase customer satisfaction with their establishments, or, conversely, to cause disappointment. The agents surveyed identified some *dos* and *don'ts* that largely determine customer satisfaction or dissatisfaction with an accommodation facility:

Satisfaction	Dissatisfaction
Peace and quiet, a cozy atmosphere	Profiteering
A laid-back, easy-going place	Hostile, discourteous, incompetent staff
Place is clean and tidy	Place is dirty and messy
Friendly, courteous and competent staff	Noise
An ethical attitude	Staff importunity
Extra services and info	Discrimination by nationality: foreign and Bulgarian
Environmental awareness and nature conservation	guests receive different levels of service
	Grimy, threadbare furniture

5.5.3 *Expectations of Eateries*

The agents identified the following as key aspects of a restaurant or other eatery suitable for ecotourism:

- Traditional exterior and interior design;
- A laid-back, no-rush atmosphere that encourages visitors to take their time eating and enjoying themselves;
- Discreet staff;
- A long menu compiled in the spirit of traditional Bulgarian cuisine, markedly featuring local delicacies and specialty dishes while offering some pleasant surprises and new discoveries;
- Local ingredients a must;
- Optimum dinner price (not including beverages) of 12-15 leva per person.

Proprietors of restaurants and other eateries are very much in a position to increase customer satisfaction or, conversely, to cause disappointment. The agents surveyed identified some *dos* and *don'ts* that largely determine customer satisfaction or dissatisfaction with an eatery:

Satisfaction	Dissatisfaction
Food is tasty and freshly cooked Organic, ecologically sound ingredients Traditional dishes Dishes prepared to order Cleanliness, good level of hygiene Friendly, courteous and competent staff An ethical attitude	Food is stale or badly cooked Portions are too small Dishes are visibly alien to the region Ingredients come out of a can Dirty, grimy environment Slow service Overpriced Profiteering and deceit

5.5.4 Rating of Possible Natural Attractions

Level of Interest	Attraction
Considerable interest	one-day hike visit to a cave
Marked interest	an outing on horseback observation of wild animals and plants mountain sports camping out in the wild shopping for gifts and souvenirs
Some or no interest	photo exhibition film lecture multimedia presentation educational and entertainment activities for children extreme hiking routes

5.5.5 Rating of Possible Folklore Attractions

Level of Interest	Attraction
Considerable interest	live music dances
Marked interest	songs tales and legends told live
Some or no interest	

5.5.6 Rating of Possible Cultural Attractions

Level of Interest	Attraction
Considerable interest	folk shows traditional folk festivals observing traditional craftsmen at work visit to a museum sites of cultural or historic interest
Marked interest	visitors engage in making of traditional artifacts visitors engage in cooking traditional dishes
Some or no interest	re-enactment of historic events feeding of livestock picking of vegetables and fruits

5.5.7 Rating of Possible Interest in Traditional Arts and Crafts

Level of Interest	Art/craft
Considerable interest	decorative textiles carpet-weaving
Marked interest	wood-carving pottery traditional costumes
Some or no interest	coppersmithry

5.5.8 The Ecotourist Package

Duration	3 overnights
Meal	breakfast
Culinary attractions	tasting local specialties in a traditional dinner
Natural attractions	one-day hike Visit to a cave
Price	100 leva

5.6 Kalofer & Govedartsi

5.6.1 Kalofer

Travel agents see Kalofer as:

- a clean little mountain township
- the birthplace of Hristo Botev
- a period town with a strong National Revival overtone
- scenic landscape
- peace and quiet
- lace knitting
- the Valley of Roses

Travel professionals consider Kalofer suitable for cultural tourism. A majority of all travel agents polled see the town as conducive to the following activities:

- visits to churches and monasteries
- tasting culinary specialties and local delicacies
- observation of, and familiarization with arts and crafts

Many agents do not identify mountain hiking as an activity characteristic of the Kalofer area.

5.6.2 Govedartsi

The name Govedartsi evokes in travel agents the following images:

- beautiful scenery: forests, clean air
- Rila, Malyovitza

- winter resort
- bad roads, old hospitality infrastructure
- picnicking

Govedartsi is seen primarily as a winter ski resort. Travel agents identify it as a possible destination for:

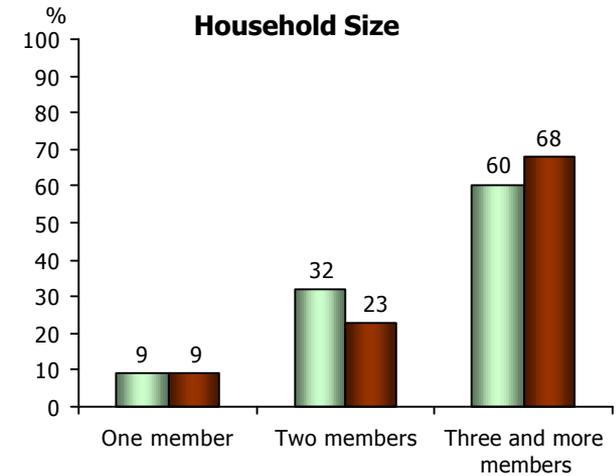
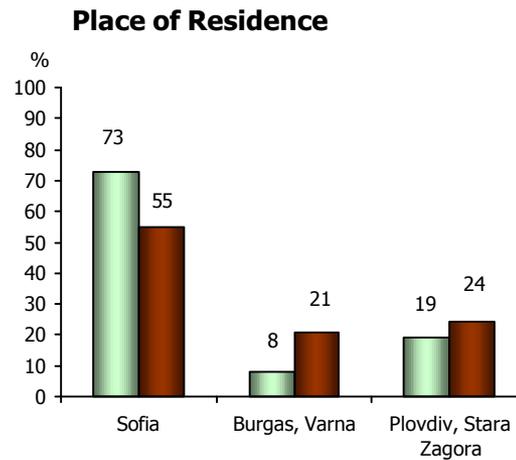
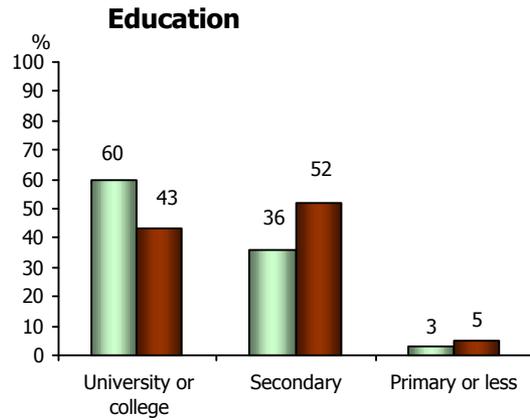
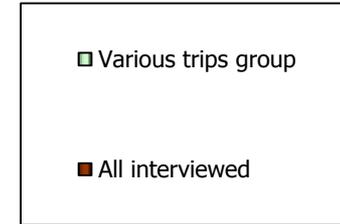
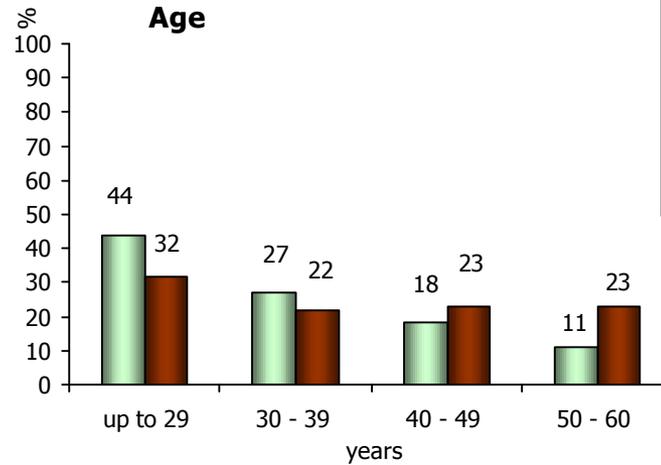
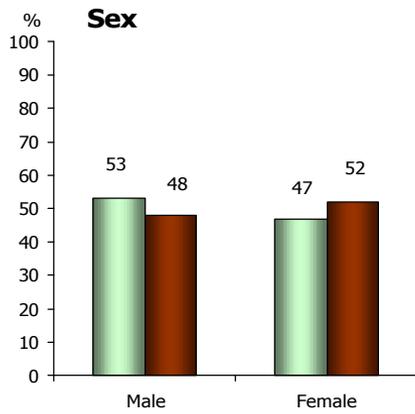
- mountain hikes
- skiing

5.6.3 Kalofer and Govedartsi as Tourist Destinations

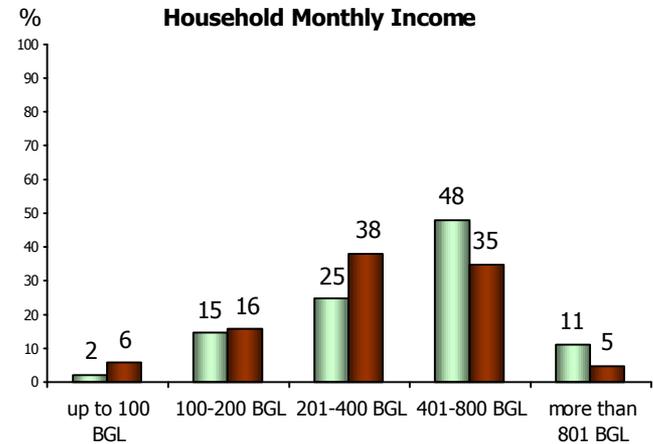
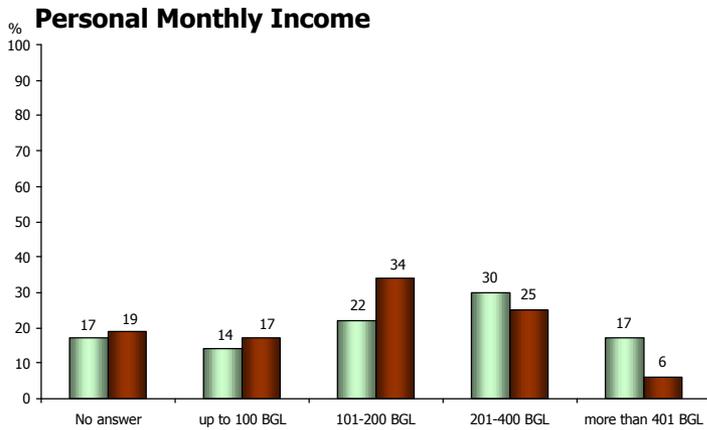
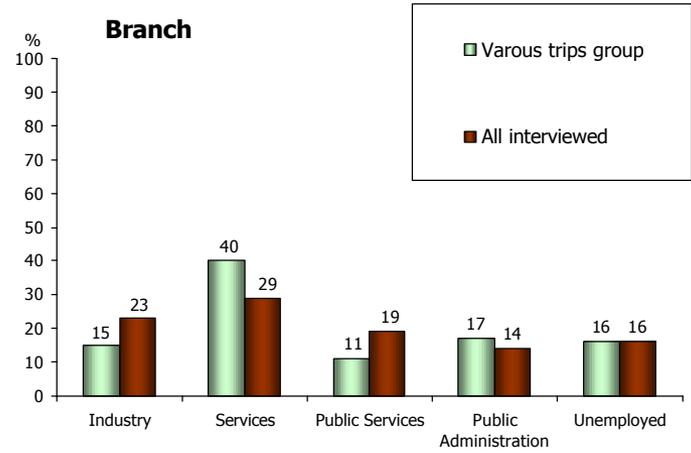
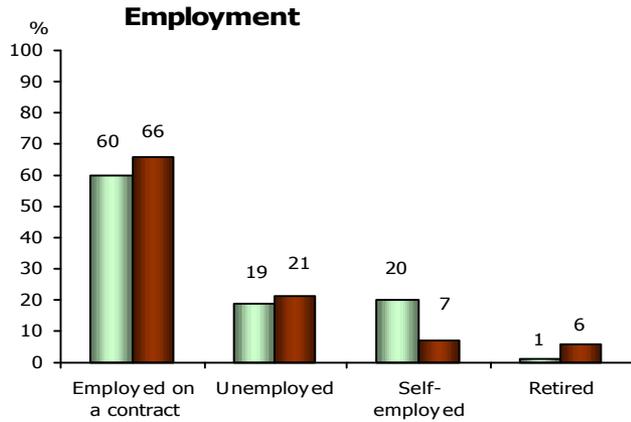
The travel agents interviewed in this survey are ambivalent about the outlook and prospects of Kalofer and Govedartsi as centers of tourism. The natural assets of both places are appreciated. At the same time, interviewees tend to emphasize the remoteness of both from traditional tourist routes, the almost total absence of hospitality infrastructure, and the low level of training of local staff. Bad roads and the lack of publicity also affected their opinions of these areas.

Most of their recommendations for developing Kalofer and Govedartsi as tourist destinations have to do with **improving the basic hospitality infrastructure**. Arguments in favor of the potential to offer a quality ecotourist product in Kalofer and Govedartsi are needed to convince travel professionals to seriously commit to marketing these two destinations.

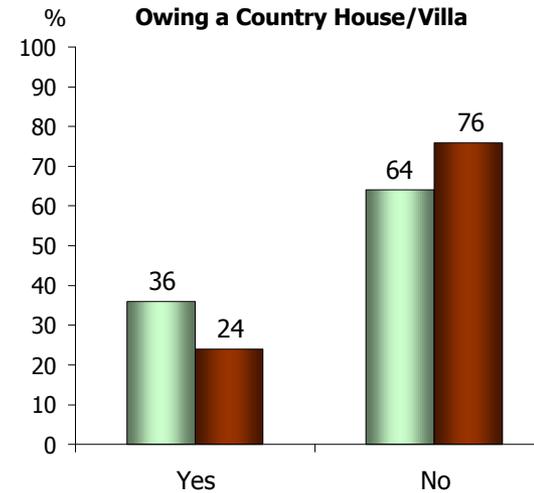
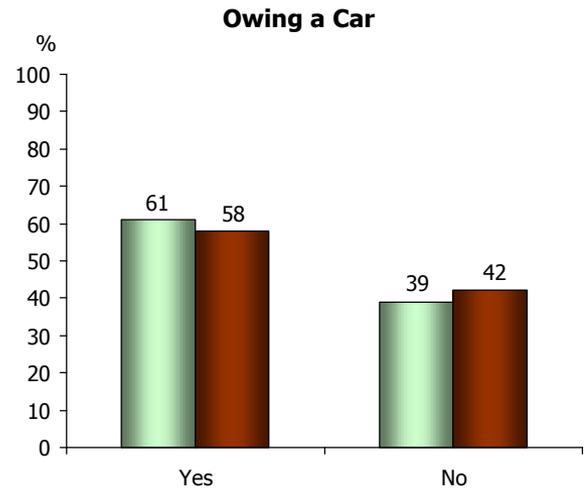
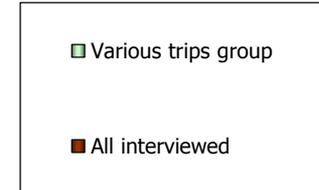
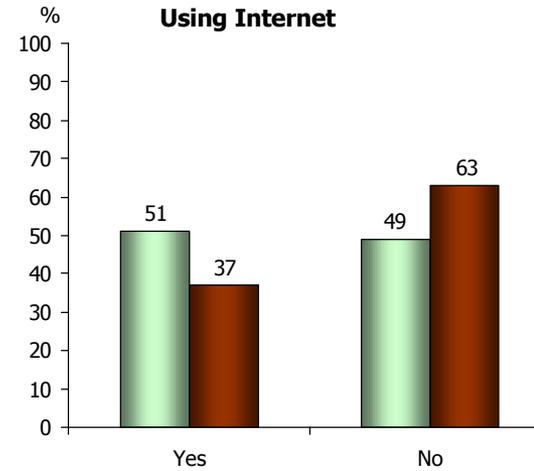
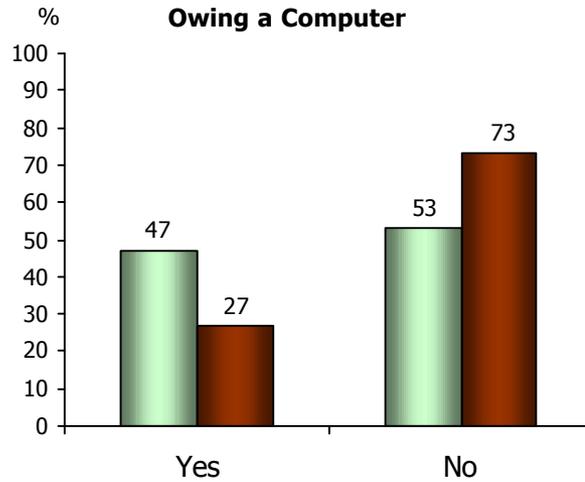
3.2.1 Demographic Profile



3.2.1 Demographic Profile

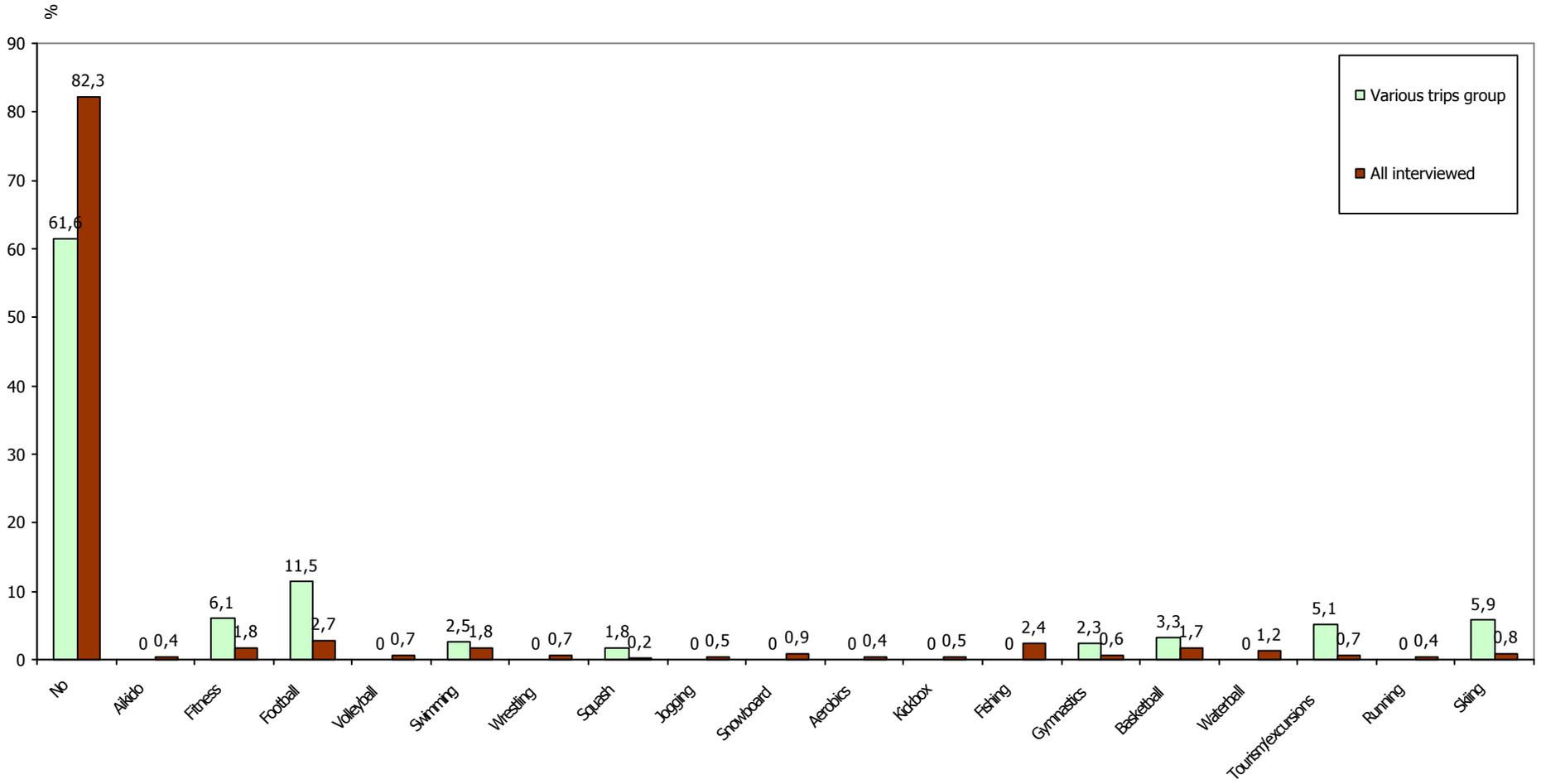


3.2.1 Demographic Profile



3.2.1 Demographic Profile

Do you practice any sport on a regular basis? If yes, which one?



3.2.2 Trips

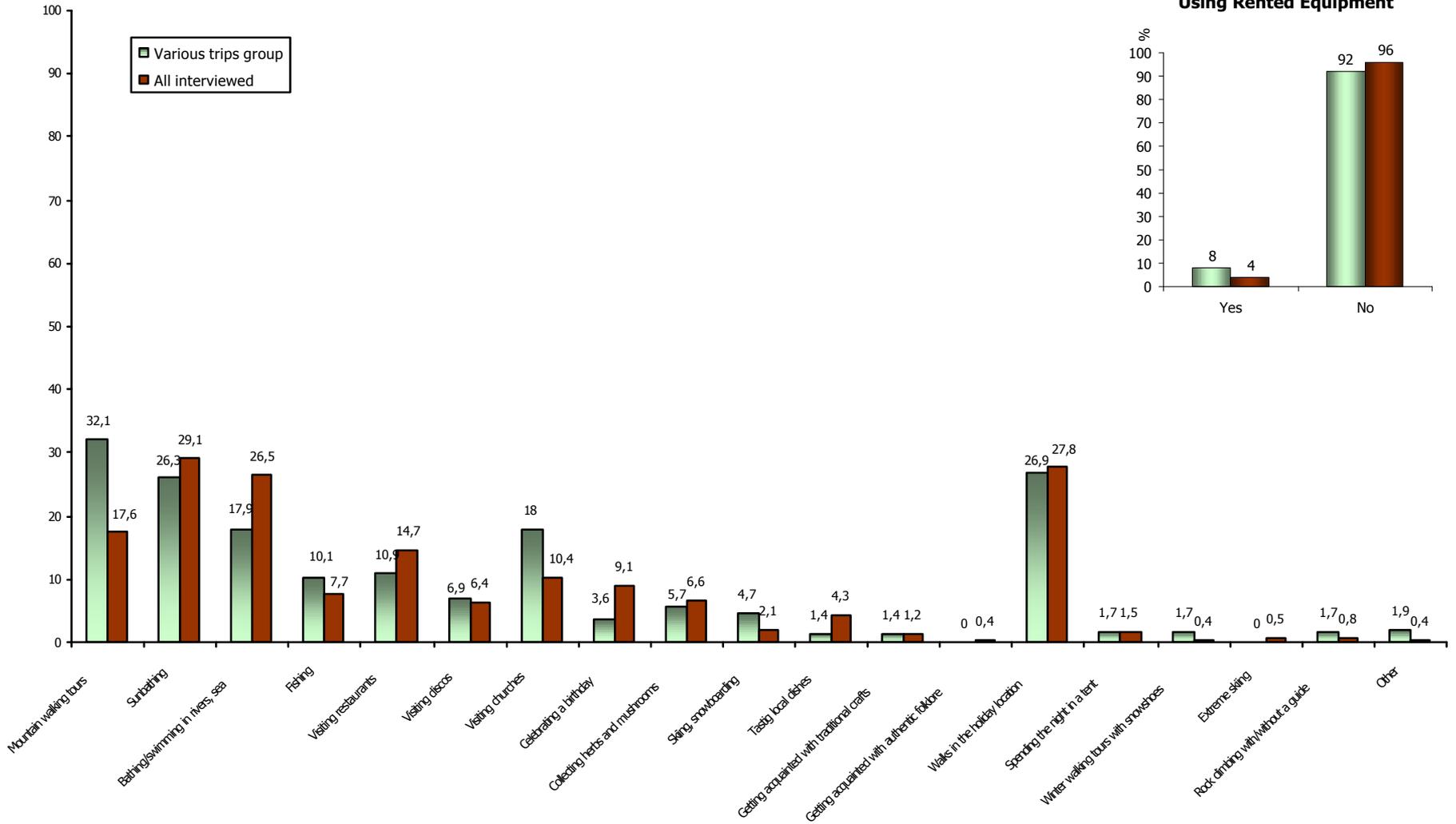
	Various Trips Group <i>Average Values</i>	All Interviewed <i>Average Values</i>
Trips without staying overnight	2.6	2.4
Trips for 1 – 3 nights	2.2	2.3
of these with paid accommodation	2.2	1.5
4 – 6 nights	1.3	1.3
of these with paid accommodation	1.2	1.0
7 and more nights	1.4	1.3
of these with paid accommodation	1.3	1.1

3.2.3 Activities

Activity	Did you practice any of the following activities during your holiday travel?		Can you identify any of the activities you practiced as the main reason for you to go this holiday? If yes – which one?	
	Various Trips Group %	All Interviewed %	Various Trips Group %	All Interviewed %
Mountain walking tours	58.3	39.1	34.2	21
Sunbathing	73.7	60.4	24	28.6
Bathing/swimming in rivers, lakes, sea	58.4	50.9	22.5	25.4
Fishing	24.8	19.2	7.9	7.4
Visiting restaurants and similar entertainment	76.5	55.9	4.1	3.4
Visiting discos, clubs, etc.	25.8	22.4	2.3	2.6
Visiting churches and monasteries	35.1	24.8	13	6.0
Celebrating a birthday, anniversary or other event	24.5	24.7	5.8	11.2
Collecting herbs and mushrooms	18.1	17.6	5.6	7.8
Skiing, snowboarding	16.3	5.8	4.9	3.0
Tasting local dishes	34.9	27.3	0	1.6
Getting acquainted with traditional crafts	9.3	7.9	0	0.5
Getting acquainted with authentic folklore	10.9	7.5	0	0.4
Walks in the holiday location and its surroundings	60.5	51.4	19.6	22.9
Spending the night in a tent in the open	9.8	6	3.3	1.8
Biking tours	0	0.4	0	0
Winter walking tours with snowshoes	2.9	1.4	1.4	0.9
Extreme skiing	3.6	1.1	0	0.5
Rock climbing with/without a guide	6	4.4	1.8	0.4
Other	0	0	2	0.4

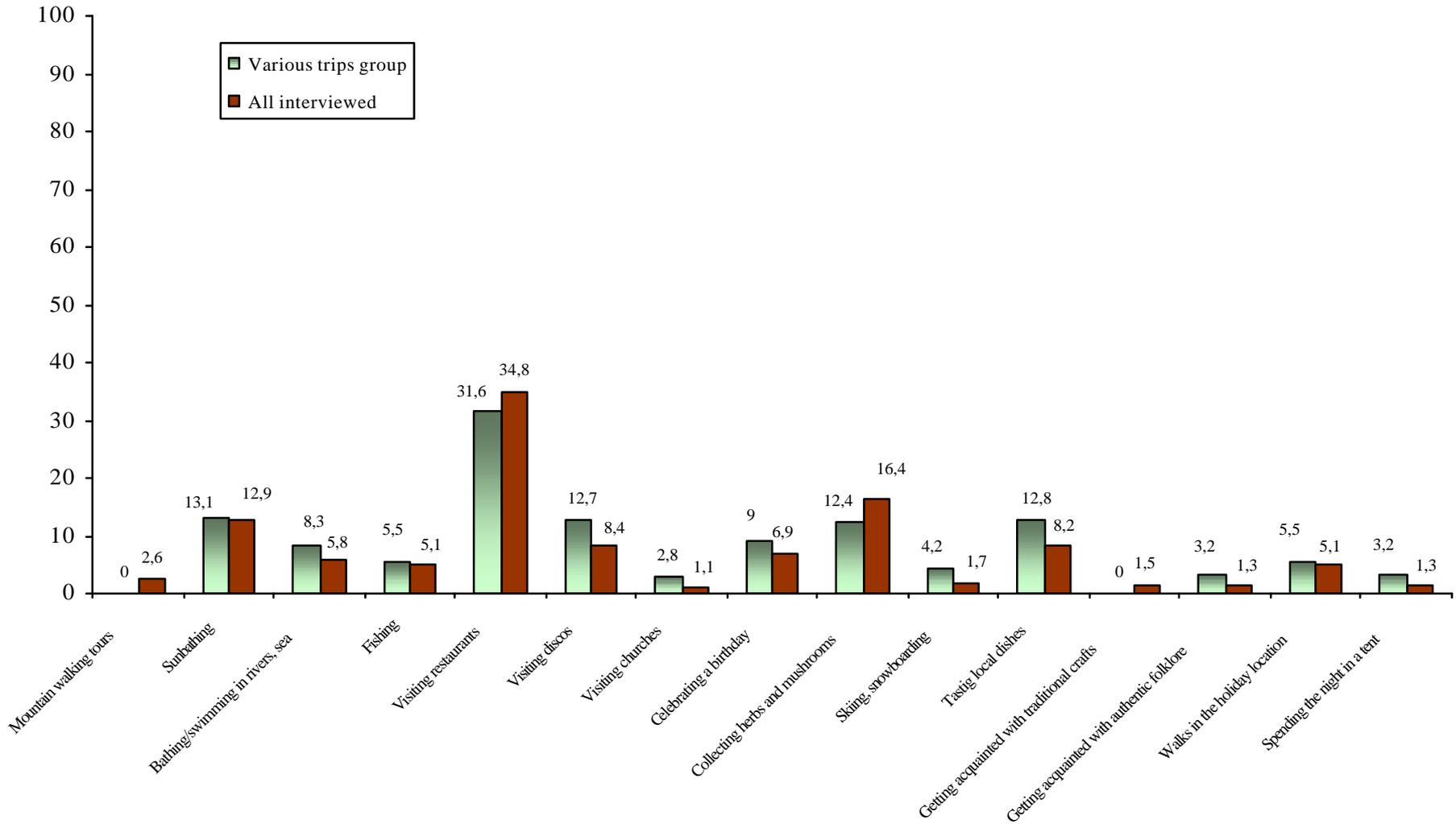
3.2.3 Activities

Could you list the activities you practiced during your holidays that you were satisfied with?

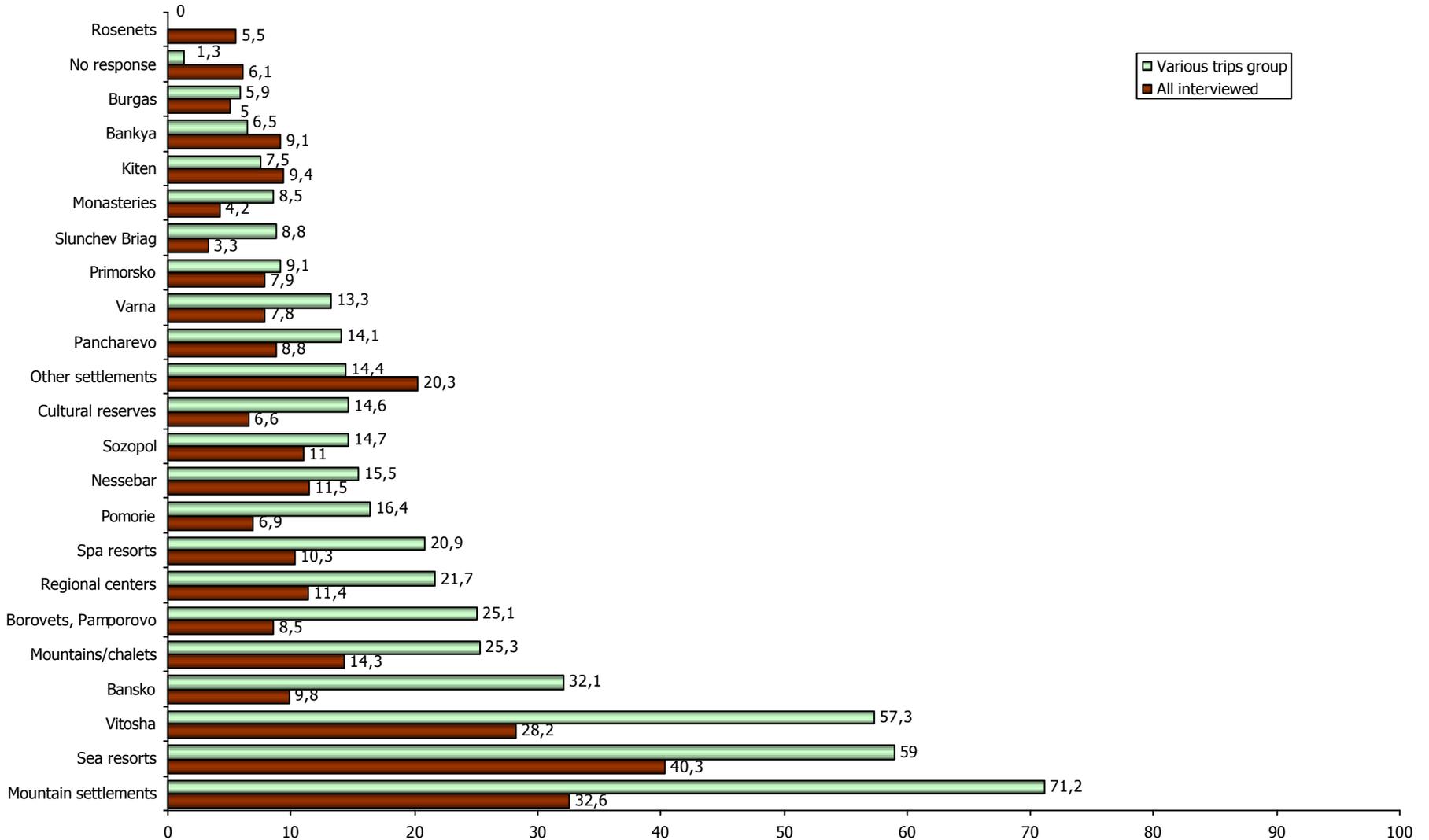


3.2.3 Activities

Could you list the activities you practiced during your holidays that you were dissatisfied with?

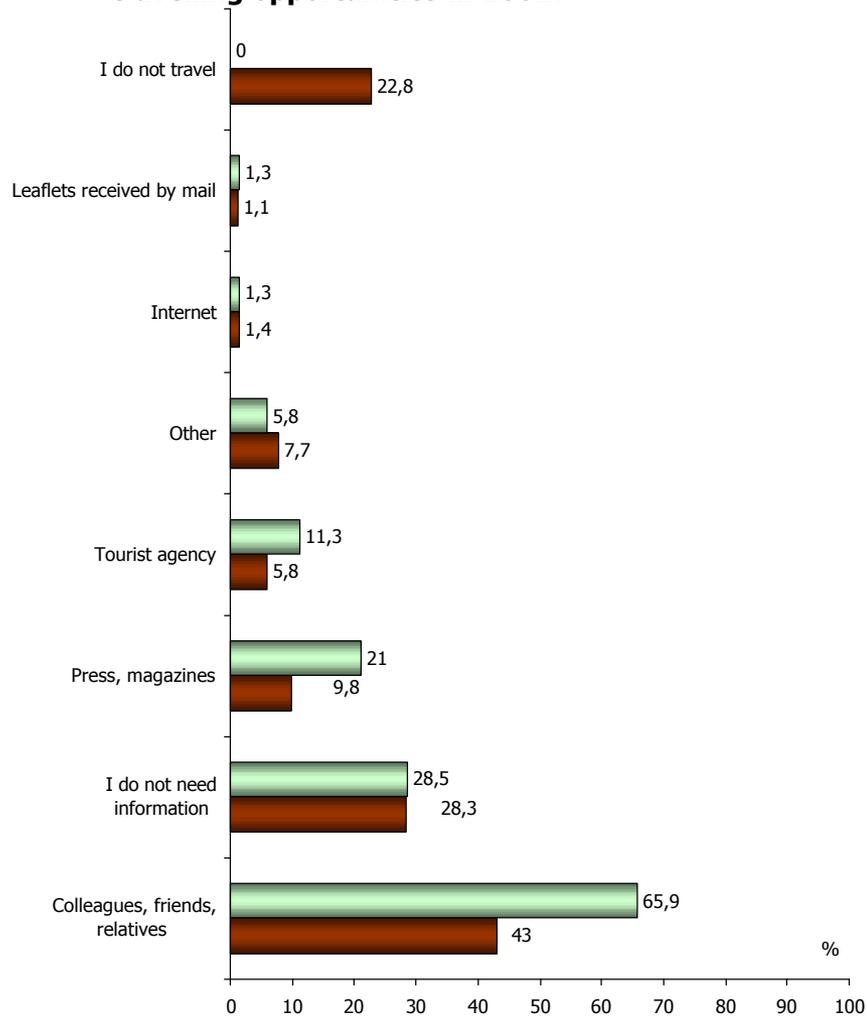


3.2.4 Visited Destinations

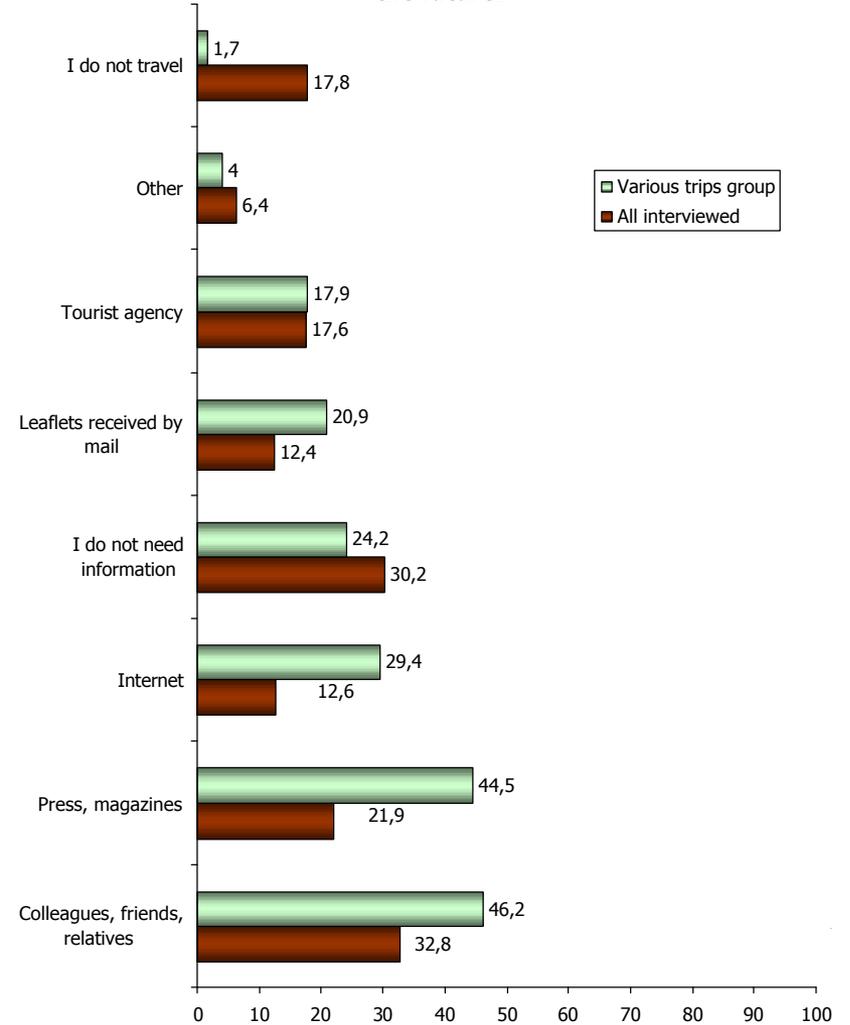


3.2.5 Organization

What sources of information did you use for travelling opportunities in 2001?

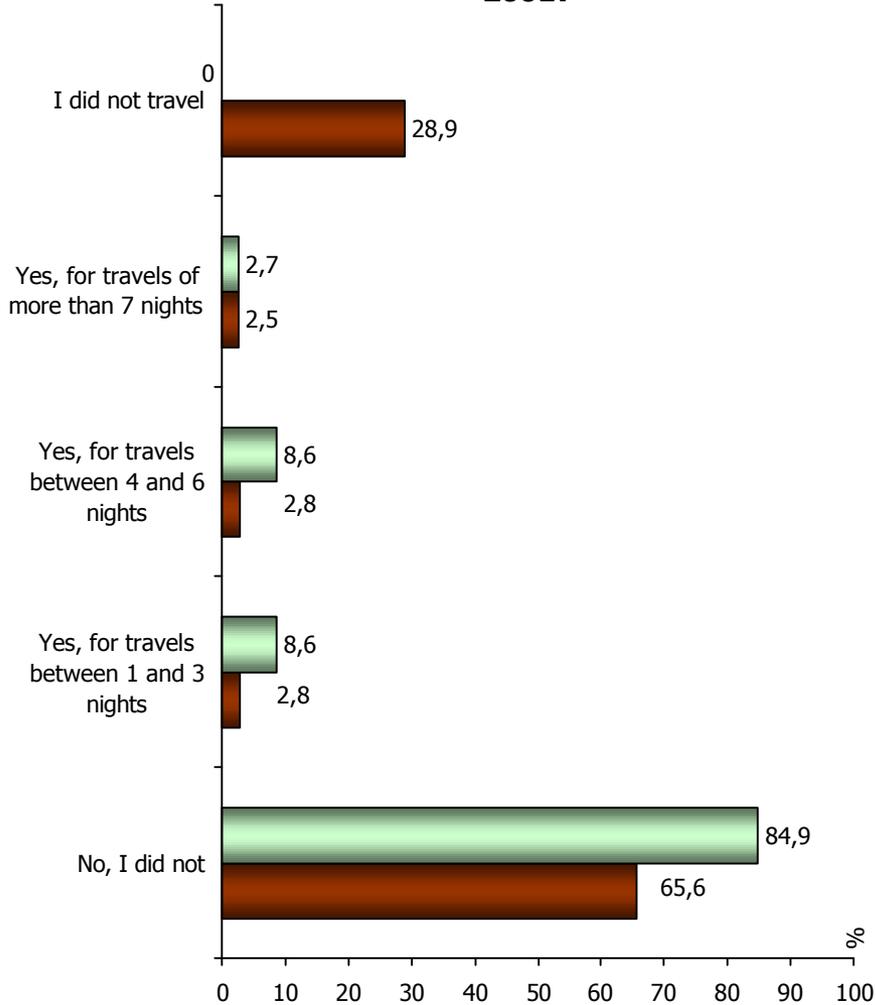


Where would you like to obtain such information from in the future?

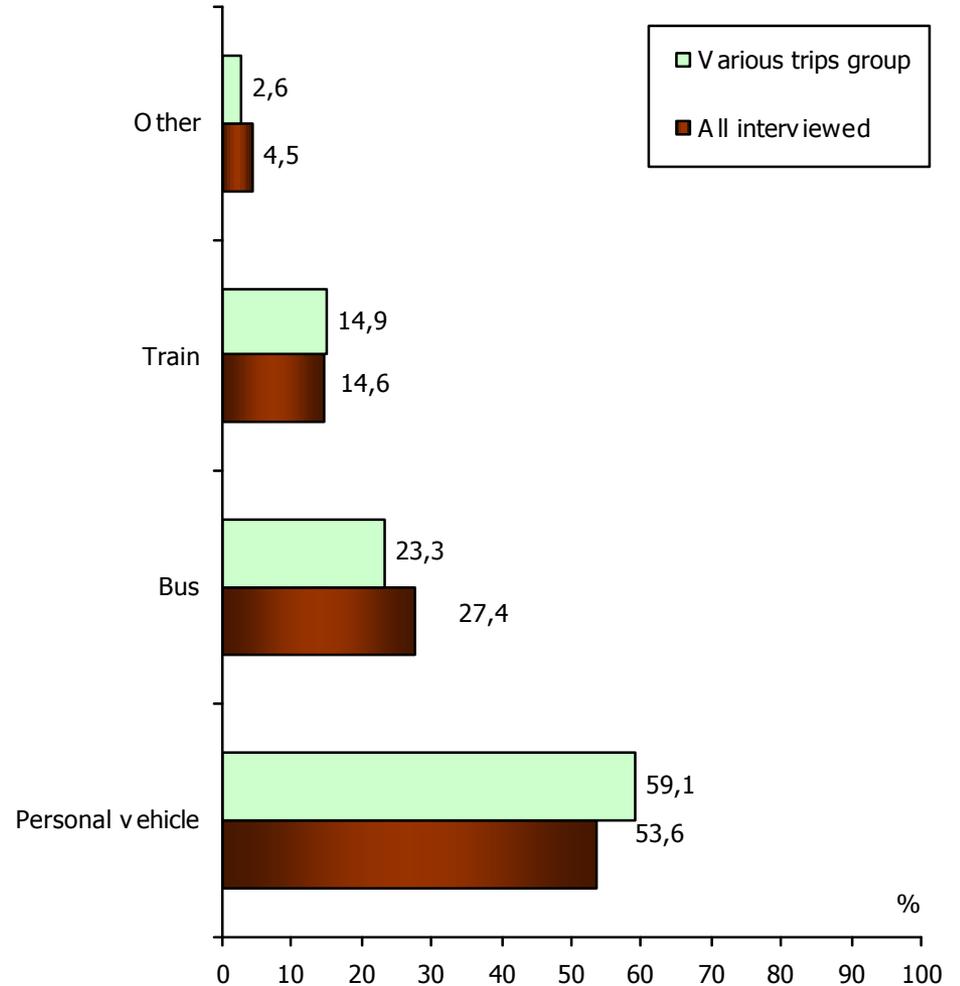


3.2.5 Organization

Did you use tourist agency services for organizing your holiday travels (in Bulgaria) in 2001?

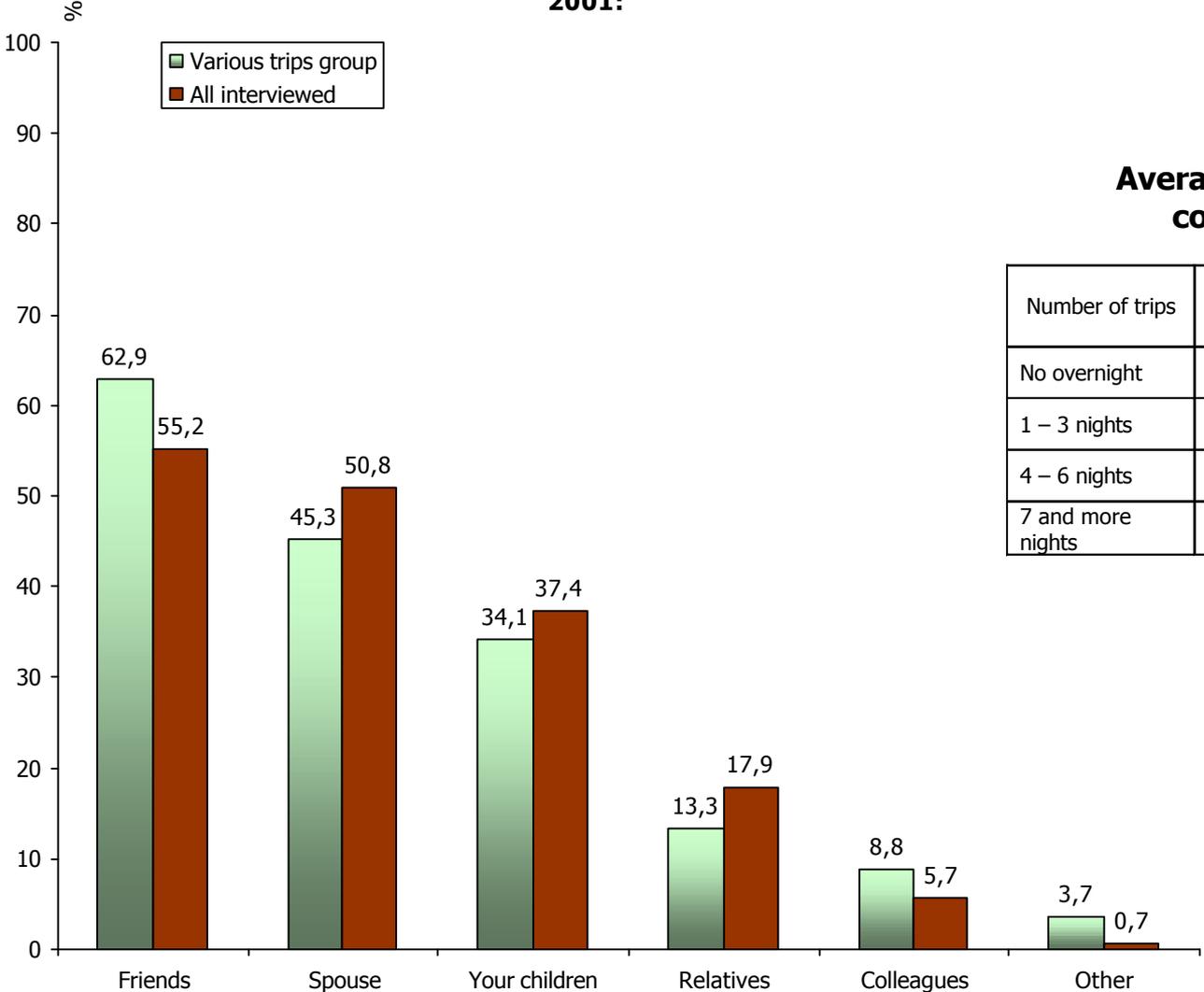


What transport did you use in most cases during your holiday travels?



3.2.5 Organization

Did the following persons accompany you during your holiday travels in 2001:



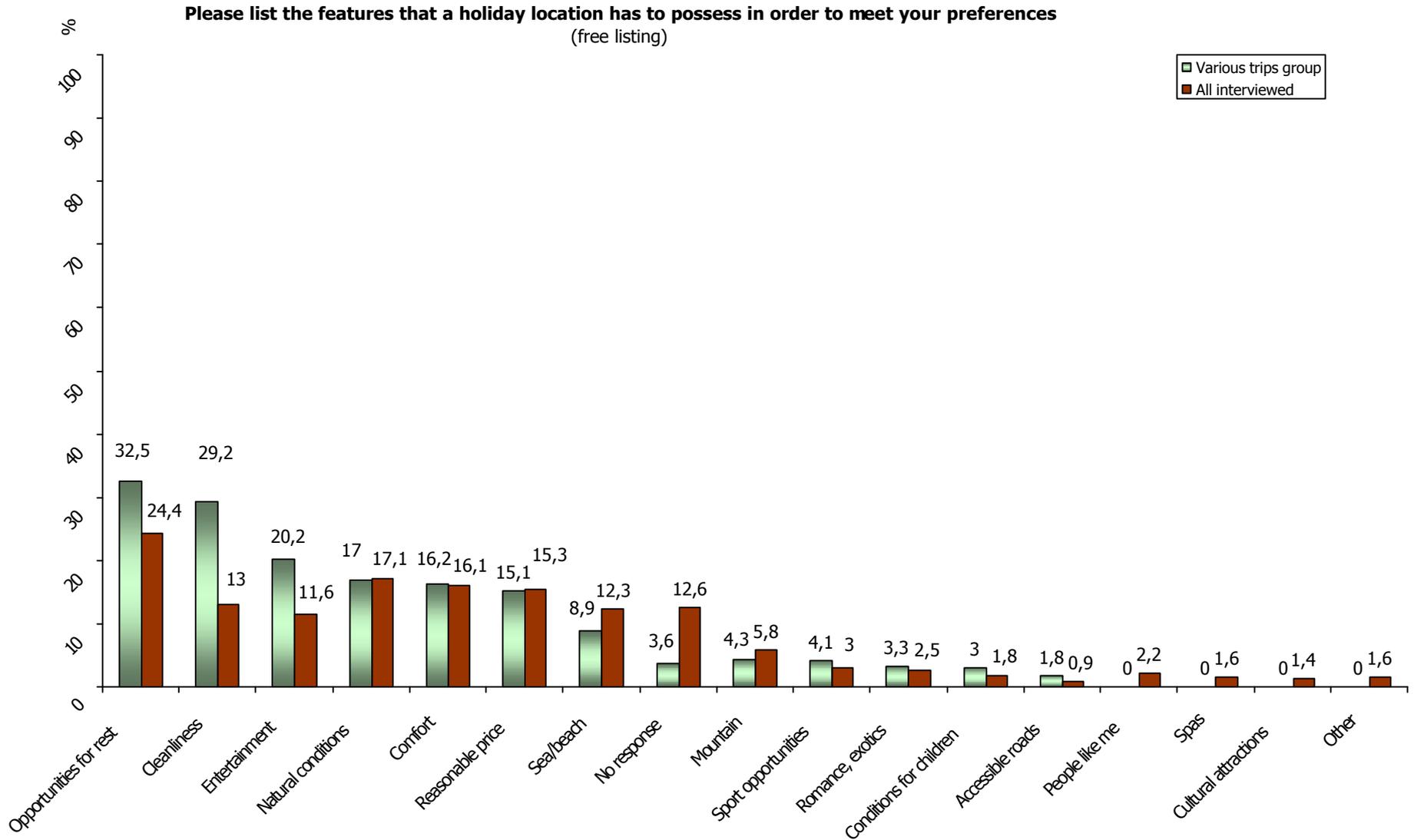
Average number of companions

Number of trips	Various trips group	All interviewed
No overnight	2.3	2.3
1 – 3 nights	2.4	2.5
4 – 6 nights	2.4	2.3
7 and more nights	2.1	2.2

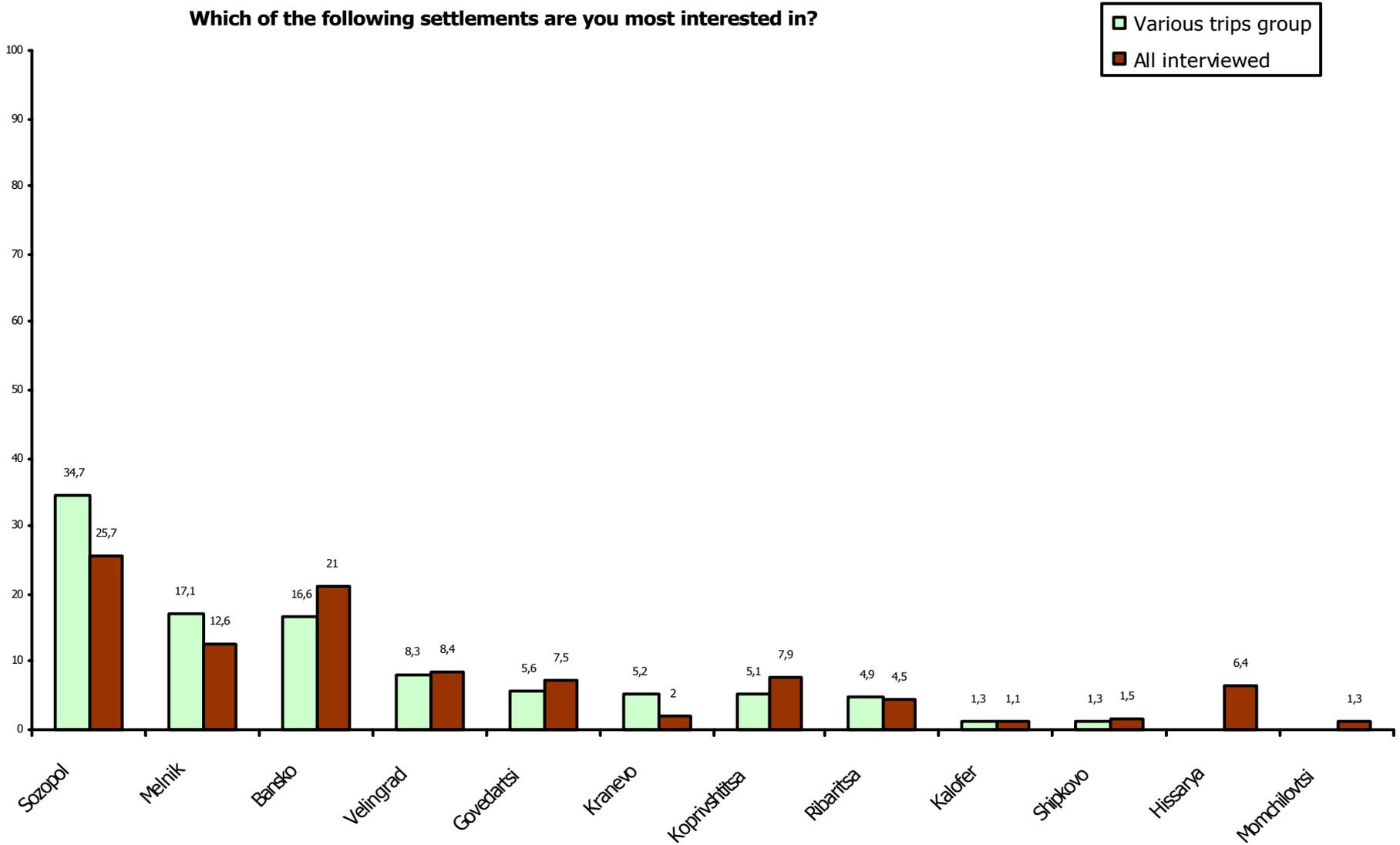
3.2.6 Destination Selection Factors

Factors	Which of the following holiday location features would you identify as most important?		Which of the following features does a holiday location have to possess in order to meet your preferences?	
	Various trips group %	All interviewed	Various trips group %	All interviewed
Reasonable price	27.2	39.3	89.9	92.6
Natural attractions	19.1	9.2	81.3	66.3
Diverse entertainment opportunities	13.6	93.3	87.4	61.1
Opportunities for a holiday with young children	12.8	9.1	31.6	34.2
Sport opportunities	7.3	2.3	42.0	28.3
Peace, opportunities for rest and solitude	6.0	11.4	59.2	55.9
Opportunities for new experiences	5.1	4.7	64.2	43.4
Accommodation facilities with all modern conveniences	5.0	4.3	69.3	56.7
Various restaurants, pubs, etc.	1.6	1.8	63.0	51.1
Access roads in good condition	2.4	2.0	77.5	60.1
Cultural attractions	0	1.9	43.2	38.9
Visited by people like me	0	4.5	54.6	56.0
No response	0	0	1.8	0

3.2.6 Destination Selection Factors

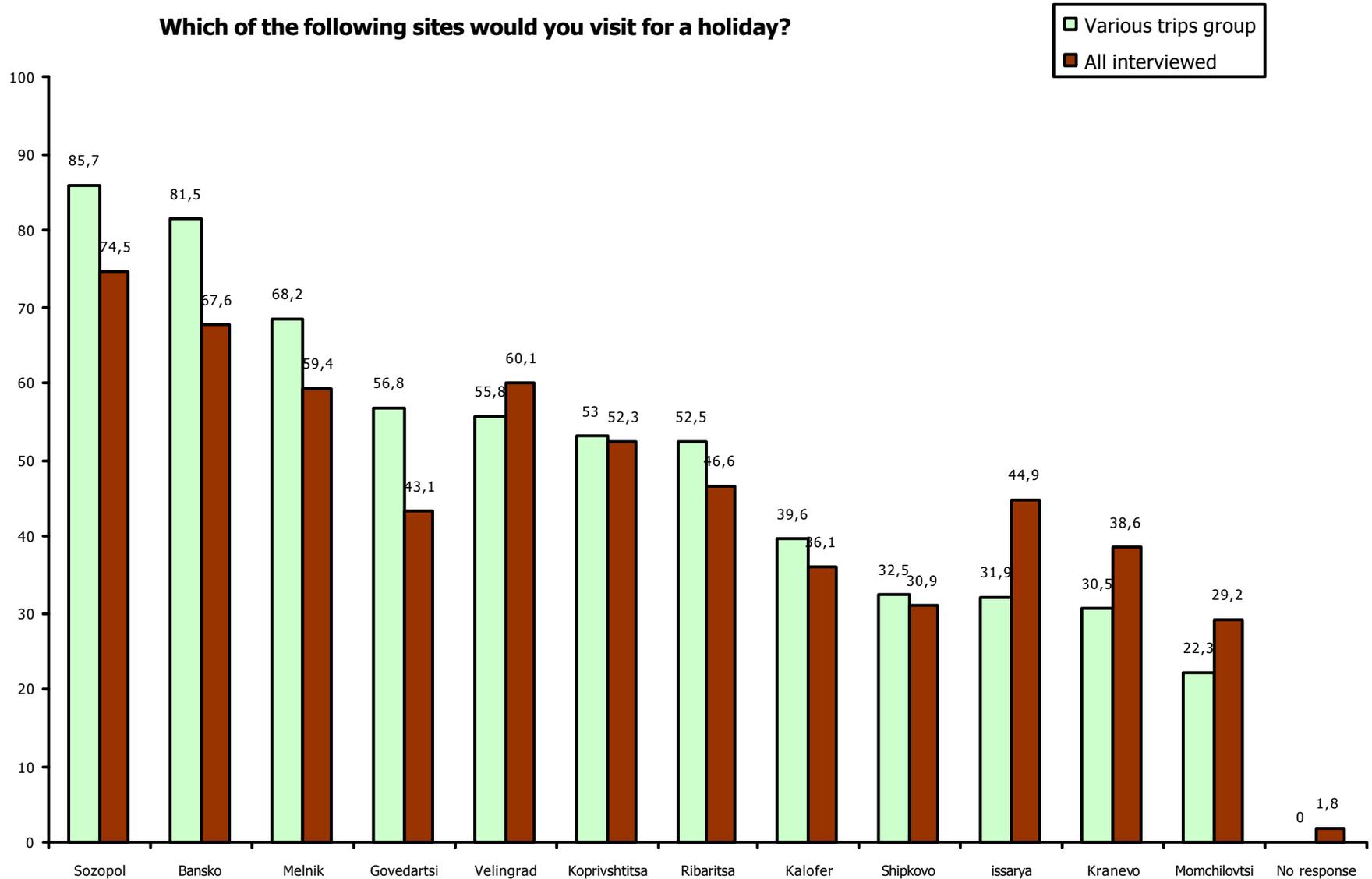


3.2.6 Destination Selection Factors



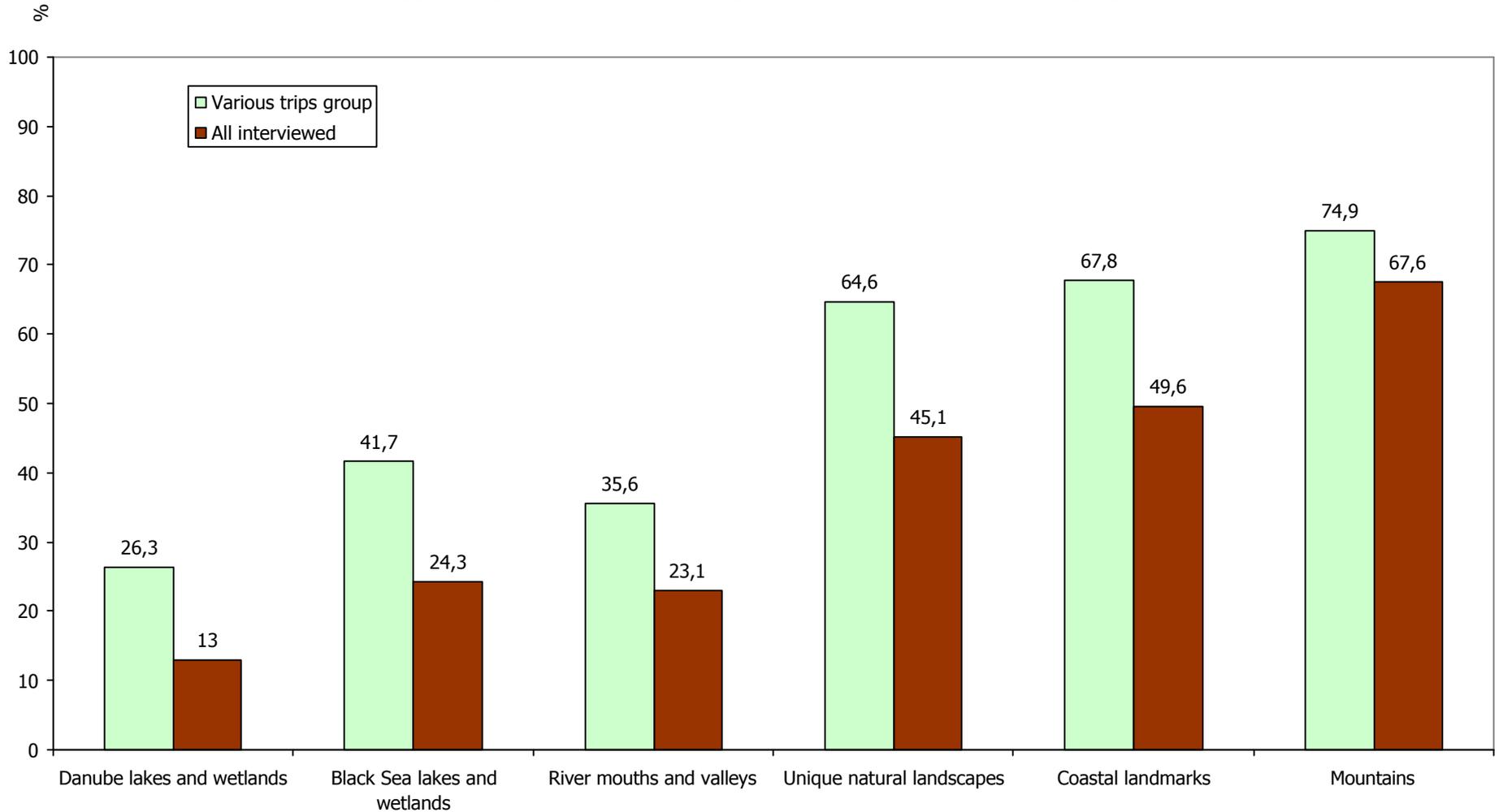
3.2.6 Destination Selection Factors

Which of the following sites would you visit for a holiday?



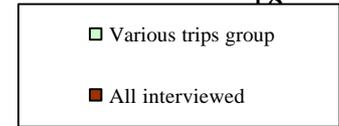
3.2.6 Destination Selection Factors

Which types of protected areas are you interested in for tourism purposes?

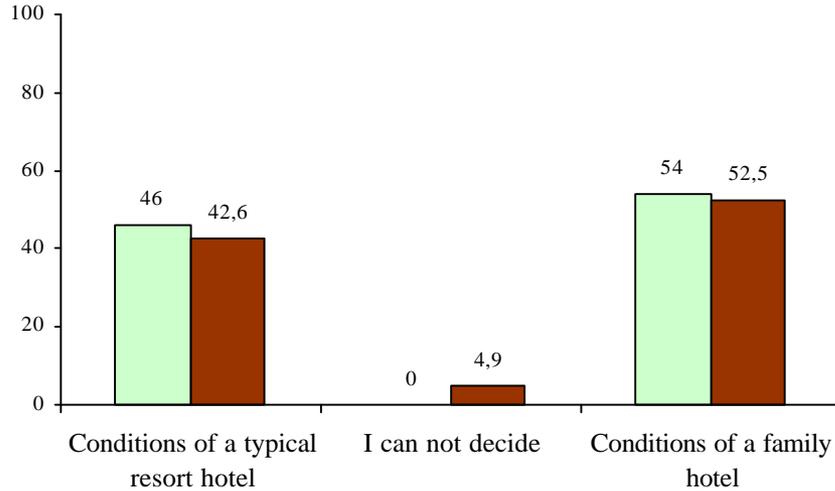


3.2.7 Attitudes to the Accommodation Facilities

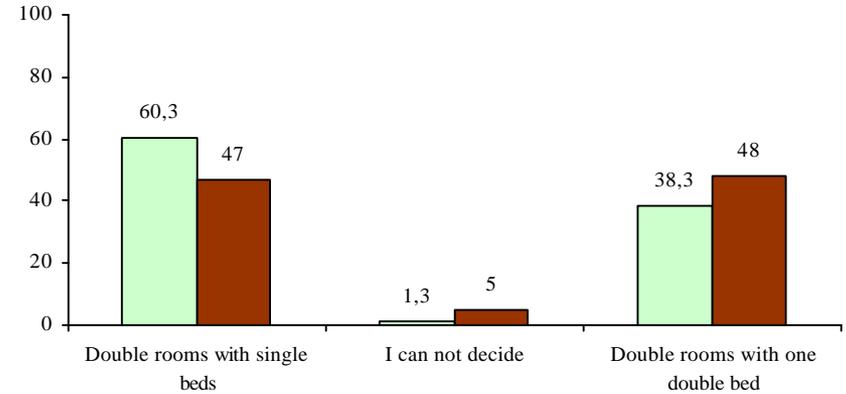
18



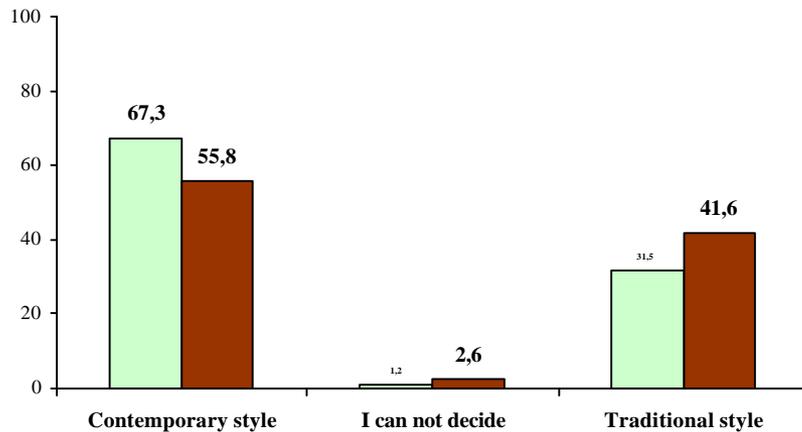
Resort hotel / Family hotel



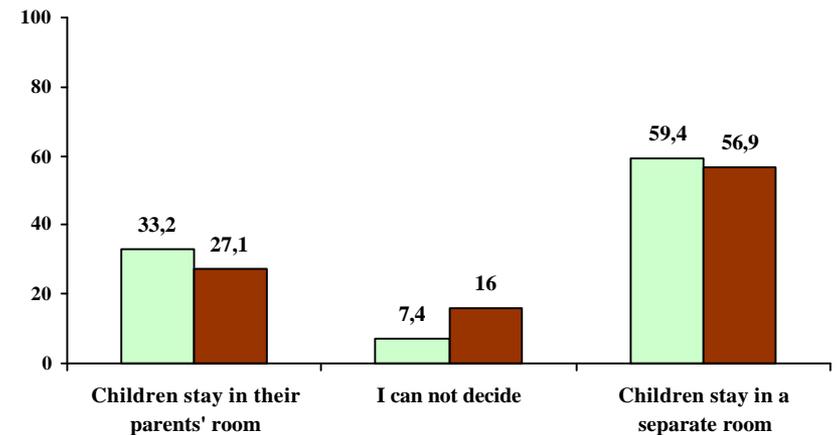
Double rooms: two single beds / one double bed



Contemporary style / Traditional style

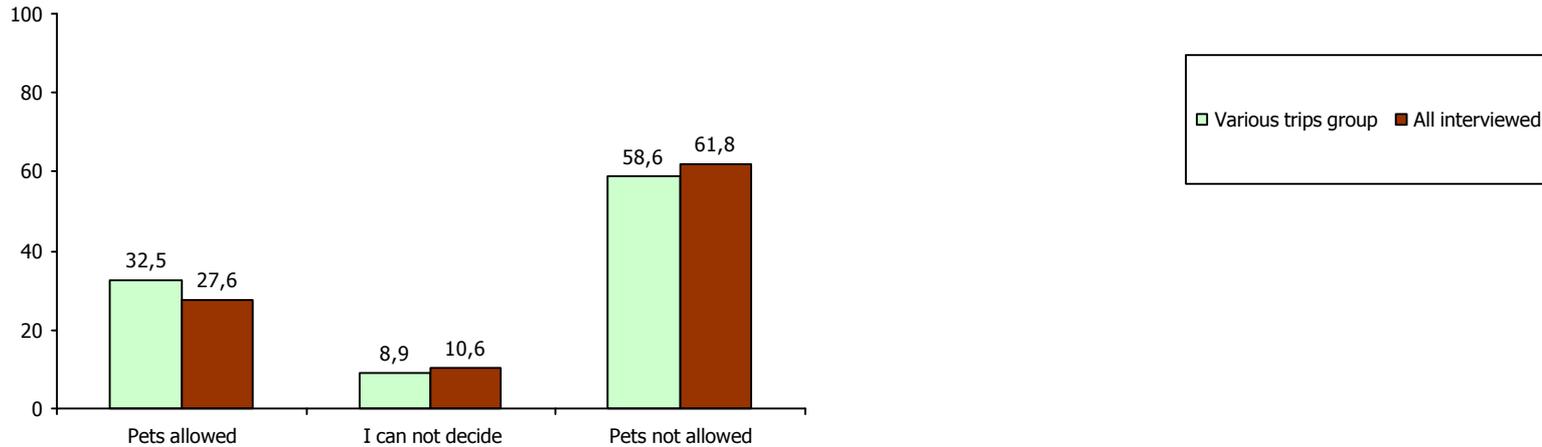


Children: in a separate room / in their parents' room

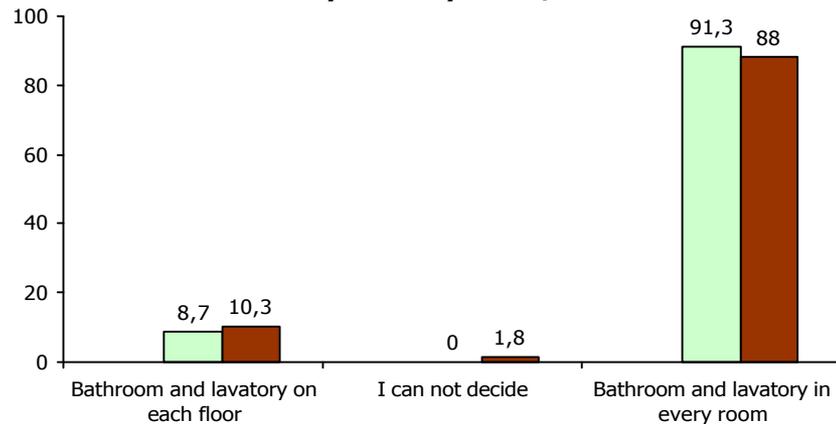


3.2.7 Attitudes to the Accommodation Facilities

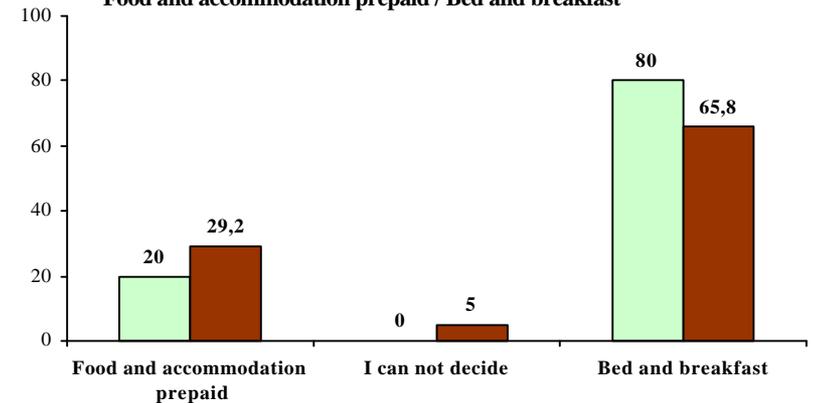
Pets: allowed / not allowed



Bathroom and lavatory: in every room / on each floor

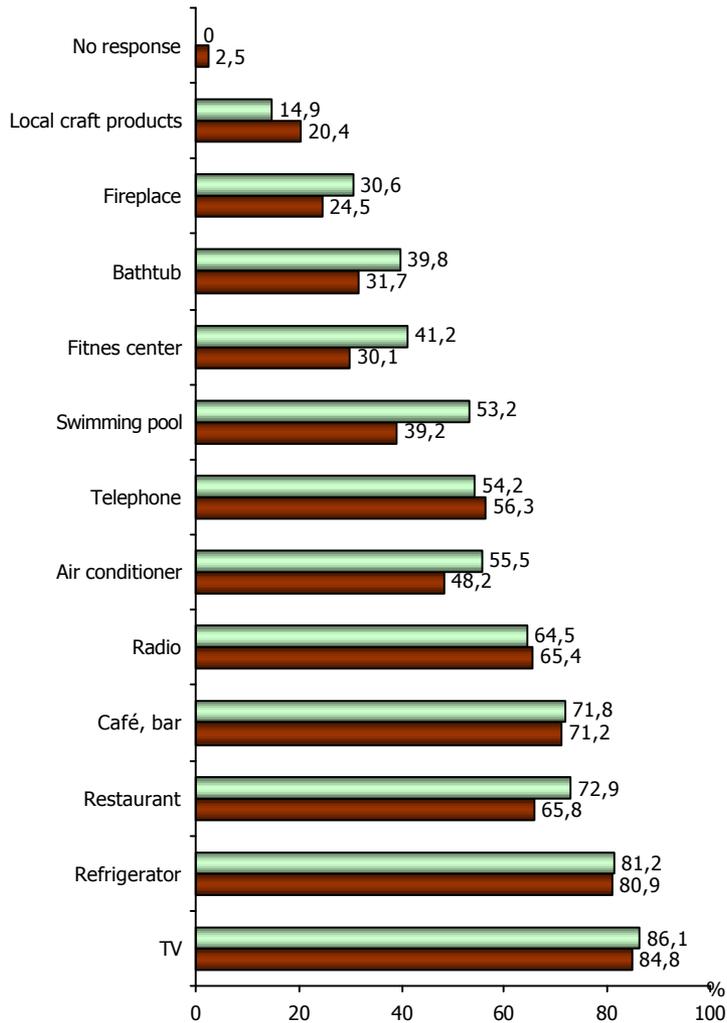


Food and accommodation prepaid / Bed and breakfast

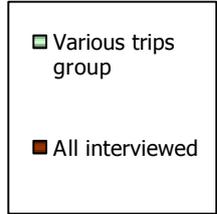
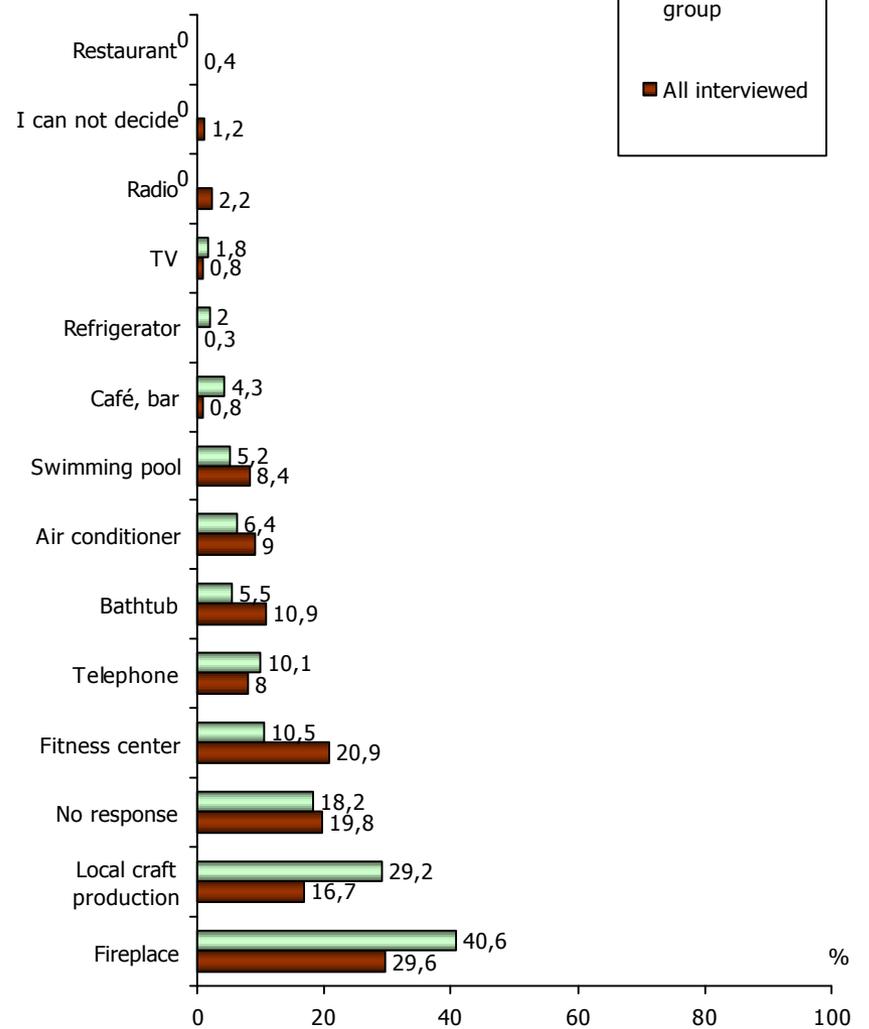


3.2.7 Attitudes to the Accommodation Facilities

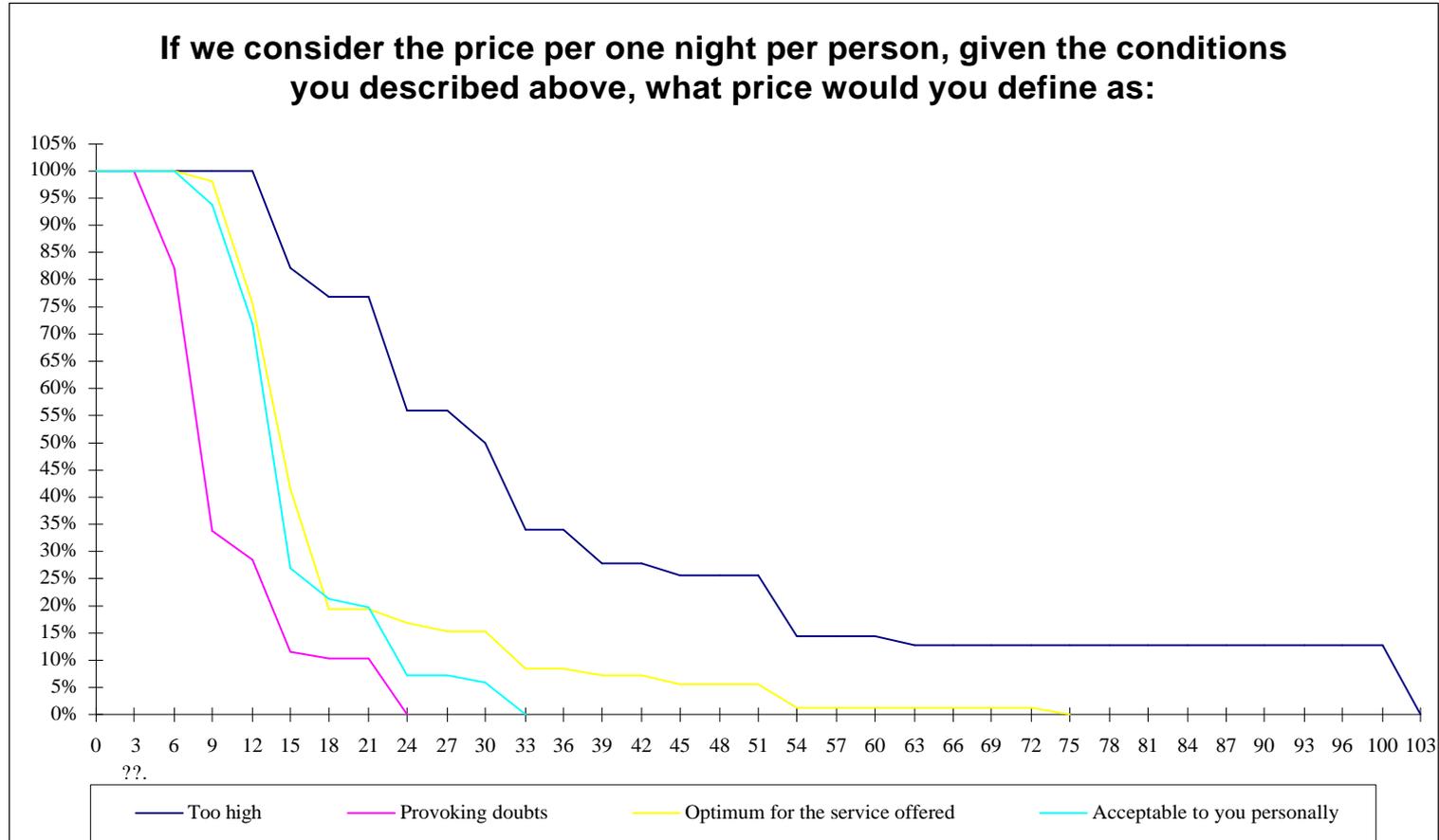
Necessary equipment and services



Useless equipment and services

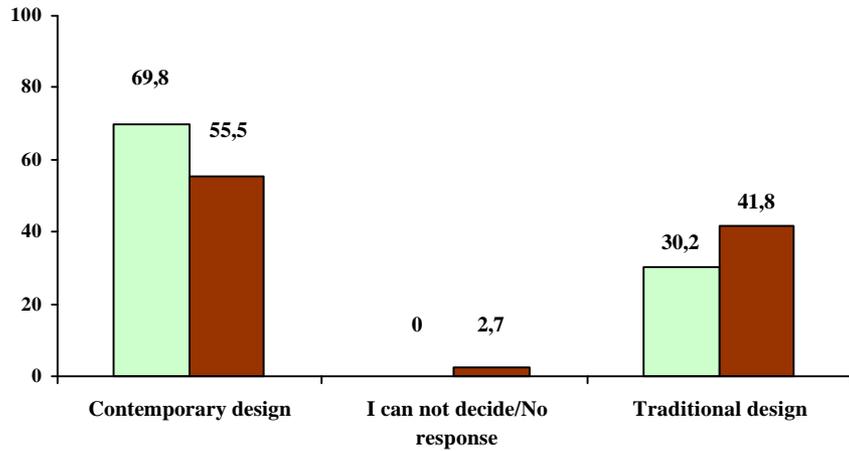


3.2.7 Attitudes to the Accommodation Facilities

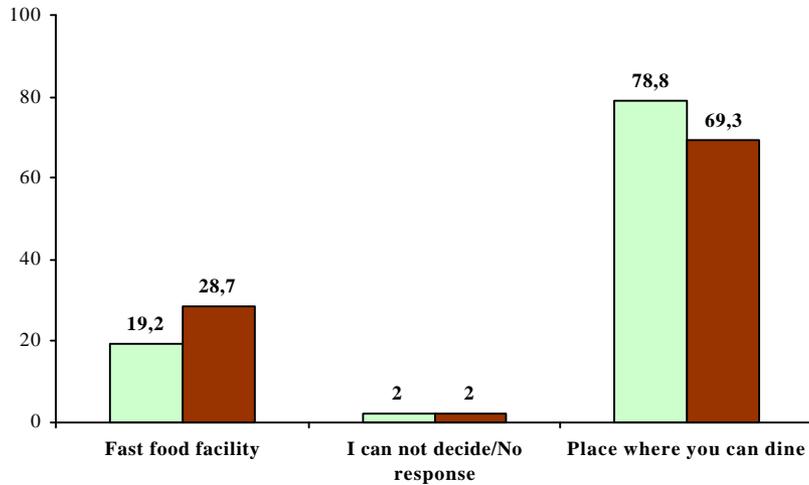


3.2.8 Attitudes to the Dining Facilities

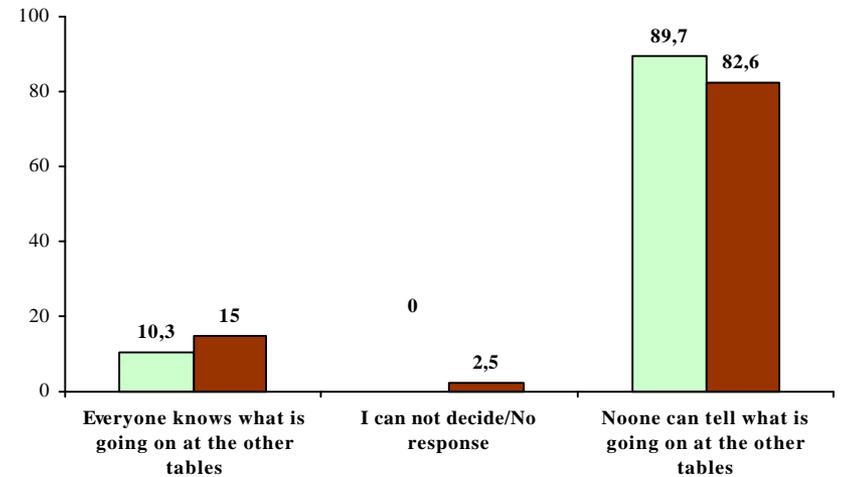
Design: contemporary/traditional



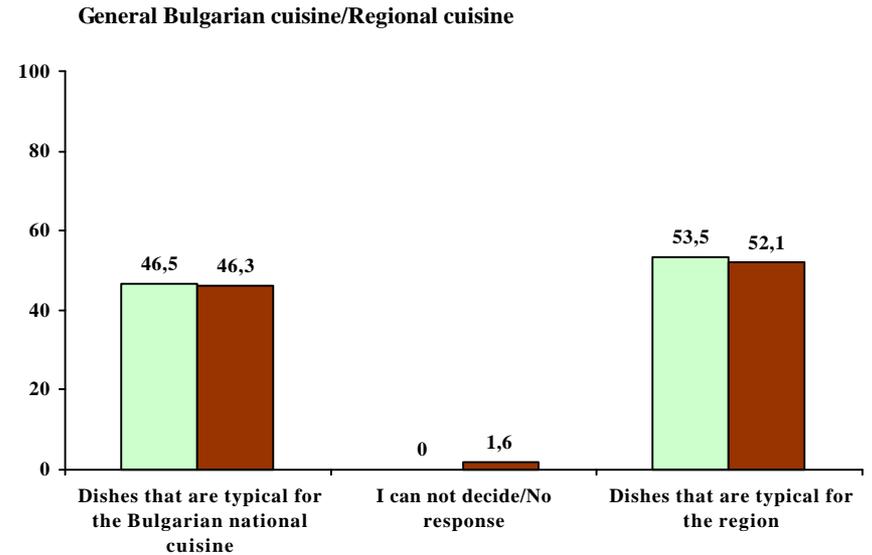
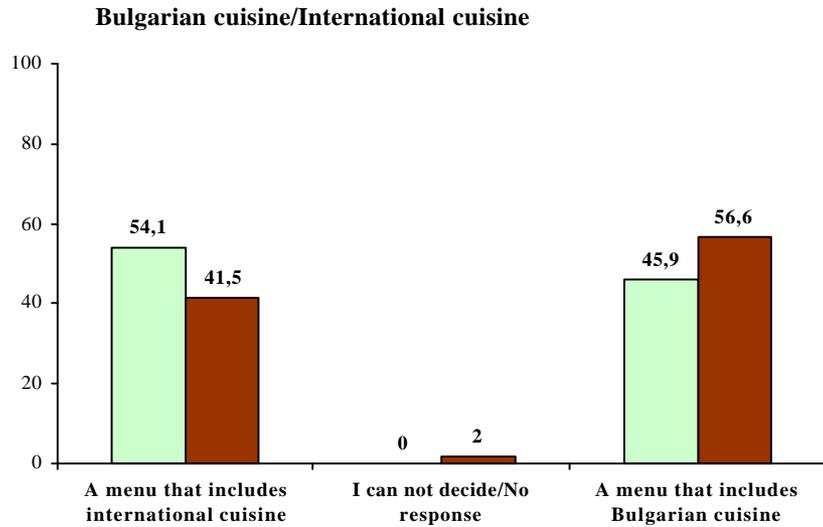
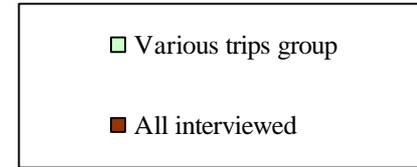
Fast food facility/Place where you can dine



Discretion

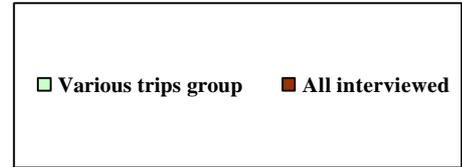
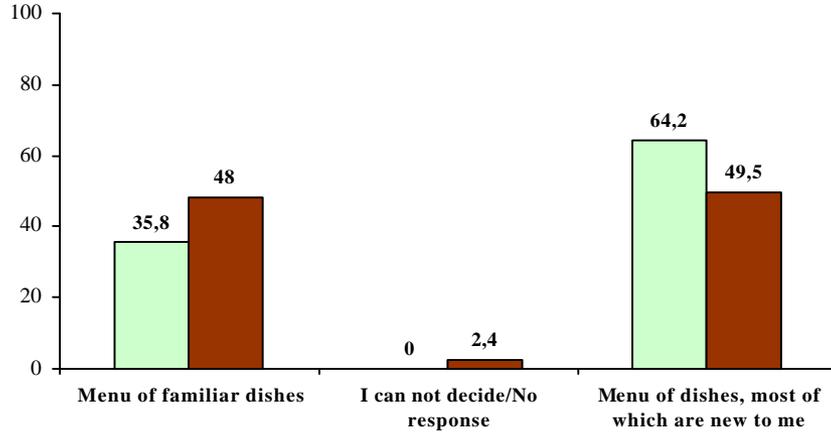


3.2.8 Attitudes to the Dining Facilities

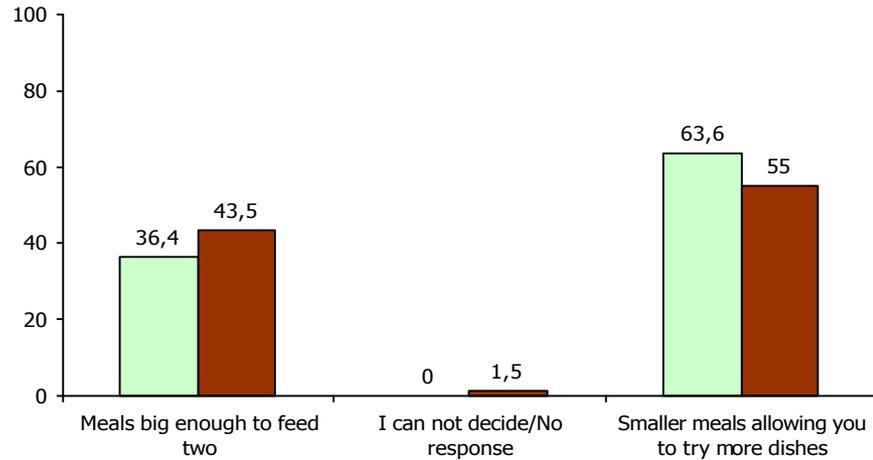


3.2.8 Attitudes to the Dining Facilities

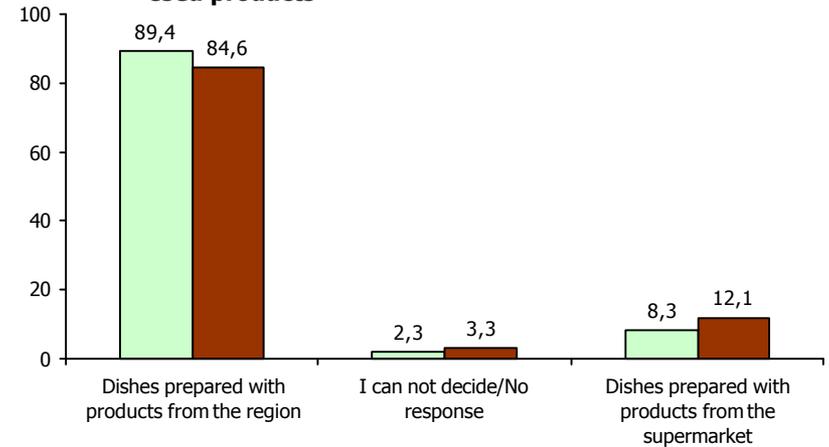
Familiar dishes/New dishes



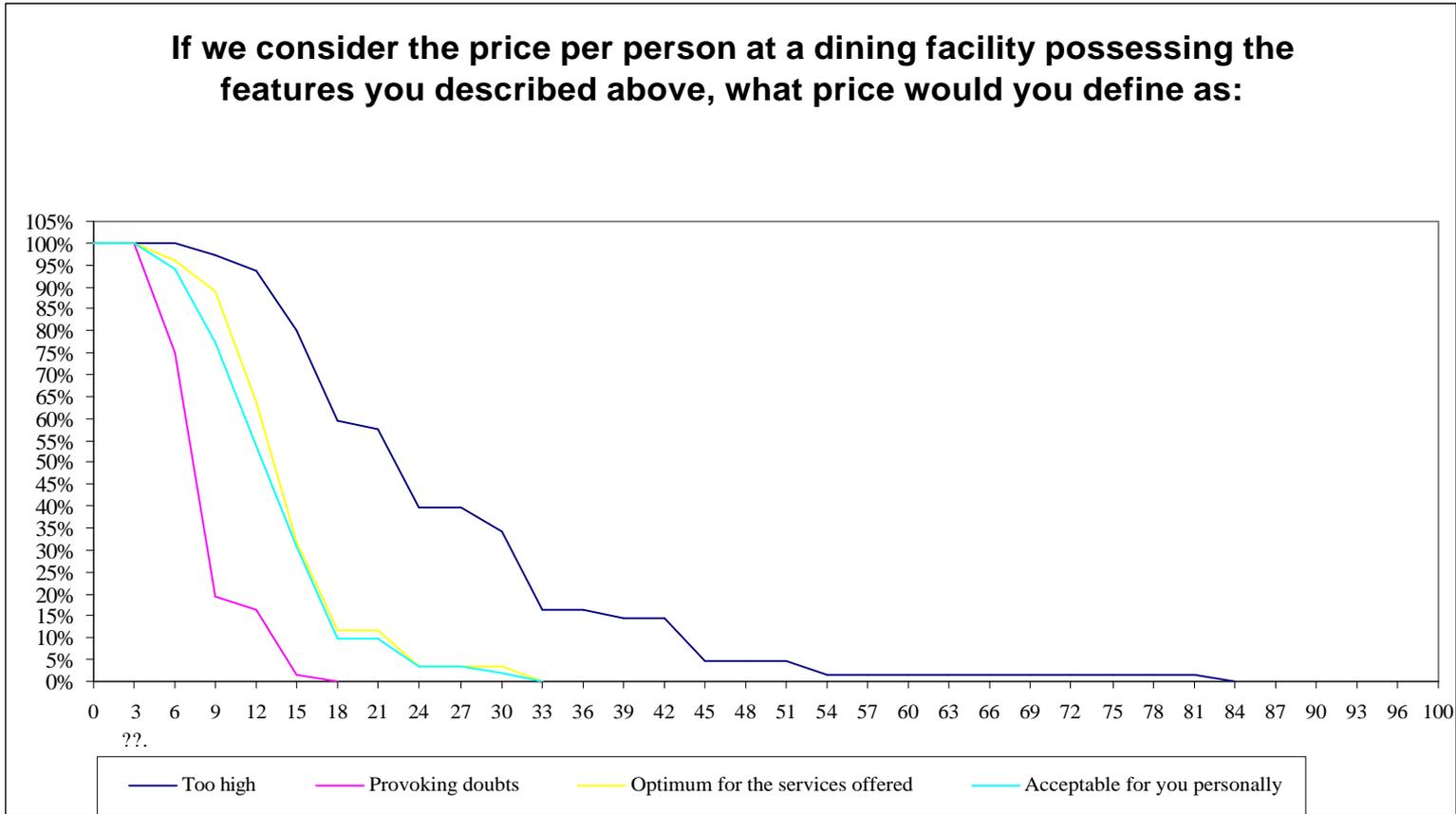
Meal size



Used products



3.2.8 Attitudes to the Dining Facilities



3.2.8 Attitudes to the Dining Facilities

Can you list dishes that you would like to be included in the menus of the restaurants you visit, but which you have never been offered there?

	Various trips group %	All interviewed %
Fish, seafood	5.8	4.0
Vegetable/vegetarian dishes	10.0	5.0
Various types of meat	8.8	3.7
Barbecue	3.4	1.8
Traditional dishes	3.0	4.9
Salads	2.3	1.0
Desserts, fruits	4.3	2.3
Foreign cuisine	13.0	4.6
Regional dishes	0	2.1
Other	0	0.8
I do not visit restaurants	0	2.1
No response	66.9	75.3

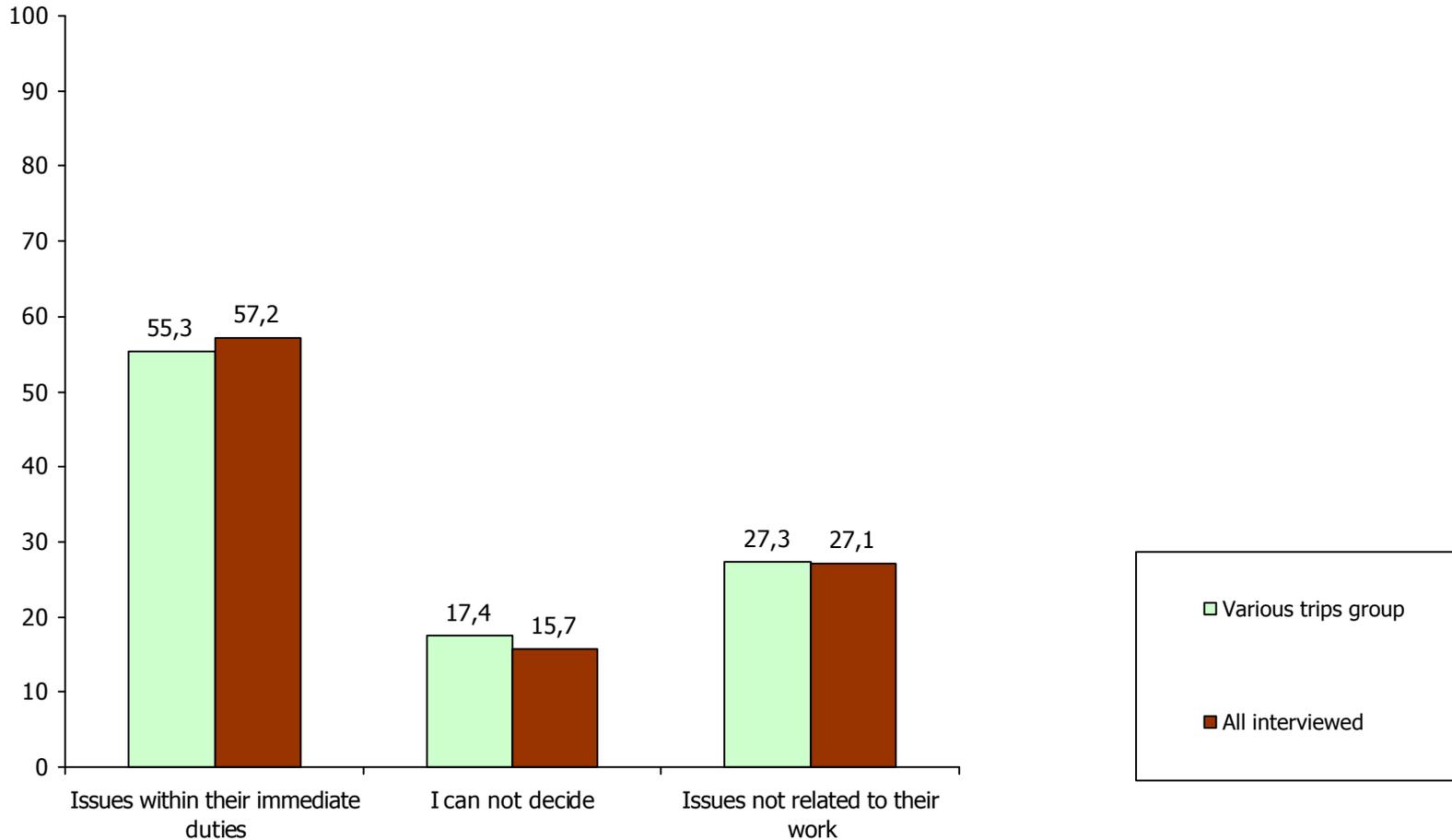
3.2.8 Attitudes to the Dining Facilities

What types of dining facilities do you visit?

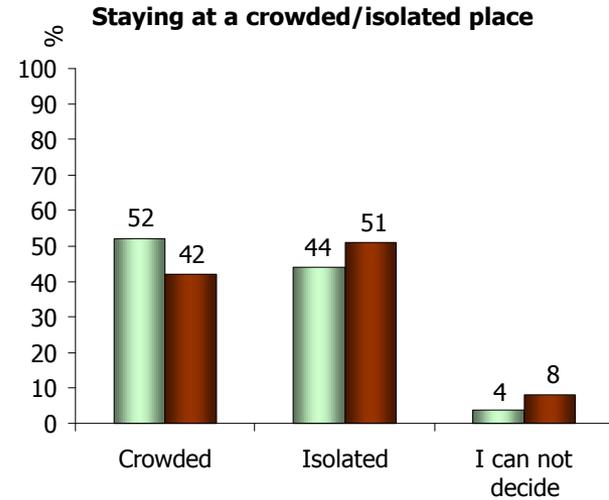
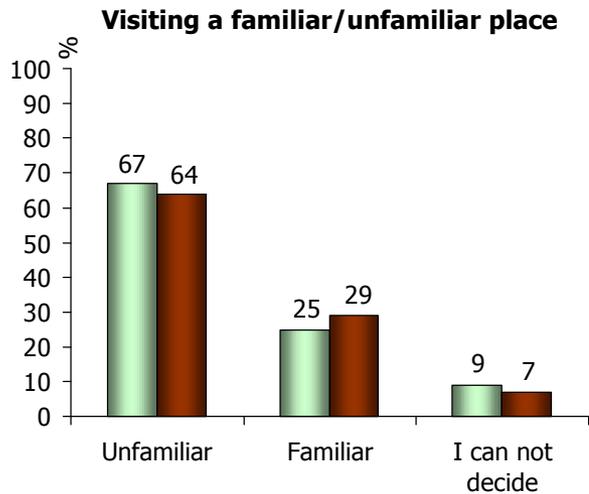
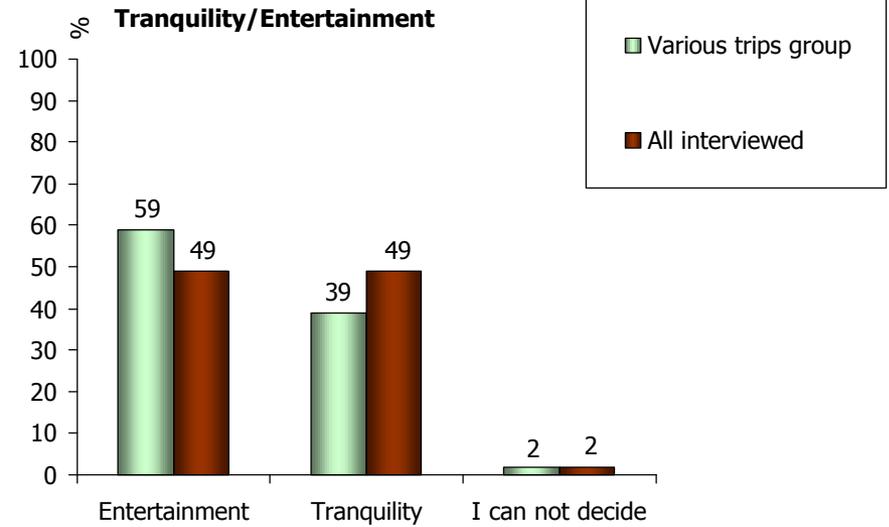
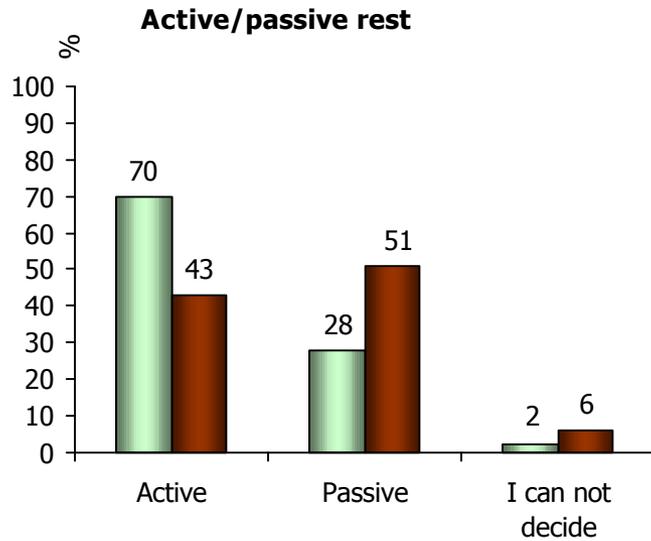
	Various trips group %	All interviewed %
Restaurant	53,7	37,3
Tavern	34,4	27,5
Beer-house	22,4	27,5
Pub	23,5	22,7
Fast-food dining facility	46,1	35,3
Chinese restaurant	52,6	31,2
Serbian restaurant	5,5	6,5
Pizza restaurant	54,9	39,0
Other	1,3	2,0
No response	2,3	18,5

3.2.9 Attitudes to the Relations with the Staff

On what issues is it admissible for the staff to talk to the visitors?

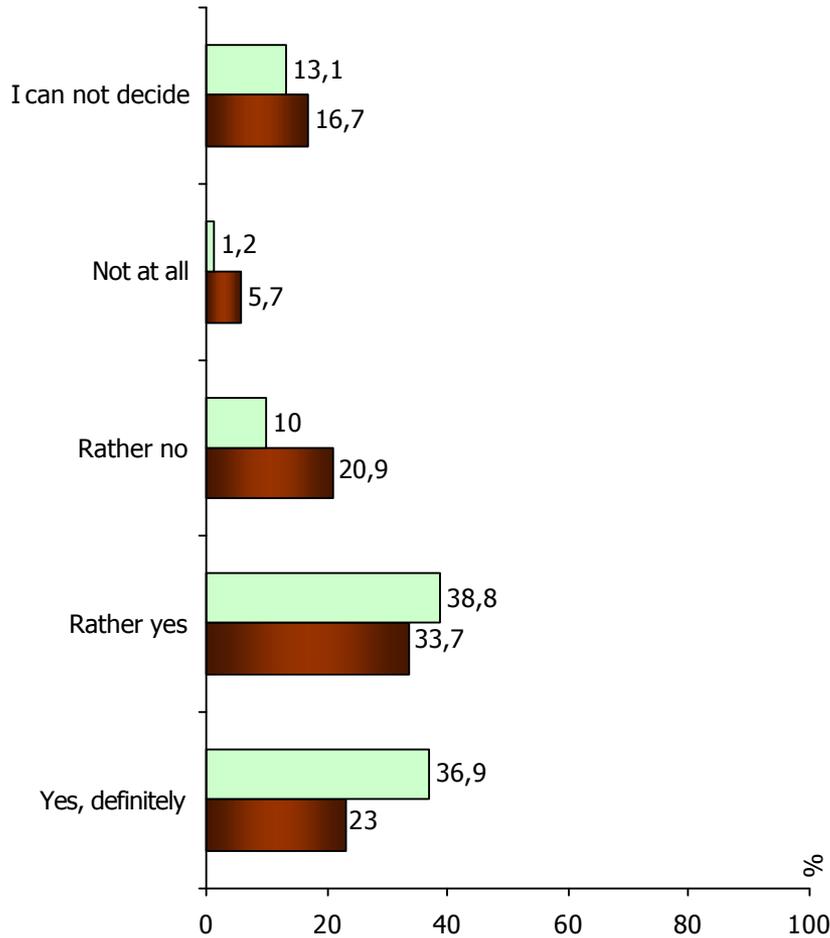


3.2.10 Ideas of a Holiday

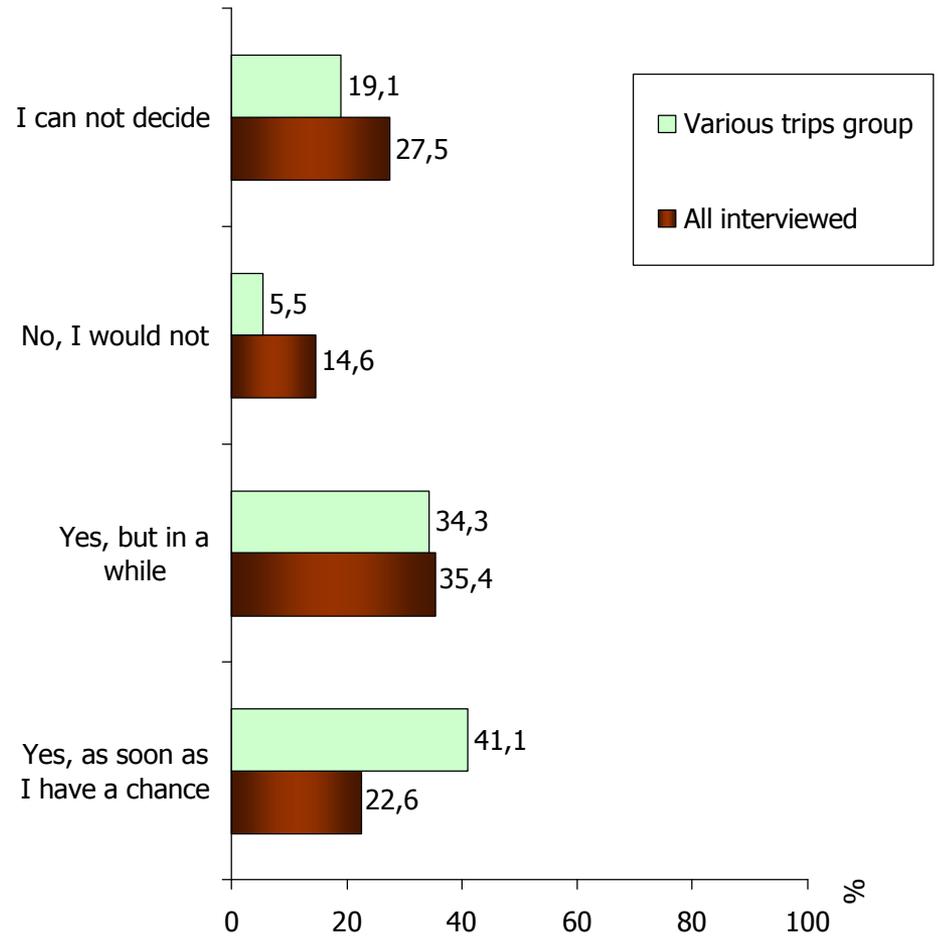


3.2.11 Attitudes to Ecotourism

Are you interested in ecotourism?

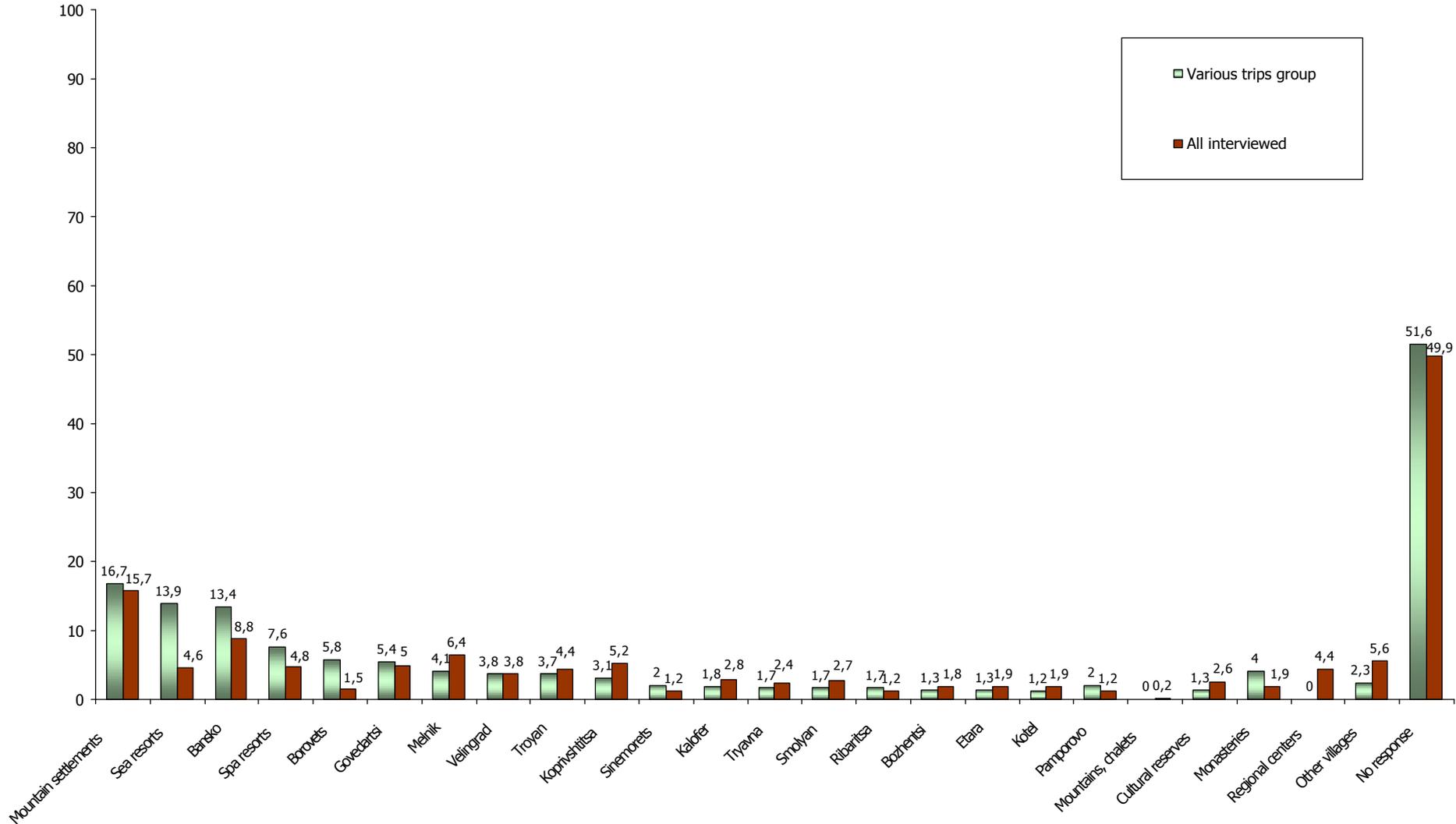


**Would you personally use an ecotourism product?
If yes – when?**



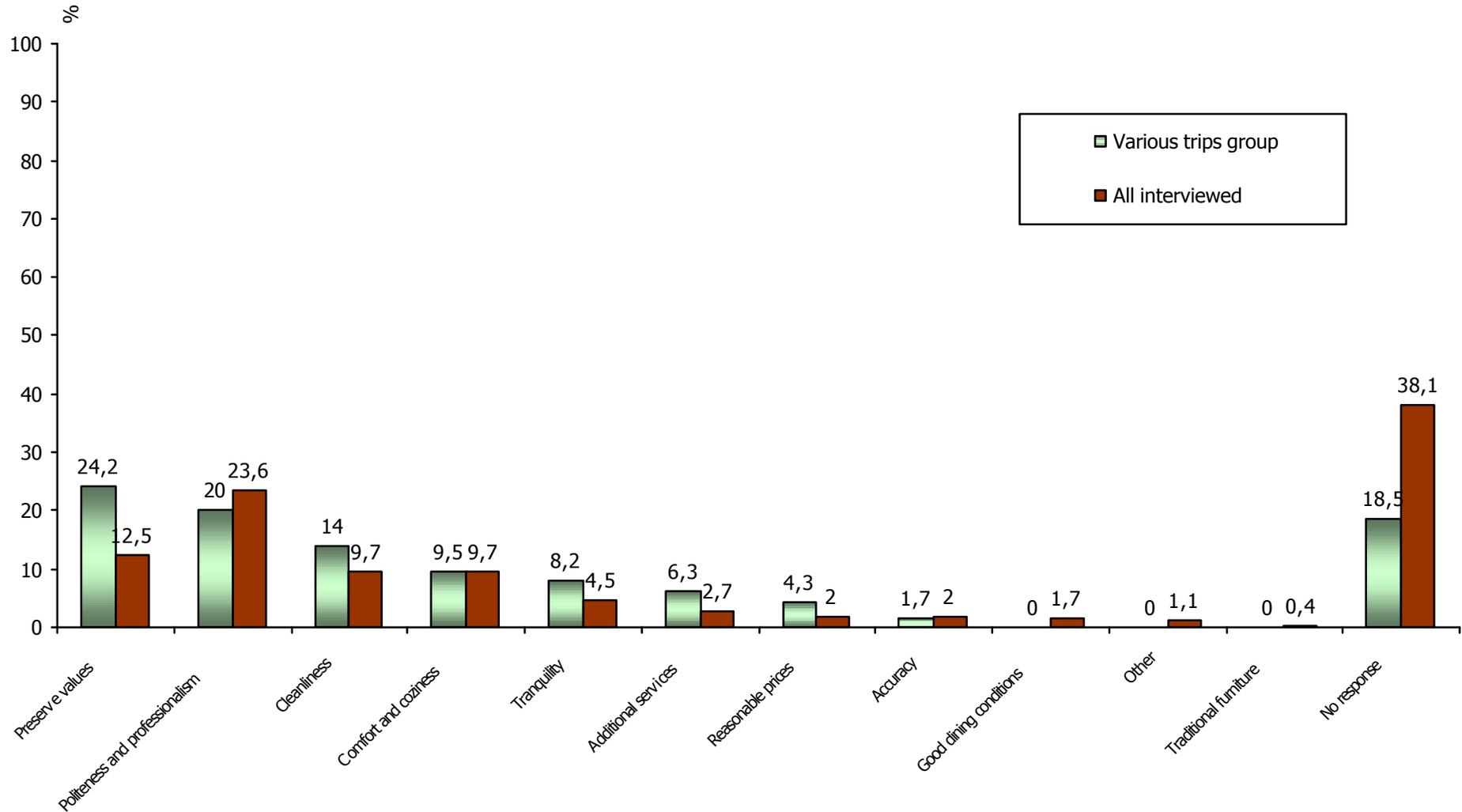
3.2.11 Attitudes to Ecotourism

**Can you list names of towns and villages, which you consider appropriate for ecotourism development?
(free listing)**



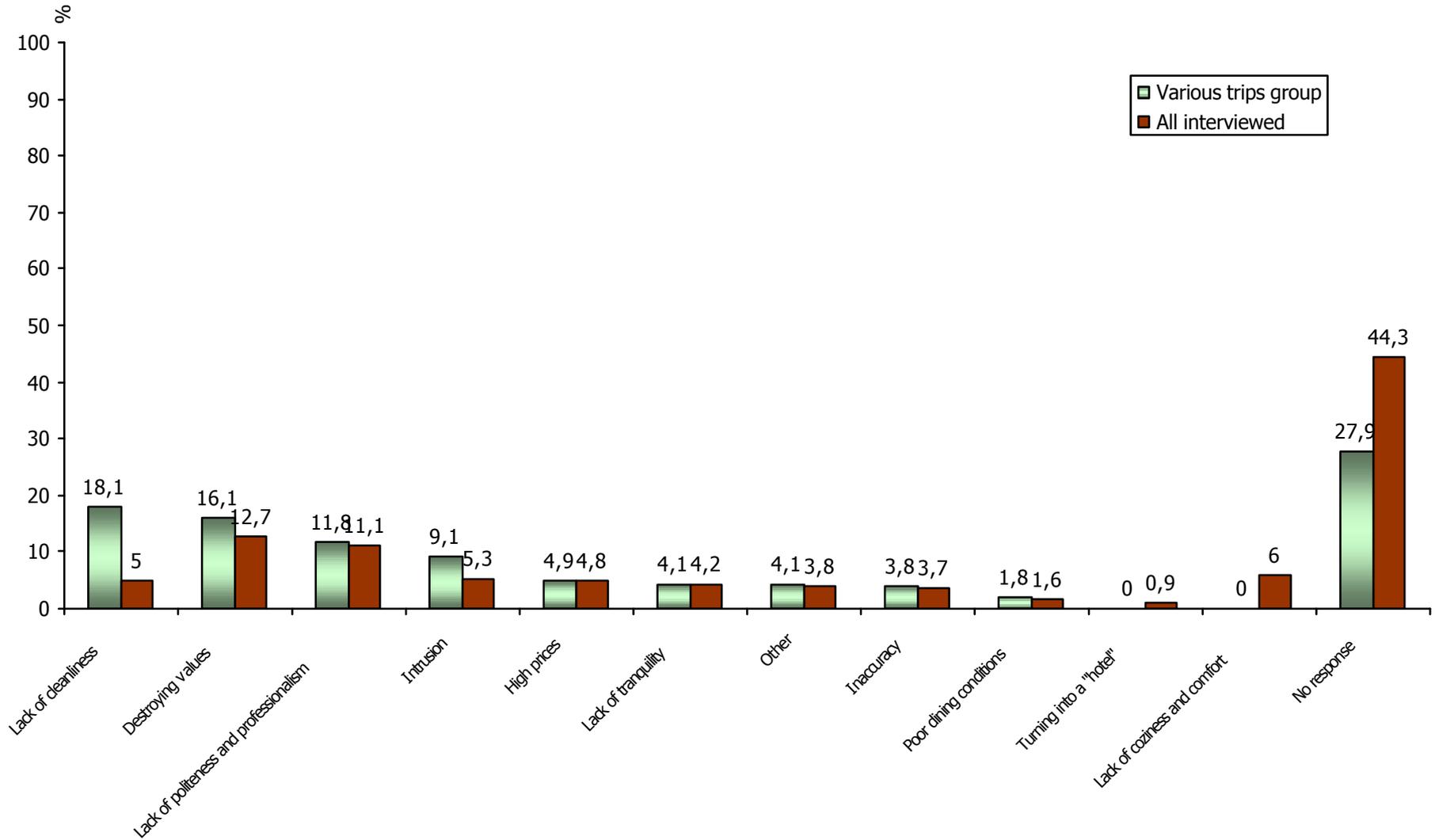
3.2.12 Recommendations to the Accommodation Facilities

What are the things that owners of accommodation facilities for ecotourists must do?



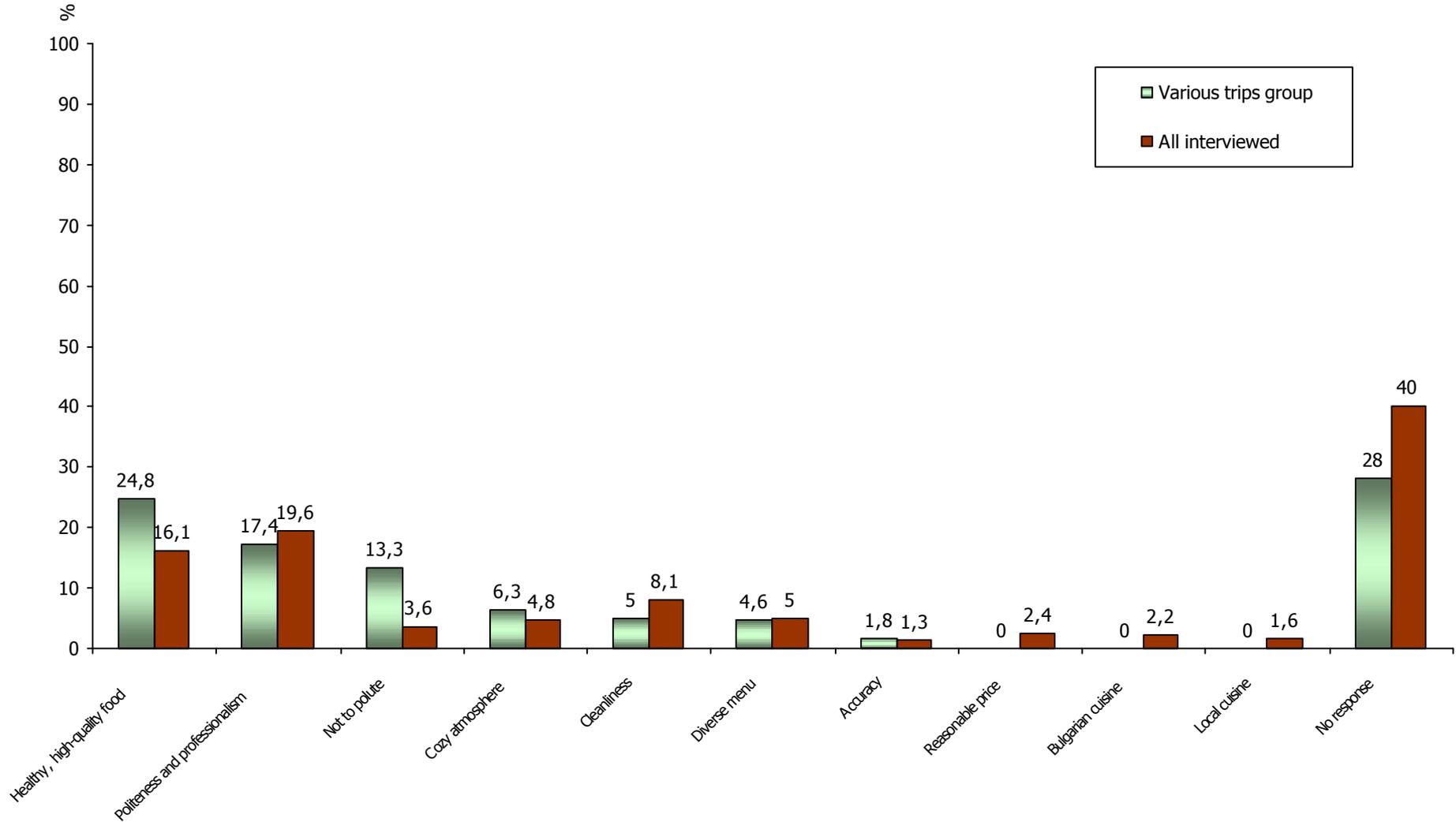
3.2.12 Recommendations to the Accommodation Facilities

What are the things that owners of accommodation facilities for ecotourists must never do?



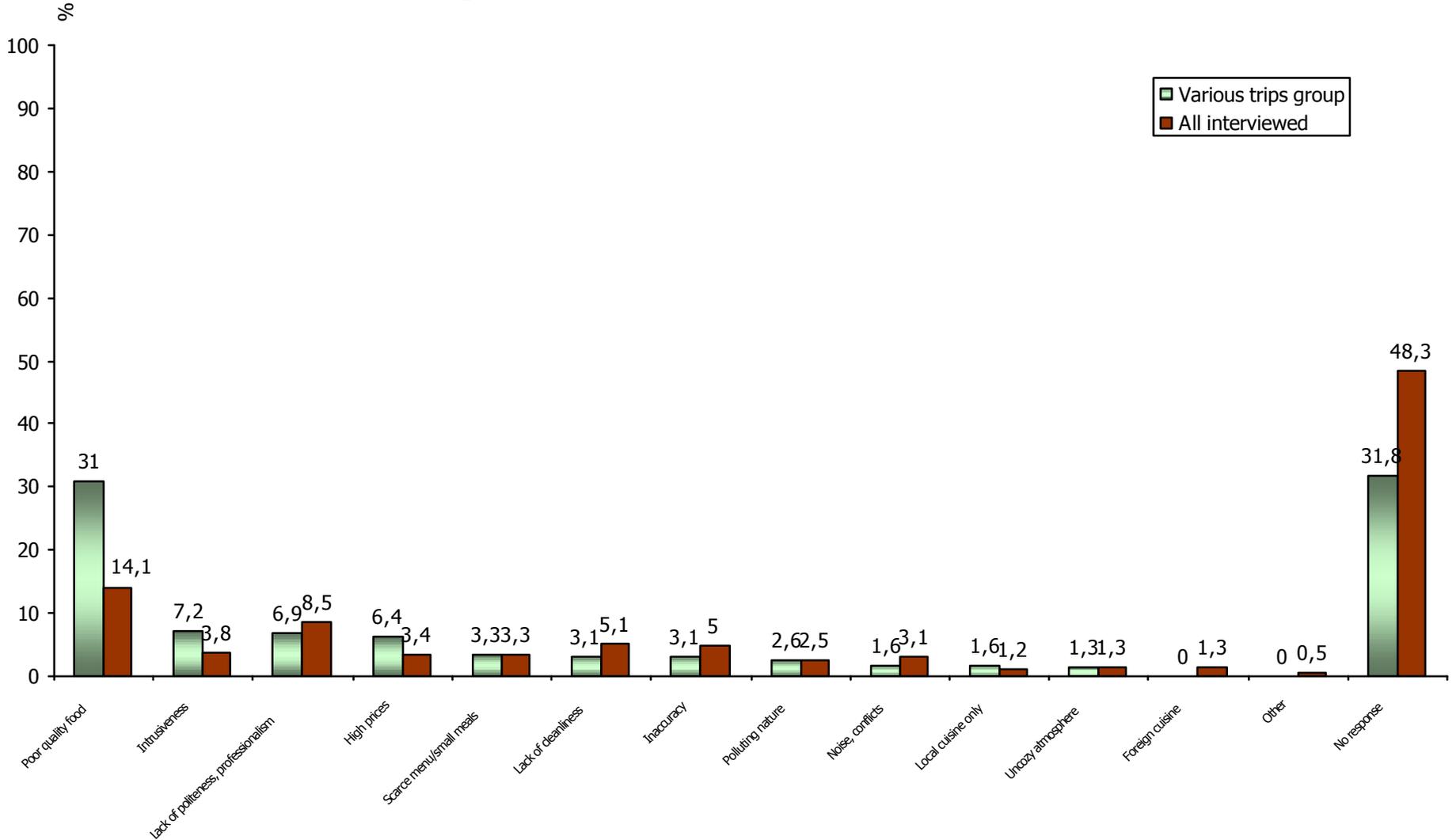
3.2.13 Recommendations to the Dining Facilities

What are the things that owners of restaurants visited by ecotourists must do?



3.2.13 Recommendations to the Dining Facilities

What are the things that owners of restaurants visited by ecotourists must never do?



3.2.14 Nature Attractions

Opportunities	Which of the following opportunities for entertaining introduction to local nature attractions would be of interest to you?		Which one of the following opportunities for entertaining introduction to local nature attractions is the most interesting to you?	
	Various trips group %	All interviewed %	Various trips group %	All interviewed %
Photo exposition on Bulgarian natural attractions	45.5	39.7	14.9	11.1
30 min film about Bulgarian nature	40.0	31.0	3.0	4.2
Lecture about natural attractions	27.1	29.7	5.0	3.9
One-day hiking excursion	71.4	62.2	21.7	23.9
Horseback ride	35.6	26.0	3.1	5.1
Wild animals and plant observation	78.8	59.9	6.3	8.1
Entertaining and educational activities for children in the nature (with or without parents)	30.1	32.5	9.8	9.5
Mountain sports	46.0	30.1	4.8	4.4
Spending the night in a tent in the open	42.2	34.2	2.3	5.6
Cave visit	61.3	47.9	17.1	9.0
Extreme guided routes	26.6	22.5	8.3	5.9
Purchasing souvenirs	37.8	46.3	0	5.9
Multimedia presentation of natural attractions	30.3	25.7	3.6	2.9
Other	0	1.0	0	0

3.2.14 Nature Attractions

How much would you pay for the opportunity for getting acquainted with natural attractions, which you are most interested in?

	Various trips group <i>Average amount in BGL</i>	All interviewed <i>Average amount in BGL</i>
Photo exposition on Bulgarian natural attractions	2.0	2.0
30 min film about Bulgarian nature	3.0	2.0
Lecture about natural attractions	2.0	2.0
One-day hiking excursion	5.0	10.0
Horseback ride	15.0	10.0
Wild animals and plant observation	5.0	5.0
Entertaining and educational activities for children in the nature (with or without parents)	5.0	5.0
Mountain sports	20.0	10.0
Spending the night in a tent in the open	5.0	10.0
Cave visit	5.0	5.0
Extreme guided routes	10.0	10.0
Purchasing souvenirs	0	5.0
Multimedia presentation of natural attractions	2.0	2.0

3.2.15 Cultural Attractions

Factors	Which one of the following opportunities for entertaining introduction to local culture and traditions is the most interesting to you?		Which of the following opportunities for entertaining introduction to local culture and traditions would be of interest to you?	
	Various trips group %	All interviewed %	Various trips group %	All interviewed %
Cultural and historical site visit	30.7	21.0	65.2	58.6
Craft-making observation	15.7	10.8	45.0	44.1
Participation in local traditional holidays and customs	15.7	11.0	48.5	40.8
Folklore performance	11.7	16.5	38.0	47.0
Local museum visit	8.9	16.1	64.8	58.1
Learning how to create crafts	5.8	5.6	13.4	19.8
Reproducing historic events	5.2	5.4	24.8	25.1
Learning how to prepare local cuisine	3.0	8.9	20.1	31.0
Other	1.9	0.5	1.8	0
Feeding livestock	1.7	1.5	11.7	11.8
Collecting fruits	0	2.7	14.5	19.9
No response	0	0	2.3	3.1

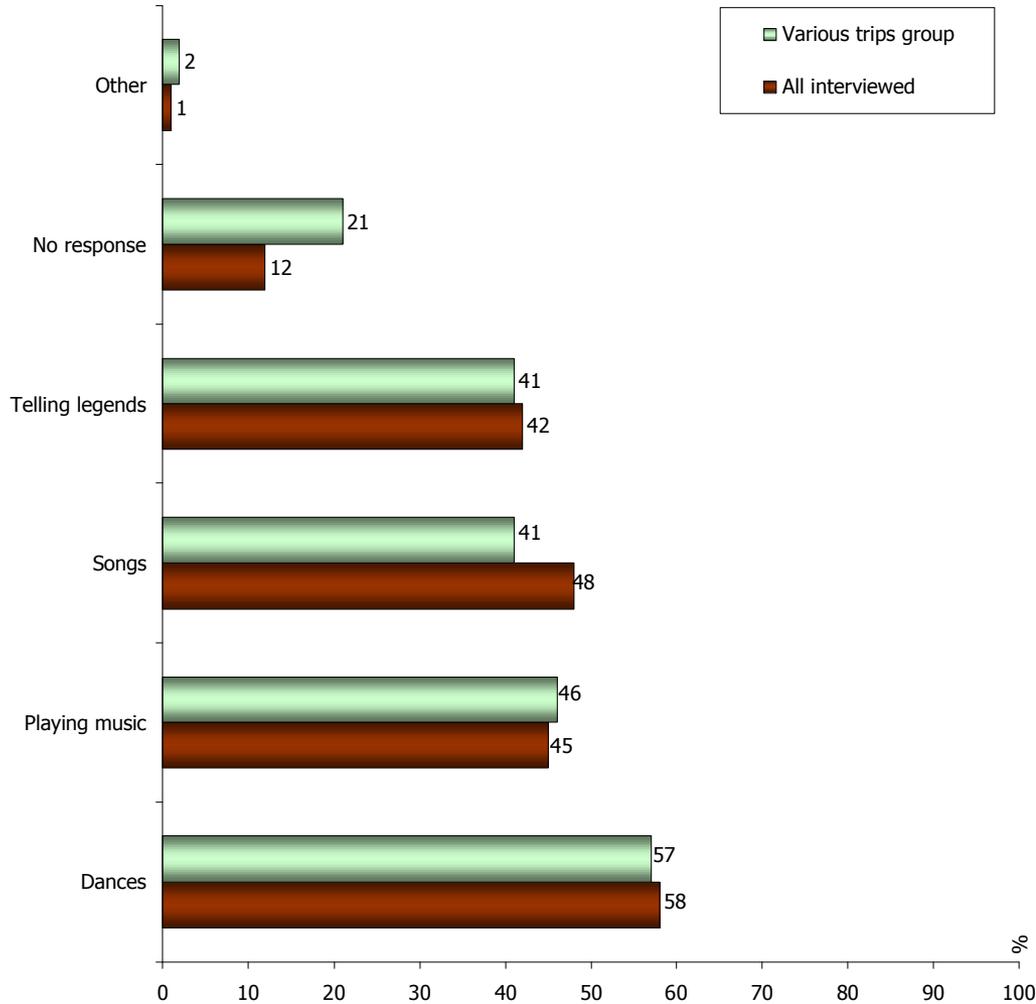
3.2.15 Cultural Attractions

How much would you pay for the opportunity for getting acquainted with the local culture and traditions, which you are most interested in?

	Various trips group <i>Average amount in BGL</i>	All interviewed <i>Average amount in BGL</i>
Folklore performance	2.0	2.0
Participation in local traditional holidays and customs	10.0	2.0
Craft-making observation	3.0	5.0
Learning how to create crafts	15.0	2.0
Local museum visit	1.0	2.0
Cultural and historical site visit	5.0	5.0
Reproducing historic events	5.0	5.0
Learning how to prepare local cuisine	5.0	10.0
Feeding livestock	2.0	2.0
Collection of fruits and vegetables	0	2.0

3.2.15 Cultural Attractions

Which of the following folklore performances would be of interest to you?



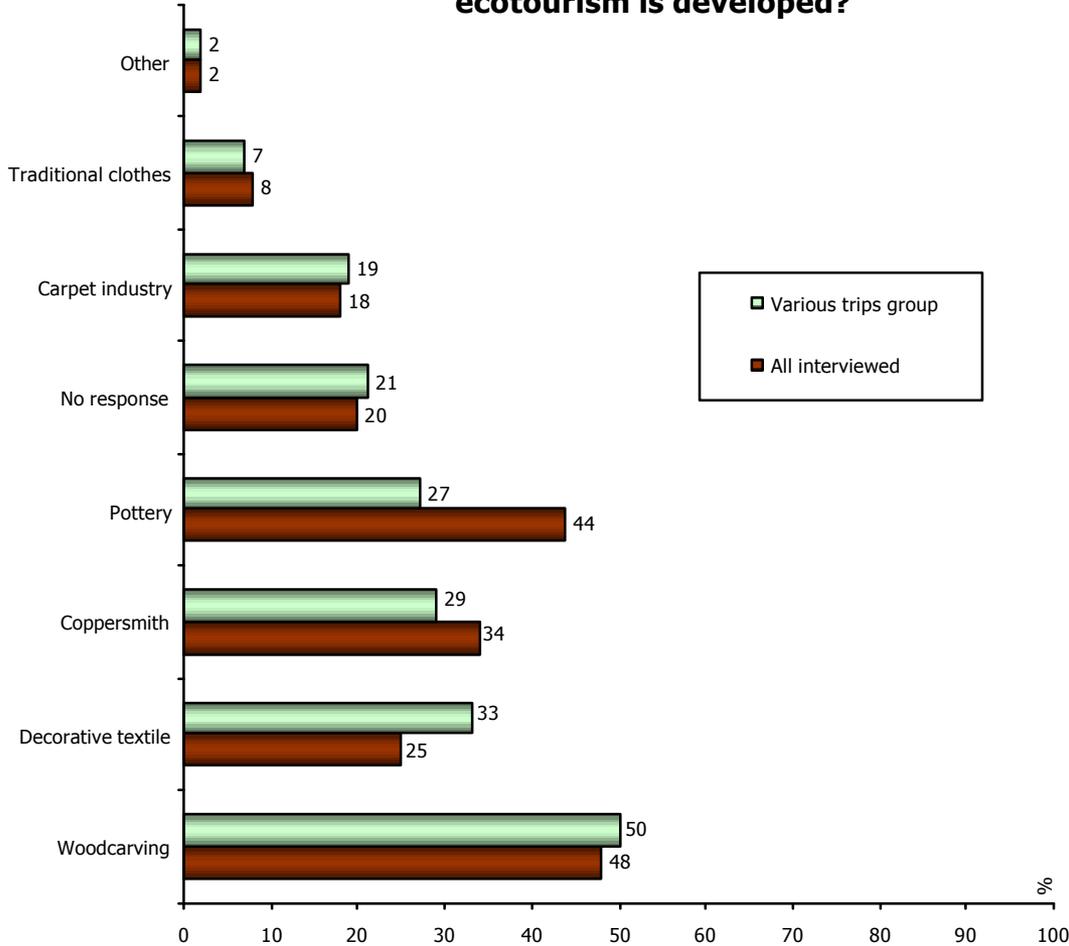
How much would you pay for the types of folklore performances that you are interested in?

Average amount in BGL

	Various trips group	All interviewed
Songs	2.0	2.0
Dances	2.0	2.0
Telling legends	2.0	2.0
Playing music	0	5.0
Other	0	2.0

3.2.15 Cultural Attractions

Which of the following arts' production would you purchase when visiting towns and villages where ecotourism is developed?



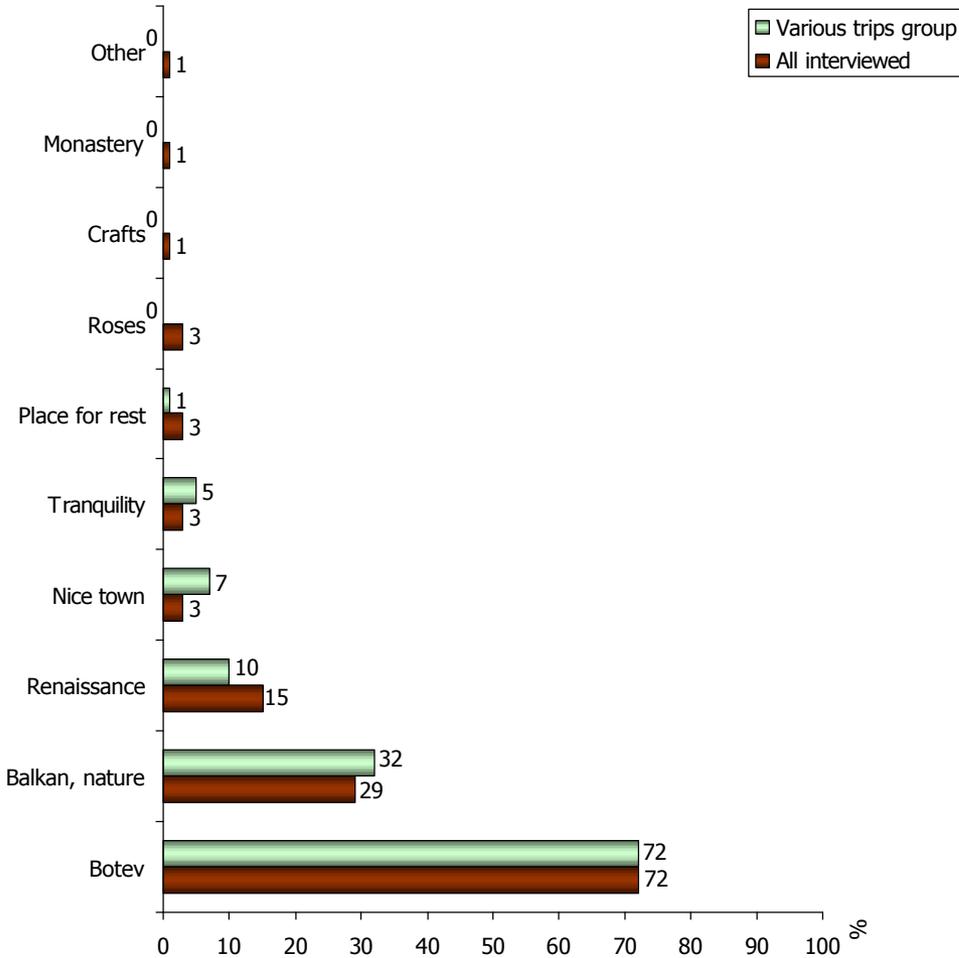
What amount of money would you spend on purchasing production of those arts?

Average amount in BGL

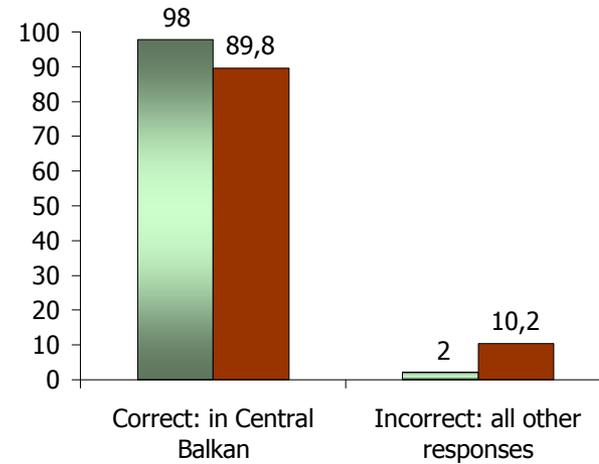
	Various trips group	All interviewed
Woodcarving	20.0	10.0
Pottery	10.0	10.0
Coppersmith	10.0	10.0
Carpet industry	100.0	100.0
Traditional clothes	100.0	10.0
Decorative textile	20.0	10.0
Other	5.0	5.0

3.2.16 Kalofer

**What is the first thing that comes to your mind about Kalofer?
What else?**

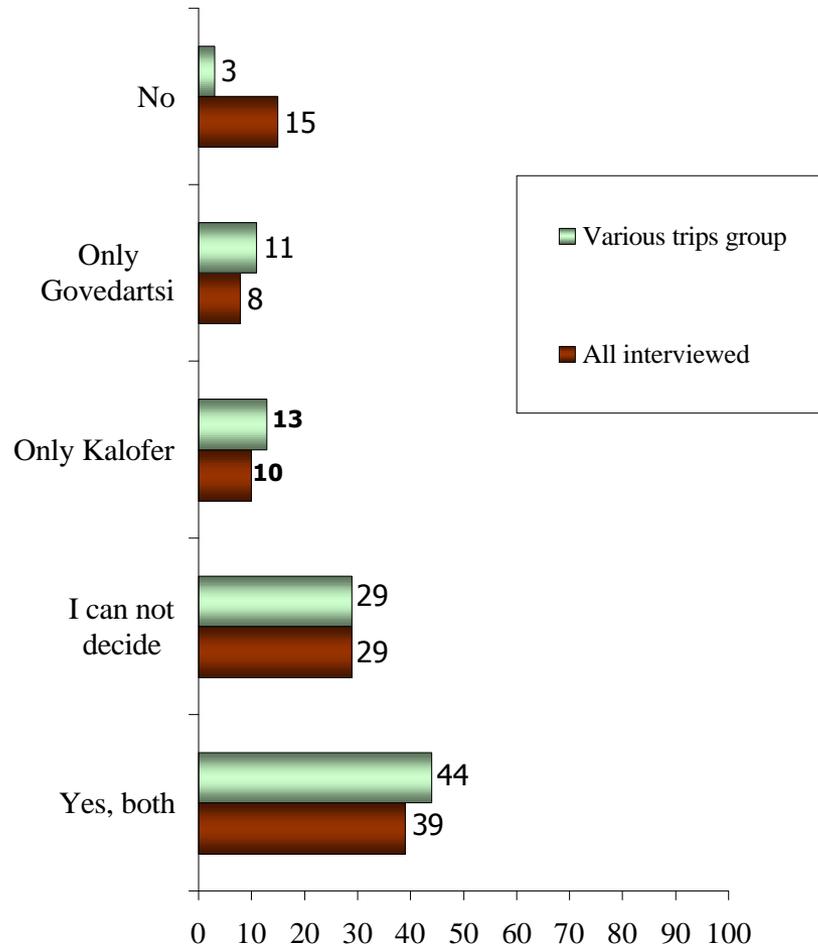


Do you know where Kalofer is located?



3.2.16 Kalofer

Would you visit Kalofer and/or Govedartsi?



Future trips to Kalofer

Average numbers

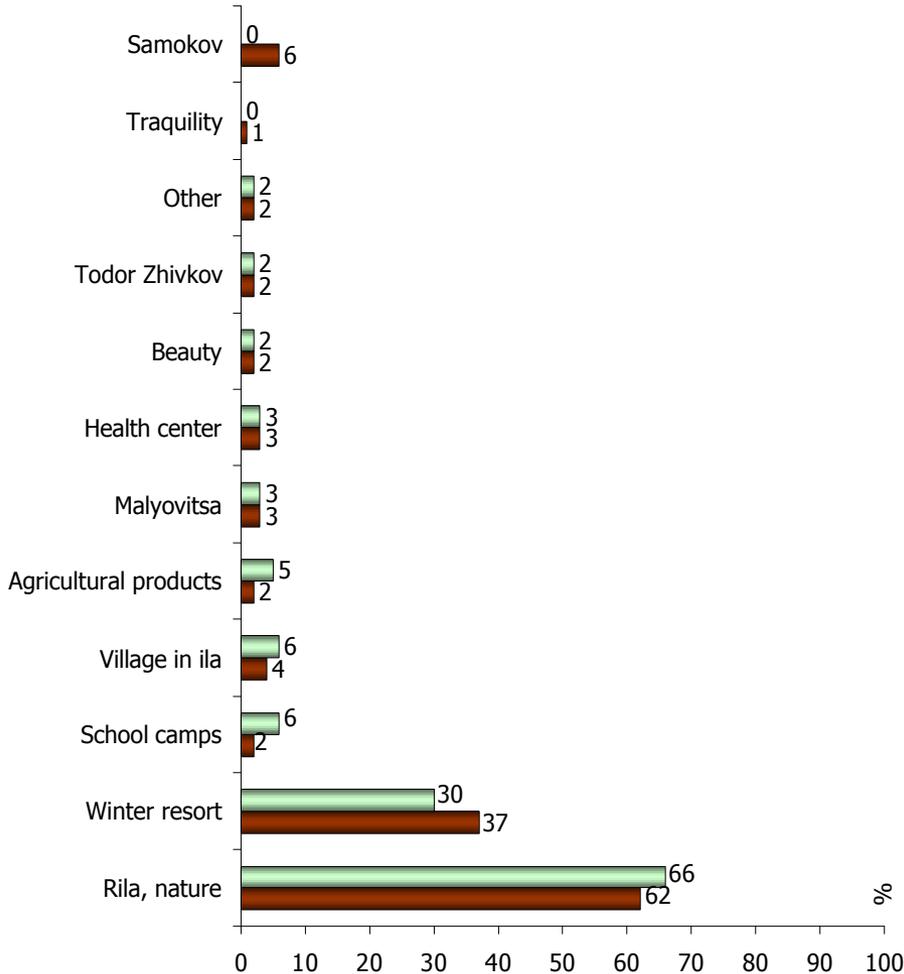
	Various trips group	All interviewed
Number of nights	3.3	3.8
Number of companions	2.2	2.5
Budget	135.4	128.3

3.2.16 Kalofer

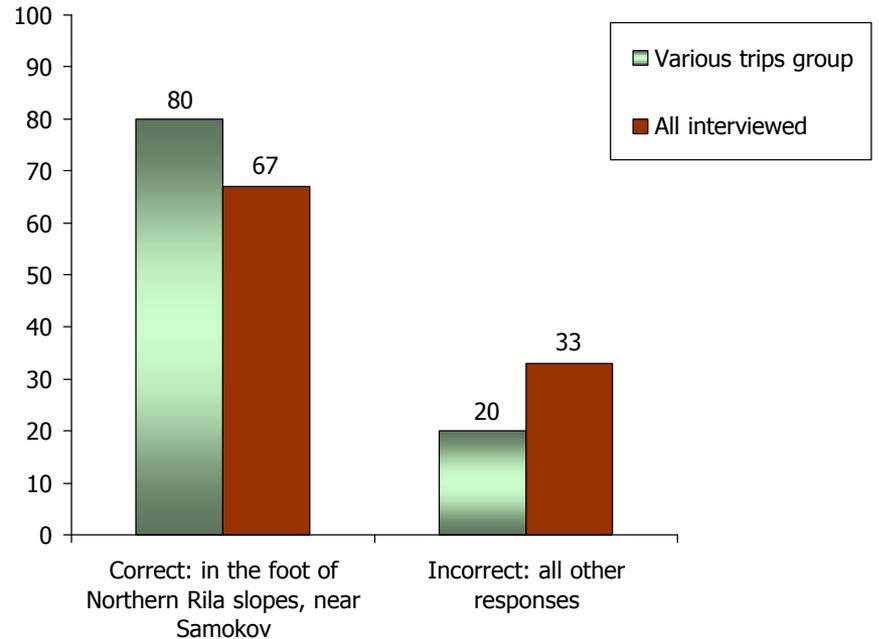
Factors	Which of the following activities can be practiced in Kalofer?	
	Various trips group %	All interviewed %
Mountain walking tours	84.4	76.5
Sunbathing	54.5	42.6
Swimming in rivers, lakes, sea	14.2	19.5
Fishing	17.8	20.5
Visiting restaurants, etc.	66.7	59.6
Visiting discos	31.3	34.2
Visiting churches and monasteries	50.9	50.4
Celebrating birthdays	32.0	33.3
Collecting mushrooms and herbs	40.7	43.4
Skiing, snowboarding	16.1	12.9
Tasting local dishes	33.3	43.2
Getting acquainted with traditional crafts	40.0	40.7
Getting acquainted with authentic folklore	36.2	38.6
Walks in the holiday location	78.5	65.9
Spending the night in a tent	29.5	31.5
Biking tours	19.6	14.6
Mountain biking	19.8	12.7
Winter walking tours with snowshoes	11.0	9.9
Extreme skiing	5.9	6.5
Delta-gliding / Paragliding	10.4	7.2
Rock climbing with/without a guide	18.3	14.1
Cave diving with/without a guide	10.7	7.9
No response	0	1.2

3.2.17 Govedartsi

What is the first thing that comes to your mind about Govedartsi? What else?

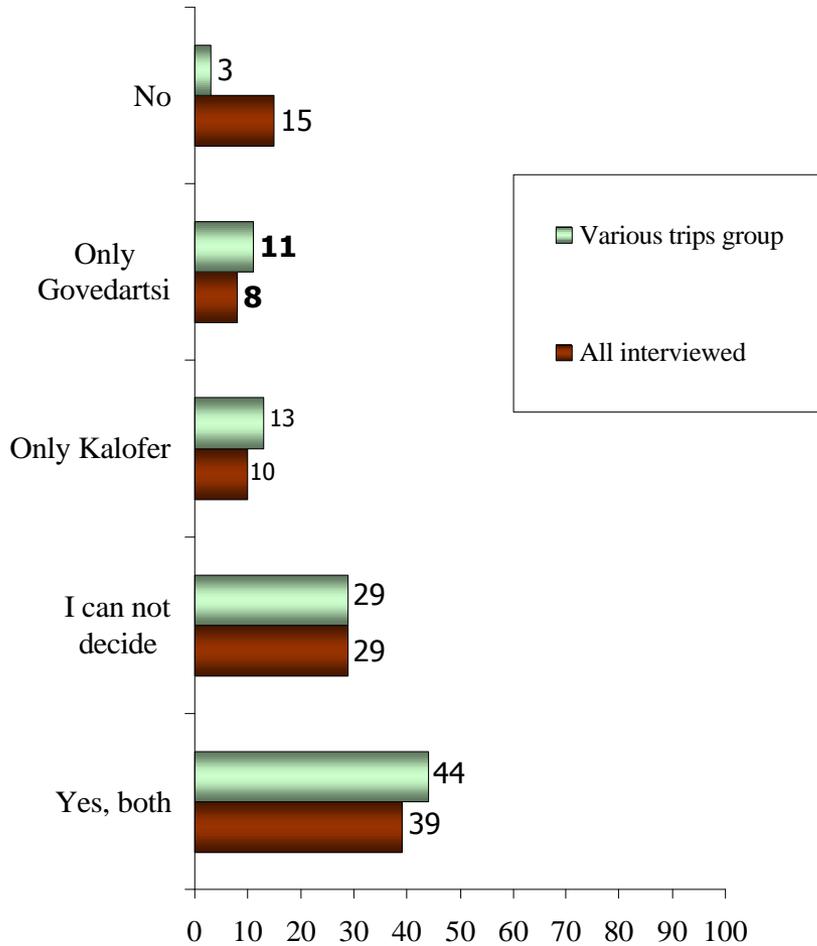


Do you know where Govedartsi is located?



3.2.17 Govedartsi

Would you visit Kalofer and/or Govedartsi?



Future trips to Govedartsi

Average numbers

	Various trips group	All interviewed
Number of nights	3.3	3.9
Number of companions	2.6	2.7
Budget	149.6	152.1

3.2.17 Govedartsi

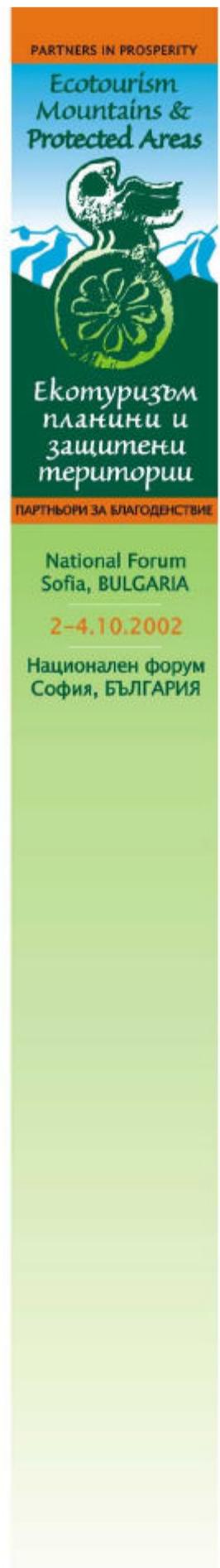
Factors	Which of the following activities can be practiced in Govedartsi?	
	Various trips group %	All interviewed %
Mountain walking tours	76.8	66.6
Sunbathing	42.7	26.7
Swimming in rivers, lakes, sea	16.1	14.1
Fishing	13.4	11.7
Visiting restaurants, etc.	42.6	31.8
Visiting discos	11.8	12.7
Visiting churches and monasteries	17.8	14.3
Celebrating birthdays	20.5	13.5
Collecting herbs and mushrooms	31.1	28.3
Skiing, snowboarding	24.7	26.0
Tasting local dishes	23.2	
Getting acquainted with traditional crafts	17.1	11.8
Getting acquainted with authentic folklore	10.7	12.6
Walks in the holiday location	52.3	38.0
Spending the night in a tent	28.4	20.0
Biking tours	8.7	7.0
Mountain biking	7.0	6.3
Winter walking tours with snowshoes	22.5	17.5
Extreme skiing	26.7	17.4
Delta-gliding / Paragliding	4.5	6.4
Rock climbing with/without a guide	10.5	11.7
Cave diving with/without a guide	1.3	4.0
No response	7.0	16.5

**Perspectives for Ecotourism Products Development
in Bulgaria –An Analysis of Marketing Research
Results in Support of the Pilot Projects in the Kalofer
and Samokov Regions**

Plamen Vulchev, BCEG Project Consultant

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The opinions expressed herein are those of the author(s) and do not necessarily reflect the views of the U.S. Agency for International Development, or the views of the Government of Bulgaria.



Perspectives for Ecotourism Product Development in Bulgaria

Plamen Valchev

This paper focuses on market research results and findings in support of the Ecotourism Pilot Projects in the Kalofer and Samokov regions. It also identifies guidelines for the establishment of eco-tourist products.

The market research project included qualitative research, representative quantitative research and a survey of travel agents. This project was designed to obtain credible and reliable information on: current practices in pleasure/recreation trips among the population in the five largest Bulgarian cities; the role of travel agents in the domestic market, and perceptions of the market potential for the Kalofer and Samokov pilot regions. Survey information was used to propose guidelines for the establishment of eco-tourist products in the Kalofer and Samokov regions.

The domestic market for ecotourism in Bulgaria is still in an embryo state. Tourist products offered are based upon existing conditions at destinations and no effort is made to make them a marketable tourist product more in line with customer expectations. This survey found that the role and function of travel agents is marginal or token. The data also show that trips and journeys with paid overnights constitute a little over half of all trips taken. Six types of recreation journeys group were identified from the surveyed population. Of these, the varied journeys group, estimated at 140 000 people, is viewed as a promising target group for eco-tourist products. However, their level of satisfaction with hospitality services (accommodation and dining) is low. The development and market realization of ecotourist practices faces a paradoxical contradiction. While there is significant potential market for ecotourism, no market agent seems interested in investing in its development.

Creating a model of the ideal ecotourist destination is a useful tool for assessing current conditions and directing efforts towards the development and marketing of ecotourist products. The ideal ecotourist destination model is a creative synthesis of the attitudes and expectations of a promising target group with the internationally established concept of ecotourism. The development of an ideal ecotourist destination model begins with understanding that the natural assets of a region are one tool used by the travel agent for generating actual benefits that culminates in a certain experience for the.

It seems that potential consumers and eco-tourist product providers have quite different perceptions of the overall outlook and opportunities for ecotourism activities in the area of Kalofer and Samokov. Representatives of the promising target group identify Kalofer and Samokov as destinations meeting their basic criteria. On the other hand, the travel agents interviewed in this survey are ambivalent about the prospects for Kalofer and Samokov as tourism centers.

Ecotourist products developed in Kalofer and Samokov can meet world-recognized standards only at a total destination level, rather than that of individual businesses. Establishing the areas of Kalofer and Samokov as ecotourist destinations will require that all members of the local partnerships look beyond the limits of their own businesses and target their efforts at developing an overall tourist outlook for the two regions. Two essential actions have been identified: 1) development of destinations and 2) development of local businesses.

Perspectives for
Ecotourism Products Development in Bulgaria

Analysis of Marketing Research Results
in support of the
Pilot Projects in the Kalofer and Samokov Regions

Plamen Valchev, 2002

1. Research Project

The consistent development of relevant Bulgarian legislation has enabled the establishment of an extensive network of protected areas. An important goal of the national parks, embodied in legislation, is to assist in the development of ecotourist products and activities. This goal is consistently implemented through the management plans. Management plans for Rila and Central Balkan National Parks are being implemented. A management plan for Pirin National Park is in preparation.

However, a much more complex set of reasons determine the primary importance of developing ecotourism. Municipalities and gateway communities around the national parks are experiencing serious financial troubles. The successful development of ecotourism may not only provide a boost to the local economy, but it may turn environmental conservation into a factor of prosperity.

This project included:

- Qualitative research
- Representative quantitative research
- Survey of tourist operators

that provided credible and reliable information on the following:

- What are current recreation journey practices?
- What is the role of travel agents in the domestic market?
- What are the prospects for eco-tourist products in the domestic tourist market?
- How are the pilot regions of Kalofer and Samokov perceived and what is their market potential?
- What are the guidelines for creating and establishing eco-tourist products?

The survey targeted the populations of Sofia, Plovdiv, Varna, Bourgas, and Stara Zagora.

2. Present situation

The domestic market in Bulgaria is still in embryo state.

- Tourist products offered are based upon existing conditions of destinations and no effort is made to make them a marketable tourist product more in line with customer expectations.
- The role and function of travel agents is marginal or token.
- Trips and journeys including paid overnights constitute a little over half of all trips taken.
- The level of satisfaction with hospitality services is low.

2.1. Tourist products market: profile of customers

71.4 percent of the research population traveled for pleasure/recreation during 2001. Patterns of mobility vary within a wide range. Vacationing at the seaside corresponds to a normal, regular level of mobility. Higher levels of mobility are reflected in additional trips and journeys of varying duration, with and without paid overnights. At lower mobility levels the seaside vacation component is absent and trips tend to be short or same-day (not including paid overnights). In recent years, a stronger penchant for diversity combined with more substantial means among vacationers makes it more likely that the seaside vacation would be dropped from holiday plans in favor of other pursuits.

Six groups of pleasure travelers have been identified:

The varied journeys group. People with a preference for varied journeys are those who show the highest degree of mobility. Depending on the duration of individual journeys, the mean number of trips taken in this group per annum is 20 and 50 percent higher than the research population average. Characteristic of this group are trips taken for mountain hiking, skiing, or visits to churches and monasteries. Leading criteria in the choice of destinations are the attractive price, the presence of scenic natural landmarks and the possibility to ski (See Tables of the Appendices 1, 2 & 3).

The same-day (no overnights) and long journeys group. This group also reports relatively high mobility. The mean number of same-day trips per annum is 20 per cent lower; yet the number of journeys of different duration is 10 percent higher than the research population average. Members of this group report different combinations of same-day (no overnight) trips, journeys of 1 to 3 overnights without payment, and longer journeys including larger numbers of paid overnights. Characteristic of this group are trips for a specific purpose, whether hiking or fishing. Leading criteria in the choice of destination are the attractive price and the possibility for quality entertainment.

The short trips group. As a whole, this group displays a lower than average degree of mobility. The mean number of trips, not including overnights, for this group is 30 percent higher, while trips with different numbers of overnights is 10 to 25 percent lower than the research population average. Members of the group report journeys of 1 to 3 paid overnights, as well as longer journeys with free overnights. Characteristic of this group is travel mostly to engage in typical seaside activities: swimming, sunbathing, etc. Leading criteria in the choice of destinations are the attractive price and the opportunity for new experiences.

The long journeys group. This group as a whole is less mobile than the overall research population. The mean number of trips of different duration taken per annum is 10 and 30 percent lower than the population average. Members of this group report journeys of 1 to 3 free overnights, as well as longer journeys with paid overnights. Characteristic of this group is travel mostly to engage in typical seaside activities: sunbathing, swimming/sea bathing. Leading criteria in the choice of destinations are the attractive price and the possibility to take the kids along.

The free overnights group. This group displays a high level of mobility, with the mean number of trips per annum 10 to 30 percent higher than the research population average. Characteristic of this group is that its members do not report any specific activities as the reason for taking the trip. The leading criterion in selecting a destination is the attractive price.

The same-day trips (no overnights) group. This is probably the least mobile of all groups within the research population. The mean number of trips, not including overnights, is 2.2 per annum, which is 10 percent lower than the research population average. At the same time, this is the only kind of trip respondents from this group will ever take. Characteristic of this group are trips specifically for activities such as walks, mountain hikes, or sunbathing. The leading criterion in the choice of a destination is the attractive price.

2.2. Tourist product market: profile of travel agents

The typical travel agency is a small outfit. At present, only a small fraction of travel agents run their business solely by tapping the resources of the domestic tourist market. Most travel agents rely on marketing Bulgarian destinations to foreign clients or foreign destinations to Bulgarians, or a combination of both. In parallel with this there is a tendency towards specialization by generically defined types of destination.

The decision of a travel agent to market any particular destination is based upon whether or not the destination consistently meets the following criteria:

- Profitability;
- Natural landmarks and scenery;
- Accommodation with all conveniences and amenities;
- A variety of eateries and cultural sites;
- Roads in good condition.

The primary function of travel agents is to market tourist packages to established resort destinations. Hotel bookings, guided tours and ticket sales are lower on their lists of services.

Travel agents show little or no sign of any consistent effort at innovation and the development of new tourist products.

- The products on offer are all developed around traditional activities: sunbathing; swimming in the sea, in rivers and lakes; visits to restaurants; visits to churches and monasteries; tasting culinary delicacies, and skiing.
- Travel agents are not markedly pro-active in seeking new information. On the contrary, they seem to share the belief that whatever there is to be known in this line of work is already known.

3. Prerequisites for development of eco-tourism products in Bulgaria

The development and market realization of ecotourist practices faces a paradoxical contradiction. While there is significant potential market for ecotourism, no marketing agent seems interested in investing in its development.

3.1. Potential Market

The Varied Journeys Group emerges as a promising target for the marketing of ecotourist products.

- The activities practiced by members of this group, as well as the criteria applied in the choice of destination, approximate considerably the standards of ecotourism (Appendices 2 and 3).
- The group displays a very high level of interest in tourist products related to protected areas, and a willingness to buy and use them once they are available.
- The group shows a high degree of sensitivity to environmental conservation issues.

- The varied journeys group numbers no fewer than 140,000 people. During the year 2001, they took 300,000 pleasure trips in Bulgaria with 1 and 3 overnights, 170,000 trips with 4 to 6 overnights, and 180,000 trips with 7 overnights or more.

The remaining five groups of pleasure travelers not seen as promising participants in ecotourism, for one or more of the following reasons:

- Lack of interest;
- Lack of willingness to use ecotourist products;
- Preferred activities are inconsistent with the spirit and standards of ecotourism.

3.2. Potential eco-tourist providers

Travel agents are barely aware of ecotourism as either a concept or practice. Almost two-thirds of all travel agents polled report unfamiliarity with ecotourism. Different responses identify ecotourism as a destination with certain attributes. The agents surveyed do not readily recognize the educational component and the environmental regeneration and conservation of natural resources components of ecotourism.

Travel agents are of two minds about the existence of marketable ecotourist destinations. Where conditions are seen as favorable, the hospitality infrastructure is inadequate or missing and the roads are bad.

Typically the interest of travel agents lies, at best, with passively marketing ecotourist products rather than actively developing them.

4. The ideal eco-tourist destination

Creating a model of the ideal ecotourist destination is a useful tool for assessing current conditions and directing efforts towards the development and marketing of ecotourist products. The finished ecotourist product can therefore be regarded as a close approximation of the ideal model.

The ideal ecotourist destination model is the creative synthesis of the attitudes and expectations of a promising target group and the internationally established concept of ecotourism. In the future, eco-tourism in Bulgaria could develop in a number of directions.

The development of an ideal ecotourist destination begins with understanding that the natural assets of a region are one tool used by the tourist operator for generating actual benefits that culminates in a certain experience for the tourist. The elements of a tourist destination can be viewed from the standpoint of conditions offered as well as experience generated.

4.1. General attributes

In every detail of the ideal ecotourist destination there should be persistent observation and application of the following principles: purity, discovery, simplicity, and conservation.

Purity. A key ingredient for any ecotourist destination, purity has many layers of meaning. Purity means cleanliness and hygiene. Purity means order. Purity is about the persistent and systematic imposition and maintenance of good hygiene and order. Purity means affability with a focus on the guests to come. Purity means festivity.

Discovery. The eco-tourist destination is meant to be a place for exploration. Each visitor should have an immediate impression that they are in a special place. Discovery is sought not only in the unique natural assets but also in the whole atmosphere and design of the individual components of the tourist service.

Simplicity. An ecotourist seeks the essentials of an area’s natural assets and simplicity in their accommodations and food. A host needs to concentrate on the essentials and eliminate anything that can be done without while still retaining the essence of the special place.

Conservation. People who operate and market a tourist destination should have conservation of the area’s natural and cultural assets as part of their mission.

4.2. Destination Attributes

Attributes of experience	Attributes of conditions
<p><u>Activity</u> – time is insufficient for all possible, modern and varied activities,</p> <p><u>Actuality</u> – “a place we tend to talk about when we meet people”</p>	<p><u>Mountain settlement</u>, a place with a well-preserved cultural and historic heritage, presence of mineral waters/river/lakes surrounded by picturesque landscapes</p>

4.3. Accommodation

Attributes of experience	Attributes of conditions
<p><u>Solitude</u> – “no one and nothing can intrude on my personal space without my permission”</p> <p>A <u>care-free attitude</u> – “I don’t have to make any efforts to get what I want, it’s enough just to ask”</p>	<p><u>Family hotel</u> – a place where you stay with a family without having to enter into any closer relationships with them</p> <p><u>Room with separate bathroom</u>, big and comfortable beds, children friendly environment, breakfast</p> <p><u>Price</u> - in congruence with the offered product</p>

4.4. Dining

Attributes of experience	Attributes of conditions
<p><u>Diversity</u> – “I want to try more things than I can eat”</p>	<p><u>Cozy place</u> – undisturbed stay,</p> <p><u>Healthy diet</u> – freshly prepared, high quality products, low-fat and low-calories food,</p> <p><u>Price</u> in congruence with the product and services offered</p>

4.5. Attractions

Ideally an eco-tourist destination in Bulgaria would offer the following attractions, specially packaged for tourists:

- mountain hikes
- bike tours
- open-air overnights

- tours for picking fungi and medical plants
- culinary specialties
- visit to churches and monasteries
- visits to cultural and historical sites
- introduction to local crafts
- participation in traditional festivities
- “green” schools

5. Kalofer and Samokov Regions

Potential providers as well as consumers of ecotourist products have a very different outlook on the possibilities for practicing specific activities in Kalofer and Govedartzi.

5.1. Varied Journeys Group as potential visitors of Kalofer and Samokov

This group, identified as a promising target in terms of ecotourism, sees both Kalofer and Samokov as destinations meeting their basic criteria.

Among respondents, Kalofer evokes images of the birthplace of the Bulgarian revolutionary hero Hristo Botev, as a neat, tidy and hospitable town at the foothills of the Balkans. It also evokes expectations of excellent opportunities for: mountain hikes, sunbathing, visits to churches and monasteries, gathering herbs and mushrooms, observing traditional arts and crafts, studying authentic folklore, and cycling.

Samokov, in turn, is regarded as a typical mountain township and a winter resort at the foot of Rila Mountain. Respondents see opportunities for: mountain hikes, sunbathing, gathering of herbs and mushrooms, camping, skiing and extreme downhill sports, and winter hikes.

A visit to either Kalofer or Samokov is most likely to take the form of a short trip.

If the ecotourist product is developed consistent with market standards, the varied journeys group has the potential to generate between 13,000 and 45,000 visitors annually to Kalofer and Samokov combined, over a 5-year period. Based on a conservative estimate, such a tourist influx is capable of injecting between 700 thousand and 2.5m leva into the local economy annually (approx. 350 000 – 1 250 000 EURO).

5.2. Kalofer and Samokov as potential destinations for travel agents

Travel agents are ambivalent and generally reserved about the potential of Kalofer and Samokov as major tourist destinations.

While Kalofer is largely seen as a suitable destination for cultural tourism, Samokov has an image as a winter ski resort.

The natural assets of both places are appreciated. At the same time, travel agents identify their remoteness from established tourist routes, the absence of hospitality infrastructure, the poor level of training of hotel and restaurant staff, the bad roads and insufficient publicity as drawbacks to marketing them as tourist destinations.

Commitments by major travel agencies to establishing Kalofer and Samokov as tourist destinations can only come as a result of consistent and purposeful efforts at improving the tourist hospitality infrastructure as such and building market confidence.

5.3. SWOT

An analysis of the strengths and weaknesses, and threats and opportunities reveals objective factors that will inevitably underlie any consistent efforts to develop ecotourist products in the areas of Kalofer and Samokov. The actual situation is seen and analyzed from the perspective of the world outlook and expectations of the most promising target group. The parameters for the development and marketing of an ecotourist product in these two pilot areas are identified at the intersection of the ideal model and reality.

<p><u>Strengths</u></p> <ul style="list-style-type: none"> - Natural sites - Historic and cultural heritage - Traditional festivals - Local participants 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> - destinations insufficiently established - lack of proper tourist atmosphere in townships and villages - underdeveloped hospitality infrastructure - no attractions
<p><u>Opportunities</u></p> <ul style="list-style-type: none"> - considerable untapped market potential - absence of any identifiable competitor - partnership with National Parks - availability of expert and financial assistance 	<p><u>Threats</u></p> <ul style="list-style-type: none"> - Management not up to existing challenges

6. Guidelines for establishing Kalofer and Samokov regions as eco-tourist destinations

The compilation and analysis of the survey data provide a good basis for identifying guidelines for action towards establishing the Kalofer and Samokov regions as eco-tourist destinations. The data are also useful for building an information distribution system and developing a promotion program of the eco-tourist products.

Ecotourist products developed in Kalofer and Samokov are able to meet world-recognized standards only at a total destination level, rather than that of individual businesses. This consideration should be kept in mind when designing ways to best capitalize on the strengths and take advantage of the opportunities, while rectifying the weaknesses and avoiding the threats. Establishing the areas of Kalofer and Samokov as ecotourist destinations would require that all members of the local partnerships look beyond the limits of their own businesses and target their efforts at developing an overall tourist outlook for the two regions. Two essential actions have been identified: 1) Development of destinations, and 2) Development of businesses

6.1. Development of Destinations

The actions needed to establish the Kalofer and Samokov regions as eco-tourist centers are of great significance. Developing the all-round tourist profile for these regions is a necessary

prerequisite for local businesses' growth that could result in increasing their value, convertibility and market potential. At the same time efforts to optimize the all-round profile of a village or township pose the real challenge, as they require the formation of shared values and a common willingness for joint action. In the interim, development of the Kalofer and Samokov regions as tourist destinations requires the attainment of 4 essential goals:

Objective 1

Active involvement of the economically vital part of the community and their commitment to making the populated place a center of ecotourism.

Objective 2.

Joint efforts in developing an all-round tourist profile of the community

Objective 3.

Achieving integrated business collaboration between local participants and their partners.

Objective 4.

Establishment and affirmation of an attractive public image of the Kalofer and Samokov areas

6.2. Businesses development

The objective of all business development should be the persistent emulation and approximation of an established ideal model of an ecotourist destination. In light of the insufficiently crystallized tourist profile for these destinations and the unlikelihood of positive change in the short-term, expectations for bringing businesses up to the desired ideal as a result of radical restructuring are unrealistic. It may even be unjustifiably risky given the potential for delayed return on investments.

Given the existing circumstances, the optimum business development process should include the following:

Stage 1. Adoption of the four principles: purity, simplicity, conservation, and discovery.

Stage 2 Implementation of these principles within the framework of existing conditions.

Stage 3. Improvement in accommodation and dining infrastructure

State 4. Approximation of the ideal ecotourist model

This would happen as the ecotourism product is fine-tuned, gradually arriving at 85% of the ideal design.

6.3. Distribution and promotion.

The distribution of tourist services offered in the areas of Kalofer and Samokov (excluding Borovetz) can be defined as direct/passive. The proper marketing of ecotourist products presupposes organizing and extending the channels of distribution. Active direct marketing is the most promising principal form of distribution, and passive indirect marketing is an appropriate auxiliary form of distribution.

Appendices

Table 1. Mean number of recreation journeys in 2001 by groups

Group	No overnight	1 – 3 overnights		4 – 6 overnights		7 or more overnights	
		paid	free	paid	free	paid	free
Varied journeys	2.6	2.2	2.2	1.2	1.3	1.3	1.4
Same-day (no overnights) trips and long journeys	2.1	*	2.4	1.2	1.3	1.1	1.2
Short trips	3.2	1.4	1.5	*	1.0	*	1.0
Long journeys	*	*	2.3	1.1	1.2	1.0	1.0
Same-day trips	2.2	*	*	*	*	*	*
Trips not including paid overnights	2.3	*	3.0	*	1.5	*	1.4
Total	2.4	1.5	2.3	1.0	1.3	1.1	1.3

Table 2. Typical activities practiced by group of travelers on pleasure trips

Group	Main Reasons for Trip	Additional Activities
Varied journeys	<ul style="list-style-type: none"> • Mountain hikes • Skiing • Visits to churches and monasteries 	<ul style="list-style-type: none"> • Visits to restaurants • Sunbathing • Bathing in sea etc. • Walks • Culinary specialties • Fishing • Camping out
Same-day (no overnights) trips and long journeys	<ul style="list-style-type: none"> • Mountain hikes • Fishing 	<ul style="list-style-type: none"> • Sunbathing • Bathing in sea etc. • Visits to restaurants • Culinary specialties • Walks • Gathering of herbs and mushrooms
Short trips	<ul style="list-style-type: none"> • Sunbathing • Bathing in sea etc. 	<ul style="list-style-type: none"> • Visits to restaurants • Discos • Walks • Culinary specialties • Mountain hikes • Camping out
Long journeys	<ul style="list-style-type: none"> • Sunbathing • Bathing in sea etc. 	<ul style="list-style-type: none"> • Visits to restaurants • Walks
Same-day trips	<ul style="list-style-type: none"> • Walks • Sunbathing • Mountain hikes 	<ul style="list-style-type: none"> • Visits to churches and monasteries • Feasting • Gathering of herbs and mushrooms • Culinary specialties
Trips not including paid overnights		<ul style="list-style-type: none"> • Sunbathing • Walks • Feasting • Gathering herbs and mushrooms • Visits to restaurants • Discos • Culinary specialties

Table 3. Criteria for choosing destinations by recreation journey groups

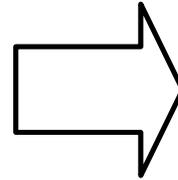
Group	Leading Criteria	Additional Criteria
Varied journeys	<ul style="list-style-type: none"> • Attractive price • Natural landmarks and scenery • Cleanliness 	<ul style="list-style-type: none"> • Rich entertainment opportunities • Possibilities for practicing sports • New experiences • Good accommodation conditions • A variety of restaurants • Good roads
Same-day (no overnights) trips and long journeys	<ul style="list-style-type: none"> • Attractive price • Rich entertainment opportunities • Peace and quiet • Good accommodation conditions 	<ul style="list-style-type: none"> • Natural landmarks and scenery • New experiences • Good conditions for children • A variety of restaurants
Short trips	<ul style="list-style-type: none"> • Attractive price • New experiences • Sea-bathing/sunbathing (beach) 	<ul style="list-style-type: none"> • Rich entertainment opportunities • <i>“Visited by guys just like me”</i> • Possibilities for practicing sports • Good accommodation conditions • A variety of restaurants
Long journeys	<ul style="list-style-type: none"> • Attractive price • Possibilities for taking kids along • <i>“Visited by guys just like me”</i> 	<ul style="list-style-type: none"> • Natural landmarks and scenery • Rich entertainment opportunities • Good accommodation conditions • A variety of restaurants • Good roads
Trips not including paid overnights	<ul style="list-style-type: none"> • Attractive price 	<ul style="list-style-type: none"> • <i>“Visited by guys just like me”</i> • Natural landmarks and scenery • Peace and quiet • New experiences • Good conditions for children • Possibilities for practicing sports • Good accommodation conditions • A variety of restaurants • Good roads
Same-day trips	<ul style="list-style-type: none"> • Attractive price 	<ul style="list-style-type: none"> • Natural landmarks and scenery • Peace and quiet • New experiences • <i>“Visited by guys just like me”</i>

Perspectives on Ecotourism Development in Bulgaria

Plamen Vulchev

Survey Program

- Predominant types of trips for recreation
- Role of travel agents in the domestic market
- Prospects for ecotourism products in the domestic market
- Market potential of the Kalofer and Samokov pilot areas
- Guidelines for recognition of ecotourism products

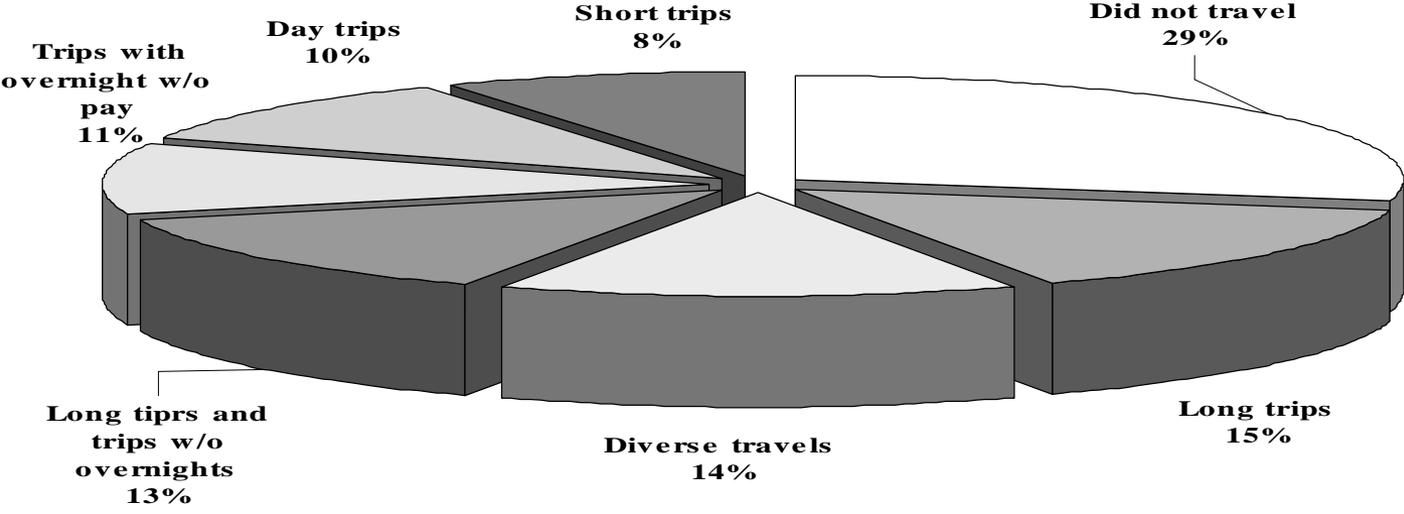


- **Qualitative survey**
- **Representative quantitative survey**
- **Survey among travel agents**

Market situation: general overview

- The proposed tourist products are based on the natural assets of the destinations
- The role and the activity of travel agents is insignificant
- Trips with a paid overnight represent a little more than one half of all recreation trips taken by people in Bulgaria's five largest cities
- Satisfaction with lodging and food services is low.

Tourist services market: consumers' profile



Base: All Interviewed People (448)

Tourist services market: providers' profile

- The typical travel agency is a small company.
- The domestic tourism market is an insignificant part of a travel agents business. The primary function of travel agents is to market tourist packages to established resort destinations. Hotel bookings, guided tours and ticket sales are lower on their lists of services.
- Selection criteria for marketing a destination:
 - Profit making opportunities*
 - Natural landmarks*
 - Lodging with all the conveniences*
 - Diverse restaurants and cultural sites*
 - Good roads*
- Travel agents show little or no sign of any consistent effort at innovation and the development of new tourist products.

Ecotourism perspectives

The development and market realization of ecotourist practices faces a paradoxical contradiction.

significant potential
market for
ecotourism

no marketing agent
interested in
investing in its
development.

Potential ecotourism market: Varied Journeys Group

- Size - over 140 000 people
- Numbers of trips taken for recreation in Bulgaria
 - *300 000 with 1 to 3 overnights,*
170 000 with 4 to 6 overnights and
180 000 with more than 7 overnights
- High degree of sensitivity to environmental conservation issues
- Activities practiced and the criteria applied in the choice of destination, approximate the standards of ecotourism
- Displays high level of interest in tourist products related to protected areas, and a willingness to buy and use them once they are available

Ecotourism potential: Potential provider

- Neither the meaning nor practice of ecotourism is well understood by travel agents
- Travel agents are of two minds about the existence of marketable ecotourist destinations. Where conditions are seen as favorable, the hospitality infrastructure is inadequate or missing and roads are bad.
- The travel agent's interest is focused primarily at passive distribution of ecotourism products.

The ideal ecotourism destination: General features

Purity

Discovery

Simplicity

Conservation

The ideal ecotourism destination: particularities

Features of the experience
<ul style="list-style-type: none">• Activity <i>There is not enough time to experience all new opportunities</i>• Actuality <i>A place people tend to talk about when meeting other people</i>

Features of the conditions
<ul style="list-style-type: none">• Mountain settlement <i>Well preserved cultural-historical heritage</i> <i>Mineral spas, rivers, lakes</i> <i>Surrounded by picturesque landscapes</i>

The ideal ecotourism destination: Lodging

Features of the experience

Solitude

“no one and nothing can intrude on my personal space without my permission”

•Carefree

Can have what one wants without any effort

Features of the conditions

• Family hotel

“I am guest of a family but I don't have to have to be very close to them”

• Room with bathroom

Large and comfortable beds, facilities for children, breakfast

• Price

In accordance with what is offered

The ideal ecotourism destination: Food

Features of the experience

- **Diversity**

Desire to try different kinds of dishes

Features of the conditions

- **Coziness**

Undisturbed stay

- **Healthy food**

Freshly prepared using high quality products and that are low-fat, low calorie

- **Price**

Corresponds to what is offered

The ideal ecotourism destination

Attractions

- Mountain trekking
- Mountain bikes tracks
- Overnights among nature
- Opportunities for picking herbs and mushrooms
- Culinary specialties
- Visits to churches and/or monasteries
- Visits to cultural- historical sites
- Introduction of crafts
- Participation in traditional celebrations
- Ecological “Green” schools