ЮБИЛЕЙНА МЕЖДУНАРОДНА НАУЧНО-ПРАКТИЧЕСКА КОНФЕРЕНЦИЯ

ТУРИЗМЪТ В ЕПОХА НА ПРЕХОДИ: ЗНАНИЯ, ПОЛИТИКИ И УСТОЙЧИВИ БИЗНЕС МОДЕЛИ

Сборник с доклади

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KEY CHALLENGES AFFECTING THE TOURISM SEASON IN 2026

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Abstract: The tourism industry in 2026 is shaped by a combination of economic, geopolitical, social, technological, and environmental challenges. Although global travel demand remains relatively strong, the sector is affected by slow economic growth, persistent inflation, and rising travel costs, which reduce consumer purchasing power and lead to shorter, more cost-conscious trips. At the same time, geopolitical instability and ongoing conflicts contribute to uncertainty, disrupt travel flows, and generate significant financial losses for tourism-dependent economies.

In Europe, tourism shows resilience, with high levels of travel intention, but travellers are becoming more selective, prioritising safety, affordability, and value for money. This results in shorter stays, tighter budgets, and a stronger focus on regional and domestic tourism. Southern Europe remains a leading destination, although competition among countries is increasing. The Bulgarian tourism sector reflects these global trends while facing additional challenges such as regional geopolitical risk perception, inflation-driven price increases, and limited air connectivity. Despite this, Bulgaria maintains competitiveness through its affordability, cultural heritage, and natural attractions, supporting demand in budget and mid-range segments. Overall, the 2026 tourism landscape is defined by a shift from growth-focused expansion to a more sustainable, resilient, and value-oriented model, driven by economic pressures, geopolitical uncertainty, and changing consumer behaviour.

Keywords: global tourism challenges, geopolitical instability, economic uncertainty sustainable development, digital transformation

Introduction

The global tourism industry in 2026 operates within an increasingly complex and interconnected environment shaped by persistent economic pressures, geopolitical instability, and accelerating structural transformation. Although international travel demand continues to demonstrate resilience, the sector is being redefined by slower global economic growth, rising inflation, shifting consumer behaviour, and widening disparities between high-end and mass tourism markets. These developments are further intensified by ongoing geopolitical tensions, climate-related risks, and rapid technological change, all of

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which are reshaping mobility patterns, destination competitiveness, and investment flows. In this context, tourism is no longer driven solely by volume growth, but increasingly by value creation, sustainability, and resilience. Destinations worldwide are adapting to changing demand patterns, where travellers are more cost-conscious, experience-oriented, and sensitive to safety and environmental concerns. At the same time, structural challenges such as labour shortages, infrastructure constraints, and uneven regional recovery continue to place additional pressure on the sector. Against this global backdrop, Europe remains one of the most resilient tourism regions, although it is not immune to economic and political uncertainties. Within Europe, countries such as Bulgaria illustrate how global trends translate into specific national challenges and opportunities, particularly in relation to competitiveness, affordability, and accessibility. Therefore, this paper examines the key political, economic, geopolitical, demographic, technological, and ecological challenges shaping the tourism industry in 2026, with a particular focus on their implications for global tourism dynamics, European travel behaviour, and the Bulgarian tourism sector.

1. Political and Economic challenges

In 2026, the tourism industry faces significant economic challenges driven by persistent inflation, high travel costs (transportation and accommodation), and reduced consumer discretionary income. While demand remains, price sensitivity is forcing tourists to shorten trips or seek value, impacting mid-scale markets, according to the 2026 Travel industry outlook. (Travel Industry Outlook, 2026) The eurozone economy is projected to grow by around 1.1% in 2026, supported by relatively resilient household demand and continued public investment support. Despite factors weighing down on the outlook—like renewed uncertainty around trade policy, particularly US tariffs, and escalating hostilities in the Middle East, which could keep energy prices higher for longer and weigh on confidence, real incomes, and input costs)—underlying domestic momentum appears robust enough to keep growth positive, albeit moderate. (Eurozone economic outlook, 2026)

The global economy has shown resilience, but the outlook remains clouded by trade tensions, fiscal strains and persistent uncertainty. Growth is expected to slow to 2.7% in 2026, below 2025 levels and the pre-pandemic average, as subdued investment and structural headwinds weigh on momentum despite easing inflation and monetary loosening. Without stronger policy coordination, today's pressures risk locking the world into a lower-growth path. Tight fiscal space, uneven disinflation and weakening multilateral cooperation are slowing progress towards the Sustainable Development Goals, particularly in developing and climate-vulnerable economies. (UN Trade and Development, 2026) The main findings can be summarized as follows: Global growth is slowing and remains uneven across regions. World output is projected to slow to 2.7% in 2026 before

edging up to 2.9% in 2027, still below the pre-pandemic average of 3.2%. While domestic demand and policy easing are supporting activity in the United States and parts of Asia, growth remains weak in Europe, and high debt and climate shocks continue to constrain many developing economies; Trade and investment face mounting headwinds. Global trade performed better than expected in 2025, driven by early shipments ahead of higher tariffs and robust services exports. But growth is projected to slow in 2026, as temporary drivers fade and trade barriers and policy uncertainty persist. Investment remains subdued in most regions; Inflation is easing, but the cost-of-living squeeze persists. Global headline inflation is projected to fall to 3.1% in 2026 from 3.4% in 2025. However, high prices continue to erode real incomes, particularly for low-income households, with food, energy and housing costs remaining a major source of pressure and inequality; Financial conditions have eased, but risks remain elevated. Lower interest rates and improved market sentiment have helped revive capital flows, but high asset valuations – particularly in AI-related sectors – and still-elevated borrowing costs continue to pose risks. Many developing economies remain constrained by heavy debt burdens and limited access to affordable finance. (UNCTAD, 2026)

These global political and economic developments have a direct impact on the tourism sector. As tourism depends heavily on consumer income, international mobility, and investment, slower economic growth and rising uncertainty are likely to reduce travel demand. Households and businesses may cut spending on tourism, leading to fewer international trips and a greater preference for shorter, cheaper, or domestic travel options. In addition, weaker global investment may slow the development of tourism infrastructure, hospitality services, and transport networks. Small tourism enterprises and developing destinations may face financial difficulties due to limited access to credit and rising operational costs. Climate change and environmental risks also present major challenges for tourism, as extreme weather events can affect the attractiveness and safety of many destinations. Despite these challenges, easing inflation and lower interest rates may provide some support for tourism recovery by improving consumer confidence and encouraging investment. However, the sector will need to adapt through innovation, sustainable development, digital transformation, and more flexible tourism services in order to remain competitive in an uncertain global environment.

In conclusion, the tourism industry is closely connected to global political and economic conditions. Current economic slowdowns, financial pressures, trade tensions, and climate-related challenges are shaping the future of tourism and forcing the sector to become more resilient, sustainable, and adaptable to changing global realities. These broader economic pressures are increasingly reflected in the structure and performance of the global tourism industry.

The travel and tourism landscape in 2026 is defined by a „K-shaped“ recovery, where high-end luxury travel remains robust while the mass market

faces significant pressure from economic, operational, and structural challenges. While travel demand remains resilient—with 82% of Europeans planning trips in spring/summer 2026, according to the European Travel Commission —travellers are becoming increasingly deal-sensitive and „smarter“ about their spending, as reported in 2026 Travel Demand Trends. (European Travel Commission, 2026), (The State of Travel Demand, 2026) Major constraints affecting the sector include rising operating costs, currency volatility, and geopolitical instability. (UN Tourism World Tourism Barometer, 2026) The key challenges shaping the tourism industry in 2026 include: *Cost of Living Squeeze and Inflation*: Elevated costs for food, energy, and travel services are eroding consumer purchasing power. Travelers are becoming more deal-sensitive, shifting demand from premium to budget-friendly options. (European Travel Commission, 2026); *Rising Operating Costs:* Businesses face increasing costs for labor, fuel, and insurance, squeezing profit margins and forcing higher prices. (Reuters, 2026); *Overtourism and Infrastructure Constraints:* Popular destinations are struggling with capacity limits, causing, as highlighted by The World Economic Forum, significant economic distortions in housing, infrastructure, and local economies; *Geopolitical Uncertainty*: Ongoing conflicts are disrupting travel patterns and, as described in the UN Tourism World Tourism Barometer, increasing volatility in energy prices, affecting transportation costs. (World Tourism Barometer, 2026); *Currency and Exchange Rate Volatility:* A strong US Dollar against other currencies changes the cost of travel, making international destinations, as discussed in 2026: Economy, Politics and the Implications for Travel, Tourism, more expensive for international travelers but potentially cheaper for US travelers, causing shifting demand patterns; *Labor Shortages:* The sector continues to face a shortage of staff, leading to rising wages and operational difficulties, as pointed out in the Top Tourism Industry Challenges in 2026 - Visit Mundus; *Outlook and Mitigation:* While premium, ultra-luxury segments remain resilient, the mass market faces limitations, and UN Trade and Development (UNCTAD) suggests that global economic growth is slowing. To manage this, the industry is increasingly focusing on digital transformation for operational efficiency and diversifying travel throughout the year to manage seasonality and overcrowding. (UNCTAD, 2026)

These global trends and challenges are not only shaping the international tourism industry but are also increasingly influencing regional tourism markets. In particular, Europe continues to demonstrate strong travel resilience despite ongoing economic pressures, changing consumer behavior, and financial uncertainty. Against this broader global backdrop, it is important to examine how these developments are affecting the European tourism sector and, more specifically, the tourism industry in Bulgaria.

Europeans’ intention to travel in spring and summer 2026 has reached its highest level since 2020, signalling strong resilience of the tourism sector despite ongoing economic and geopolitical pressures. According to the European Travel

Commission's latest Monitoring Sentiment for Intra-European Travel (Wave 24), 82% of Europeans plan to travel between April and September 2026, up significantly (+10%) compared to last year. Younger Europeans are playing a key role in driving this growth. Travel intentions among 18–34-year-olds have increased markedly, recording the strongest year-on-year rises across all age groups (+21% among 18–24s and +16% among 25–34s). (European Travel Commission, 2026) While travel sentiment is at record levels, Europeans are becoming more deliberate and selective in how they travel. In particular, travellers are planning shorter trips compared to last year. The most common stay is now 4 to 6 nights (38%, up 3%), while longer stays of 7 to 12 nights have declined (37%, down 5%). Budgets are also tightening. A growing share of travellers (+6%*) plan to dedicate a moderate budget of up to €1,000 per trip. At the same time, the proportion of higher-spending travellers has declined, with those budgeting €1,500 or more per trip down by 9% compared to last season. This shift reflects increased sensitivity to costs and a stronger focus on value for money. Geopolitical tensions and rising costs are increasingly influencing travel decisions. Safety has strengthened as the leading criterion when choosing a destination, cited by 22% of travellers, followed by pleasant and stable weather (15%) and attractive deals (14%). Concerns about rising trip costs remain the most prominent overall, affecting 20% of Europeans, while worries linked to tensions in the Middle East have increased sharply, rising by 9 percentage points to 18%.

With tighter budgets, travellers are prioritising spending on accommodation, followed by food and drinks and activities at the destination, while interest in luxury experiences has declined by 3% since last year. Europeans show a clear preference for travelling within Europe this summer (90%), with a growing share of travellers planning cross-border trips across the region (65%, up 4%). Interest in travelling to more distant European destinations is also increasing (+4%), nearly matching demand for neighbouring countries. Southern and Mediterranean Europe consolidate their position as the top choice for spring and summer holidays, recording a strong surge in demand (+17%) and attracting nearly 60% of travellers. Spain (14%) leads the ranking, followed by Italy (11%), France (8%), Greece and Portugal (both at 6%). These destinations continue to benefit from strong demand for sun-and-beach holidays, alongside culture and city experiences. At the same time, travel patterns are shifting, as multi-country trips are becoming less popular. In contrast, more travellers (+5%) are opting to visit multiple cities within one destination (42%), reflecting a growing preference for deeper exploration. Travellers are also planning fewer trips. 39% of Europeans intend to take only one trip in the next six months, up by 7% compared to last year, while the share planning to travel at least twice has declined to 57%. The findings point to a tourism landscape defined by strong demand alongside more cautious decision-making. While Europeans continue to prioritise travel, they are adapting their behaviour in response to economic pressures and geopolitical

uncertainty. (Monitoring Sentiment for Intra-European Travel Spring/Summer 2026)

In the context of these broader European tourism trends, the Bulgarian tourism sector is also being shaped by a combination of economic, political, and external global factors. Although Bulgaria continues to benefit from its position as an emerging and relatively affordable destination within Europe, several structural and external pressures are increasingly influencing its tourism performance and competitiveness. Political instability in the wider region, combined with ongoing geopolitical tensions and the war in Ukraine, continues to affect perceptions of safety and regional stability. While Bulgaria remains geographically close to the conflict area, it has so far maintained a relatively stable tourism environment; however, uncertainty in the region continues to influence international traveller confidence and risk perception, particularly among long-haul markets (UNWTO, 2026). At the same time, rising prices represent a significant challenge for the Bulgarian tourism industry. Inflationary pressures on food, energy, and accommodation costs have led to higher prices across the hospitality sector, reducing the traditional price advantage that Bulgaria has held compared to other European destinations. This is particularly critical for the mass tourism segment, which is highly price-sensitive (World Bank, 2026). In addition, the cost of air travel remains a limiting factor for inbound tourism. Higher fuel prices, increased operational costs for airlines, and limited direct flight connections to certain markets have contributed to more expensive and less convenient travel options. This particularly affects Bulgaria's accessibility from Western Europe, where price competitiveness is a key determinant of destination choice (IATA, 2026). These challenges are further reinforced by global economic uncertainty and changing consumer behavior, as travellers increasingly prioritize value for money, safety, and convenience when selecting destinations (European Travel Commission, 2026). As a result, Bulgaria faces growing competition not only from established European destinations but also from alternative low-cost and short-haul travel options. Despite these constraints, Bulgaria retains important competitive advantages, including its relatively low cost of living compared to Western Europe, rich cultural and historical heritage, and diverse natural resources such as the Black Sea coast and mountain resorts. These factors continue to support demand, particularly in the budget and mid-range tourism segments (Ministry of Tourism of Bulgaria, 2026). Overall, the Bulgarian tourism sector is operating in a complex environment shaped by geopolitical instability, inflation, rising travel costs, and changing global demand patterns. In order to remain competitive, the industry will need to focus on improving connectivity, enhancing service quality, and developing more sustainable and higher-value tourism products.

2. Geopolitical and Security Challenges

Geopolitical instability from ongoing military crises worldwide adds a critical layer of risk to tourism challenges, disrupting travel flows, airspace access, and perceptions of safety while amplifying existing demographic, technological, and ecological pressures (World Economic Forum, 2025–2026; United Nations World Tourism Organization, 2025). This comprehensive framework integrates all core challenges into a logical sequence: starting with sudden-onset geopolitical shocks that exacerbate labor shortages and seasonality, drive rapid technological adaptations for resilience, and intensify ecological strains from diverted demand.

Military conflicts, civil unrest, and hybrid threats (e.g., cyberattacks, energy disruptions) trigger immediate travel advisories, airspace closures, and risk aversion, often causing 70-90% drops in tourist arrivals, billions in revenue losses, and long-term destination stigmatization (European Travel Commission, 2025; United Nations World Tourism Organization, 2025). Refugee influxes strain local resources, while diverted demand creates both opportunities and overloads elsewhere.

The global examples outline some of the leading challenges towards season 2026. The Ukraine-Russia Conflict (Ongoing 2022-2026) resulted in Ukraine's tourism sector collapse of over 90% post-airspace closure (European Travel Commission, 2025). The iconic Odessa beaches shifted from bustling resorts to near-zero international visitors destination. Domestic travel persists only via niche resilience efforts. Neighboring countries like Bulgaria lost ~1 million Russian and Ukrainian tourists annually (12-14% of total arrivals pre-2022), compounded by energy price spikes, supply chain breaks, and „proximity risk“ perceptions deterring broader Eastern European bookings (European Travel Commission, 2025; World Economic Forum, 2025–2026).

The Israel-Gaza/Hezbollah Escalations (2023-2026) led to Israel's arrivals drop with nearly 70% (~3.5 million fewer visitors vs. 2019 peaks). The conflict costs a loss of $3.4 billion, with holy sites (United Nations World Tourism Organization, 2025like Jerusalem's Old City emptying out—despite limited „solidarity tourism“ incentives for domestic groups. Spillover hit Lebanon (tourism GDP share from 20% to <5%) and UAE luxury hubs (e.g., Dubai airport disruptions from missile debris), prompting U.S./EU advisories for Jordan and Israel.

Middle East/Iran Tensions (2025-2026), the broader Iran-backed conflicts generated $550-600 million daily regional losses (11-27% arrivals drop, $34-56 billion annual hit), redirecting European sun-seekers from eastern Mediterranean hotspots (e.g., Turkey, Egypt) to „safer“ northern alternatives. Other hotspots as Syria's civil war reduced hotel occupancy from 90% to 15%, damaging 289 heritage sites and causing 66% job losses. Myanmar's post-coup violence (part of doubled global conflicts per WEF 2025) shut down trekking circuits. Sudan/Yemen/DRC remain on „war-risk“ no-go lists with total tourism blackouts.

In the case of Bulgaria, the proximity to Ukraine amplified 2022-2026 losses (e.g., canceled Black Sea charters), but Middle East diversions offer upside for Sunny Beach/Nessebar (potential +10-15% capacity from UAE/Egypt redirects). Persistent risks include energy vulnerabilities, cyber threats from hybrid warfare, and refugee resource competition.

Military crises demonstrate tourism's extreme vulnerability to sudden geopolitical shocks, with direct-hit destinations facing near-total collapse (Ukraine 90%+, Syria occupancy to 15%) while neighbors endure 12-15% market losses from spillover effects like energy shocks and perception risks (World Economic Forum, 2025–2026). Globally, these conflicts have doubled active hotspots since 2022 (per WEF trends), costing tens of billions annually and accelerating demand diversion patterns—e.g., Middle East turmoil redirecting Europeans northward (European Travel Commission, 2025), potentially boosting Bulgaria's Black Sea capacity by 10-15% if marketed aggressively as a „safe haven."

For Bulgaria, proximity risks (Ukraine losses) coexist with strategic opportunities (Middle East inflows), but sustained threats like hybrid cyberattacks and refugee strains demand proactive resilience: diversified source markets (beyond Russia/Ukraine), real-time safety certifications, crisis revenue insurance, and integrated risk monitoring. Diversify source markets beyond Russia/Eastern Europe, invest in crisis insurance/revenue protection, and aggressively market „safe haven" narratives via influencers and real-time safety apps. Long-term, destinations aim balance recovery gains against stigmatization, prioritizing infrastructure hardening and narrative control to convert diverted demand into stable growth amid 2026's volatile landscape. This underscores the need for tourism strategies that treat security as foundational, not peripheral, to demographic, technological, and ecological planning.

3. Demographic and Sociocultural Challenges

Key issues on the challenges of the demographic and sociocultural sphere more often result in labor shortages (International Labour Organization, 2025; World Travel & Tourism Council, 2025), lack of skilled workers, seasonality (reduced service quality), and labor import. Another issue is aging of the population. Southern Europe and parts of Asia are seeing rising median ages and shrinking labor pools, creating shortages in hospitality and service workers. Nowadays, compounded by geopolitical disruptions that accelerate workforce exits and migrant dependencies reflect the global frame. The World Travel & Tourism Council (WTTC) projects that by 2035, global demand for Travel & Tourism workers will exceed supply by over 43 million people (16% shortfall). The hospitality subsector alone could face an 8.6 million worker gap. Structural causes include post-pandemic exits (e.g., 20-30% workforce attrition in many markets), shrinking working-age populations due to aging demographics, low

wages (often 20-30% below national averages), long hours, high informality (up to 40% in developing regions), and turnover rates exceeding 50% annually.

Tourism sector is vulnerable to seasonality and in the light of the events in the geopolitical conflict results in several significant effects. Seasonal jobs lead to unstable employment, limited training, and difficulties retaining staff, which directly lowers service quality (International Labour Organization, 2025) during peaks when demand surges 3-5x. Many destinations rely on temporary or migrant labor to fill gaps, but this often leads to language barriers, cultural mismatches, and inconsistent standards—exacerbated by conflict-driven migration surges.

Bulgaria in specific reveals that the sector faces acute shortages, especially in coastal areas (Sunny Beach, Nessebar, Golden Sands). Hotels report necessity of foreign workers for 85% of roles in peak season (Bulgarian National Radio, 2026; Bulgarian Telegraph Agency & Novinite, 2025–2026). In Q1 2026 alone, ~12,000 permits (Bulgarian National Radio, 2026) were issued for third-country workers in tourism (total ~24,000 in 2025). Workers often arrive from Asia (e.g., Indonesia, Philippines, Kyrgyzstan) via recruitment agencies. Local young people often leave for better opportunities abroad (USA in general) or avoid seasonal instability. These risks reduced service quality, as evidenced by TripAdvisor reviews citing language issues and high staff turnover (25-30% vacancy rates in Black Sea resorts). Geopolitical refugee competition further pressures low-skill roles.

On the opposite a new trend has been outlined. New Generation (Gen Z/Millennials) are appointed as future tourists and employees. Gen Z (born 1997-2012) and Millennials (1981-1996) represent 50%+ of travelers by 2026 and a growing workforce share, prioritizing authenticity amid global instability (Canvas8, Expedia, & Simon-Kucher, 2025; Peek Pro, 2025; Rajput et al., 2025). As Tourists they prioritize authentic, meaningful, cultural, and sustainable experiences over mass tourism. They heavily rely on social media (TikTok, Instagram, YouTube) for inspiration (for example, 72% of Gen Z consult it for trips and city routes). Moreover, the New Generation value user-generated content (UGC), authenticity perception, and intangible cultural heritage (ICH) like traditions and local stories (Peek Pro, 2025). They seek once-in-a-lifetime experiences and cultural immersion (e.g., 65% prefer experiential over luxury stays). On the other hand - boomers lead the move toward off-peak, slow travel.

As employees, the New Generation expect flexible, values-driven management, digital-native communication (Forbes, 2025). They request purposeful engagement and work-life balance; require quick feedback rather than traditional hierarchies. Moreover, they register high turnover (40% spikes) if jobs feel inauthentic or seasonal-only, worsened by conflict-era job scarcity. While affluent travelers continue to move freely, inflation and high transport costs are limiting access for middle-income groups, particularly in Europe. Tourism demand is polarizing toward both luxury markets and budget alternatives, squeezing the mid-range segment.

The interplay of entrenched demographic pressures and acute sociocultural shifts delineates a multifaceted crisis in tourism labor ecosystems. The seasonality and geopolitical externalities synergistically undermine service integrity and workforce sustainability, as evidenced by Bulgaria's 85% foreign labor dependency and 25-30% vacancies. WTTC projections underscore the imperative for systemic interventions, revealing not merely quantitative shortfalls (43 million globally by 2035) but qualitative misalignment. The low remuneration and informality fueling 50%+ churn inevitably led to necessitating policy recalibrations toward formalization and upskilling.

Gen Z/Millennial ascendancy heralds a paradigmatic pivot. Their dual roles as authenticity-craving tourists (72% social media-driven) and empowerment-seeking employees compel destinations to reconcile digital amplification of ICH with preservationist ethos. In addition, mitigating „staged authenticity“ risks are evident, while curbing 40% turnover through flexible, purpose-centric paradigms. For Bulgaria, this mandates targeted strategies. Some of them include: youth retention incentives, multicultural training for migrant cohorts, and social media-savvy ICH marketing. All of this reveals vulnerabilities into competitive differentiation, fostering resilience in an era of compounded global instabilities. Empirical validation from platforms like TripAdvisor affirms that unaddressed gaps erode experiential quality, imperiling long-term viability absent proactive, intergenerational alignment.

4. Technological Challenges

Digitalization, AI, and New Tourist Demands bring another nuance to the situation. Tourists expect hyper-personalization (itineraries, recommendations, chatbots), seamless apps, real-time services, and AI-driven experiences (EY, 2025; Skift & McKinsey, 2025–2026). All of them are accelerated by geopolitical needs for contactless, resilient operations. AI handles booking, pricing, customer service (chatbots), and predictive analytics. By 2026, agentic AI (autonomous agents) will plan, rebook, and execute parts of trips (e.g., 40% of reservations AI-driven) (Phocuswright, 2026; Forbes, 2025).

Technological challenges reflect on workforce in specific. Evident is the need for new skills—digital literacy, data interpretation, collaboration with AI tools—amid 30-40% skills gaps (International Labour Organization, 2025; World Travel & Tourism Council, 2025). „Soft skills“ (emotional intelligence, creativity, complex problem-solving, empathy) remain irreplaceable (MDPI, 2025) for human-touch service, even as AI automates routine tasks. Leading challenge is bridging the skills gap while avoiding over-reliance that diminishes authentic hospitality, especially in conflict-vulnerable areas.

The trends for 2025–2026 outline hyper-personalization across channels, generative AI for itineraries/content. In addition, an integration into operations (revenue management, operations with 90% no-show prediction accuracy) stay

imperative. Technology readiness moderates satisfaction with AI services (e.g., 25% satisfaction boost). Bulgaria's case reveals that coastal hotels lag in AI adoption (only 20% use chatbots vs. EU average 45%), but initiatives like Nessebar's AR heritage apps and cybersecurity upgrades show promise amid regional threats (Bulgarian Ministry of Tourism, 2025–2026).

A special emphasis is set on soft skills. Even with AI, human elements like cultural sensitivity and emotional support differentiate experiences, especially for Gen Z seeking meaningful connections over scripted, automated interactions. Synthesizing these dynamics mandates strategic upskilling hybrids: digital fluency conjoined with empathetic competencies to bridge gaps, fortify cybersecurity, and sustain cultural immersion amid agentic AI's ascendancy.

The infusion of digitalization and AI into tourism heralds a dual-edged transformation, compelling hyper-personalized, resilient paradigms that mitigate geopolitical volatilities yet expose stark skills chasms (30-40% deficits) and risks of authenticity dilution. Empirical trends affirm generative AI's operational efficacy—90% predictive accuracy in revenue streams, 25% satisfaction increments—yet reaffirm soft skills' irreplaceability, forging differentiation for Gen Z demographics who privilege human-mediated profundity over automation.

For Bulgaria, leveraging AR innovations at sites like Nessebar while accelerating adoption could catalyze competitive resilience, transmuting technological imperatives into sustainable experiential advantages. Absent such integration, over-reliance imperils hospitality's human essence, perpetuating vulnerabilities in an era where technological readiness predicates both recovery from disruptions and appeal to authenticity-seeking cohorts. This nexus delineates not mere adaptation, but a requisite evolution toward symbiotic human-AI ecosystems for enduring sectoral viability.

5. Ecological Challenges

Climate change impacts are crucial for the travel and tourism industry (Intergovernmental Panel on Climate Change, 2023; United Nations World Tourism Organization, 2025). Rising temperatures, extreme weather (heatwaves, wildfires, floods, droughts), sea-level rise, coastal erosion, and „season merging" (shorter traditional peaks, unpredictable weather) disrupt destinations, increase economic losses, and shift tourist flows (e.g., away from overheated Mediterranean summers toward cooler alternatives like parts of Bulgaria)—further pressured by conflict-driven diversions. Tourism itself contributes ~5–10% of global GHG emissions (World Travel & Tourism Council, 2025) (aviation heavy), amplifying feedback loops (+2-3°C in Bulgaria by 2050; €1-2B EU damages/year).

Additional Global Examples include (European Environment Agency, 2025):

➢ Greece (2025 Heatwaves/Wildfires): Rhodes and Crete saw 30% cancellations during 45°C+ peaks and fires scorching 20,000 hectares, diverting 500,000+ UK tourists to Bulgaria/Portugal. Aviation emissions spiked rerouting efforts by local authorities.

➢ Italy (Venice Flooding/Acqua Alta): 2025 events submerged St. Mark's Square repeatedly, costing €100M+ in damages and reducing stays by 15%. Sea-level rise erodes 1m/year of lagoon barriers, predicting more troubles to the destination.

➢ Spain (Balearics Drought): Mallorca imposed water rationing (hotels -40% usage), deterring 10% family bookings. Wildfires in Canary Islands closed tourist trails, causing income loss.

➢ Bulgaria/Europe Vulnerabilities: Vulnerable sectors include tourism, agriculture, and biodiversity. Increased extreme events (droughts, flooding; +15% in 2025) raise economic risks. The insurance coverage is registered as too low (<30%). Bulgaria lags in circular economy and waste management (recycling 35% vs. EU 50%) but progresses in renewables (solar +50% in 2025; hydrogen pilots). Key vulnerabilities, registered in coastal tourism (40% GDP contribution) show 20% summer water shortages, Black Sea erosion (0.2-0.5m), ecosystems like Strandzha forests significantly at risk. Recent cases (European Environment Agency, 2025; Bulgarian Ministry of Environment and Water, 2025) include: October 2025 flash floods in Elenite, Nessebar, Sveti Vlas with 3 persons killed (incl. rescuers), submerged resorts, swept vehicles to sea, and prompted mass evacuations. Official sources declared the events were caused by illegal hotel builds in dry channels.

On the other hand, a demand shift is evident (United Nations World Tourism Organization, 2025). Rising temperatures are making some traditional summer destinations too hot, driving tourists toward cooler climates such as Scandinavia, Scotland, or the Alps. Roughly 25% of travelers in 2026 state they're intentionally seeking cooler destinations to avoid heat discomfort and reduce environmental impact (ftnnews.com.) Tourists increasingly seek sustainable practices, green events, eco-certifications (e.g., EU Ecolabel).

Record demand in popular areas like Norway's fjords, Spain's Mediterranean coast, and the Balearic Islands is placing heavy stress on local ecosystems. Water scarcity, waste management, and land degradation are now critical limits to growth. For example, Mallorca has reached what locals call a „breaking point," prompting caps on tourist beds and stricter sustainability taxes (travelandtourworld.com.).

Low-impact programs, waste management, resource efficiency, and conscious operators („green policy") attract conscious travelers. 70% of the tourist flows prioritize sustainability and according to analyzers, eco-tourists spend 20% more on similar products. Geopolitical overloads (e.g., refugee strains) exacerbate resource pressures. That is why governments are enforcing tougher emission rules — for instance, Norway now bans greenhouse-gas-emitting vessels from

UNESCO fjords to protect fragile ecosystems (thetraveler.org). There's also growing investment in electric transport, waste reduction, and „visitor dispersal" to minimize concentrated ecological footprints.

Other examples of sustainable practices attracting attention include:

- EU Ecolabel Hotels: Best Western Moran (Czechia) cut energy 30%, water 50%, eliminated single-use plastics; Hotel Fevery (Belgium) pioneered national certification with filtered water.
- Europe Greener Stays: Green House Bournemouth (UK) uses rainwater harvesting, composting; Bryggen Guldsmeden Copenhagen (Denmark) achieves zero-waste food, 50% renewables.
- Many mature destinations face „infrastructure fatigue," meaning capacity limits on roads, ports, and utilities. Tourism taxes and EU recovery funds are being reinvested into green infrastructure — renewable energy hotels, water efficiency, and protected trails — especially in Southern Europe.

Following the examples, strategic decisions and recommendations predict in the short-term: water-saving tech (e.g., low-flow fixtures, desalination pilots) in Black Sea hotels; expand insurance to 50% coverage via public-private funds; retrofit for flood resilience (elevated infrastructure in Nessebar/Elenite). In the medium-term: Acceleration in circular economy (target 50% recycling by 2028); certification of 30% coastal properties with EU Ecolabel; promotion of year-round mountain eco-tourism (e.g., biking/climate therapy in Rhodopes, per 2026 plans) to offset „season merging." In the long-term: integration in nature-based solutions (dune restoration vs. erosion); enforce building codes against flood-prone development; collaborate on EU Green Deal for hydrogen/solar scaling, aiming for net-zero aviation offsets.

Conclusion

The 2026 tourism landscape reflects a convergence of complex political and economic challenges, characterized by persistent inflation, geopolitical tensions, trade uncertainty, and uneven global economic recovery across regions. Destinations are increasingly shifting from volume to value, prioritizing high-spending, low-impact visitors. Policies now focus on social sustainability, ensuring tourism revenue supports housing, water, and community infrastructure. Travelers themselves are more aware — 43% globally aim to avoid overcrowded destinations this year, marking a mainstream shift toward conscious travel. In essence, 2026 tourism is defined less by growth and more by balance — between people and place, economy and environment, visitor and resident.

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