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# THE POTENTIAL FOR ATTRACTING CHINESE TOURISTS TO BULGARIA'S TOURIST MARKET

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**Abstract:** With its great variety of natural, cultural and historical resources and low labour cost, Bulgaria has the potential to develop new tourist products and attract tourists from lucrative markets such as the Chinese market, which provides millions of tourists every year. However, in order to attract these tourists to the Bulgarian tourist market, we must analyse their needs. The aim of this article is to define the possibilities for adjusting the Bulgarian tourist product to the main characteristics of Chinese tourists in terms of mitigating the existing cultural differences.

**Keywords:** China, tourism, Chinese tourist's characteristics.

**JEL:** F12, L83

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## 1. Executive summary

The World Tourism Organization (UNWTO)<sup>2</sup> defines tourism as a key driver of socio-economic progress through the creation of jobs and enterprises, export revenues, and infrastructure development. According to UNWTO, tourism creates over 9% of the world's GDP and one of every eleven jobs worldwide. Over the past six decades (see Table 1) tourism has experienced continued expansion and diversification, to become one of the largest and fastest-growing economic sectors in the world.

*Table 1. Number of tourist arrivals and receipts worldwide*

| Year | International Tourist Arrivals<br>(million) | International Tourist Receipts<br>(million USD) |
|------|---|---|
| 1950 | 25  | 2   |
| 1980 | 278   | 104   |
| 1995 | 527   | 415   |
| 2014 | 1 133                                       | 1 245   |

**Source:** UNWTO Tourism Highlights, 2015 Edition, p. 2

In the 1990s UNWTO launched its research project Tourism 2020 Vision<sup>3</sup>; intended to provide long-term forecast and assessment of the development of tourism. It was furthered with the Tourism Towards 2030 project. The updated forecasts are complemented with analyses of social, political, economic, environmental and technological factors that affected tourism in the past and that are expected to affect it in the future.

According to Tourism Towards 2030, the number of international tourist arrivals worldwide is expected to increase by an average of 3.3% a year over the period 2010 to 2030. Over time, the rate of growth will gradually slow, from 3.8% at the beginning of the period to 2.9% in 2030 (see Table 2.) International tourist arrivals worldwide are expected to reach 1.4 billion by 2020 and 1.8 billion by the year 2030.

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<sup>2</sup> UNWTO Tourism Highlights, 2015 Edition, p. 2 <http://www.e-unwto.org/doi/book/10.18111/9789284416899>, 28.07.2015.

<sup>3</sup> <http://www.unwto.org/facts/eng/vision.htm>, 28.07.2015.

**Table 2. International Tourist Arrivals by region of destination**

| Region                  | International tourist arrivals |       |       |          |       | Average annual growth (%) |          |          |         |         | Share (%) |      |
|-------------------------|--------------------------------|-------|-------|----------|-------|---------------------------|----------|----------|---------|---------|-----------|------|
|                         | Actual data                    |       |       | Forecast |       | Actual data               |          | Forecast |         |         |           |      |
|                         | 1980                           | 1995  | 2010  | 2020     | 2030  | 1980/95                   | '95/2010 | 2010/30  | 2010/20 | 2020/30 | 2010      | 2030 |
| World                   | 277                            | 528   | 940   | 1 360    | 1 809 | 4.4                       | 3.9      | 3.3      | 3.8     | 2.9     | 100       | 100  |
| Africa                  | 7.2                            | 18.9  | 50.3  | 85       | 134   | 6.7                       | 6.7      | 5.0      | 5.4     | 4.6     | 5.3       | 7.4  |
| North and South America | 62.3                           | 109   | 149.7 | 199      | 248   | 3.8                       | 2.1      | 2.6      | 2.9     | 2.2     | 15.9      | 13.7 |
| Asia                    | 22.8                           | 82    | 204   | 355      | 535   | 8.9                       | 6.3      | 4.9      | 5.7     | 4.2     | 21.7      | 29.6 |
| Europe                  | 177.3                          | 304.1 | 475.3 | 620      | 744   | 3.7                       | 3.0      | 2.3      | 2.7     | 1.8     | 50.6      | 41.1 |
| Middle East             | 7.1                            | 13.7  | 60.9  | 101      | 149   | 4.5                       | 10.5     | 4.6      | 5.2     | 4.0     | 6.5       | 8.2  |

**Source:** UNWTO Tourism Highlights, 2015 Edition, p. 15

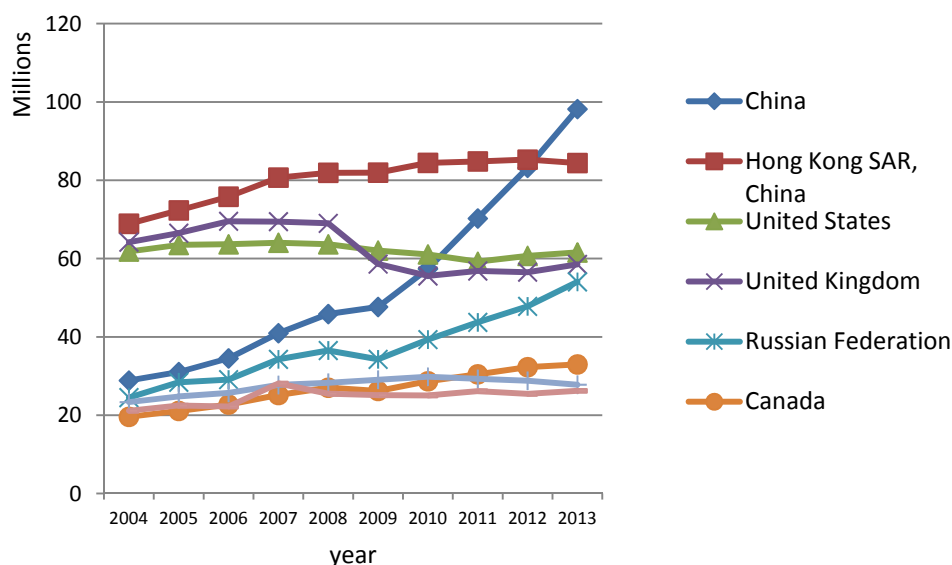
The data in Table 2 shows that international tourist arrivals will grow at different rates in the different regions. They will grow at higher rates in the developing markets of Asia (from 21.7% to 29.6%), the Middle East (from 6.5% to 8.2%) and Africa (from 5.3% to 7.4%) compared to the developed markets of Europe (from 50.6% to 41.1%) and America (from 15.9% to 13.7%), whose relative share will decrease.

The fast-growing markets of Asia and the Pacific are probably the most interesting because the tourist departures from this region are expected to increase significantly due to the increase of the purchasing power of the population of these countries (China, India, Japan, etc.), the liberalization of travelling abroad in some of them and the increasing share of their middle classes.

China has significant potential for generating tourist departures. With a population of 1355 mln. people, in 2013 the number of international tourist departures from this country was 98 185 000<sup>4</sup>, which is a little over 7% of its population. The analysis of the data published by the World Bank (see Figure 1) shows that for the last ten years the departures by Chinese citizens have grown by 340%.

<sup>4</sup> World Bank: International tourism, number of departures, <http://data.worldbank.org/indicator/ST.INT.DPRT>, 28.07.2015.

Figure 1. Number of international tourist departures



The global trends were taken into account by the Bulgarian government in its "National Strategy for Sustainable Development of Tourism in Bulgaria, 2014 – 2030"<sup>5</sup> and "Annual Programme for Tourist Advertisement in 2015"<sup>6</sup>. In April 2015, the government approved a Protocol of Intention between the Ministry of Tourism of Bulgaria and the Ministry of the Economy, Trade and Tourism of Romania. The protocol of intention calls for the development of joint tourist products in the areas of cultural-historical, spa, festival and other kinds of tourism. The aim is to boost the potential for attracting more tourists from third markets, including distant ones, with the focus being mostly on China.<sup>7</sup> The protocol of intention lists different areas for close cooperation, joint events and exchange of information and expert groups. Among the most important is the creation of a Bulgarian-Romanian tourist information centre in China, which will promote the joint tourist products that the two countries will offer.<sup>8</sup>

This event stirred the researchers' interest.

<sup>5</sup> The document was approved by the Council of Ministers with Decision No. 22 of 04 June 2014 [http://www.tourism.government.bg/sites/tourism.government.bg/files/uploads/strategy-policy/strategy\\_2014-2030\\_13\\_05\\_2014-sled\\_ms\\_26\\_05\\_2014.pdf](http://www.tourism.government.bg/sites/tourism.government.bg/files/uploads/strategy-policy/strategy_2014-2030_13_05_2014-sled_ms_26_05_2014.pdf), 28.07.2015.

<sup>6</sup> [http://www.tourism.government.bg/sites/tourism.government.bg/files/documents/2015-05/godishna\\_programa\\_za\\_nacionalna\\_turisticheska\\_reklama\\_2015\\_0.pdf](http://www.tourism.government.bg/sites/tourism.government.bg/files/documents/2015-05/godishna_programa_za_nacionalna_turisticheska_reklama_2015_0.pdf), 28.07.2015.

<sup>7</sup> <http://www.monitor.bg/article?id=466672>>, 15.06.2015

<sup>8</sup> <http://banks.dir.bg/news.php?id=18898139>>, 15.06.2015

According to the Swedish school of corporate internationalization, firms take into account two main factors when they decide to initiate and/or continue an international operation – the size of the potential market and its cultural differences.<sup>9</sup> Regarding the first factor, the choice of China as a market having a vast potential for development and generating huge numbers of outbound tourists is correct. However, regarding the second factor (cultural differences), the choice of China as a target market is highly questionable. The cultural differences between our countries are too big. Moreover, tourism as an industry falls into the category of services and it is exactly the cultural aspect that has a significant impact on the pattern of service provision. Since all services inherently involve some level of human interaction, the likelihood of cultural incompatibility is much greater for such industries.<sup>10</sup>

Considering the above presumption, *the aim of this article is to define the possibilities for adjusting the Bulgarian tourist product to the main characteristics of Chinese tourists in terms of mitigating the existing cultural differences.*

To achieve this aim we have defined the following objectives:

- ✓ To define the main characteristics of Bulgaria's tourist product.
- ✓ To define the key characteristics of the Chinese tourist.

The tasks were performed using secondary data, and an analysis, synthesis and summary of information as well as other comparative and analytical methods.

## 2. Key characteristics of Bulgaria's tourist product

Tourism is one of the leading industries in Bulgaria's economy. According to the Ministry of Tourism, this industry generates between 12% and 18% of Bulgaria's GDP and about 300 000 permanent and 500 000 seasonal jobs.<sup>11</sup> In 2012 the absolute share of tourism in the country's GDP was BGN 10 586.1 mln. and the long-term forecast is that this share will increase by 1.9% annually to reach BGN 13 072.2 mln. in 2023.<sup>12</sup>

Considering the global trends, the Ministry forecasts an increase in tourist arrivals in Bulgaria. In 2012, the number of international tourist arri-

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<sup>9</sup> Дамянов, Ат., Илиев, Др., Любенов, Здр. Фирмена интернационализация. Фабер, 2014, p. 132.

<sup>10</sup> Hollensen, Sv. Global marketing: a decision-oriented approach. 5th ed., 2011, p. 92.

<sup>11</sup> National Strategy for Sustainable Development of Tourism in Bulgaria, 2014–2030, Sofia, 2014, p. 7

<sup>12</sup> *ibid*, p. 22

vals was slightly over 6.5 mln. With a forecast of a 4% annual increase, this number is expected to reach 9 mln. in 2020 and with a forecast of an annual increase of 3% in the period 2020-2030, it is expected to exceed 9 mln. by 2030, provided that, "Bulgaria succeeds in developing the necessary tourist products and takes advantage of these trends".<sup>13</sup>

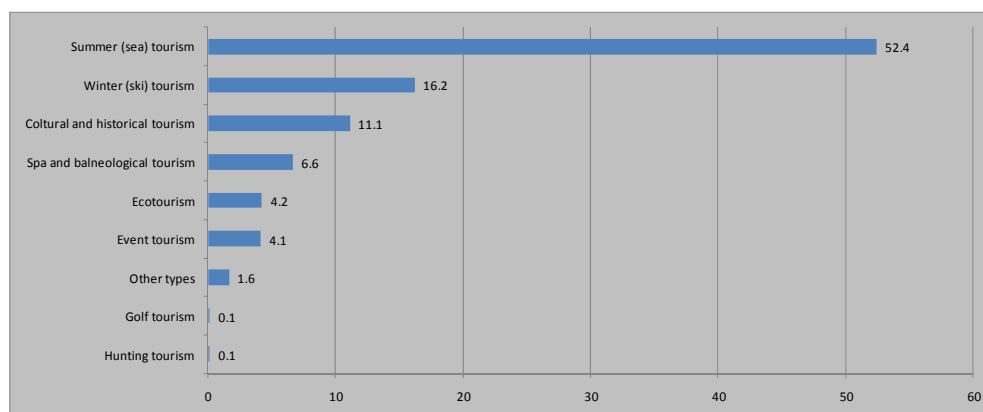
This is why the development and provision of adequate tourist products is of primary importance.

With a territory of 111 000 km<sup>2</sup>, Bulgaria ranks 102<sup>nd</sup> in the world, 11<sup>th</sup> in the EU and 15<sup>th</sup> in Europe. Thus it can be defined as a country with a relatively small territory but with a significant diversity of natural and cultural tourist resources.

The country's coastline is 378 km. long, of which 25% is sandy beaches (over 200 beaches) that may be used as sea resorts. About 30% of Bulgaria's territory consists of mountains with diverse relief - 8 of them with an altitude of over 2000 meters and five (Rila, Pirin, the Rhodopes, the Balkans and Vitosha) suitable for ski tourism. This is why the summer (sea) tourism has the greatest share in the tourism industry, followed by the winter (ski) tourism (see Figure 2.<sup>14</sup>).

Bulgaria relies heavily (and will undoubtedly continue to do so in the future) on the sea tourism, which generates about 70% of all receipts in this sector.

**Figure 2. Relative shares of the various types of tourist products offered in Bulgaria**



<sup>13</sup> *ibid*, p. 19

<sup>14</sup> National Strategy for Sustainable Development of Tourism in Bulgaria, 2014–2030, Sofia, 2014, p. 55

Data from national statistics shows that almost 64% (see Table 3) of overnight stays by international tourists in 2014 were registered in the nine resorts of national importance<sup>15</sup> and 61.87% of them were registered in the sea resorts.

**Table 3. Number of overnight stays by international tourists in Bulgaria in 2014**

|   | Overnight stays   | Relative share | Receipts in BGN.   | Relative share |
|---|-------------------|----------------|--------------------|----------------|
| <b>Total for the country</b>                                | <b>14 077 798</b> | <b>100.00%</b> | <b>711 764 101</b> | <b>100.00%</b> |
| <b>Total for the resorts of national importance, incl.:</b> | <b>8 975 661</b>  | <b>63.76%</b>  | <b>437 027 563</b> | <b>61.40%</b>  |
| <i>Mountain resorts</i>                                     |                   |                |                    |                |
| <i>Pamporovo</i>  | 82 794            | 0.59%          | 4 329 221          | 0.61%          |
| <i>Borovets</i>   | 183 693           | 1.30%          | 6 454 431          | 0.91%          |
| <i>Seaside resorts</i>                                      |                   |                |                    |                |
| <i>Albena</i>   | 1 000 151         | 7.10%          | 52 680 973         | 7.40%          |
| <i>Duni</i>   | 244 302           | 1.74%          | 11 865 766         | 1.67%          |
| <i>Elenite</i>  | 101 631           | 0.72%          | 4 554 281          | 0.64%          |
| <i>Golden Sands</i>   | 2 663 604         | 18.92%         | 141 624 985        | 19.90%         |
| <i>PrimorskoIYC</i>   | 66 781            | 0.47%          | 1 891 239          | 0.27%          |
| <i>Saints Constantine and Helena</i>                        | 461 218           | 3.28%          | 23 863 948         | 3.35%          |
| <i>Sunny Beach</i>  | 4 171 487         | 29.63%         | 189 762 719        | 26.66%         |
| <b>Other</b>  | <b>5 102 137</b>  | <b>36.24%</b>  | <b>274 736 538</b> | <b>38.60%</b>  |

Source: NSI and author's calculations

The number of hotel beds (see Table 4) confirms the dominant position of seaside tourism. The largest number of beds (120 986, or 38.50% of all beds registered in the country) is reported for the district of Burgas, which is followed by the districts of Varna (19.25%) and Dobrich (9.62%.) In fact, these three districts share the 378-km. coastline.

<sup>15</sup> The resorts of national importance were defined by Decision No. 45 of CM on 25Jan.2005 and include: 1. Resort Complex Albena -Balchik Municipality, Dobrich district; 2. Resort Complex Golden Sands, Varna Municipality, Varna district; 3. Resort Complex Saints Constantine and Helena, Varna Municipality, Varna district; 4. Vacation Village Elenite, Nesebar Municipality, Bourgas district; 5. Resort Complex Sunny Beach, Nesebar Municipality, Bourgas district; 6. Vacation Village Duni, Sozopol Municipality, Bourgas district; 7. Resort Complex Primorsko International Youth Center, Primorsko Municipality, Bourgas district; 8. Resort Complex Pamporovo, Chepelare Municipality and Smolyan Municipality, Smolyan district; 9. Resort Complex Borovets, Samokov Municipality, Sofia district.

*Table 4. Distribution of hotel beds by districts in 2014*

| District                     | Accommodation places |             | Beds          |             |
|------------------------------|----------------------|-------------|---------------|-------------|
|                              | number               | rel. share  | number        | rel. share  |
| <b>Total for the country</b> | <b>3163</b>          | <b>100%</b> | <b>314257</b> | <b>100%</b> |
| Vidin                        | 36                   | 1.14%       | 960           | 0.31%       |
| Vratsa                       | 30                   | 0.95%       | 1049          | 0.33%       |
| Lovech                       | 84                   | 2.66%       | 4208          | 1.34%       |
| Montana                      | 27                   | 0.85%       | 1201          | 0.38%       |
| Pleven                       | 29                   | 0.92%       | 1323          | 0.42%       |
| VelikoTarnovo                | 118                  | 3.73%       | 5297          | 1.69%       |
| Gabrovo                      | 67                   | 2.12%       | 3393          | 1.08%       |
| Razgrad                      | 16                   | 0.51%       | 609           | 0.19%       |
| Rousse                       | 42                   | 1.33%       | 1616          | 0.51%       |
| Silistra                     | 20                   | 0.63%       | 627           | 0.20%       |
| Varna                        | 367                  | 11.60%      | 60494         | 19.25%      |
| Dobrich                      | 153                  | 4.84%       | 30230         | 9.62%       |
| Targovishte                  | 21                   | 0.66%       | 871           | 0.28%       |
| Shoumen                      | 55                   | 1.74%       | 1684          | 0.54%       |
| Burgas                       | 747                  | 23.62%      | 120986        | 38.50%      |
| Sliven                       | 82                   | 2.59%       | 2572          | 0.82%       |
| Stara Zagora                 | 59                   | 1.87%       | 3843          | 1.22%       |
| Yambol                       | 21                   | 0.66%       | 816           | 0.26%       |
| Blagoevgrad                  | 287                  | 9.07%       | 20032         | 6.37%       |
| Kyustendil                   | 67                   | 2.12%       | 3186          | 1.01%       |
| Pernik                       | 16                   | 0.51%       | 757           | 0.24%       |
| Sofia                        | 104                  | 3.29%       | 8307          | 2.64%       |
| Sofia (capital)              | 131                  | 4.14%       | 12232         | 3.89%       |
| Kardzhali                    | 36                   | 1.14%       | 1139          | 0.36%       |
| Pazardzhik                   | 61                   | 1.93%       | 4315          | 1.37%       |
| Plovdiv                      | 173                  | 5.47%       | 9393          | 2.99%       |
| Smolyan                      | 275                  | 8.69%       | 11528         | 3.67%       |
| Haskovo                      | 39                   | 1.23%       | 1589          | 0.51%       |

Source: NSI and author's calculations

Almost all foreign tourists (97.3%) preferred to stay in hotels and only 2.7% chose to stay in camping sites, huts and other short-term accommodation places.<sup>16</sup> Most of them stayed in four- and five-star hotels (58.2%), followed by three-star hotels (31%) and one- and two-star hotels (10.8%.) Contrary to the tourists' preferences, the number of one-star hotels (391, or almost

<sup>16</sup> Statistical Reference Book 2014, NSI, C. 2014, p. 226.



54% of all hotels - see Table 5) is far greater than the number of the hotels with higher category.

*Table 5. Distribution of hotels by category*

| <b>Category</b> | <b>Number</b> | <b>Rel. share</b> |
|-----------------|---------------|-------------------|
| 1*              | 391           | 53.93%            |
| 2**             | 107           | 14.76%            |
| 3***            | 113           | 15.59%            |
| 4****           | 93            | 12.83%            |
| 5*****          | 21            | 2.90%             |
| <b>Total</b>    | <b>725</b>    | <b>100.00%</b>    |

The smallest is the number of the five-star hotels (only 21, or a little above 3%), 10 of which are located on the Black Sea coast, 2 – in mountain resorts and 9 – in the capital of the country.

The above characteristics show that the Bulgarian tourist product can be defined as a *monoproduct – summer seaside tourism*. This view is shared by other authors, who define it as, “mono-cultural and seasonal”.<sup>17</sup>

The firms operating in this sector have certain problems with its seasonal character in terms of utilization of their capacity throughout the whole year, the maintenance of their facilities during the inactive seasons and the employment and retention of qualified staff. These problems, combined with the social and economic development of the country, are the reason for certain disadvantages of Bulgaria’s tourist product:<sup>18</sup>

- Lack of personal security for the tourists – significant levels of petty crime;
- Underdeveloped transport infrastructure;
- Overbuilding;
- Poor maintenance of the tourist sites, poor organization and hygiene;
- Poor quality of the tourist services;
- Poor/mediocre services, lack of professionalism;
- Poor staff qualification.

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<sup>17</sup> Горчева, Т. Състояние и проблеми на българския туристически продукт на европейския пазар. // Народно стопански архив, бр.1, 2013, стр. 44.

<sup>18</sup> National Strategy for Sustainable Development of Tourism in Bulgaria, 2014–2030, Sofia, 2014, p.26.

The results from surveys conducted within Project "Brand Bulgaria Strategy Development, Product and Regional Brand Development"<sup>19</sup> confirm the above assessments and show that the international tourists consider our country an *inexpensive sea tourist destination with insufficiently good tourist services and unsatisfactory hygiene, safety and infrastructure levels.*

This is further confirmed by the differences in the symbols associated with "destination Bulgaria" by foreign and national tourists (see Table 6.)

*Table 6. Symbols Bulgaria is associated with*

| <b>Bulgarian tourists</b>          | <b>Foreign tourists</b> |
|------------------------------------|-------------------------|
| 91% roses                          | 42% sea, beaches        |
| 90% sea                            | 39% sun                 |
| 83% mineral springs                | 39% rituals and crafts  |
| 82% mountains                      | 36% folk music          |
| 81% churches and monasteries       | 29% wine                |
| 81% folk music, rituals and crafts |                         |
| 78% Thracian civilization          |                         |

**Source:** "Brand Bulgaria Strategy Development, Product and Regional Brand Development" Project data

The country offers 3 national parks (Pirin, with an area of 40 332,6 ha., the Central Balkans, with an area of 71 669,5 ha. and Rila, with an area of 81 046 ha.), 10 nature parks, 55 reserves, 35 supported reserves and over 600 hot and cold mineral springs.

Some traces of human settlements from the Palaeolithic era have been found on the territory of Bulgaria. Archaeologists have found and are still finding artefacts from the ancient Greek, Roman, Thracian, Byzantine, Bulgarian and Islamic civilizations. According to the NSI<sup>20</sup>, in 2014 there were 204 museums with a total area of 413 409 sq.m. in the country, but only 116 of them had their own websites.

Nine Bulgarian cultural and natural sites and two intangible cultural heritage entries are included in UNESCO's world heritage lists.<sup>21</sup>

<sup>19</sup> [http://www.tourism.government.bg/sites/tourism.government.bg/files/documents/2015-02/brand\\_research.pdf](http://www.tourism.government.bg/sites/tourism.government.bg/files/documents/2015-02/brand_research.pdf) 28.07.2015

<sup>20</sup> <http://www.nsi.bg/bg/content/3669/%D0%BC%D1%83%D0%B7%D0%B5%D0%B8>, 29.07.2015

<sup>21</sup> There are seven cultural heritage sites – the Boyana Church (listed in 1979), the Rock-Hewn Churches of Ivanovo (listed in 1979), the Thracian Tomb of Kazanlak (listed in 1979), the Madara Rider (listed in 1979), the Ancient City of Nesebar (listed in 1983), the Rila Monastery (listed in 1983) and the Thracian Tomb of Sveshtari (listed in 1985), two natural heritage sites – the Pirin National Park (listed in 1983) and the Srebarna Nature Reserve (listed in 1983) and two intangible cultural heritage entries – the Bistritsa Babi (listed in 2008) and Nestinarstvo (listed in 2009.)

With its great variety of natural, cultural and historic resources and low labour costs, Bulgaria has the potential to develop a wide range of alternative tourism products. The adjustment of the classic tourist product (mass seaside tourism) and the development of specialized tourism products,<sup>22</sup> such as cultural tourism, event tourism and special types of tourism related to the unique history, local culture, traditions, customs, folklore and crafts would facilitate the development of regional and national competitive advantages. The provision of such new tourist products is a factor for attracting tourists from lucrative markets such as the Chinese market with millions of outbound tourists annually. However, in order to attract them to the Bulgarian tourist market, we have to analyse the characteristics and needs of Chinese tourists.

### **3. Analysis of Chinese tourist inflow to Bulgaria**

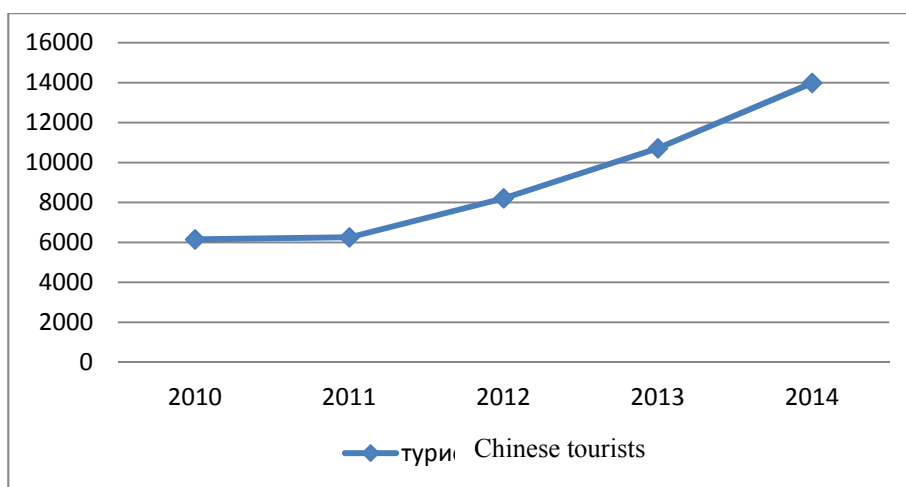
The analysis shows that there is a marked trend of increase of the number of Chinese tourists (see Figure 3.) This determines the need for adequate measures to sustain this new trend. The average annual increase in Chinese tourists in Bulgaria for the last three years was 30.8% while the average annual increase of all international tourists to the country for the same period was 5%. This means that the number of Chinese tourists increased six times faster than the number of all other tourists.

The country has a significant potential to develop specific services for this type of tourists. However, as a market of tourist services, Bulgaria is not advertised sufficiently and is generally unknown to Chinese tourists. The lack of adaptation of our tourism products to this trend poses the risk of losing our competitive advantage and hence profits in this sector. Although a small number in absolute terms, Chinese tourists constitute a fast-growing opportunity that must be taken into consideration and pursued by both the government and businesses.

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<sup>22</sup> National Strategy for Sustainable Development of Tourism in Bulgaria 2014-2030. Sofia, May 2014. <<http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=902>>, 15.06.2015

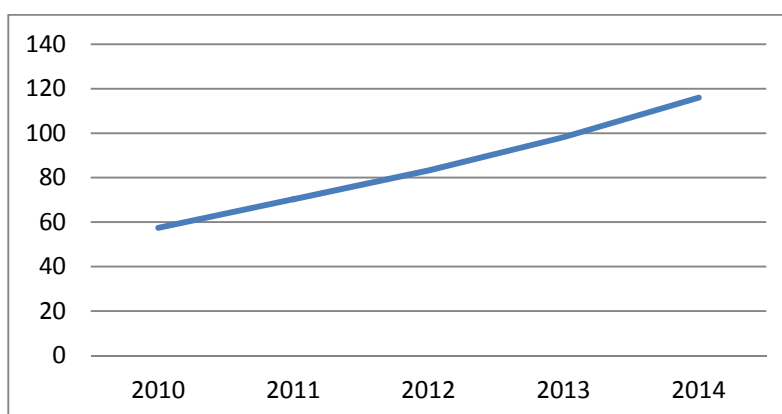
**Figure 3. Number of visits by Chinese tourists to Bulgaria from 2010 to 2014**



Source: Ministry of tourism, <http://www.tourism.government.bg/bg/kategorii/statisticheski-danni>, 27.07.2015

There is a trend for a steady growth of the number of outbound Chinese tourists (see Figure 4.) For the last three years, this number grew by 18.1% and, given the expected growth of the Chinese economy and the rise of the living standards of an increasing part of the Chinese population, the number of outbound tourists is expected to grow significantly.

**Figure 4. Number of outbound Chinese tourists in the period 2010 – 2014 (million)**



Source: China Outbound Tourism Research Institute (COTRI)

\* The data for 2014 is preliminary

According to the China Outbound Tourism Research Institute (COTRI)<sup>23</sup>, there will be 135 mln. outbound Chinese tourists in 2015, which is an increase of 16%. China is becoming the biggest outbound tourist market and given its two-digit growth rates, it provides huge opportunities for small markets of tourist services such as Bulgaria. Currently Bulgaria attracts only 0.01% of all outbound Chinese tourists.

Our country's biggest problem is the great distance between China and Bulgaria, which is over 8 thousand kilometres between their capital cities by car and over 7 thousand kilometres by plane. However, this problem may not be so big, because according to the UNWTO more than half of all tourists prefer air (54%) to road (39%), sea (5%) or rail 2% transport.<sup>24</sup>

Therefore, the problem with the cultural differences between the two countries is more significant and requires greater efforts to bridge these differences to be made by both the government and businesses.

#### **4. Key characteristics of the Chinese tourist**

In recent years, China has overtaken both the USA and Germany to become the largest outbound market in the world.<sup>25</sup>

Disposable Personal Income in China increased with 7% (from 26955.10 CNY in 2013 to 28844 CNY in 2014<sup>26</sup>), which is a factor for further increase of the number of outbound Chinese tourists.

Another factor for the growth of the number of outbound Chinese tourists is the liberalization of travel permit and visa procedures.

The growing interest by Chinese tourists in visiting new places, getting familiar with other cultures, acquiring new knowledge and experiences, as well as their propensity to shop make them an attractive tourist segment to any destination.

According to a survey published in Hotels.com™ Chinese International Travel Monitor 2014 (CITM)<sup>27</sup>, 97% of all China's international travellers have been abroad for leisure reasons, while 49% have visited other countries for business or education purposes.

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<sup>23</sup> [http://www.china-outbound.com/fileadmin/COTRI\\_graph\\_2000-2015\\_Feb.15.jpg](http://www.china-outbound.com/fileadmin/COTRI_graph_2000-2015_Feb.15.jpg)

<sup>24</sup> UNWTO Tourism Highlights 2015 Edition, p. 5.

<sup>25</sup> Capturing the lucrative China outbound tourism market. [http://www.eturbonews.com/61142/capturing-lucrative-china-outbound-tourism-market\\_26.07.2015](http://www.eturbonews.com/61142/capturing-lucrative-china-outbound-tourism-market_26.07.2015).

<sup>26</sup> <http://www.tradingeconomics.com/china/disposable-personal-income>, 15.06.2015

<sup>27</sup> Hotels.com™ Chinese International Travel Monitor 2014, [https://press.hotels.com/content/themes/citm/assets/pdf/citm\\_uk\\_pdf\\_2014.pdf](https://press.hotels.com/content/themes/citm/assets/pdf/citm_uk_pdf_2014.pdf), 15.06.2015

Chinese travellers typically spend between one to two weeks away when travelling internationally. Trips to see friends and relatives or for education reasons are of average length 1.6 weeks, while leisure trips are generally shorter - 1.4 weeks on average.<sup>28</sup>

Leisure is not paramount for the Chinese. They work hard and strive to achieve success, so many of them are willing to sacrifice their leisure or the time they spend with their families. However, when they decide to travel, their trips are short and they are willing to spend significant amounts of money on their international travel.

According to the same survey, 50% of Chinese travellers say that their average daily spend, excluding accommodation, is more than 10,000 CNY (1635 USD; 1492 EUR), with two per cent of these spending more than 50,000 CNY (8174 USD; 7462 EUR) and 36% of travellers questioned spend between 500 and 2000 CNY (81-326 USD; 74.62; 298.48 EUR) a day.

The greatest number of journeys both in the country and abroad is registered during the so-called "Golden Weeks". These are three weeks of national holidays used by the Chinese to travel. The first Golden Week is the Chinese New Year Golden Week, which begins in January or February.<sup>29</sup> The second Golden Week<sup>30</sup> is from the 1<sup>st</sup> to the 7<sup>th</sup> day of May. The third Golden Week is the first week in October.<sup>31</sup> July and August are traditionally used for summer holidays. Trips to Europe are preferred outside the tourist season (May to September) because of the lower costs and higher quality of the services.

The dominant social group among Chinese international travellers is the group of professional people with a high level of education, a small family and high incomes.<sup>32</sup>

The most numerous age groups of Chinese travellers are people aged 22 to 44. They are most willing to travel and visit new places although their

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<sup>28</sup> *ibid.*

<sup>29</sup> China adopted the Gregorian calendar in 1912. However, the Chinese New Year is based on the ancient lunisolar Chinese calendar and falls on the second new moon after the winter solstice, i.e. on different dates each year, a date between 21 January and 20 February.

<sup>30</sup> During this Golden Week all government agencies, trade organizations, and enterprises without uninterrupted production cycles are closed.

<sup>31</sup> The National Day of PR China is celebrated on October 1<sup>st</sup> to commemorate the founders of PRC. Shopping is an integral part of the celebration and the Chinese buy gifts for themselves and for their families. In the past, this day was celebrated mainly in China, but in recent years more and more Chinese people prefer to travel and shop abroad.

<sup>32</sup> **Wolfgang, A.** *China's Outbound Tourism (Contemporary Geographies of Leisure, Tourism and Mobility)*. 1<sup>st</sup> Edition, Routledge, Taylor & Francis e-Library, 2006, pp. 97-98.

incomes are rather limited.<sup>33</sup> Middle-aged international travellers have higher incomes and are prone to spending more time and money abroad.

Travelling with a partner and children or other family members remain the most popular options amongst Chinese international travellers, with friends in third place.<sup>34</sup>

China is a highly collectivist culture.<sup>35</sup> This means that people act in the interests of the group they identify themselves with and not necessarily of themselves. This is one of the reasons why Chinese tourists prefer travelling in organized groups to planning individual trips. Moreover, travelling in an organized group reduces the cost and the trip is less expensive compared to an individually planned trip.

Given the cultural differences and the language barrier (many Chinese do not speak English or French, although there is a trend for increasing the number of those who do), most tourists prefer to travel in groups accompanied by an interpreter.<sup>36</sup>

When travelling abroad, Chinese travellers like to conduct thorough research about how and where to choose a holiday destination. Travel guidebooks, friends and online travel websites are still the most popular sources of information when making decisions.<sup>37</sup> Social media and online review sites are also very important when making decisions to buy a tourist product. According to the specialists, those interested in attracting the outbound Chinese traveller should use SinaWeibo instead of Twitter, QQWeibo instead of Facebook, and place their videos in Youku instead of YouTube.<sup>38</sup>

More than half (over 50% of the respondents to the survey by Hotels.com,<sup>TM</sup> Chinese International Travel Monitor 2014) of Chinese travellers prefer to book 3 or 4-star hotels when they travel abroad, with a further 17 per cent electing for a 5-star property, 7% preferring all-inclusive resorts, 6% preferring bed-and-breakfast accommodation, 5% preferring hostels, 3% preferring 1- or 2-star hotels and only 1% likely to stay in motels. This means that the Chinese traveller's choice is affected by the available tourist facilities

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<sup>33</sup> Rakotonanahary Fanomezantsoa Nasolomampionona, Profile of Chinese Outbound Tourists: Characteristics and Expenditures // *American Journal of Tourism Management*, 2014, 3(1): 17-31.

<sup>34</sup> Hotels.com<sup>TM</sup> Chinese International Travel Monitor 2014, [https://press.hotels.com/content/themes/citm/assets/pdf/citm\\_uk\\_pdf\\_2014.pdf](https://press.hotels.com/content/themes/citm/assets/pdf/citm_uk_pdf_2014.pdf), 15.06.2015

<sup>35</sup> What about China?, <http://geert-hofstede.com/china.html>, 15.06.2015

<sup>36</sup> [http://asia.actualno.com/Osobenosti-na-kitajskija-turist-news\\_18099.html](http://asia.actualno.com/Osobenosti-na-kitajskija-turist-news_18099.html), 15.06.2015

<sup>37</sup> Hotels.com<sup>TM</sup> Chinese International Travel Monitor 2014, [https://press.hotels.com/content/themes/citm/assets/pdf/citm\\_uk\\_pdf\\_2014.pdf](https://press.hotels.com/content/themes/citm/assets/pdf/citm_uk_pdf_2014.pdf), 15.06.2015

<sup>38</sup> Capturing the lucrative China outbound tourism market. <http://www.eturbonews.com/61142/capturing-lucrative-china-outbound-tourism-market>, 26.07.2015

and services such as room service, restaurants, sports facilities, swimming pools, shops, bars, casinos, free Wi-Fi, etc.)

In-house Chinese-speaking staff<sup>39</sup>, Chinese newspapers and magazines as well as translated travel and tourism guides and Chinese TV channels rank as the most important amenities for Chinese travellers.<sup>40</sup>

Two of the Silk Road's largest markets – Russia and Turkey – have benefitted from increasing Chinese arrivals. In 2014, more than 1.1 million Chinese tourists visited Russia. More than 400,000 of these travelled through organised group itineraries. In the first quarter of this year, arrivals were up a further 27% on last year's corresponding period. Meanwhile, around 200,000 Chinese tourists visited Turkey in 2014.<sup>41</sup>

Of course, the European countries are still among the most preferred destinations by Chinese tourists. France and the UK rank highest, but in recent years, interest in Italy has grown as well.<sup>42</sup>

But what attracts Chinese travellers, what are the reasons for their trips? The answer is: their significant spending power and their propensity to shop. Most Chinese international trips, especially those to Europe, are made for shopping purposes. Recent research estimates that the Chinese spend on average US\$ 6,000 per visit to USA and EUR 4,000 per European visit.<sup>43</sup> They are most interested in luxury and brand goods (jewellery, watches, boutique clothes, etc.), because the Chinese import duties on these items are extremely high and they are very expensive there.

International trips for most Chinese are a demonstration of social prestige since only the Chinese with sufficient incomes can afford to travel abroad.

Most Chinese tourists are attracted most to tourist destinations that offer spas, entertainment and shopping and less to sea and mountain destinations.<sup>44</sup>

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<sup>39</sup> Rakotonanahary Fanomezantsoa Nasolomampionona, Profile of Chinese Outbound Tourists: Characteristics and Expenditures // American Journal of Tourism Management, 2014, 3(1): 17-31.

<sup>40</sup> Hotels.com™ Chinese International Travel Monitor 2014, [https://press.hotels.com/content/themes/citm/assets/pdf/citm\\_uk\\_pdf\\_2014.pdf](https://press.hotels.com/content/themes/citm/assets/pdf/citm_uk_pdf_2014.pdf), 15.06.2015

<sup>41</sup> Capturing the lucrative China outbound tourism market. [http://www.eturbonews.com/61142/capturing-lucrative-china-outbound-tourism-market\\_26.07.2015](http://www.eturbonews.com/61142/capturing-lucrative-china-outbound-tourism-market_26.07.2015)

<sup>42</sup> Hotels.com™ Chinese International Travel Monitor 2014, [https://press.hotels.com/content/themes/citm/assets/pdf/citm\\_uk\\_pdf\\_2014.pdf](https://press.hotels.com/content/themes/citm/assets/pdf/citm_uk_pdf_2014.pdf), 15.06.2015

<sup>43</sup> Capturing the lucrative China outbound tourism market. [http://www.eturbonews.com/61142/capturing-lucrative-china-outbound-tourism-market\\_26.07.2015](http://www.eturbonews.com/61142/capturing-lucrative-china-outbound-tourism-market_26.07.2015)

<sup>44</sup> <http://thexperts.bg/Turoperatori-shte-predlagat-kak-da-privlichame-turisti-ot-Kitaj>, 15.06.2015



As being representative of an ancient culture, Chinese visitors are most interested in visiting heritage sites and particularly those accredited by UNESCO, but also unique attractions in any destination.<sup>45</sup>

The above characteristics of Chinese travellers and the drivers for their outbound journeys allow us to distinguish two types of Chinese travellers<sup>46</sup>:

- *Cost-aware customers* with limited budgets, and
- *High-end tourists* with are willing to spend more.

The cost-aware tourists often resort to organised group travel. They chose their destination through a tourist agency. The most popular products for this type of tourist are packages offering visits to more countries at a low price. These tourists often do not speak a foreign language and prefer services provided in their native (Mandarin) language.

The high-end tourist is less worried about the price and often seeks personalized or themed itineraries. Such tourists are interested in cultural heritage sites and prefer to stay in 4- or 5-star hotels. They often speak foreign languages and prefer to visit fewer countries but more destinations in one country, which is why they tend to invest more time in selecting the destination.

## **5. Conclusions and recommendations for the development of specific Bulgarian tourist products for attracting Chinese tourists**

Chinese tourists would be attracted to products that are developed taking into account the specific characteristics, preferences and requirements to the providers of tourist services. The conventional Bulgarian tourist products (sea tourism in the summer and ski tourism in the winter) are not particularly attractive for them. What they would be interested in are the mineral and spa services provided on an all-inclusive basis. This type of products will be attractive mostly for high-end Chinese customers. However, they require much higher-quality services and are most likely to prefer personalized rather than package services. This raises the question of their higher requirements for the hotel category - they would prefer 4- and 5-star hotels, which are the smallest segment in our country.

The cost-aware tourists will be attracted mostly with group packages. Currently they are probably the most promising segment, because their re-

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<sup>45</sup> Capturing the lucrative China outbound tourism market. <http://www.eturbonews.com/61142/capturing-lucrative-china-outbound-tourism-market>, 26.07.2015

<sup>46</sup> <http://ec.europa.eu/growth/tools-databases/tourism-business-portal/documents/toolstutorials/positioning/china.pdf>, 15.06.2015

quirements for the quality of the services are not too high - they would stay in 3- and 4-star hotels that are available in our country. The main problem will be the requirement for Chinese-speaking staff. This requires the recruitment or training of tour guides who speak Mandarin - a language that is quite difficult to learn. Since they travel in organized groups to reduce their travel costs, these tourists would like to visit as many sights as possible. This is why a good idea would be to develop of services provided jointly with neighbouring countries.<sup>47</sup> In recent years, there has been growing interest from Chinese tourists in Russia and Turkey. This is why some joint tourist products could be developed on the grounds of Bulgaria's geographical proximity and cultural affiliations with these markets.

The Chinese tourists' interest in cultural heritage sites (and especially in sites accredited by UNESCO), which abound in Bulgaria, is a good opportunity for development of specific tourist products intended for the Chinese market.

We could hardly be able to match their propensity to buy branded or luxury goods, but Bulgaria has traditions in various crafts and could offer unique handmade products that are good substitutes for such goods.

In this regard, the efforts of the Bulgarian government to implement a comprehensive categorization system for tourist sites through the Bulgarian Ministry of Tourism should be considered a step in the right direction.<sup>48</sup> They must also improve the road infrastructure and the access to cultural heritage sites and especially to the sites accredited by UNESCO.

The providers of tourist services (hoteliers and travel agents) will have to invest in staff training (suitable language training) and improve their facilities (to raise the category of their establishments.) We have to redefine our concept of competition, i.e. we should engage in the so-called *coopetition*.<sup>49</sup> The performance of the sector can be improved and the competitiveness of such joint tourist products can be increased if the ideas, efforts and knowledge of all tourist industries in the region are pooled and if they work together to achieve their goals.

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<sup>47</sup>A good example in this respect is the Memorandum for development of a route called "The Roman Emperors' Road" signed with the Serbian town of Sremski Kalovtsi near Novi Sad in February 2012. <<http://www.mediapool.bg/pat-na-rimskite-imperatori-shtepriivlichia-turisti-u-nas-harvatiya-rumaniya-i-sarbiya-news189982.html>>, 15.06.2015

<sup>48</sup> For more details see: <http://www.tourism.government.bg/bg/kategorii/novini/ministerstvoto-na-turizma-vuvezhda-yasen-reglament-za-kategorizaciya-na>

<sup>49</sup> The term was borrowed from онятието е взаимствано от Тапскот, Тикол, Лоуи и идеята за б-мрежите, в които между участниците в б-мрежата се осъществява сътрудничество и конкуренция. For more details see: Тапскот, Д., Тикол, Д., Лоуи, А. Цифров капитал. С., „Класика и Стил“ ООД, 2001, pp. 23-25.

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YEAR LXVIII, BOOK 3 – 2015

---

## **CONTENTS**

### **D. M. Jusubalieva**

Distance Learning for the Development of Human Resources  
and Knowledge /3

### **Rumen Varbanov**

The Use of the Internet to Support and Develop Democracy /14

### **Dragomir Iliev, Daniela Ilieva, Yordan Neikov**

The Potential for Attracting Chinese Tourists to Bulgaria's  
Tourist Market /33

### **Victor Monev**

Plurilingualism, Multilingualism in the European Union  
and Multilingual Didactics /53

### **Kameliya Bozhinova**

Outsourcing Printing Services in Bulgaria – Part of the Global  
Outsourcing Market /65

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and Develop Democracy**

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to Bulgaria's Tourist Market**

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---

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