

Passenger Traffic in Bulgaria and North Macedonia - Current State and Prospects for Development

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Abstract: The purpose of this publication is to examine the current state and dynamics of passenger traffic between Bulgaria and North Macedonia and to mark the prospects in the context of tourism. The authors use statistical data, as well as publications of researchers and institutions directly or indirectly related to the problem at hand. Along with this, the text also focuses on cross-border cooperation between the two countries in the field of tourism as a convenient tool for promoting economic development and inclusion to the European idea. Main emphasis in this cooperation can be placed in several directions: joint projects for the implementation of common specialized routes; development in the field of advertising in the digital environment by promoting the destinations by journalists and bloggers; exchange of good practices.

Keywords: Bulgaria, Northern Macedonia, Travels, Tourism, Cross border cooperation

1. Introduction

Bulgaria and northern Macedonia are neighboring Balkan countries with common roots. There is a deep kinship in language, religion, life, culture, traditions and cuisine between them. Their natural conditions are similar too. However, there are also a number of disparities, mainly related to the socio-economic development of the two countries. In their new historical development, they fall into various supranational structures that contribute to deepening diversification between them.

Typical of modern tourism is the most intense tourist exchange between neighboring countries as well as between countries with similar language and culture. Bulgaria is no exception to this rule. In recent years, most arrivals of foreign visitors to it have been reported by neighboring countries. Bulgarian citizens also choose neighboring countries as a priority when traveling abroad due to lower transport costs and the possibility of day-to-day visits.

One of the aims of this publication is to analyze the current state and dynamics of passenger flows between Bulgaria and Northern Macedonia and to outline the perspectives in this direction. Statistical data, as well as publications of authors and institutions that directly or indirectly address the problem posed, are used for this analysis.

At the same time, the text also focuses on cross-border cooperation between the two countries in the field of tourism as a convenient tool for promoting economic development and integrating with the European idea.

2. Comparative Characteristics of the Tourist Market of Bulgaria and Northern Macedonia

The tourist markets of Bulgaria and Northern Macedonia are specific, both in the volume of tourists and in their characteristics. The variations in the volume of tourists are determined by the different demographic potential of both countries. The population of Bulgaria is 3.5 times more than that of Northern Macedonia. With a population of about 2 million people, Northern Macedonia is a modest tourist generator.

According to the World Tourism Organization, the last two years have ranked North Macedonia's tourism sector very high. In 2019, with an increase of over 25 % in the number of overnight stays, the country is second in Europe, in 2021, despite the pandemic, it is fifth in the world in terms of growth of foreign tourists, and in 2022 it is in the top 10 in terms of currency flow and tourist turnover in the tourism industry. According to the strategic planning for 2023, the Macedonian Tourism Promotion and Support Agency expects foreign exchange income from tourism in the amount of 530 million dollars. Most tourists in the country come from Turkey, Serbia, Greece, Germany and Bulgaria.

The representative survey Attitudes of European towards tourism , conducted among the citizens of most European countries, provides information on the attitudes of travel and quality characteristics of the two tourism markets. According it, the main motive for travel for the citizens of both countries is the beach recreation, but this motive is more pronounced in the Macedonians - 47%. Citizens of Northern Macedonia ranked last among other interest-based surveys related to city visits and organized events, as well as practicing sports tourism (5%, 3% and 2% respectively). As with the Bulgarian citizens, the interests related to the visit of friends and relatives are well expressed - about 1/3 of the respondents. For Macedonian citizens the interest in SPA and wellness services is relatively high - 35% (11% for Bulgarian citizens). Bulgarian citizens are more interested in natural landmarks (22%) than their Macedonian neighbors (11%). In both countries, interest in cultural attractions is significantly weaker than the average for Europe. Accordingly, the value are 9% for Bulgaria - the lowest, 13% for Macedonian citizens at 22% on average for the EU.

The most important factor for Macedonians is the price level in the visited country (24%) to turn into loyal traditional visitors. The quality of tourism services, culture, nature and especially suitability for people with disabilities remain in the background. Similarly, estimates are made for Bulgarian citizens, but for them nature is an essential factor (44% - coincides with the EU average). When choosing a destination, the most important are recommendations from acquaintances, but for Macedonian citizens they are not as significant as other Europeans (34%, 56%). For them, personal experience (31%) and information from the internet (27%) are of utmost importance. Compared to other Europeans, however, Macedonian citizens least use the Internet to organize their trips (15% at 53% on EU average, 28% on Bulgarians). Unlike the other studied nationalities, Macedonians mostly use local organization (30% at 11% on average for EU and 12% on Bulgarian citizens). Macedonian citizens often use the services of travel agencies for this purpose (22% at 19% for the EU) too. Bulgarian citizens considerably less often use tour guides - only 11%. The most preferred country for visits by Macedonian citizens is Greece - 22%, Germany - 8% and Italy - 4%. Bulgarians also choose Greece, but only 8% of them. Macedonian citizens are one of the most satisfied with travel services (90% fully satisfied, 4% dissatisfied), unlike the Bulgarian citizens, who are among the most unhappy (75% fully satisfied, 14% dissatisfied). As with Bulgarian citizens, as well as Macedonian, the most frequent reason for travel cancellation is money (75% and 58% respectively, with an EU average of 46%). This is the reason to spend less, to limit the number and duration of your trips. Both Macedonians and Bulgarians prefer medium-length trips - from 3 to 14 nights (38% and 36% respectively).

3. Priorities of Citizens in North Macedonia in Bulgaria

The exchange of tourists between Bulgaria and northern Macedonia takes place through their common border through the three existing border checkpoints, namely Gyueshevo - Devedere, Stanke Lisichovo - Delchevo and Zlatarevo - Novo Selo. In order to increase the border contact, another three border checkpoints will be opened at Simitli - Pehchevo, Strumyani - Berovo and Black Rock. At a length of 165 km, a border checkpoint currently serves 55 km of its length, which is close to the EU average. Increasing contact will further facilitate the movement of people and cargo. This is expected to contribute to the networking of the two countries, which will facilitate traffic on transport corridor) N°8.

Arrivals of citizens of Northern Macedonia in Bulgaria are variable (Figure 1). They are high in 2006, with the largest number reported in 1999 - 976 734 or approximately every second Macedonian citizen visited Bulgaria.

After 2006, a period with more limited arrivals started, with the lowest values in 2007 - 241 358 or only one in ten visited Bulgaria. This may be related to the change in the border crossing regime in relation to Bulgaria's entry into the EU. Gradually, the number of visitors started to increase by 609 591 in 2018. They are about 4% more than in the previous year. Northern Macedonia is the sixth most important country in terms of the number of its citizens arrived in Bulgaria in 2018 after Romania, Turkey, Greece, Germany and Serbia . If only tourist arrivals are considered, then Northern Macedonia is the 5th most important tourism market generating tourism to Bulgaria after Romania, Greece, Germany and Turkey. Arrivals for tourist purposes in 2019 were 559 617 and their growth compared to the previous year was + 2.6%. In 2020, the trips fell sharply to 287 371 people. In 2022, activity gradually recovered and 425 591 citizens of the Republic of North Macedonia visited Bulgaria.

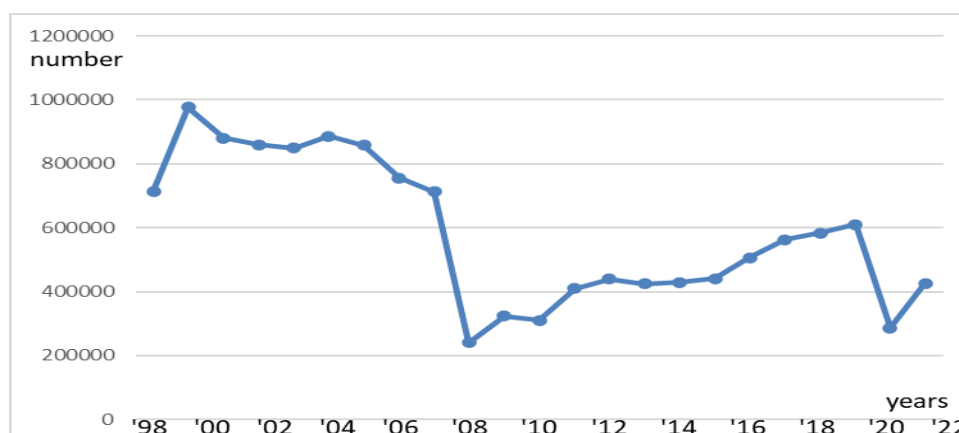


Figure 1: Arrivals of citizens of Northern Macedonia in Bulgaria during the period 1998 r. – 2022.

One of the main problems related to the visits of Macedonian citizens to Bulgaria is the visa regime, which significantly impedes their travels to our country. They prefer to visit and rest in countries where there are no border and visa restrictions when traveling.

In 2018, the Macedonian citizens staying in the country have 93 376. They have completed 275 740 nights. Therefore their average stay in our country is 3 nights - their stay is relatively short. Geographic proximity makes their visit possible but not prolonged. It is good to develop ways to extend their stay. Good opportunities in this regard provide ski tourism and especially healing tourism. Statistics can not account for overnight stays over accommodation, but it can be assumed that they are significant and longer. In Bulgaria, Macedonian citizens can find their preferred accommodation places, namely relatives, friends or second homes.

Macedonian citizens arrive in Bulgaria mainly for tourist purposes (Figure 2). This is true for all seasons during the year. Less well-known are the official and other (for example transit, education, visiting, etc.) motives. Macedonian citizens arriving in Bulgaria are practicing various types of tourism - marine recreation, ski tourism, balneotherapy. Some important advantage of Bulgaria is the Black Sea coast, which is particularly attractive for the citizens of the landlocked. In this respect, however, a serious competitor is Greece, whose Aegean coast is getting faster and offers a longer season for beach recreation. The interest in religious, cultural and gambling tourism is less expressed. Almost irrelevant to them are the opportunities for practicing eco- and rural tourism and sports tourism.

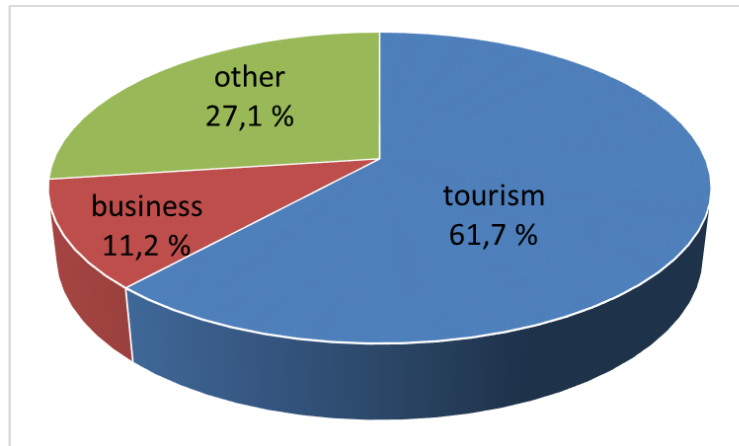


Figure 2: Arrivals of citizens of Northern Macedonia in Bulgaria for the purpose of the trip in July 2023.

Arrivals are relatively evenly distributed over months (Figure 3). Preferred months stand out in October, January and August in connection with ski tourism and sea recreation. The trips are the weakest only in February. May, July and September are also "strong" months.

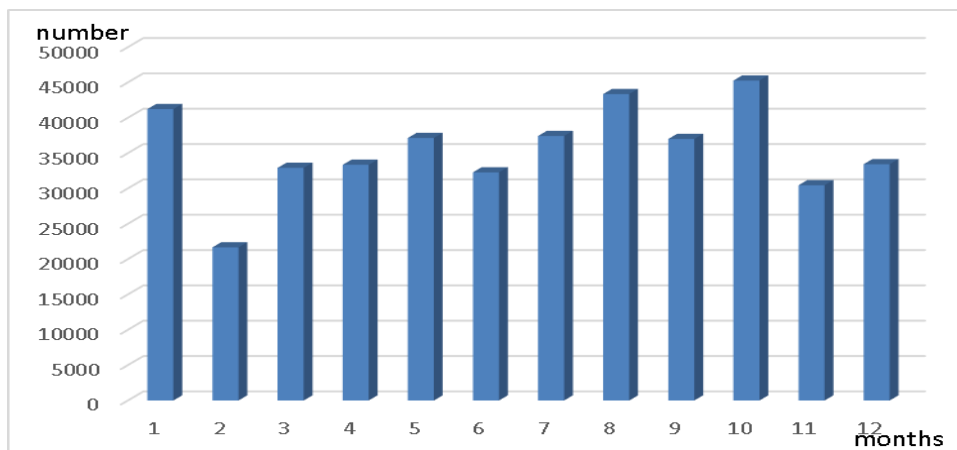


Figure 3: Distribution of arrivals of citizens of Northern Macedonia in Bulgaria by months in 2022.

Bulgaria is not expected to participate in tourism fairs in Northern Macedonia every years. It would be better to have such advertising activities every year. This would contribute to the popularization Bulgaria as well as to the increase of arrivals from Northern Macedonia.

North Macedonia is the country that sends the largest number of tourists to Bulgaria in relation to its population. In 2019, half a million Macedonians came to our country (25% of the country's population). 2022 - 72% increase compared to 2021. These figures make North Macedonia one of the top 10 markets for Bulgaria.

4. Travel of Bulgarian Citizens in North Macedonia

The trips of Bulgarian citizens to Northern Macedonia have also changed over the years (Figure 4). There are four upward periods and three travel declines. The lowest number of visits was in 2003 - 222 113 and most of them in 2018 - 416 448. Thus, about 6% of Bulgarians visited Northern Macedonia in the previous year. The increase compared to 2017 is about 5%. A period of lasting interest in our Southwest neighbor is forming. Northern Macedonia is ranked sixth among the preferred by Bulgarian citizens for travel abroad after Turkey, Greece, Romania, Serbia and Germany. For Northern Macedonia, Bulgarian tourists are the second largest number of international arrivals in the country after those of Greek citizens. Other major generators are Albania, Serbia, Turkey and Kosovo. The neighboring countries predominate. In 2020, the trips fell sharply to 71 705 people. In 2022, activity gradually recovered and 237 660 Bulgarian citizens visited the Republic of North Macedonia.

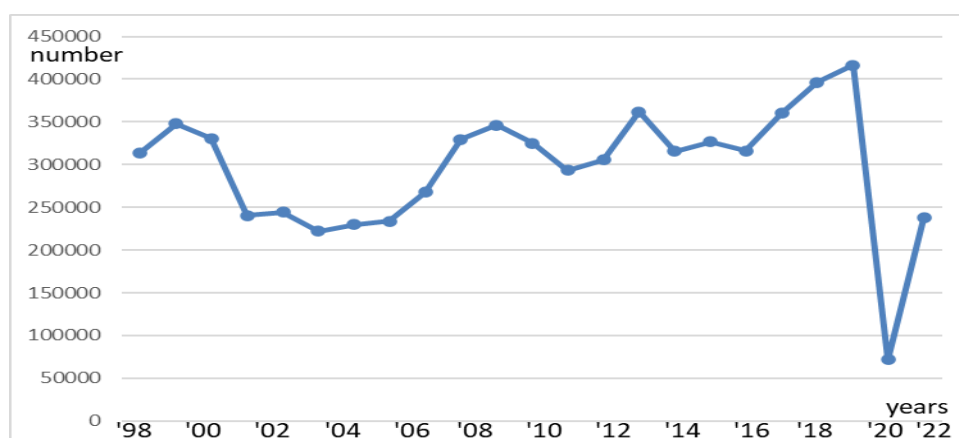


Figure 4: Travels of Bulgarian citizens in Northern Macedonia during the period 1998 r. – 2022 r.

In contrast to Macedonian citizens, Bulgarians travel mainly for business purposes (Figure 5). There are around 40 % of the trips. The other motives (such as visiting, transit) are also strongly covered. Only 1/3 of the trips are tourists.

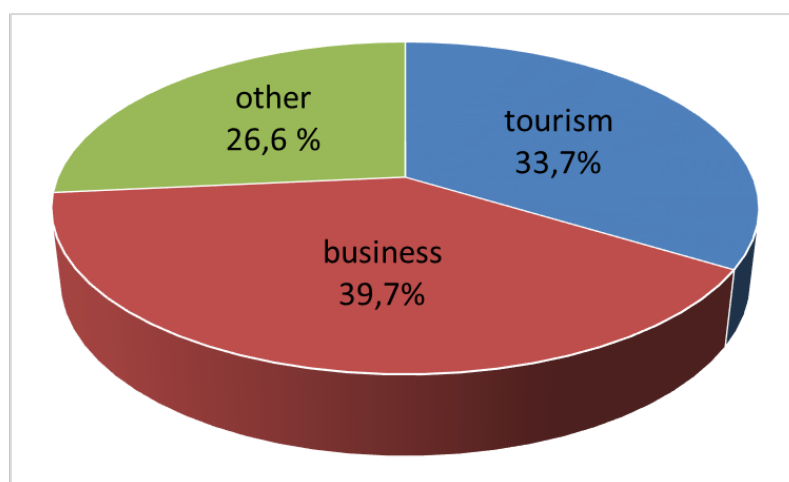


Figure 5: Travels of Bulgarian citizens to Northern Macedonia for the purpose of the trip in July 2023.

The trips of Bulgarian citizens to Northern Macedonia are permanent throughout the year (Figure 6), but still with a pronounced predominance over the warm half-year. The most preferable months are May, August and December and the least visited - October.

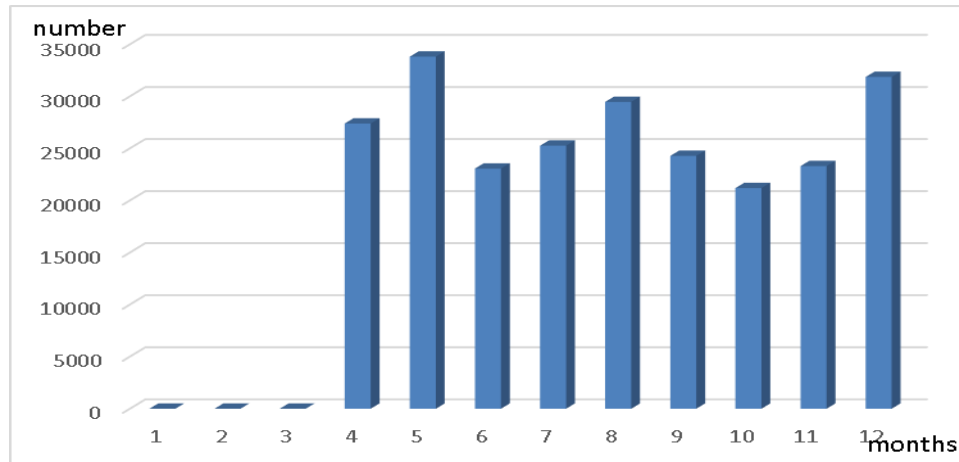


Figure 6: Distribution of trips of Bulgarian citizens in Northern Macedonia by months in 2023.

Most preferred places from foreign tourists, incl. Bulgarians in northern Macedonia are the lakes and, above all, the Ohrid Lake, the capital and the mountain resorts. The Lakes are the most attractive tourist resource of Northern Macedonia and are an important competitive advantage for the country.

Tourism as an industry is very sensitive to the surrounding environment and a number of processes directly or indirectly affect its planning, success, growth and development. According to data from the Macedonian National Agency for the Promotion and Support of Tourism, the number of Bulgarian tourists in North Macedonia has more than doubled in the first four months of 2023 compared to the same period in 2019 (the last before the covid-crisis). For the first four months of 2019, there were 16,809 Bulgarian tourists - an average of about 10% of all foreigners, which places them in the top three of the most numerous guests. Now only 7,331 Bulgarians have chosen North Macedonia for tourist trips, which is about 5% of foreigners. The reported drop is 60% and is due to the current political relations and the obstruction of the European integration processes.

5. Opportunities for Cross-Border Partnership between Bulgaria and Northern Makedonia about Tourism

The geostrategic importance of the Balkans is determined by the characteristics and historical parameters of today's geopolitical situation in the region. Cross-border cooperation in the field of tourism is a convenient tool to promote the integration of more countries in this region into the European idea and is being discussed more and more involved at different levels.

Macedonia is an important tourist market and a strategic partner for Bulgaria. In the dialogue between the two countries in this direction in recent years, the importance of tourism as a structure-determining factor for the two economies has been more and more clearly outlined, and the possibilities of attracting more tourists to the Balkans with cross-border routes and services are being discussed. A working group is being considered to develop a joint tourism product to promote the interest of tourists from distant markets such as China, India, Japan, South Korea, USA, etc. to the region and to be included in a future common Balkan tourist route.

In 2023, in the high-level meetings between the two countries on the occasion of 30 years since the establishment of diplomatic relations between them, initiatives to popularize specialized forms of tourism were discussed, as an excellent opportunity for the development of a common Balkan product. The prospects for this cooperation are outlined in several directions – from the development of common wine routes, to joint projects in the field of advertising in the digital environment through the promotion of destinations by journalists and bloggers, as well as the exchange of useful practices. There are more than 200 favorable places in Bulgaria and North Macedonia, where tourists can enjoy the taste of quality wine, touch the riches and peculiarities of both countries, thus laying the foundation for an even more dynamic future development for sustainable and ecological tourism.

Tourism in both Bulgaria and Northern Macedonia marks a rapid development trend by offering modern content in spaces that, with their natural and social characteristics, are the basis for new attractive experiences and leisure time use. The tourism industry is a significant challenge for the economic development of the countries. In border regions it is directly dependent on working together and partnership. Cross-border cooperation rethinks the interpretation of borders and redefines their functions. Changed relations in the world and the development of beneficial links between neighboring countries stimulate their joint actions in different directions - improving infrastructure, improving communications, modernizing spaces, opening additional border posts, etc. Cross-border partnership and the implementation of joint projects naturally leads to a more efficient use of existing facilities and services and prevents their expensive and often unnecessary duplication.

At the same time, cross-border integration strengthens regional identity, which is a prerequisite for successful international tourism, to develop a broad market and maximize tourism potential. Tourism is often interpreted as an expression of freedom and a driver of social change. Cross-border connections allow and encourage closer interaction between tourists and local communities and more efficient use of border areas.

An improved regional economy and job creation is another benefit of tourism in these territories. Socio-economic growth as a result of the development of the tourism industry is a powerful tool for changing and imposing a higher standard. Cross-border cooperation in the field of tourism therefore plays an important role in social and regional development. It undoubtedly also acts as a catalyst for innovation and knowledge transfer, as well as maintaining regional competitiveness.

Tourism is popularizing both Bulgaria and Northern Macedonia as attractive tourist destinations in the Balkans and attracts the curiosity of tourists from many countries of the world. Both countries have potential for many types of tourism, but their interests are most common in cultural, rural, religious, culinary tourism. More recently, there is a need for the development of active tourism, of alternative and adventurous tourism, for which both countries offer excellent conditions - slopes and steep mountains, ski terrains, calm and fast rivers, broad plains. There are also a number of prerequisites, which are a sure foundation for the development of common tourism initiatives:

- EU programs that allow the funding of such initiatives;
- the existence of numerous cultural and natural resources;
- the relative cultural proximity of the two regions;
- the interest of modern tourists to destinations that are outside the standard "sea-mountain" scheme;
- targeted regional policies for the development of attractive tourist products and the provision of quality tourism services.

"The offer of joint tourism products - mainly in cultural tourism, but also in the field of tourism demand in the field of mountain tourism, hunting tourism, wine tourism and rural tourism would improve the opportunities of the environment in the border regions of Bulgaria and Macedonia." In this way, the seasonal imbalance is overcome, the employment of the local population is overcome and the problems of demographic collapse, depopulation of villages, etc. are overcome. In this context, the use of European programs and funds provides broad opportunities and is "a prerequisite for an integrated tourism development that is a factor in overcoming poverty and the consequences of the current crisis that have plagued both sides."

The joint tourism products between Bulgaria and Northern Macedonia have existed for a long time and this is because the market itself requires it and the travel agencies cooperate. "What we as a region can do, in particular Bulgaria and Macedonia, is to increase the accessibility of the overseas and eastern markets because potential tourists will come from there. They will visit the region, not just one country, because we are small states. If tourism develops within the region or within 2-3 countries, it will be more interesting for tourists, even for Europeans," said Alexander Donev, former director of the Tourism Agency of the Republic of Macedonia.

As a follow-up to the European Cohesion Policy, the cross-border cooperation program Interreg - IPA Bulgaria - Macedonia 2014-2020 introduces a new program framework that focuses more on strategy and results. Among the thematic priorities of the program are the development of tourism (including natural and cultural heritage) and a common objective "to strengthen cross-border cooperation between people and institutions in the region, to jointly address common problems and to exploit the untapped potential". The program is co-financed by the European Union's Instrument for Pre-Accession II. Priority Axis 2. Tourism includes several specific objectives:

- increasing the tourist potential in the region through cooperation for better conservation and sustainable use of natural and cultural heritage;
- improving the competitiveness of the region's tourist supply;
- promoting cooperation on sustainable tourism.

For Bulgaria, the regions eligible to benefit from this program are Kyustendil and Blagoevgrad, Macedonia - its northeastern, eastern and southeastern regions. "The program is an example of how institutions and organizations on both sides of the border continue to seek and find effective and sustainable solutions to regional problems and to maintain and develop successful partnerships."

Among the approved tourism development projects are: "Cultural Bridge Through the Centuries" of the Georgi Todorov Community Center and Development Center of the Eastern Planning Region - Macedonia, worth just over BGN 800,000. The second project is "Preservation of the Spiritual Sanctuaries in Strumica and Kyustendil" worth almost BGN 1 million. Nearly BGN 200,000 receive a project for the development of cultural tourism, the Chamber of Commerce and Industry in Kyustendil and the Kumanovo Small and Medium Enterprises Foundation. The project "Young people - the new promoters of culture in the cross-border region of the tourist association" Strumica "and Association" Business information and cultural center "- Sandanski is also approved. Near by 220 thousand are awarded for the project "Youth from Bulgaria and Macedonia together with Tourism for Better Health" of the Health Promotion Foundation and the Center for Development of the Northeastern Planning Region in Macedonia. A project of the municipalities of Dupnitsa and Kumanovo - "The General History of a Cultural Bridge Beyond the Borders" will be financed with nearly BGN 1 million. Gotse Delchev Municipality also receives more than 1.1 million BGN for a joint project with the Center for Development of the Eastern Planning Region and others. Also, projects on the competitiveness axis were approved.

The overall budget of the program for the period up to 2020 is over BGN 37 million, which is used to strengthen cross-border cooperation between people and institutions in the region, to jointly solve the common problems and to exploit the unused potential on three axes reaching to a population of over 1 million people in both countries.

The creation of consolidated tourism products between the two countries not only stimulates their economic growth and develops cross-border cooperation but also improves the reputation of the region as a place in Southeastern Europe, which is modernized and offers good practices of recreation and tourism.

6. Conclusion

Passengers between Bulgaria and Northern Macedonia are significant and there is a tendency to increase in both directions. Given the fact that the countries are neighboring, however, the trips are not large. The reasons for this are varied. The first is related to the poor demographic potential of

both countries. The second reason stems from the border regime when crossing the EU borders, and that is exactly where the border exists between the two countries. It can be expected that travel (including tourist trips between Bulgaria and Northern Macedonia) will increase not only due to geographical proximity but also due to the similarities in language and culture, which are a prerequisite for easier communication. Between the two countries there are rich opportunities for cross-border cooperation and partnership of tourism. The conditions are favorable for its development within the inter-neighborly relations and interests.

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