

Opportunities for sustainable development of the tourist exchange between Republic of Georgia and Republic of Bulgaria

Възможности за устойчиво развитие на туристическия обмен между Република Грузия и Република България

Introduction

Georgia and Bulgaria are two of the countries in the Black Sea region, distinguished by a variety of natural and anthropogenic tourism resources. They have a number of similar characteristics arising from their geopolitical location, historical and cultural heritage and contemporary political and socio-economic development. Located on the same latitude, they control the eastern and western coasts of the Black Sea respectively, and through their territories the links between the countries of Eastern Europe, the Middle East, the Caucasus region and the Balkans are realized (Figure 1). Both countries in the past and today fall into the overlapping areas of interest and influence of regional geopolitical players Russia and Turkey.



Fig. 1. Location of Georgia and Bulgaria

Source: https://www.welt-atlas.de/map_of_black_sea_1-1033

Tourism is an important economic sector in both Georgia and Bulgaria (Table 1). In Georgia, in 2016, it forms 7% of GDP and 64% of exports of services [1]. In Bulgaria, its share amounts to 13% of GDP and 65% of exports of services [2].

In recent years, the tourist development of Georgia and Bulgaria has been characterized by positive dynamics in terms of incoming and outgoing international tourist flows.

Table 1. Comparative data on tourism in Georgia and Bulgaria, 2016
(from different sources)

Indicator	Georgia	Bulgaria
Territory (thousand km ²)	69.7	111.0
Population (Thousand People)	3720	7102
Sites in the World Heritage List (number)	3	9
Accommodation (number)	1765	3331

Indicator	Georgia	Bulgaria
Beds in accommodation (thousand units)	57	328*
Share of tourism in employment (% of jobs)	5.3	11.9
Share of tourism in GDP (%)	7.1	12.8
Share of revenues from international tourism in exports of services (%)	64	65
International arrivals (in thousands)	6361	10604
International Arrivals for Tourism (in thousands)	2721	8252
Revenue from international arrivals	2,17 billion \$	3,2 billion €
Outbound international trips (in thousands)	3400	5392
Expenses for international tourism	0,39 billion \$	1,2 billion €
Tourist Balance	1,78 billion \$	2 billion €
Accomplished Nights, 2016 (Mln)	28,7	25,2*
- by citizens of the country;	17,1	9,0*
- by foreigners	11,6	16,2*

* in accommodation with more than 10 beds

Inbound and outbound tourist flow in Georgia

In 2016, the number of international arrivals in Georgia increased by 459 thousand and for the first time exceeded 6 million. For 4 years, from 2012 to 2016 it increased by 1.9 million or by over 40%. Revenues from international tourism amounted to US \$ 2.2 billion (12% annual growth) against US \$ 1.6 billion in domestic tourism revenues, international tourism accounts for nearly 60% of the country's tourism product. The upward trend continues in 2017, when the growth of arrivals is almost 19% and the number exceeds 7.5 million [11], of which 3.5 million are for tourism purposes. Revenues from international tourism in 2017 reach \$ 2.7 billion [19].

About 94% of the incoming tourist flow in Georgia is formed by countries belonging to the European Tourism Region. Low is the share - a total of 6% - of the other regions: Asia Pacific, Middle East, Africa and America. Another feature is the high share of neighboring countries in Georgia, which appear to be the main emittive markets (Figure 2). In 2016, they account for more than 80% of the number of international arrivals, incl. Azerbaijan and Armenia - 24%, Turkey - 20% and Russia - 16%. Thus, each of the neighboring countries forms a significant inflow of more than 1 million people [1].

In 2017 there was a very high growth in arrivals from some new emerging markets: Saudi Arabia - 165%, Iran - 118%, India - 64%, China - 54% [19].

A positive trend for Georgia is the increase in the average length of tourist stays - from 4.8 days in 2013 to 6.5 days in 2016. Tourists from Ukraine - 15 days and Russia - 13 days who make a real contribution the majority of visits to recreation and entertainment, while the average stay of tourists from neighboring countries (excluding Russia) is only 3 days [1].

Geographic proximity to Azerbaijan, Armenia and Turkey determines the large number and high relative share of one-day excursions and transit of their citizens. This also determines the prevailing use of road transport - over 80%, while air transport in international arrivals in Georgia is still low - only 17% [1]. From 2011 to 2016, arrivals by air were the fastest - more than 3 times. In the same period, road transport increased by 2.2 times, by rail. transport - by 10% and by water transport remain at the same level [19].

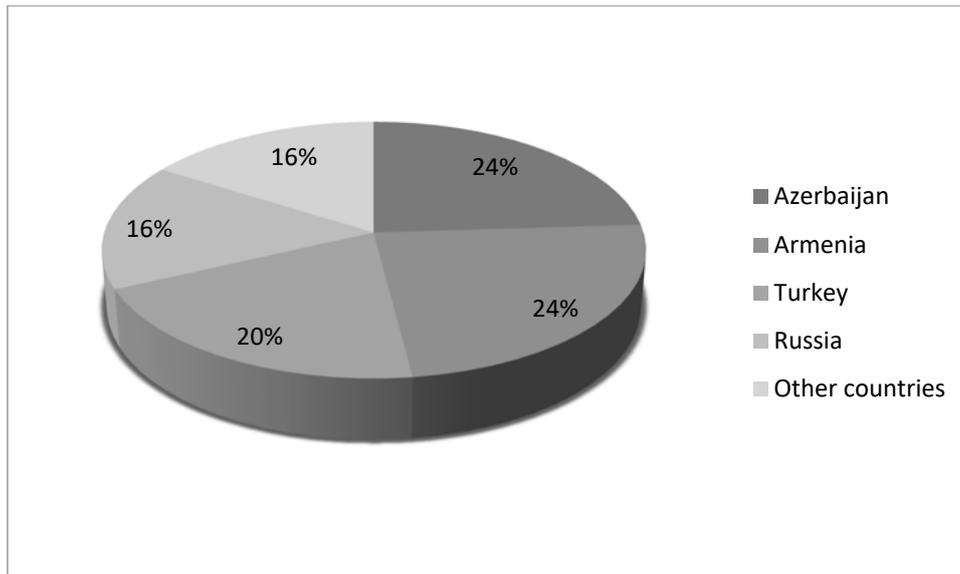


Fig. 2. Structure of international arrivals in Georgia by country, 2016

Inbound international tourism in Georgia is characterized by pronounced seasonality. The summer season (July - September) is a strong season. Most arrivals are in August, and at least in January; the ratio between the strongest and the weakest month is approximately 3:1. In the third quarter, nearly 40% of the revenues from international tourism are realized [1].

Outbound international tourism is less developed than the inbound. In 2016, 3.4 million outbound trips were made. Of these, 88% are by road, 11% by air, 0.7% by rail and by 0.1% by sea. Georgian citizens' spending on international tourism is US \$ 0.4 billion, marking an increase of 17% [1].

Inbound and outbound tourist flow in Bulgaria

In 2016 the total number of international arrivals in Bulgaria is 10.6 million. The arrivals for tourism purposes are 8,252 million, compared to the previous year, a growth of 1,153 million (16%) was achieved. The main part - 5.1 million or 62% of international arrivals are for recreation and vacation, 1.4 million (17%) - for business, 0.7 million (8%) - for visitation and 13% - for other purposes, incl. transit. Revenues from international tourism amount to 6.4 billion leva (over 3.2 billion €) [6].

In 2015-2016 the length of stay of foreigners in the country is between 5 and 6 days. The seaside resorts are about 6-7 days in the summer season, and in the other seasons it is 2-3 days, except in January, when it increases to 4-5 days [6].

The main emirate markets for Bulgaria are the European Tourist Region countries, which account for over 95% of international arrivals. The leading number of arrivals is Romania - 1.7 million, Turkey - 1.3 million and Greece - 1.2 million, followed by Germany - 1 million and Russia - 0.6 million. Significant is the number of arrivals and Macedonia (0.6 million) and Serbia (0.5 million) [12]. Thus, the neighboring countries of Bulgaria form more than 50% of the incoming tourist flow. The visits of citizens of these countries are usually short and they have a relatively small number of nights and incomes.

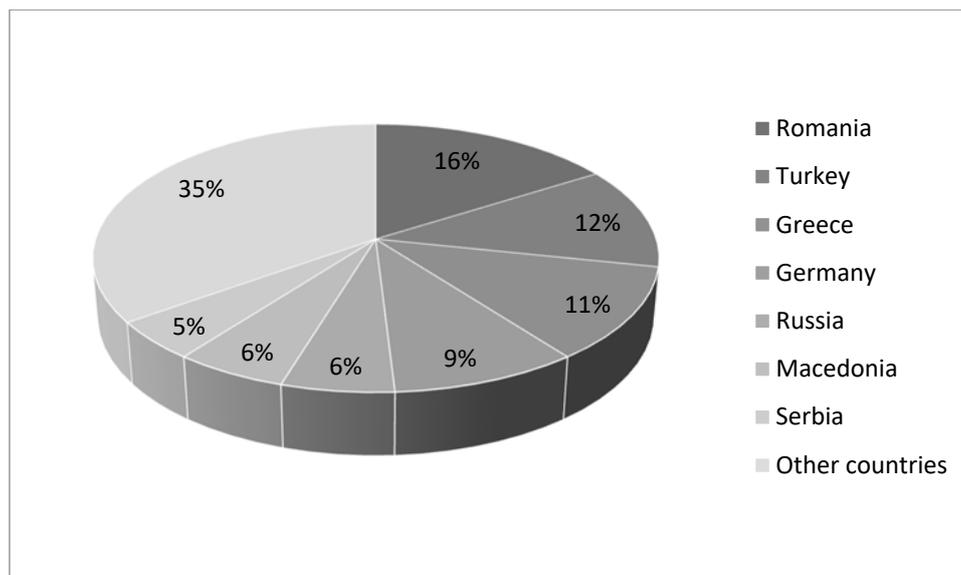


Fig. 3. Structure of international arrivals in Bulgaria by country

Of greater importance for Bulgaria as emitting markets are Germany, Russia, Great Britain and Poland. In 2016, foreign citizens have spent 16 million nights in the country. Of these, 20% are for tourists from Germany, 12% for Russia, 10% for Romania, 8% for Poland and the UK [16].

Characteristic of the Bulgarian incoming international tourism is the seasonal nature. In 2016 the distribution of international arrivals in the country by quarters is as follows: I - 11%, II - 26%, III - 47% and IV - 16%. The ratio between the strongest and the weakest months (August and February respectively) is 5.3:1 [12].

The outbound tourist flow from Bulgaria is smaller than the inflow, but it is also characterized by positive dynamics. In 2016 the number of trips of Bulgarian citizens abroad increased by 12% and reached 5.4 million. Their seasonal distribution has a summer maximum (31% in the third quarter), but seasonality is less pronounced. The ratio between the strongest and the weakest month is only 2:1. Major receptive markets, attracting 2/3 of the outflow, are the neighboring Balkan countries: Turkey and Greece with 1.2 million travels, Romania, Serbia and Macedonia - by 0.4 million. Among other countries stands only Germany with 340 thousand trips of Bulgarian citizens [15]. The cost of Bulgarian tourists traveling abroad increased by 21% and reached € 1136 million [18].

Tourist exchange between Georgia and Bulgaria

In the period 2006-2011, the number of arrivals of Bulgarian citizens in Georgia increased by more than 20% - from 8304 to 10309. At the same time, Bulgaria is taking a more backward position between the emitive markets for Georgian inbound international tourism, from 10th to 15th place. After 2011 there is a weak and unsustainable growth, but our country is already outside the Top 15 of the Georgian emitive markets [19].

In 2016, Georgian statistics account for 12815 international arrivals of Bulgarian citizens at 10639 for 2015 [1]. This represents 0.2% of the Bulgarian outgoing tourist flow, as well as 0.2% of the inflow into Georgia. Bulgaria ranks 23rd among Georgia's emitive tourist markets. It yields to smaller countries like Lithuania or to more remote ones like the Philippines.

According to data from the Bulgarian Ministry of Tourism, the visits of Georgian citizens to Bulgaria in 2016 are 11355. Compared to the previous year, they have increased by 8.4% [18]. Their relative share as part of the outgoing Georgian flow is 0.3% and at the same time is only 0.1% of the tourist flow in Bulgaria. Among the countries whose citizens visit Bulgaria, Georgia ranks 45th, giving way not only to traditional European emittive markets, but also to far more remote countries like Japan, Australia and the Philippines.

The two-way tourist exchange between Georgia and Bulgaria in 2016 amounts to 24,170 trips. This quantity in no way corresponds to the resources and capabilities of the two countries that refer to the same region and the distance of about 1000 km by air. We believe that the situation is due first and foremost to the insufficient mutual awareness and popularity of both parties and to their unsatisfactory transport connectivity.

In order to outline the potential for sustainable growth of bilateral tourist exchange it is necessary to analyze the tourist resources and the specifics of the national tourist product of Georgia and Bulgaria and on this basis to draw their competitive advantages which can make them more clearly recognizable and preferred destinations. We believe that the emphasis should not be on the similarities that undoubtedly exist, but on those resources and elements of the tourist product that have a unique character.

Tourist resources of Georgia. The specificity of the tourist product

Georgia is ranked seventh in the Lonely Planet ranking of the world's best tourist destination in 2017 [20]. This prestigious ranking has its rationale. The country has long been known around the world for its unique tourist resources. Located to the south of the Great Caucasus mainland, Georgia covers territories with a denivelation more than 5000 meters, with 87% of its area being in the mountainous and semi-mountainous areas. The peculiarities of the relief determine the great diversity of climate, water, vegetation and the animal world. The Kolchida valley to the west facilitates the climate impact of the Black Sea, with which the country has a 308-kilometer coastline.

In spite of its little territory, the country is unique by its distinguished natural landscapes -humid subtropics, mountainous regions and perpetual snowy peaks.

The available natural tourist resources are characterized by high attractiveness. In the country are registered 103 climatic resorts and over 2000 mineral springs [19]. This is a solid basis for the specialization in mountain, balneal, ecological and adventure tourism, which is complemented by the sea holiday tourism on the Georgian Black Sea coast.



Bagrati Cathedral (XI c.)



Gelati (XII c.)



Jvari Church near Mtskheta (VI c.)



Svetitskhoveli (XI c.)

Another area of tourism specialization of Georgia is cultural tourism. More than 30,000 historical and cultural monuments are located on the territory of the country. Among them 5,000 are protected by the state and 3 are included in the UNESCO World Heritage List:

✓ Historical monuments of Mchheta (medieval Georgian capital) - Svetitskhoveli Church, Djivari Temple and Samtavro Monastery, period 6th-11th centuries. In 2009 he was listed on the list of sites at risk, and in 2016 he was removed from it.

✓ The temple of Bagrat and the Gelatian monastery near Kutaisi, prov. Imeretia, XI - XII century.

✓ Upper Svantiya area, architecture of the 12th c. [8].

Archeological excavations in Dmanisi are completely unique place of interest for tourists because of the earliest Pleistocene hominid cranial remains (1.7 - 1.8 million years) discovered on that site [2].

Besides that, Georgian regions with completely distinguished culture, lifestyle, traditions, national cuisine, etc. represent important tourism resources [5].

In summary, tourism resources of Georgia are conditioned by the following:

1) The Black Sea coastline. It is the main base for the development of mass tourism;

2) Caucasus Mountains. Highlands of Georgia create extremely good conditions for the development of ski tourism and alpinism;

3) Material cultural and natural monuments;

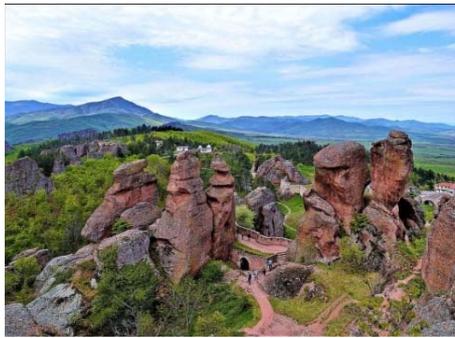
4) Resorts and resort places.

The location of natural and anthropogenic tourism resources determines to a large extent the direction and intensity of the internal and incoming tourist flow. This in turn affects the location of the accommodation base. As of 2016 there are 1765 accommodation places in the country with 57 thousand beds. Their territorial concentration is greatest in the capital and along the Black Sea coast: 26% are in Tbilisi, 20% in Adjara and 54% in the other 9 provinces [1].

In 2017, 63% of the beds are concentrated in hotels; 17% are in private homes, 12% are in guest houses and hostels and 8% are in other accommodation. The presence of the major hotel chains: Hilton, Hyatt, Radisson, Ramada and others, which already account for about 12% of the accommodation base, is increasing. It is planned that in 2018 and 2019 it will complete the construction of over 190 hotels with over 21200 beds. The two largest are in Batumi: Twin Tower with 350 rooms and Pulmann Hotels and Resort with 310 rooms [19].

Tourist resources of Bulgaria. The specificity of the tourist product

In the course of its development as a European tourist destination, Bulgaria initially specialized in offering two major tourist products - those of the sea recreative tourism and mountain ski tourism. Gradually, the market mix, with which the country is entering the foreign markets, adds new products to the health (mainly balneological) and urban cultural tourism. On the domestic tourism market, the product of rural tourism is also becoming increasingly popular.



Belogradchik Rocks



Bachkovo Monastery



Sozopol

This specialization is dictated by the extensive use of local natural tourism resources. Moreover, almost half of the material and technical base of tourism in Bulgaria is concentrated in 3 large and about 30 medium and small tourist resorts along the Black Sea coast. Since Bulgaria and Georgia are competing with each other by offering a similar product in terms of sea tourism, the opportunities for expanding tourist exchanges with regard to this product are limited.

The same can be said for the products of mountain and balneological tourism, which the two countries offer with the self-confidence of regional leaders - Bulgaria in the Balkans, and Georgia - in the Caucasus region. Mountain skiing in Bulgaria is practiced in the period December - April, but partial revival in the mountain resorts is also observed during the summer months, when Bulgarian tourists are mainly staying there.

In Bulgaria there are over 140 mineral water deposits, based on which 19 spa resorts of national importance and 35 of local significance have been built and

registered [6]. Among them with greater capacity are Velingrad, Sandanski and Hisarya.

The diversity of relief and other natural components is a resource for the development of ecological, hunting (traditional for Bulgaria) and adventure tourism.

Summing up the nature-related tourism potential, we will note that in both countries it is diversified and can be assessed as significant but its similar characteristics do not imply a significant increase in bilateral tourism exchanges. Such an increase can be expected in particular with regard to the product of cultural tourism, which in Georgia and Bulgaria is unique.

The Bulgarian lands are the arena of millennial civilization development which has led to the overlapping of various cultural layers - Thracian-Roman, Slavonic-Bulgarian, Byzantine, Ottoman-Turkish and that of the modern Bulgarian state. Today, about 40,000 objects from different historical eras are registered in Bulgaria, of which more than 10,000 are of national importance. By this indicator, the country ranks among the top ten in Europe [6].

UNESCO's World Heritage List includes 7 cultural and 2 natural sites as well as 5 sites of immovable cultural heritage. Bulgaria ranks third in Europe after Italy and Greece by the number of archaeological cultural values. There are 33 archaeological and 10 ethnographic, architectural and historical reserves in the country. In 2016, 195 museums were operated, which were visited by more than 5 million people, incl. over 1 million foreigners. There are 1278 events and festivals in the Tourist Festivals and Events Registry, maintained by the Ministry of Tourism, of which 99 are of international importance [6].

Cultural tourism is a major element in the tourist product of all the tourist regions of the country. It can play a special role in the less developed regions - the Danube region, the Balkan region, the Thracian region and the Rose Valley region, where a large part of the cultural and historical attractions are concentrated. Opportunities also include the election of Plovdiv as the European Capital of Culture in 2019.

One of the channels for expanding the tourist exchange between Georgia and Bulgaria may be religious tourism, as the traditional religion of both nations is Eastern Orthodoxy. It is necessary to actively involve the visits of Bachkovo Monastery *Uspenie Bogorodichno*, built and originally inhabited by Georgian monks, in more tourist programs offered on the Georgian market.

Cultural and wine tourism should be promoted as important elements of the product of our cultural tourism. It is necessary to intensify the work of the three wine clusters - Antique Road of Thracian Wine, The Way of Orpheus and Dionysius Road, as well as to fill up the nine national wine routes. This can also be related to the growing rural tourism, part of which its rich content is the authentic local cuisine and regional beverages.

Many of the Bulgarian cities have a rich history and cultural and historical heritage, a saturated event calendar, various entertainment and sports opportunities. Their advantage is the closeness to nature and the possibility of combining cultural with other types of tourism. With the highest attractiveness and transport accessibility are our big cities with functioning international airports - Sofia, Plovdiv, Varna and Bourgas.

In recent years, many business tourism and conference tourism events have taken place in Bulgaria. Their frequency is particularly high during the Bulgarian Presidency of the European Council. With its active stance on the Western Balkans' European integration, Bulgaria reaffirms its role as a regional political leader. The

accumulated inertia can also be used with regard to the pre-accession process in Georgia and other Caucasus countries.

A specific niche with a significant outlook is gambling tourism. Over 700 gaming halls and 25 gaming casinos operate in Bulgaria. The latter contribute to the realization of complex tourist packages including hotel accommodation and cultural and entertainment programs in order to attract a larger number of solvent clients. The progress of the sector is reflected in the growth of revenues from state fees - from BGN 5 million in 2012 to BGN 125 million in 2015 [6].

Opportunities to increase tourist exchange between Georgia and Bulgaria - vision, resources and constraints

The medium-term vision for the development of Georgian tourism (by 2025) envisages turning the country into a year-round destination of high-quality tourism based on its unique cultures and natural resources [11]. Similar is the vision for development of Bulgarian tourism (2014 - 2030), according to which Bulgaria should develop as a preferred destination for sustainable tourism in four seasons [6].

Tourist Competitiveness. Both countries have close positions on the aggregate index of their tourism competitiveness. In 2017, Georgia ranks sixth among the countries of the Black Sea region. However, it outpaces everyone on some distinct indicators, such as Business Environment and Safety and Security [4]. According to the same index in 2017, Bulgaria ranks fourth in the region, giving way only to Greece. Reserves to improve the position of the country mainly concern the pillars of tourism prioritization, air transport infrastructure, cultural resources and business trips [4].

Participation in exhibitions. In April in Tbilisi, the Caucasus Tourism Fair is being held together with the accompanying exhibition for event tourism *Caucasus Incentive, Business Travel and Meeting Exhibition* [23]. There is no information on the participation of representatives of the country in these events on the website of the Bulgarian Ministry of Tourism. The National Tourist Board of Georgia participated with a stand at the International Exhibition *Holiday and Spa Expo* in Sofia in 2017 and 2018.

Transport links between Bulgaria and Georgia. The most important setback for Georgian and Bulgarian tourists is the high prices for international air transport. The low-cost company Wizz Air revealed a direct air link between Sofia and Kutaisi in 2016 but in 2017 the line was closed. The road transport between Bulgaria and Georgia requires a bus or car pass through the territory of Turkey. Depending on the starting and ending points, the length of the route may vary between 1500 and 2000 km and the travel time is at least 1 day. For this reason such trips are rarely practiced. Another transport alternative is sea transport. The ferry connections Varna - Novorossiysk - Poti and Burgas - Poti - Novorossiysk operate due to the long travel time (3 days) used mainly for freight [13]. The ferry owned by the Bulgarian company "PB Management" has trips from Burgas to Batumi sea ports four times a month. The company plans to add the other ferry in order to double the ferry trips and the number of visitors between two countries [7].

Travel offers. Most of the offers offered by tour operators for organized tourist trips of Bulgarian citizens to Georgia include:

- ✓ air flights from Sofia and Varna to Georgia only, with a duration of 5 to 7 days (4 - 6 nights) and package prices from 1750 to 3350 BGN;
- ✓ combined trips with visits of Georgia and the neighboring Caucasus countries - Armenia and Azerbaijan (the so-called Grand Tour of the Caucasus), lasting one to two weeks and prices from 2541 to 4728 BGN [14].

In the first case there is a possibility for flight from Sofia / Varna to Istanbul and from there to Tbilisi; for combined trips, flights usually range from Sofia to Baku. In both cases, long bus journeys have to be made due to the large number and remoteness of the sites visited. The accommodations are usually 4 or 5 star hotels. All of this makes the product much more expensive. Another drawback is the fact that visas and passports are required for travel to Azerbaijan [21].

Cheaper offers include shorter programs, e.g. 5-days flight from Thessaloniki to:

➤ Tbilisi with 4 overnights in three-star hotels in Tbilisi and Kutaisi and a package price of 845 BGN.

➤ Kutaisi with 4 overnights in three star hotels in Kutaisi and Batumi with a package price of 739 BGN. Anxiety causes long bus transfers Sofia / Plovdiv - Thessaloniki and Tbilisi - Kutaisi / Kutaisi - Batumi [9].

Bulgaria is still not a popular destination for the citizens of Georgia. On the Georgian tourist market there are mainly trips to the summer and winter destinations of the holiday tourism in Bulgaria. One-week holiday rates range from 665 to 1327 €. The proposals for cultural tourism objects are mainly focused on the capital Sofia [17].

Visa regime. Visa liberalization adopted in 2017 led to increased number of tourists to Georgia. Visa-free travel gave new opportunities to our citizens to travel to different European countries without any obstacles. The country already has tangible and concrete results in different directions such as tourism development, establishing new business ties, activating students exchange programs, strengthening partnerships between professionals and promoting tight relations between nations.

According to the statement regarding the anniversary of the launch of visa liberalization released by Minister of Foreign Affairs Mikheil Janelidze: "Above 192,000 Georgian citizens have applied for visa-free travel. Each of them has crossed the border several times. Therefore, the border was crossed more than 250,000 times" [22].

Cooperation in the field of tourism between the Republic of Georgia and the Republic of Bulgaria was supported by the agreement on Cooperation in the Field of Tourism signed on December 15, 1997.

The numbers of tourists from Bulgaria have gradually increased in recent years. It's true, that this data is less in quantities than the number of visitors from the neighboring countries. However, percentage growth is evident. In particular, since 2016 up to now, the growth has been about 30-50%.

Conclusion

The state of the tourist exchange between Georgia and Bulgaria does not correspond to the opportunities and interests of both countries. In our opinion, this situation is primarily due to insufficient mutual awareness and popularity, as well as to our unsatisfactory transport connectivity.

Opportunities for sustainable growth of bilateral tourism flow from the specifics of the tourist resources and the national tourist product of Georgia and Bulgaria. Delivering their competitive advantages can make them more recognizable and preferred destinations.

The funds and information resources involved in advertising both countries as tourist destinations are insufficient and need to be drastically increased to increase their recognition on the world tourist market.

Recommendations

- Tourism Ministries of Georgia and Bulgaria to leverage their budget programs related to the development of national tourist advertising and international cooperation in the field of tourism.
- Enhanced participation of both countries in international tourism fairs. It is absolutely necessary for Bulgaria to participate with its stand on the Caucasus tourist market in Tbilisi. Georgia could participate in the tourism fair for cultural tourism in Veliko Tarnovo. This can increase the mutual awareness and popularity of both countries.
- The governments of Georgia and Bulgaria should work to create the conditions for the opening of a regular airline between Tbilisi and Sofia as well as a roundabout Black Sea cruise line on the route Varna - Burgas - Istanbul - Trabzon - Batumi - Poti - Sochi - Odessa - Constanta - Varna.
- The tourism business in both countries should work to diversify the proposed tourism programs by including more and more cultural tourism products.
- There is also a need to step up the activity of the universities that train tourism managers. This could include mutual information exchange, creation of joint bachelor and master programs, training for exchange of experiences in the field of tourism under programs such as Erasmus+ and collaborative research (in the example of this study).

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