



FACULTY OF GEOLOGY AND GEOGRAPHY

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**LIFE CYCLE OF THE TOURISM PRODUCT OF THE
DESTINATION OF SAMOKOV MUNICIPALITY**

A U T O R E F E R A T

of a dissertation for acquiring the degree of Doctor of Science

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The dissertation was discussed at an extended meeting of the Department of Geography of Tourism within the Faculty of Geology and Geography at Sofia University "St. Kliment Ohridski" on September 18, 2024. It was proposed for defense before a specialized jury composed of:

1. Prof. Dr. Mariana Assenova
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The dissertation is 227 pages long (excluding appendices and bibliography) and includes 26 tables and 61 figures. It is structured as follows: introduction, five chapters, conclusion, bibliography with 365 sources, of which 90 in Cyrillic, 275 in Latin, 14 internet sources, and 5 annexes.

The defense of the dissertation will take place on at in during a meeting of the appointed jury.

The defense materials are published on the Sofia University website and are available to those interested at the Dean's Office of the Faculty of Geology and Geography, Room 254 on the second floor (north wing) of the Rectorate of Sofia University "Sv. Kliment Ohridski".

OVERVIEW OF THE DISSERTATION

1.1 Relevance of the study

The tourism industry is becoming one of the world's largest economic sectors. Tourism revenues already account for a significant share of the global economy, and trends indicate that this growth will continue. At the same time, tourism destinations worldwide are beginning to realize the benefits that tourism brings to their regions. However, this does not mean that tourism doesn't have its drawbacks. Mass tourism is often detrimental to a tourism destination, leading to issues such as abuse of natural resources, pollution, social tension, and economic instability. Alternative forms of tourism, such as ecotourism, tourism for the purpose of cultural site visits, nature conservation, education, or event attendance, are options that a destination can incorporate into its tourism development plan. These tourism products provide a new type of experience for tourists while creating a sustainable economic base and opportunities for the conservation of natural and cultural resources. Today's tourists seek more than just a holiday—they desire an experience of a lifetime. With adequate preparation, almost any region can become a consistently attractive tourism destination.

In this respect, a tourism product located in a particular destination must be carefully planned, its status in its life cycle must be regularly assessed (what phase it is currently in), and it must be subject to ongoing evaluation. The product should be developed with the aim of preserving benefits not only for tourists and the tourism industry but also for the social and natural environment, ensuring that tourism development is sustainable.

The relevance of the topic is further supported by the fact that the main tourism product—winter ski tourism in Samokov municipality—is severely threatened by the predicted climate changes. The study also aligns with the National Strategy for Tourism in Bulgaria until 2030, which aims for Bulgaria to develop year-round tourism across all four seasons.

1.2 Subject, object, aim, objectives, research questions, and hypothesis

The subject and object of the dissertation are considered in two aspects: theoretical and empirical.

A) Theoretically, the **object** is the *tourism destination encompassing the tourism product* as a phenomenon, and the **subject** is the *life cycle of the tourism product and the tourism destination*.

B) Empirically, the **object** is the *tourism destination* of Samokov municipality, including its *tourism product* and its variants. The **subject** is the *life cycle of this destination and its products* (i.e., the stage of the life cycle in which they are currently).

Aim of the study:

To determine the life cycle stage of the tourism product of the destination that is Samokov municipality.

Research objectives:

1. To theoretically clarify the essence of the concepts of *tourism product* and *tourism destination*.
2. To theoretically clarify the essence of the concepts of the *tourism product life cycle* and the *tourism area life cycle*.
3. To study and analyze scientific literature on the above concepts, with particular attention to their evolution and the criticisms of different conceptualizations.
4. To present a general description of Samokov municipality as a tourism destination.
5. To study and analyze the main indicators defining the tourism area life cycle stage.
6. To empirically identify the life cycle stage of the tourism destination Samokov.
7. To analyze the impact of risk phenomena, such as the COVID-19 pandemic, on the evolution of tourism destinations and changes in their life cycle stages.
8. To present and justify a model of the tourism product life cycle of the destination in Samokov municipality.

To the aim and research objectives, the following research questions were formulated:

1. Is there a need to revise the existing tourism area life cycle models?
2. The dynamics of which indicators and parameters best illustrate the evolution of tourism destinations?
3. To what extent can the TALC model be used to plan and manage tourism destinations?

The following **hypothesis** was formulated:

The life cycle of a tourism product and a tourism area is determined by the life cycles of the tourism sub-products and territorial entities within it. Most often, or almost always, they are at different stages of their life cycle. Therefore, a tourism area and its product may be in more than one stage of their life cycle.

1.3 Methods

The methods used in the dissertation include analysis, selection, synthesis, and systematization of scientific publications; analysis of secondary data; quantitative analysis; induction and deduction; designing original questionnaires to explore the attitudes and perceptions of stakeholders; conducting a survey of part of the tourism sector; conducting semi-

structured field interviews with key informants; comparison and generalization; and field observation.

1.4 Structure and content of the dissertation

INTRODUCTION

I. THEORETICAL AND METHODOLOGICAL FOUNDATIONS OF THE STUDY

I.1. Characterisation of the concepts of tourism site, tourism product and tourism destination

I.1.1. Nature of the tourism product (TP)

I.1.1.2. Structural elements of the TP

I.1.1.3. Tourism destination (TD)

I.1.1.4. Nature and scope of the tourism destination

I.1.1.5. Elements of a tourism destination

I.1.1.6. Boundaries of the tourism destination

I.1.1.7. Hierarchy of tourism destination

I.2. Research methodology

I.2.1. Territorial scope of the study

I.2.2. Content scope of the study

I.2.3. Methods used in the research

I.2.4. Sources of information used

I.2.4.1. Secondary information

I.2.4.2. Primary information (own studies)

II. LIFE CYCLE OF THE TOURISM PRODUCT AND THE TOURISM AREA

II.1. Tourism product life cycle (TPLC)

II.1.1. Specific curves of the PLC

II.1.2. Modifications (varieties) of the classical curve

II.2. Tourism product life cycle and portfolio matrix

II.3. Tourism area life cycle (TALC)

II.3.1. Criticisms and additions to Butler's model of TALC (after Lagiewski, 2006)

II.3.2. Strategies to avoid the decline and eventual death of the destination

II.3.3. Applicability of the TALC model

III. PREREQUISITES FOR THE DEVELOPMENT OF TOURISM IN SAMOKOV MUNICIPALITY

III.1. Geographical location and natural resource potential

III.2. Anthropogenic tourism resources

III.3. Main tourist territorial entities in Samokov municipality

III.3.1. Borovets National Resort

III.3.2. Belchin village – Belchin bBani and Tsari Mali Grad

III.3.3. Malyovitsa resort

III.3.4. The villages of Beli Iskar, Govedartsi, Madjare and Mala Tsarkva

III.3.5. Town of Samokov

III.4. Socio-economic development

III.5. Tourism management in Samokov municipality

IV. CURRENT STATE OF TOURISM IN SAMOKOV MUNICIPALITY

IV.1. Tourism development of Samokov municipality

IV.1.1. Absolute indicators of tourism development

IV.1.2. Tourism development intensity indicators

IV.1.3. Indicators of the structure and type of tourism

IV.2. Empirical study

IV.2.1. Unstructured key informant interviews

IV.3. SWOT analysis of tourism in Samokov municipality

V. LIFE CYCLE OF THE TOURISM PRODUCT OF DESTINATION OF SAMOKOV MUNICIPALITY

V.1. Life cycle studies of tourism destinations in Bulgaria

V.2. Life cycle of the tourism destination Samokov municipality

V.2.1. Life cycle of Borovets National Resort

V.2.2. Tourism sub-products in the destination of Samokov municipality

V.3. Conclusions and summary

V.4. Guidelines for further sustainable development of tourism in the tourism destination Samokov municipality

CONCLUSION

BIBLIOGRAPHY

APPENDICES

SYNTHESIZED EXPOSITION OF THE DISSERTATION

I. THEORETICAL AND METHODOLOGICAL FOUNDATIONS OF THE RESEARCH

In this chapter, the theoretical foundations of the research are discussed, clarifying the two main concepts used and discussed in the dissertation that relate to achieving its goal: tourism product and tourism destination.

I.1. Definition of the concepts of tourism site, tourism product and tourism destination

Definitions of the concepts, which are adopted by the author and used in the rest of the thesis, are presented and commented on.

I.1.1. Nature of the tourism product (TP)

The essence of the tourism product is revealed. It is assumed that the concept of *tourism product* is derivative (and in a formal logical sense, *specific*) with respect to the concept of a *product* (which is *generic*).

A review of the various sources leads to the finding that the author approaches the revealing of the content of the concept of TP in two main ways: *definitively* and *descriptively*.

After analysing individual publications, the author adopts the view of Marinov (Маринов, 1997), who likens the product to an atom (the atomic model). The core represents the landscape in a broad sense—natural landscape, cultural landscape, and general infrastructure. At the periphery are the facilities and services that satisfy tourist needs—the secondary supply—accommodation, food, tourism infrastructure, etc.

M. Assenova et al. (Асенова и др., 2013) point out an important aspect of the nature of TP, stating that “*it means different things depending on the point of view*”, i.e., depending on who is offering it.

Furthermore, it is stated that the tourism product has different *levels* in satisfying the needs and wants of tourists.

Ribov (Рибов, 1997) emphasizes as an essential feature of TP that it is “*the result of labour activity*”.

One of the most comprehensive descriptions of the features of TP is offered by E. Alexandrova (Е. Александрова, 2005), who defines them as “*specifics characterizing the tourism product*”.

A similar detailed list of the “more important characteristics of the tourism product” is offered by N. Krusteva (Кръстева, 2005), where some repetitions with other authors’ opinions are unavoidable: *combination of tangible and intangible forms; diversity; complexity; flexibility; intangibility; inseparability; variation; non-commodity nature; non-repeatability,*

impermanence, impossibility to store and warehouse; seasonality; limited consumption in time; necessity of customer participation to result from (to happen); local character; and territorial segmentation.

As a result of the above analysis and for the needs of the present study, the following definition can be formulated: ***The tourism product is a complex phenomenon, a heterogeneous set of landscape in a broad sense, and peripheral goods, services, activities, and others forming a variety of sub-products offered to tourists to satisfy their needs.***

1.1.2. Structural elements of the TP

According to D. Doganov (Доганов, 2000), there is still no coherent theory regarding the nature and structure of the tourism product. One reason for this is the broad scope of the concept of “tourist”, and consequently, the even broader understanding of the product intended to satisfy this tourist. The lack of a “coherent theory” on the structure of TP complicates the formulation of an author’s thesis on the issue, which stems from the tasks of the empirical study.

Therefore, the dissertation discusses some well-established opinions in the literature by specialists—Doganov (Доганов, 2000), Hawkins and Lamoureux (Хоукинд и Ламроу, 2001), Alexandrova (Александрова, 2005), Acerenza (based on Доганов, 2000), Assenova et al. (Асенова и др. 2013), and others.

We assume that “the creation of a **tourism product** can be seen as an **effective combination of the individual components of the tourism offer into a package of tourism services that provides greater benefit to the tourist than the benefits of its constituent elements**” (Александрова, 2019).

The review of opinions on the structure of the TP shows that there is no consensus among specialists on this issue. In relation to the dissertation’s aim, the “atomic” version of the structure is accepted as appropriate.

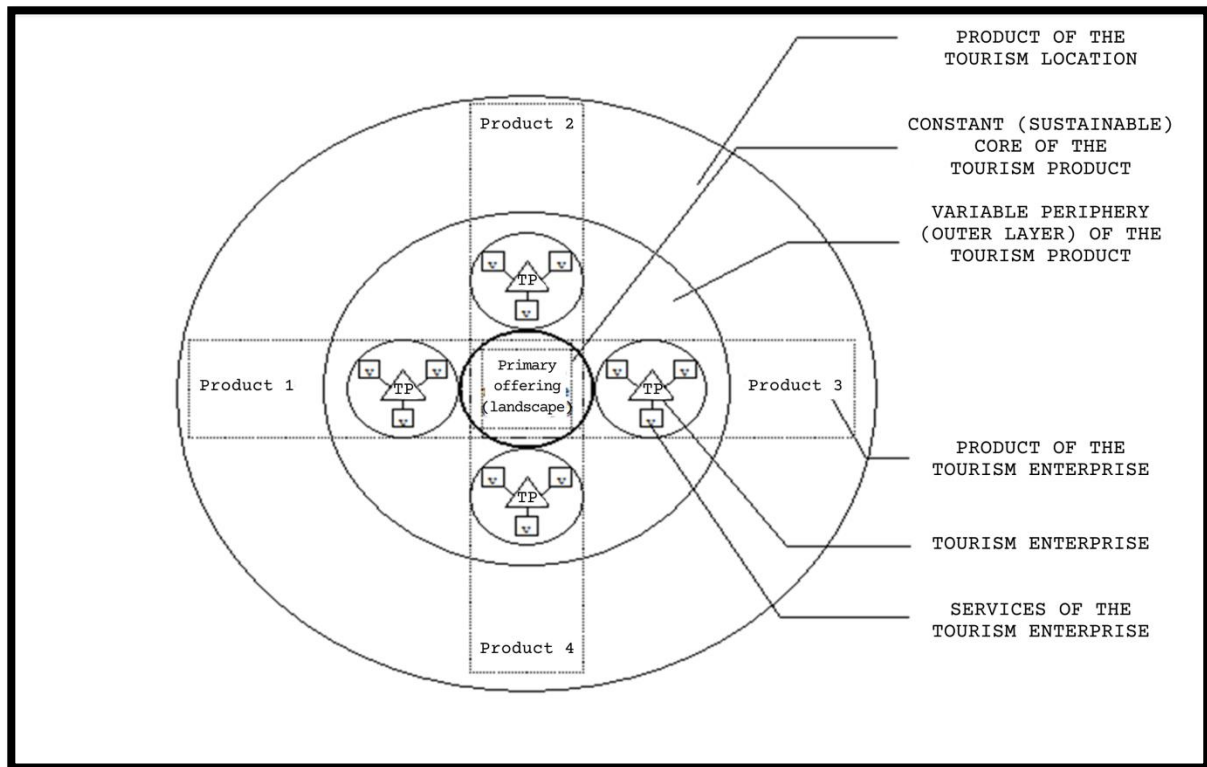


Fig. 1. Scheme of the tourism product (Marinov, 1997, based on the idea of Tschiederer, 1980)

1.1.3. Tourism destination

Tourism destination is specifically defined in point 13 of the Additional Provisions of the Tourism Act in a very different way, namely, “*Tourism destination*” is a regulated set of economic, social, cultural, and ecological activities carried out in tourism sites with real boundaries, with the aim of creating, realizing, and consuming goods and services that form the attractiveness of the tourism product (package) with sustainable competitiveness and efficiency.

Slaveikov and Naydenov (Славейков, Найденов, 2009) assume that it is “a territory with defined boundaries that can attract and satisfy the tourist needs of a large group of tourists”, further specifying that a destination can also be a *settlement* within this territory. According to them, the important questions for understanding the nature of a tourism destination are: *under what conditions can a territory or a settlement qualify as an destination; what are the characteristics of each destination; and what types of destinations exist.* They identify 3 types of conditions, 4 types of features, and 3 types of destinations as important.

1.1.4. Nature and scope of the tourism destination

Bieger (1997) provides a sufficiently complete definition based on the understanding of WTO from 1993 and on numerous authors such as Freyer (1993), Kaspar (1991), Inskip (1991), and others (based on Догаиов, 2000).

A tourism destination is “a geographical space (place, settlement, region) that is chosen by the respective visitor (or segment of visitors) as the purpose of the tourist trip, has the necessary facilities for accommodation, dining, entertainment, and other recreational activities for the stay, and is the actual product and competitive unit in tourism that is to be managed as a strategic business unit” (Bieger, 1997).

WTO (2007) states that the optimal destination level for management is sub-national (regional and local) and that a tourism destination has physical and administrative boundaries.

1.1.5. Elements of a tourism destination

The elements of TD are analysed. The main conclusion that emerges is that a tourism destination includes not only the elements of the Tourism and Recreation System, but also the entire local environment. In this regard, the model of the tourism system and its environment proposed by Маринов (Маринов, 2003) is extremely valuable. In this model, the destination includes the territorial system of tourism and its local environment, i.e., the destination is a space or territory with all its characteristics.

It also discusses the different types of boundaries of the TD—geographical (administrative and natural), cultural, historical, economic, socio-cultural, and functional.

1.1.6. Boundaries of tourism destinations

The boundaries and clear hierarchy of TSRT are mostly dealt with by the science of Geography of tourism. Therefore, the author has chosen geographical administrative boundaries that are accurate and help to present the issue of the life cycle of the destination of Samokov within municipal boundaries in an orderly and comprehensive manner. It is also important to note that secondary tourism information can be found exclusively at the municipal level.

Regardless of the different aspects of boundary definition, most authors and researchers set boundaries for the purposes of study, analysis, and management, i.e., for supply purposes the destination must be defined within certain boundaries.

1.1.7. Hierarchy of tourism destinations and discussion models

Tourism districts typically contain more than one destination linked by corridors. They are in a “relationship of subordination”, forming territorial hierarchical levels—local destinations, regional, national, and supranational. Neighbouring local destinations can interact and merge to form higher-ranked ones (regional tourism organizations) or tourism regions, which, due to their significant scope, can be more easily identified and recognized in the international tourism market. It is of utmost importance, according to the definitions discussed, to correctly identify not only the territorial scope but also the management entity that has the ability to use different impact instruments with the aim of implementing the tourism development strategy in the destination.

Several discussion models of TD are also reviewed—Freichtling (2002), Ritchie, Crouch (2002).

In conclusion, it can be summarized that these two basic concepts of tourism theory—tourism product and tourism destination—are dynamic to varying degrees. The tourism product, although inelastic, is susceptible to change, with its cyclical nature clearly identifiable and non-discursive, whereas the tourism destination, as a territorial entity with natural components, has a relatively stable and much more difficult-to-define dynamicity. An example of this is global warming and its effects on tourism and life in general, a fact that, even if well known by scientists, cannot be predicted with a clarity that allows the process to be reversed. It is the landscape (the core), of which the climate is part, that is most resilient and needs to be studied and managed strategically with foresight to achieve sustainable development of the tourism destination. One way is to empirically establish the tourism product life cycle and, as a result, establish the tourism area life cycle.

We can summarize that a tourism destination is a geographical concept associated with a clearly defined territory and includes the landscape in a broad sense, as well as the concept of a tourism product.

I.2. Research methodology

I.2.1. Territorial scope of the study

The study covers the territory of Samokov municipality, which in this case is viewed as a tourism destination.

I.2.2. Content scope of the study

To achieve the main objective, 4 separate studies were carried out in separate stages.

The first stage is an introduction to the topic of the dissertation—the theoretical framework is specified and the main concepts and formulations are discussed. An in-depth literature review is carried out mainly in the foreign English literature. The basic theoretical model to be used (Butler, 1980) is clarified and the main approaches and criticisms to it are analyzed.

The second stage is an analysis of the tourism potential and tourism development of Samokov municipality and is based exclusively on secondary information. Tourism development and management are analysed.

The third stage is the collection and processing of primary data that complements the information related to the attitudes and perceptions of various actors in local tourism development, namely local tourism businesses, local government, cultural institutions, and others. These were explored through several separate surveys in the form of semi-structured interviews using two questionnaires, one for local tourism businesses and one for key informants. The interviews were conducted over a long period—from 2014 to 2023 (2024). A comparison is made between the results of the two surveys. A SWOT analysis of the tourism destination Samokov is developed.

In the fourth (final) stage, the life cycle of the tourism destination Samokov municipality, its tourism product, and territorial tourism entities is defined. An in-depth literature review of the scientific publications of Bulgarian authors on the topic is made. The dynamics of various tourism indicators within four time stages—2008-2014, 2014-2019, 2020-2021, and 2021-2023—are studied. As a result, based on the analysis of this dynamic by periods and the author's expert assessment, the stages of tourism development and the tourism area life cycle of Samokov municipality, its tourism sub-products, and territorial entities are defined and presented as separate graphs. Taking into account the results of the study, conclusions are drawn, a summary of the problems is made, and guidelines for their solution are outlined.

1.2.3. Methods used in the research

The research process was based on a wide range of primary and secondary data collection methods. Traditional methods of processing and analysis of existing publications and documents were used—analysis of literature sources and departmental documents, analysis of statistical data, scientific analysis, and synthesis. A semi-structured interview was used to determine the attitudes of key stakeholders in order to gather specific information for the study (Dogramadjieva, 2003, 2011, 2018).

1.2.4. Sources of information used

1.2.4.1. Secondary information

1.2.4.2. Primary information (own research studies)

The limitations of the study stem mainly from the lack of sufficient and adequate secondary sources of information and statistics for a sufficiently long period of time and the reluctance of some representatives of the tourism industry (mostly small accommodation owners) to participate in the empirical study and provide information about their activities.

II. LIFE CYCLE OF THE TOURISM PRODUCT AND THE TOURISM AREA

This chapter analyses different aspects of the tourism product life cycle (TPLC) and the tourism area life cycle (TALC). An attempt is made to establish parallel similarities between them and determine their hierarchical relationship.

II.1. Tourism product life cycle (TPLC)

The idea of the similarity between the life cycle of humans (and biological systems in general) and the development of sales of a commodity (product) date back to the second half of the 1960s. By examining a significant amount of empirical data, T. Levitt, and later other authors, have found that product classes, individual commodities, and even specific brands go through four phases: introduction, growth, maturity (saturation), and decline. Levitt (1965) proposed a concept of similarity between goods' market behaviour and the life cycle of biological systems and humans.

Further in Chapter Two, the features of the different stages of the PLC are discussed in detail, focusing on the following features which are directly relevant to the life cycle of the tourism product - *the definition of the beginning and the end of each of the four stages is somewhat arbitrary, and there is no precise length for each stage of the PLC.*

II.1.1. Specific curves of the PLC

The specific curves of the PLC express the stages (phases) in the development of products.

II.1.2. Modifications (varieties) of the classical curve

The classical curve shows the most general scheme of the product life cycle (including the tourism product). However, for various reasons, some products deviate more or less from this pattern. Different exemplary models are reviewed.

II.2. Tourism product life cycle and portfolio matrix

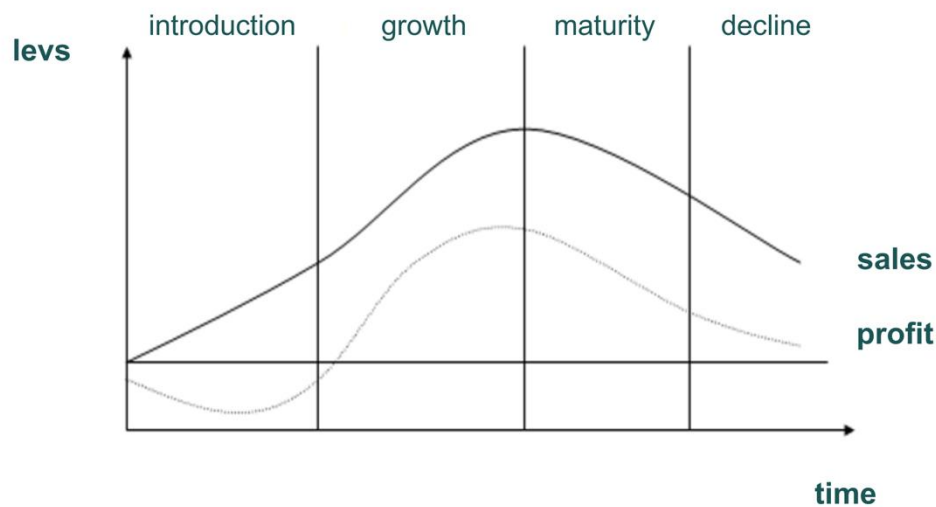


Fig. 11. Product life cycle (Levitt, 1965)

The development of product programs is known as *Portfolio analysis*. It was first developed and applied by the Boston Consulting Group, founded by Bruce Henderson in 1970. Each tourism product is placed (positioned) on the Boston Consulting Group matrix according to two criteria: annual market growth and the company's market share. In this matrix, individual products are designated as strategic business areas. Four types of tourism products thus emerge: stars, cash cows, problem children, and dogs.

The analyses of the life cycle of the tourism product and the curves that express its market position lead to the following conclusions:

1. The life cycle of a tourism product has the same stages as the life cycle of products in general. This can be illustrated by the classic TPLC curve.
2. Variations of the classic curve are possible for some tourism products.
3. Tourism products can also be classified according to the Boston Consulting Group's portfolio matrix as: "star products," "problem children," "cash cows," and "dogs."

Knowledge of the product life cycle is closely related to the management and marketing of organizations and serves to analyse and introduce modifications and new products to the market. This fully applies to the tourism product, which is complicated, complex, heterogeneous, and dependent on rapidly changing consumer demand. Weak product elasticity and elastic tourist demand, especially in international markets, pose challenges for tourism development, particularly at the destination level.

II.3. Tourism area life cycle (TALC)

The idea of the tourism area life cycle is inherently an extension of the concept of the PLC. It uses the classic “S” curve and is based on resource capacity.

The universally acknowledged originator of the TALC and its curve is Butler (1980). He himself acknowledges, however, that Christaller (1963) was the first to describe the continuous process of evolution of tourist zones.

Butler (1980) describes destination development as a series of stages determined by visitor numbers and developed infrastructure. He was the first to propose the concept of studying the Tourism Area Life Cycle (TALC) by linearly measuring the number of tourists. Tourist territories are dynamic, constantly changing, and evolving. They go through six phases (sometimes seven):

- Exploration stage
- Involvement stage
- Development stage
- Consolidation stage
- Stagnation stage
- Decline/Rejuvenation stage

The original model does not have a fixed time scale; it is accepted that some destinations may take a century or more to cycle through (Butler, 2011).

The aim of the model is to draw attention to the dynamic nature of destinations and to propose a generalized process of development and potential decline that can be avoided through appropriate interventions (in planning, management, and development) or resource management.

Later in the chapter, other models of TALC are analysed.

Butler’s (1980) pioneering concept of TALC has been applied, further developed, complemented, and criticized by the author himself and many international and Bulgarian scientists. Despite all the criticisms, TALC is being used and built upon as a theory and tool not only in all geographical (territorial) studies but also in economic, sociological, and other analyses from the academic to the practical-applied level.

II.3.1. Criticisms and additions to Butler’s TALC model (based on Lagiewski, 2006)

Some critiques and additions to Butler’s classical TALC model are presented here. The main criticisms of the model relate to the number of stages, the determination of the transition

from one stage to another, the metrics used to determine the stage, when Decline occurs, and whether a destination can be in more than one stage at the same time, etc.

There have been numerous criticisms about the invalidity or failings of the model and alternative approaches. It has been argued that the model is essentially theoretical, although others (e.g., Getz, 1992) support its relevance in tourism planning. Prosser (1995) notes several criticisms of the model, including limitations on capacity issues, limitations of the life cycle model itself, lack of empirical evidence, and limited practical utility.

However, he concludes (1995), “The extensive criticism levelled at the resort life cycle concept shows no sign of dissuading researchers from adopting the model as a framework for their research...the original model survives largely intact and according to some, offers the prospect of further development.”

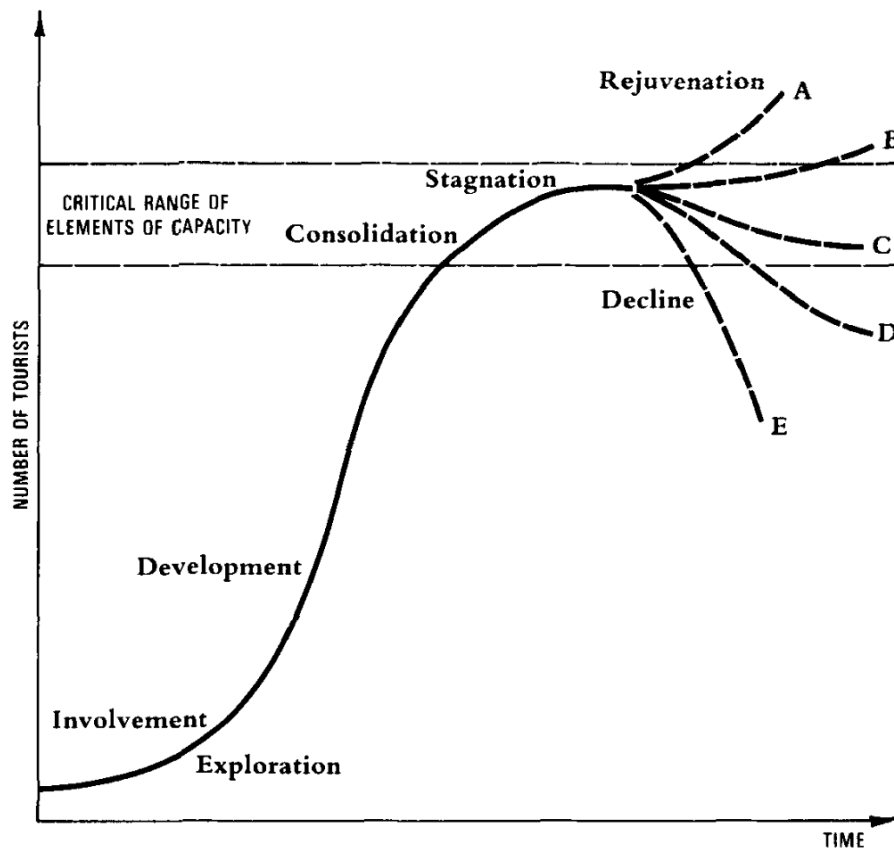


Fig. 22. Tourism Area Life Cycle (Butler, 1980)

Although not all of the works cited in the literature are discussed in detail, an attempt was made to include all that pertain to Butler's (1980) article. As mentioned in the introduction, works that relate to the creation of Butler's original work are listed, as they were important in

generating Butler's concept, but only published works specifically using Butler's model are discussed in detail. Works related to general product life cycle theory are omitted.

Prideaux (2000) summarizes 7 main criticisms of TALC: scepticism that destination development can be described by a single, unified model; criticism of the TALC model; criticism of carrying capacity; lack of empirical evidence supporting the model; problems with its application to future tourist planning; and the precise shape of the curve and identification of transition points from one stage to another. Prideaux also criticizes the use of only one indicator to position a destination in a particular stage.

Another aspect is the considerable discussion about the accuracy of the TALC model in illustrating the mature stages of destination development and whether there is a need to add additional stages to the model.

Despite these criticisms made by various researchers, Butler's TALC model is frequently used in the tourism research literature.

II.3.2. Strategies to avoid the decline and eventual stagnation of the destination

Most researchers agree that eventually, in the life cycle of any destination, a certain stagnation or decline occurs. Unfortunately, there is no broad consensus on the indicators that serve to identify the stage at which destinations are. Instead, there is consensus that rejuvenation can only be successful if there is a complete transformation of the tourist attractions in the destination (Cooper, 1990, 1992). It is therefore very important that signs of stagnation are recognized early. It is also stressed that stagnation and decline can only be avoided when there is an understanding that the approaches of the past will not work in the future (Faulkner, 2003).

Butler (2005) also points out that a successful destination rejuvenation requires a complete transformation of its tourist attractions. So far, only two strategies are proving profitable: 1) the addition of anthropogenic attractions and 2) the incorporation of new natural resources (Butler, 2005). Sometimes complete destination reorientation, as Butler suggests, may be impossible due to financial or political reasons. Therefore, Agarwal (1994, 2002) suggests an additional alternative stage after stagnation, the so-called "reorientation" stage, in which destination rejuvenation efforts are implemented. This stage is particularly important for destinations where the stagnation stage cannot be clearly identified (Butler, 2005).

II.3.3. Applicability of the tourism area life cycle model

Regarding the methodology of applying the TALC model as a scientific research method, Haywood (1986) believes that the life cycle model is applicable to large geographic regions, small settlements, and even individual tourist facilities, as long as it is appropriate, and

the necessary information is available. A key requirement is that the scope of the destination is explicitly stated, because the selection and interpretation of the necessary information depends on it. It must also be considered that within a destination, there may be areas and products in different phases of development, the consideration or neglect of which depends on the level of generalisation.

The second issue concerns the choice of indicators for measuring and evaluating tourism development, on the basis of which the destination should be attributed to one stage or another of the life cycle. Authoritative authors agree that it is necessary to use a wide range of quantitative and qualitative indicators on the state and trends of supply and demand, to take into account competition, as well as the destination's external economic, political, and other factors that directly or indirectly affect tourism development. This brings forth the problem of gathering and handling tourism information (including the collection of a variety of data, their appropriate combination, and interpretation for the purposes of reliable analysis).

As pointed out by Dogramadjieva (Дограмаджиева, 2004), a useful guide for selecting, sorting, and evaluating data is the matrix developed by Cooper (1997) to determine the stage of development of destinations. It includes indicative quantitative and qualitative parameters for the state of demand, supply, and tourism marketing in the different phases. It is relatively simple and adaptable to different destinations, as it does not contain absolute values and fixed threshold levels of quantitative indicators. The lifecycle stages in the matrix are reduced to four by grouping them logically, in view of the development strategies appropriate to them.

D. Buhalis, in his work "Marketing the Competitive Destination of the Future" (2000), based on Butler's 1980 concept and later theoretical developments on issues, relating to destination marketing and management, develops a theoretical model synthesizing several academic models. He proposes a Matrix based on the synthesis of several academic models of the stages a destination goes through and how this affects tourism. The basis of the matrix is the six life cycle stages, the "s" curve of the area life cycle, which is a function of the differences between supply and demand.

Buhalis' (2000) concept and the Matrix he developed enable the determination of the stage of destination development, which reflects on tourism development—influences of tourism, marketing response—and can generally be used as a strategic planning tool, which makes it extremely valuable for academic and applied purposes.

Few authors have challenged the model in terms of the existence of stages or that they can be identified. Haywood's (1986) initial criticisms still stand, and although he revised the topic (Haywood, 2006), his initial reservations, particularly regarding the difficulty in

identifying stages, remain largely unexamined. In his view, whatever objective indicators are used, no action is likely to be taken unless those responsible for the development of the destination agree with the location of the destination on its “curve”.

The need or rationale for additional stages in the cycle can be explored in much more detail than has been done to date and may better illustrate the case for restructuring in the tourism context. Gale (2007) notes that the problem with unilinear models is that they do not address structural changes, such as economic restructuring and cultural changes in societies that clearly affect the importance of resorts in the postmodern world, echoing some of the earlier arguments of Gordon and Goodall (2000).

Whether the TALC model will continue to be used in the future remains to be seen. It has already had a longer life than might reasonably be expected, and the reasons for this are not entirely clear.

III. PREREQUISITES FOR THE DEVELOPMENT OF TOURISM IN SAMOKOV MUNICIPALITY

III.1. Geographical location and natural resource potential

This section provides a brief and general description of the *primary supply* of tourism services according to the concept of the “core model” of the TALC. These include natural, anthropogenic (cultural) factors, and general infrastructure. Without these, it is impossible to understand the tourism product and the overall experience of interacting with it.

The geographical position of Samokov municipality, the relief and climate of the territory, the availability of water resources, its flora and fauna are discussed in turn. Additionally, the protected areas in the municipality—Rila National Park and Vitosha Nature Park—are included.

III.2. Anthropogenic tourism resources

III.2.1. Cultural-historical and religious sites

The centers of cultural development and spiritual enrichment of the population in Samokov municipality include community centers, libraries, the art gallery, the historical museum, monasteries, churches, cultural-historical monuments, etc. In Samokov municipality, 126 cultural monuments have been declared, with 71 located in the town of Samokov, 36 in Borovets, and 19 in the villages. Thirteen of these are of national importance—11 in Samokov and two in Borovets. Since 2013, the historical zone “The Old Borovets” which is part of the

resort complex, has held the status of a group architectural-structural cultural property of national importance. The following sites have been identified as priority locations with significant cultural-historical heritage: the “Belyova cherkva” complex (Church “Rozhdestvo Bogorodichno”), the Church “Vavedenie Bogorodichno” (“Dolnomahlenskata carkva”), the Female Metochion with the Church “Pokrov Bogorodichen”, the Church “Uspenie Bogorodichno” (“Mitropolitska churkva”), the Church “Sveti Nikola”, the Church “Preobrazhenie Gospodne”— Borovets resort complex, Synagogue, “Sarafska kushta”, Historical Museum, Memorial Community Centre “Otets Paisii”, Bayrakli Mosque, The Great Fountain (the fountain with the earring), Professional High School “Konstantin Fotinov”, School “Sv. sv. Kiril i Metodii“, graphic base—”Esova kushta”, “Boseva kushta”, “Kokoshkova kushta”, “Obrazopisova kushta”, medieval fortress “Shishmanovo kale”, historical monument “Krusta”, and historical site “Karagyol” (Радев, 2000).

III.2.2. Cultural events and activities

Important for the development of tourism is the municipality’s “***Cultural Calendar for the Year***”, which brings together the proposals of cultural institutions and civic organizations. In addition to national and local holidays, the cultural calendar includes various scientific forums, festivals, etc. Traditional festivals in the region offer opportunities for tourist exposure. Examples include the festival of the town of Samokov—Dormition of St. Simeon of Samokov (21 August), the festival of Rila, which has a tradition of almost 80 years, the Rila Zelnik Festival in the village of Beli Iskar, the rock festival “Rock in Rila”, the jazz festival in Borovets resort complex, the traditional plein air festival with the participation of well-known painters, and the festival of beans (Bob Fest) in the village of Raduil, etc.

III.2.3. Sports events and activities

To the anthropogenic tourism resources, we should add the well-established ***sports-recreational infrastructure***, which enables the development of both mass and elite sports. It is a prerequisite not only for the active and healthy life of local residents but also for the development of sports tourism. Notable facilities include the multifunctional sports hall “Arena Samokov”, stadium “Iskar”, motocross speedway “Rido”, winter resort Borovets, and the newly built full golf course Okol Lake.

We can conclude that Samokov municipality has a preserved rich cultural and historical heritage, traditions, and customs, which contribute to the development of cultural tourism. However, local traditions and customs are still not sufficiently promoted at the international and national levels. There are also reservations in integrating cultural heritage into the economic

sphere. New technologies and new forms of cultural promotion should be introduced, aimed at educating and involving young people. It is also necessary to create various forms of interaction between the municipality, businesses, and public organizations to develop year-round tourism.

Thanks to its beautiful nature, unique location, and rich cultural heritage, Samokov and the region are an attractive place to visit and relax. The area is suitable for the year-round development of various forms of tourism.

III.3. Main tourism territorial entities in Samokov municipality

III.3.1. Borovets national resort

The national resort of Borovets is officially defined as a „core“ according to the Tourism regionalization of Bulgaria (2015).

Borovets is situated on the northern slopes of Rila Mountain at the foot of Musala Peak (2925 m) at an altitude of 1300 m. It is the first Bulgarian mountain winter and ski resort. It is located just 10 km from Samokov, 70 km from Sofia, and 110 km from Plovdiv, and is easily accessible from across the country.

The chronology of development of Borovets as a resort is traced. Its main characteristics, which make it one of the national resorts of Bulgaria, are given. Additionally, by Decision No. 45 of the Council of Ministers of 25 January 2005 (State Gazette No. 11 of 01.02.2005), Borovets was declared a settlement of national importance, with its general and detailed land use plans approved by the Minister of Regional Development and Public Works.

III.3.2. Belchin village - Belchin Bani and Tsari Mali Grad

Here we find a unique and attractive combination of abundant water resources, particularly mineral waters in the area of Belchin Bani village, as well as a rich cultural and historical heritage of the territory. The restored and completed fortress “Tsari Mali Grad” attracts thousands of visitors year-round. The settlement also includes an ethnographic museum, a branch of the historical museum in the town of Samokov, and the churches “Sveta Petka” and “Sveti Petar i Pavel”. The area surrounding the fortress includes an amusement park with a playground and various recreational facilities.

III.3.3. Malyovitsa resort

Malyovitsa resort (1730 m altitude) is located in the northwestern part of Rila, 27 km from the municipal center of Samokov. The permanent snow cover guarantees skiing throughout the winter season. Malyovitsa is one of the symbols of Bulgarian mountaineering

and hiking. Nearby is one of the most beautiful high mountain lakes on the Balkan Peninsula—Strashnoto. At the foot of Malyovitsa Peak is the hut of the same name, which serves as a starting point for hikes to the peak.

In the 1950s, the Central Mountain School, the only one of its kind on the Balkan Peninsula, was organized here to train personnel for mountaineering sports—mountaineers, mountaineering instructors, tourism, orienteering, ski tourism, ski teachers, mountain guides, etc.

III.3.4. The Villages of Beli Iskar, Govedartsi, Madjare, Mala Tsarkva – “Iskrovete”

The village of Beli Iskar is situated at the foot of Musala Peak and is distinguished by its exceptionally beautiful natural environment, which is conducive to the development of ecotourism and rural tourism. From the village, several attractive routes lead to Musala, Malyovitsa, Vada Hut, the Seven Rila Lakes, Chakar Voyvoda, Yastrebets, Granchar Hut, Tsarska Bistritsa Palace, and Borovets. Every year, the local tourism association organizes the Rila Zelnik Festival. Just one kilometer from the village starts the “Central Rila Reserve”, one of the four reserves in Rila National Park, included in the UN List of Representative Protected Areas.

The exceptionally beautiful scenery surrounding the other villages also attracts an increasing number of tourists, which lead to the development of hotels, guest houses, and restaurants.

III.3.5. Town of Samokov

The town of Samokov is the centre and the only town in the municipality that attracts tourists with its economic, transport, and commercial functions. In recent decades, the town has been developing in the direction of cultural-historical, event, pilgrimage, sports, urban, and nature-oriented tourism.

III.4. Socio-economic development

This section discusses the conditions of transport accessibility, water supply and sanitation, and electricity systems in Samokov municipality, as well as the dynamics, structure, and territorial distribution of the population of the municipality, economic development in the industrial and agricultural sectors, and the forestry fund, which is also of great importance for tourism development.

III.5. SWOT analysis of tourism in Samokov municipality

The synthesized analysis of the development of the tourism sector in Samokov municipality, including its strengths, weaknesses, opportunities, and threats (SWOT analysis), is based on a holistic consideration of tourism in integration with all other spheres of life and socio-economic development. This summary analysis aims to better inform municipal tourism development policies to overcome weaknesses, avoid threats, leverage strengths, and capitalize on opportunities.

III.6. Tourism management in Samokov municipality

The organization and management of tourism in Samokov municipality are overseen by the Mayor of the municipality, the Municipal Council, the The Advisory Council on Tourism issues, and the Municipal Enterprise “Marketing, Tourism, and Tourism Activities”. Their main functions and duties are presented in this section.

Tourism activities in the municipality are also organized by the tourism association “Rila Tourist”, the ecotourism association “Rila”, and the local tourism association in the village of Beli Iskar.

To establish regional tourism destinations, the municipality cooperates with neighboring municipalities, resulting in the creation of a “Concept for the Development of a Regional Tourism product for the Tourism region Samokov - Sapareva Banya - Dolna Banya”.

IV. CURRENT STATE OF TOURISM IN SAMOKOV MUNICIPALITY

IV.1. Tourism Development of Samokov municipality

Tourism development in the municipality is influenced by the availability of favourable tourism resources for different types of tourism, functioning material and technical tourism facilities, and a relatively constant tourist flow. The municipality accounts for 1.4% of the country’s bed occupancy and 2.2% of the bed-nights (NSI, 2024). It accounted for 1.9% of all overnight stays in 2023 and 2.1% of all tourists in the country. Samokov municipality also accounts for 1.9% of all revenue generated from overnight stays and 1.6% of revenue generated from overnight stays of foreigners.

The tourism characteristics of the municipality are reviewed based on absolute and relative indicators analysis (Маринов, 1997), as well as the stage of their tourism development. The data are derived from official national statistics (NSI, 2024).

IV.1.1. Absolute indicators of tourism development

It should be noted that the data for these indicators are conditional, as they largely depend on the quality of tourism information available in municipalities and the country, as well as the presence of informal tourism enterprises, etc.

Of these, the indicators themselves are examined and analysed, along with their dynamics since 1998, as this is crucial for determining the evolution of the municipality's tourism development and identifying its current stage in the life cycle.

The analysis covers the number of beds and bed-nights, number of nights and overnight guests (total, Bulgarians, and foreigners), and revenue from overnight stays (total, Bulgarians, and foreigners).

IV.1.2. Indicators of the Intensity of Tourism Development

The intensity of tourism development and its impact can be summarized by three main indicators: tourism function, bed density, and tourism intensity. Other related indicators, such as the number of overnight stays per square kilometer and the number of beds per thousand inhabitants, are also considered.

One of the most important indicators of tourism development intensity is the tourism function. The tourism function of Samokov municipality has remained relatively stable over the years, with the exception of 2008, when its highest value reached 0.169. From that year onwards, the tourism function of the municipality has been classified as **dominant**, whereas before it was supplementary.

IV.1.3. Indicators of the structure and type of tourism

The available information allows the analysis of several indicators that are considered fundamental in the literature for characterizing the structural features and type of tourism: average stay of visitors (both total and foreign), relative share of overnight stays by foreign visitors, relative share of hotels in the accommodation base, occupancy rate of the bed base, seasonal fluctuations, revenue per bed, per bed-night (lodging index), per visitor, per overnight stay, and per capita.

A key indicator is the **average stay** of tourists, as it largely determines the type of tourism that develops in the destination and the overall spending by tourists in that destination. It is evident that the average stay of tourists in the municipality is relatively low—2.8 days in 2023—with the average stay of foreign tourists exceeding that of Bulgarians throughout the whole study period. The growth rates of the three types of average stay over the period are negative: total (-22.2%), Bulgarians (-8.3%), and foreigners (-35.9%), with a particularly concerning strong downward trend in the average stay of foreign visitors.

Special attention is paid to the *seasonality* of tourism in Samokov municipality. The analysis of the seasonality of tourism is based on the Municipality's Report on the Implementation of the Tourism Development Programme in Samokov municipality for 2022. It is apparent that tourism in Samokov municipality is bi-seasonal, with a strong winter season (December, January, February, and March) and a weaker summer season (July and August).

The analysis of tourism in Samokov municipality can be summarized as follows:

- Samokov municipality has well-developed tourism, considering Borovets National Resort and the relatively high tourism function – 0.133 (Table 6).
- Tourism development in the municipality has slowed significantly over the past 25 years. This indicates a saturation of the tourism potential of the destination and its stage in the life cycle, namely slow and modest development with a transition into stagnation. This is further supported by negative growth rates in average tourist stay (Appendix 1).
- The COVID-19 pandemic had a significant negative impact on tourism development in Samokov, particularly in 2020. This impact is evident across most indicators of tourism structure and type of tourism development and across most absolute indicators except for the number of beds in accommodation. Some exceptions are found in some indicators, related to the intensity of tourism development in the municipality, such as tourism function, bed density per square kilometer, and per 100 inhabitants (Figures 31 and 33).
- There is a noticeable trend of decreasing length of stay coupled with an increase in weekend visits. This trend can be attributed to the proximity of Samokov to the capital city, allowing residents to easily spend weekends in nature, skiing, or enjoying spa services without substantial travel time. There has also been an increase in the number holidays throughout the year at the expense of their duration, which is typical of the new generation of Millennials. Another contributing factor to this trend is the availability of low-cost airlines, which have made travel more convenient and accessible.
- The analysis of tourism indicator values can be divided into pre-2019 and post-2019, as the pandemic has had a considerable effect on travel and holiday behaviours worldwide. Steady growth was observed in tourist numbers and overnight stays until 2019. After a sharp decline in 2020, growth resumed in 2021, 2022, and 2023.
- Interest in rural and alternative tourism has continued to grow, with a focus on accommodation in the villages of Samokov municipality. Notably, there is increased

interest in smaller accommodations located in the smaller settlements of the municipality, a trend influenced by the general public's attitudes toward travel and vacations during periods of restrictions. Currently, the villages of Samokov lack sufficient additional services to fully engage guests during their stay. There is great potential, but it should be structured and offered appropriately.

- Absolute and calculated indicators of revenue from accommodation in Samokov municipality have shown the highest and most consistent increase, largely attributed to rising accommodation prices and inflation.
- The municipality continues to exhibit pronounced bi-seasonality in tourism, with strong winter ski tourism and weaker summer mountain tourism. The majority of overnight stays, with a prevailing percentage of foreigners, occur in the national resort of Borovets, while visits to the villages are predominantly by Bulgarians. The number of overnight stays in the town of Samokov itself is insignificant.
- It is likely that tourism development in Samokov will continue at a slow pace, with a fundamental precondition being the incorporation of new forms and types of tourism that will attract visitors without further increasing tourism superstructure and infrastructure, thus promoting sustainable tourism development.

IV.2. Empirical study

The main objective of the methods of the empirical study on the life cycle of tourism products in Samokov municipality is to provide specific information obtained from a survey of accommodation facilities in the region. This study examines the state of these establishments, their tourists, and the attitudes of hoteliers towards future tourism development – the restrictors and the activities needed to improve the environment for tourism growth. The first surveys, conducted between 2013 and 2015, aimed to identify the real problems faced by hoteliers during the previous calendar years (2012 and 2014) and gather opinions on possible solutions (Appendix 2).

An updated survey of accommodation establishments, using a revised questionnaire, was conducted in spring 2024 (Appendix 3). Most of the questions were relevant, with some added where possible to compare data from 2023 to the pre-pandemic year of 2019, in order to determine the extent of supply recovery.

The geographical scope of the survey included accommodation facilities within the spatial area of Samokov municipality. The surveys were conducted in the accommodation facilities by the author or by fourth-year tourism students. The 2013 survey took place in April

for Borovets resort complex and the town of Samokov, and in August for the villages of Beli Iskar, Govedartsi, and Malyovitsa resort complex. Surveys for 2014 and 2015 were conducted in May 2014 for Borovets resort complex and in August 2014 and May 2015 for the town of Samokov.

The 2024 survey was conducted in two phases: the beginning of May for Borovets and Samokov, and the end of May for the villages of Beli Iskar, Govedartsi, Malyovitsa resort complex, Belchin and Belchinski Bani, and Okol Lake Park.

The initial basis of the study was the analysis of information from the Samokov municipality register of accommodation facilities. A total of 80 surveys were conducted, distributed as follows: 2012 – 22, 2014 - 48. Huts with difficult accessibility were excluded from the survey, but they are represented in the NSI statistics. The coverage rate of existing accommodation facilities was higher in Borovets resort complex, as it includes the largest year-round establishments. In the villages, the main challenge was covering private accommodations that do not operate when there are no tourists.

The 2024 survey was based on information from the Samokov municipality accommodation register, with surveys conducted proportionally to the number of accommodation beds in each location. A total of 38 surveys were conducted. Though the survey is not representative, the results serve as a comparison with the 2014 survey.

All new accommodations in Malyovitsa resort, Belchin, and Okol Lake Park Resort were surveyed.

Huts and private accommodations in the villages were not surveyed. There were difficulties in surveying guesthouses in the villages, as they had been under increased scrutiny by several institutions during COVID-19 and were reluctant to share their opinions, particularly regarding information about their organizational activities. Apartment hotels in Borovets and Samokov were also minimally covered due to them refusing, explaining that they are privately owned by individuals and are only responsible for managing common spaces, which makes it difficult to provide accurate information.

Interviews were also conducted in 2012 and 2014 with key stakeholders whose opinions are particularly important. The total number of surveys was 12. In 2024, unstructured interviews were held with 10 key stakeholders in the municipality.

The main problems and conclusions identified are:

1. Climate change and adaptation of the tourism product of the municipality. Not all supply stakeholders have adapted, lacking the knowledge and resources, both capital and human. Mass ski tourism is considered the “cash cow”, “spa, wellness, and balneological tourism

are viewed as the stars”, “ecotourism” is gaining momentum in the “Iskrovete” area, and Borovets resort complex is diversifying into summer tourism—congress, sports, cultural events, spa and wellness, etc. Some progress has been made, but not universally. The COVID-19 pandemic allowed time for renovations in hotels and other accommodations, and most establishments now have a modern look, catering to changed tourist needs.

2. General infrastructure:

- a. Road network – condition and maintenance, rehabilitation is needed of the Sofia-Samokov-Kostenets road. The road is dangerous, in poor condition, with a lot of motor accidents, even though it is the only access route to settlements in the municipality. Clearing snow from the Beli Iskar-Borovets road is important to shorten travel time to the ski area and connect the ski areas of Malyovitsa and Borovets.
- b. Common infrastructure – water purification plants, there is risk of water pollution of the waters in the Cherni Iskar River, villages lack proper sewerage, capital resources are needed—state and EU funding.
- c. Parking and internal availability of public transport – Measures such as shuttle services during peak seasons in Malyovitsa are needed to reduce the pressure of private cars as well as blue and green zones in Borovets and “Iskrovete”. Cars are parked on the sidewalks and the only road Samokov-Malyovitsa. The municipality should consider standardized pricing for parking and public transport in Borovets resort complex, “Iskrovete”, and Malyovitsa resort complex, as well as integrated pricing for ski facilities and public transport – tourists have long given famous resorts in the Alps (Samokov municipality-Borosport-Malyovitsa ski) as examples.

3. Threat to Rila National Park from the ski areas, particularly in Malyovitsa. There is willingness to develop the ski area, supported by the municipality. It should not be permitted. The park has lacked a new development plan for several years, with the last 10-year plan having expired. Malyovitsa should remain a center for alternative, eco-tourism, and mountaineering, and should not be turned into a mass ski tourism destination with overdevelopment so there is no access to the park for all tourists.

4. There is corruption, and the population is dissatisfied with the state and EU directives that do not reflect public opinion or are not practically implementable, from here the gray economy in the “Iskrovete” and among small private accommodations, which may not survive if all regulations are strictly enforced. The situation during the pandemic was particularly difficult, but the war in Ukraine, inflation, and the political crisis also pose significant threats. Tourism has traditionally been the main livelihood for residents of the

municipality since the liberation of Bulgaria from Ottoman rule. Rila Mountain is the main natural resource for tourism in the area and is dependent on natural laws. All external factors, such as wars and pandemics, adversely affect mountain tourism, and this must be considered in management at regional, national, and European levels, as existing planning documents and strategies may quickly become inadequate for the development of the overall tourism product of the Samokov destination.

5. The recovery after COVID-19 has been difficult, ambiguous, the municipality doesn't see prospects, but it has a clear direction, with strategic planning documents containing development measures ((IMDP 2020-2028), Cultural Heritage and Tourism Management Program of Samokov Municipality 2021-2030). Public-private partnerships have been challenging, and local residents are not always involved in the processes of tourism planning, private initiatives have proven more flexible and efficient than municipal efforts, there is corruption, but there are also partial successes and good practices. Since COVID-19, positive changes have been noted, despite the difficult period for the municipality, its population, and tourism in particular—marked by bankruptcies, inflation, the war in Ukraine, ownership restructuring, market shifts, new investments, and projects, as well as the development of year-round sub-products that meet new user requirements. The focus on developing new year-round, visionary, eco-oriented tourism sub-products fosters optimism that the municipality is moving in the right direction—toward a sustainable, environmentally friendly, and highly efficient tourism product that meets the evolving needs of tourists.

V. LIFE CYCLE OF TOURISM AREA SAMOKOV MUNICIPALITY

V.1. Studies of the life cycle of tourism destinations in Bulgaria

Although since its development the TALC model has been widely used around the world for various regional studies of tourism development, as Dogramdzhieva (Дограмаджиева, 2004) pointed out that despite its popularity, the concept of the area life cycle and its possibilities for “operationalization” are rarely discussed in the Bulgarian scientific literature and are not applied in the practice of tourism planning in Bulgaria. Existing works in the foreign literature do not answer all questions related to the application of the model but provide a good basis for further development and creative interpretation.

A noticeable development in Bulgarian scientific literature on this topic occurred between 2003 and 2013. Notable publications include those by *Dogramdzhieva* (Дограмаджиева, 2003) who used Cooper's (1997) matrix to determine the life cycle of 12

tourist centres in Bulgaria; *Marinov (Маринов, 2004)* examined the life cycle of destination Bulgaria through the lens of the main types of tourism products, identifying their current stages of development and outlining strategic directions for improvement, aimed at achieving “rejuvenation” of the destination as a whole; *Dogramdzhieva (Дограмаджиева, 2004)* continued her analysis by noting that the life cycle model supports integral tourism planning and facilitates the internal spatial differentiation of destinations. *Vodenska (Воденска, 2006)* published a study on the life cycle of tourist destinations and the impacts of tourism within them. Her work is based on Butler’s (1980) and Cooper’s (1997) concepts, using 22 indicators to describe the life cycle in 15 municipalities in Bulgaria. *Stambolski (Стамболски, 2009)* also addressed the question of the area life cycle in his publication for development of mountain tourism in Bulgaria using Bansko, Berkovitsa, and Chepelare as examples. Furthermore, the Buchalis model was applied to determine the tourism development stages of Dolen, Leshten, and Kovachevitsa (*Дограмаджиева и др., 2013*). *Assenova (Асенова, 2013)* published an article, focused specifically on the life cycle of Tsarevo municipality, examined on the basis of a detailed analysis of the dynamics of the number of beds, tourist flow, and overnight stays in the municipality.

Assenova (2013) applies the same model in her studies of the development of rural tourism in mountain villages in Bulgaria. *Dogramadjieva (2013)* applied a similar approach for a field study of tourism demand and supply in mountain villages, including architectural reserves in the Western Rhodopes. *Daleva (Далева, 2015)* used the model to determine the life cycle stage of Blagoevgrad municipality.

Mountain tourism in small-scale settlements in Bulgaria has proven particularly suitable for applying Butler’s TALC model and in 2016, *Marinov, V., M. Assenova and E. Dogramadjieva* conducted a generalized study on development patterns and sustainability aspects of small-scale mountain tourism in Bulgaria. 30 indicators were studied, and 3 models of tourism development of destinations were outlined. *Yankov and Nekova (2017)* analysed the new stage in tourism development in the Tryavna-Dryanovo tourism localization, without discussing the overall area life cycle. *Mitova R. (Митова Р., 2020)* applied Butler’s model to assess the life cycle stages of tourist centers around Vitosha Mountain.

According to *Kotsakov (Коцаков, 2024)* Butler’s (1980) study of the tourism area life cycle is useful for conceptualizing the evolution of tourism in particular destinations as it “conceptualizes development” as a clearly defined and continuous process. It is rare to see a destination in pure form, and it is more common to observe a combination of stages. The model

was applied to Devin municipality, which the author classified as a mix of two of the stages, namely “participation” (to a lesser extent) and “development” (to a greater extent).

V.2. Life cycle of the tourism area Samokov municipality

As noted above, the life cycle stage of Samokov municipality was first assessed by Vodenska (Воденска, 2006), who identified it as being in the consolidation stage.

Tourism development in the municipality from that year onwards has been analysed to determine how TALC has progressed and to identify the current stage of the destination. The year 2008 is considered the starting point—it is particularly significant as it marks the beginning of Bulgaria’s overall development as a member of the European Union. Another reference year is 2014, when the first field survey by the author was conducted, collecting primary data. The year 2019 is also important, being the last year before the onset of the COVID-19 pandemic and the resulting tourism crisis. The final years included in the analysis are 2021 and 2023. At the heart of the analysis is the direction of observed changes over these four periods, in terms of both primary and secondary information (Table 21). It should also be mentioned that absolute data on tourism revenue and its changes over time are not analyzed, despite their availability and specific calculations having been made, as their increase is assumed to be driven mainly by inflation and price changes rather than genuine tourism development. However, calculated indicators such as revenue per night, per tourist, per bed, and per resident deserve attention.

The analysis of information for the *first period* allows the conclusion that Samokov municipality’s tourism destination remained in the consolidation phase until 2014.

In the *second period (2014-2019)*, tourism development of the destination showed some revival. Despite a decline in bed and bed-night numbers, the number of overnight stays and visitors increased, as did indicators such as the density of overnight stays per sq km, tourism intensity, occupancy rate, and overnight stays per bed. Nevertheless, the average stay of tourists continues to decline, and mainly at the expense of foreign visitors. Results from the interviews conducted in 2014 indicated positive trends in tourism development in the municipality (Table 21). Increased occupancy, primarily during the week, was confirmed, while weekend occupancy remained unchanged. A comparison with previous years showed improvement, with even better expectations for the coming years.

The above analysis suggests that there has been a change in the life cycle stage of the Samokov tourism destination, and that it is again entering a development stage. However, it should be noted that the increase in some indicators has been rather slow, and there is a lack of significant change or improvement in the destination’s product. In Borovets, the tourism product has started to diversify towards spa, wellness, and summer sports tourism.

The third period analyzed is the COVID-19 pandemic, which lasted approximately two years. It was characterized by a general decline in tourist travel worldwide and in specific countries, with disastrous consequences for some destinations. Surprisingly, not all indicators decreased in Samokov—some even increased (Table 21). As expected, indicators such as total and foreign overnight stays, number of overnight stays (total), density of overnight stays per sq km, number of stays per bed, tourism intensity, and occupancy rates declined. To a large extent, indicators like the number of beds, bed-nights, bed density, and tourism function remained largely unchanged.

Surprisingly, the average stay of tourists was maintained and even showed a slight increase. Overnight stays by Bulgarian tourists also increased, along with the density of overnight stays per 100 inhabitants.

This analysis allows us to characterise the two years of the COVID-19 pandemic in Samokov municipality as a partial return to the consolidation phase—the accommodation base was maintained, and the levels of tourism function and average stay remained stable. Consequently, we must assume that the guiding factor for determining the TALC stage should not solely be the number of tourists or overnight stays. Butler’s model should be modified to include new indicators, such as average tourist stay, tourism function, and number of beds. The number of tourists is certainly relevant, but it tends to be more important in the initial stages of TALC.

The second field study (surveys and interviews) conducted in 2023 revealed that the challenges during this period—the most difficult time for tourism as a whole—had problems that were not fully captured by NSI data. Full recovery of the sector had not been achieved, as travel for tourism was restricted, and some accommodation establishments either closed or went bankrupt. Quarantine measures were also imposed on some floors of larger hotels.

Simultaneously, investments increased during (and after) the pandemic, there was ownership restructuring, benefiting larger investors, while the local population was discontented, larger businesses prospered while medium and small businesses suffered.

The fourth period (2023-2024) is isolated to reflect the process of tourism revitalization in the destination after the pandemic. The data indicate that the number of overnight visitors and stays effectively increased compared to 2021 and 2008. The exception is overnight stays by foreign tourists, which, although having increased since 2021, have still not reached the levels seen in 2008. The number of Bulgarians staying overnight remained stable, while the number of overnight stays decreased. Encouragingly, the average length of stay showed a slow

but steady increase, though it remained low for Bulgarian tourists. Indicators like occupancy rates and nights per bed also showed improvement.

Overall, this fourth period can be defined as the beginning of new development or revitalization of the destination. However, given its short duration, it is premature to conclude that such a trend exists. Nonetheless, changes in the destination in recent years suggest significant improvement in the tourism product—renovation of existing and construction of new accommodation facilities, as well as the introduction of new offerings and product such as a golf course, balneological and spa tourism and others.

An interesting trend is that the number and percentage of hotel beds are decreasing in favor of alternative accommodations in villages, while beds in 1–2star hotels are increasing at the expense of three-star hotels.

According to the interviewed key informants, though, occupancy generally declined and the comparison with the previous year is negative. There has been some increase in tourist tax collections, but people's attitudes towards interaction and cooperation with municipal authorities have not changed.

Despite the observed, noted and discussed changes in the tourism indicators of Samokov municipality during the whole considered period from 2008 to 2023, no significant changes in its tourism development can be noted. All changes, whether positive or negative, have been slow and gradual and they do not contribute to any positive growth or significant revitalization of tourism in the area.

Thus, we can agree with other authors that a tourism destination can be at multiple stages of its life cycle simultaneously.

In our view, destination of Samokov is currently in two stages – development and consolidation. Later we will see that these stages differ by tourism sub-products and tourism territorial entities.

Certain indicators exhibit a continuous downward trend such as the number of inhabitants, noted by Strapp (1988) as an important factor for tourism development, the number of beds, and the number of bed-nights. Only revenue and related derivatives have shown continuous growth; however, as previously mentioned, this is largely attributed to external factors rather than genuine tourism development of the area.

Haywood (1986) emphasized growth rates, particularly in overnight stays and tourist numbers. In Samokov municipality, these indicators have average values, with overnight stays showing twice the growth rate.

Against the backdrop of generally positive growth rates of various indicators, several indicators stand out with negative growth rates. Apart from the population number, these include the three types of average tourist stay—total, Bulgarian, and foreign. The average stay for foreign tourists fell most sharply (-35.9%), from 5 days in 2008 to 4.1 days in 2023. Meanwhile, the average stay for Bulgarian tourists decreased only slightly, from 2.4 days to 2.2 days (-8.3%). Overall, the average tourist stay in Samokov municipality remains low.

In addition to product development, it can be argued that the different tourism territorial entities in the destination are also developing at different speeds and are at different stages of their life cycle.

V.2.1. Life cycle of Borovets National Resort

Borovets National Resort is currently certainly in a stagnation phase, as reflected by all non-revenue indicators. None of the metrics have returned to pre-pandemic levels. Notably, the most significant decline in most indicators occurred not during 2019-2020 but slightly later, in 2021.

Due to the lack of detailed data for other territorial entities within the destination (the town of Samokov and the villages), only personal observations and information from key informants in the territory of the municipality can be utilized. Based on these sources, it can be stated that the town of Samokov has experienced some growth over the past 2-3 years, while the villages have developed better and at a much faster pace. Much of the activity in the villages cannot be accurately captured, as a significant percentage of accommodations are not registered or categorized, and another percentage had fewer than 10 beds were not included in official statistics until recently.

V.2.2. General conclusions about the TALC of Samokov

The application of Cooper's (1997) matrix confirms that Samokov is in a stagnation phase.

Table 23. Qualitative Characteristics of Selected Tourism Indicators for Samokov Municipality - Author's Assessment (based on Асенова, 2013; Cooper, 1997)

Visitor number of tourists	Substantial (Slowly increasing)
Growth rate	Moderate
Capacity of the accommodation base	Substantial
Occupancy of the base	Low
Prices of services	High
Cost per tourist	Medium
Types of tourists	Followers (mass market)

Image and attractions	Substantial
Tourists are regarded as	Clients
Product	Differentiated
Distribution	Intermediaries
Marketing focus	Retaining loyalty/ seeking new

Author's assessment

The author applied Buhalis' (2000) model to analyse the destination Samokov municipality (Table 24).

It is evident that Samokov municipality is fully in the maturity and saturation stages.

According to Birkenhauer's classification of tourism development based on the number of overnight stays (cited in Маринов, 1997), Samokov municipality falls under the "fully developed" category. During the years preceding the pandemic (2016, 2017, 2018 and 2019), as well as in 2022-2023, it reached the mature stage of development.

Table 24. Life cycle of destination of Samokov and the impact of tourism – author's assessment (based on Buhalis, 2000)

Analysis of impacts	Introduction	Growth	Maturity	Saturation	Decline
SITUATION	New trendy destination	More people interested; Investment on accommodation & facilities	Maximum visitation; Increasing facilities	Oversupply; Original demand moves	Reduction of demand; Special offers to boost visitation
DESTINATION CHARACTERISTICS					
Visitor number of tourists	Few	Many	Too many	Many	Many
Growth rate	Low	Fast growth	Fast growth	Slow growth	Decline
Accommodation capacity	Very low	Low	High	Very high	Very high
Occupancy levels	Low	Very high	Very high	High	Low
Prices of services	High	Very high	High	Low	Very low
Expenditure per capita	High	Very low	Very high	Low	Very low

Visitor types	Drifters	Innovators	Innovators	Followers	Cheap-mass market
Image of attractions	Low	Very high	High	Low	Very low
Tourists are perceived as	Guests	Guests	Customers	Customers	Foreigners
MARKETING RESPONSE					
Marketing target	Awareness	Inform	Persuade	Retain	Loyalty/new market
Strategic focus	Expansion	Penetration	Defence	Defence	Reintroduce
Marketing expenditure	Growing	High	High	Falling	Consolidate
Product	Basic	Improved	Good	Deteriorates	Decay
Promotion	Introduction	Advertising	Travel trade	Travel trade	Travel trade
Price	High	High	Lower	Low	Below cost
Distribution	Independent	Independent	Travel trade	Travel trade	Travel trade
ECONOMIC IMPACTS					
Employment	Low	High	Very high	High	Low
Foreign exchange	Low	Very high	Very high	High	Low
Profitability of private sector	Negative	Growing	Very high	High	Decline
Income of residents	Low	Very high	Very high	Low	Very low
Investments	Low	Very high	Very high	Low	Very low
State revenue and taxes	Low	Very high	Very high	Low	Very low
Economic structure	Balanced	Tourism oriented	Tourism dominated	Tourism dependent	Unbalanced and not self-sufficient
Dependency on intermediaries	Negligible	Low	High	Over-dependent	Over-dependent
Imports	Low	Very high	Very high	Very high	High
Inflation	Low	Very high	Very high	High	Low
SOCIAL IMPACTS					
Types of tourists	Allocentrics	Allocentrics	Midcentrics	Psychocentric	Psychocentrics

Relationship between locals and tourists	Euphoria	Apathy	Irritating	Antagonism	Final
Demographics at destination	Immigrations and older residents	Youth stays to work in tourism Mode balanced	Balanced	Balanced	Immigrations as no jobs available and older residents
Migration to the destination	Low	High	Very high	Low	Low
Crime at the destination	Low	High	High	Very high	Very high
Family structure	Traditional	Effectuated	Modern	Modern	Modern
ENVIRONMENTAL IMPACTS					
Environment and landscape	Unspoilt	Improved	No respect	Polluted	Damaged
Conservation and heritage	Unspoilt	Improved	No respect	Decay	Damaged
Ecological disruption	Unspoilt	Improved	No respect	Decay	Damaged
Pollution-related to tourism	Negligible	Low	High	Very high	Very high
Water pollution	Negligible	Low	High	Very high	Very high
Congestion and traffic	Low	Low	Very high	Very high	Low
Erosion	Low	High	Very high	Very high	Very high

Author's assessment

Table 1. Level of tourism development - author's assessment based on Birkenhauer (cited in Маринов, 1997)

Level of development	Number of nights
Embryonic minor	Up to 10 000
Embryonic restricted	10 000-50 000
Embryonic significant	50 000-100 000
Developed	100 000-300 000
Fully developed	300 000-500 000
Mature	Over 500 000

Author's assessment

All analyses conducted thus far lead to the conclusion that the tourism destination of Samokov municipality was generally in the consolidation phase from 2006 to 2019. Following

the pandemic, which resulted in a decline across nearly all indicators, a recovery phase has begun, though it is not yet complete. It remains uncertain whether this recovery will continue as growth (revival) or remain in the stagnation phase (Fig. 61).

Some new tourism products and certain tourism territorial entities in the destination are, even now, showing signs of growth (Fig. 59 and Fig. 60).

Another conclusion that emerges is that the two-year period of the COVID-19 pandemic (2020-2021) cannot be seen as a disruption in the tourism development of the destination or as the beginning of a new stage. According to information from the NSI, the stagnation phase persisted during this period with slightly lower values of some indicators.

The lifecycle of the individual tourism sub-products in the destination and the stage each one is in are of interest. Tooman (1997) suggests that each change in a destination's product leads to a new beginning of its lifecycle, a statement with which we cannot agree.

V.2.2. Tourism sub-products in the destination of Samokov municipality

The following types of tourism are currently developing in the tourism destination of Samokov municipality: *winter mountain tourism, summer mountain tourism, hunting and fishing tourism, cottage, sports, and rural tourism.*

In addition to these traditional forms of tourism in Samokov municipality, recent years have seen the creation of favourable conditions for new types of tourism that are rapidly gaining popularity. They are being developed in an effort by the municipality and private investors to diversify the tourism offer and the tourism product of the destination through new sub-products. The goal is twofold: to transform the destination into a year-round attraction and to address climate change, which threatens the dominant form of tourism in the area—winter ski tourism.

These new or somewhat reintroduced forms of tourism include *ecotourism, cultural-historical, sports, medical (health) and balneological tourism, congress and conference tourism, pilgrimage tourism, spa and wellness.*

Since no secondary data is available for each individual product (as such statistics are not maintained), and targeted field observations on the different types of tourism and individual territorial entities are not possible to conduct, the author has adopted the Zimmermann (1997) model to express their views on the current state of development of individual tourism sub-products in Samokov municipality. This assessment is based on personal observations and input from key informants.

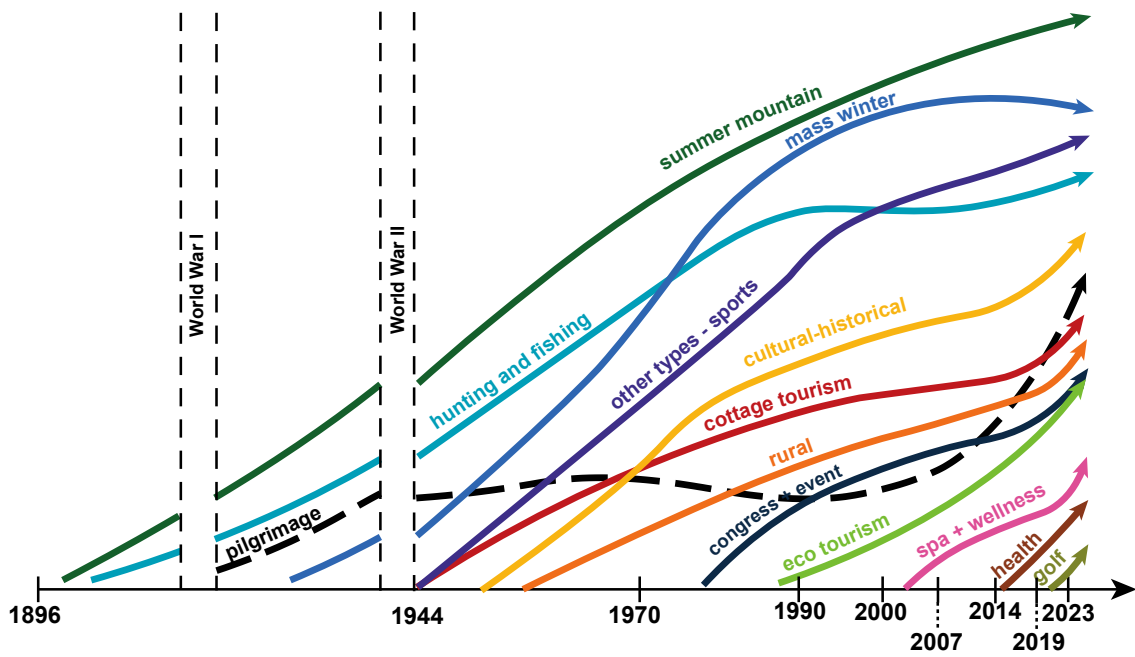


Fig. 1 Life cycle of tourism sub-products in the destination Samokov municipality (based on Zimmermann, 1997)

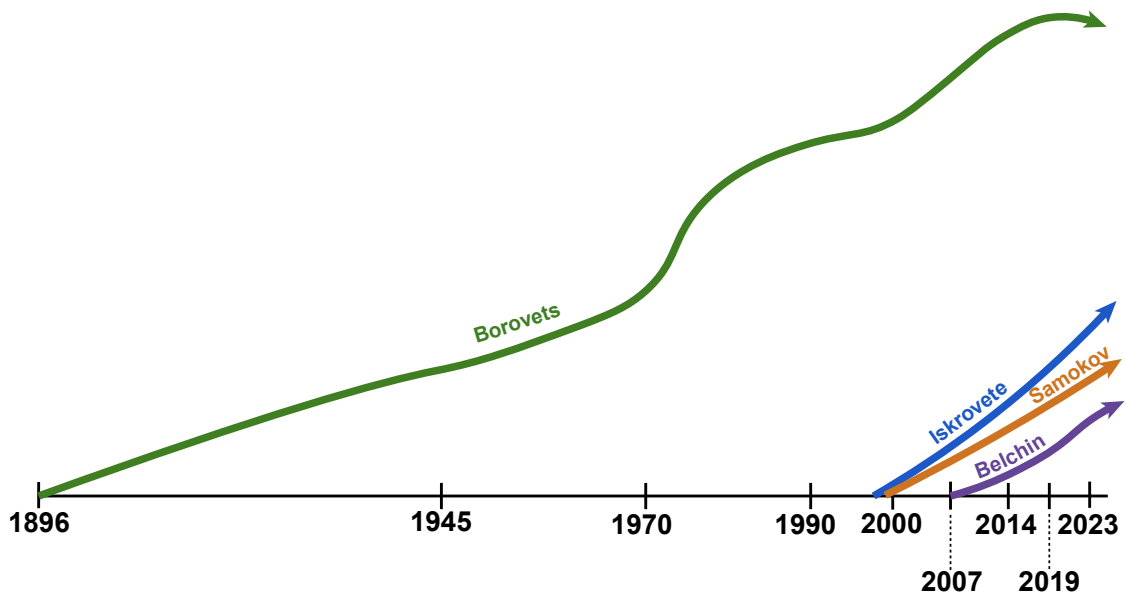


Fig. 2 Life cycle of territorial tourism entities in the destination Samokov municipality

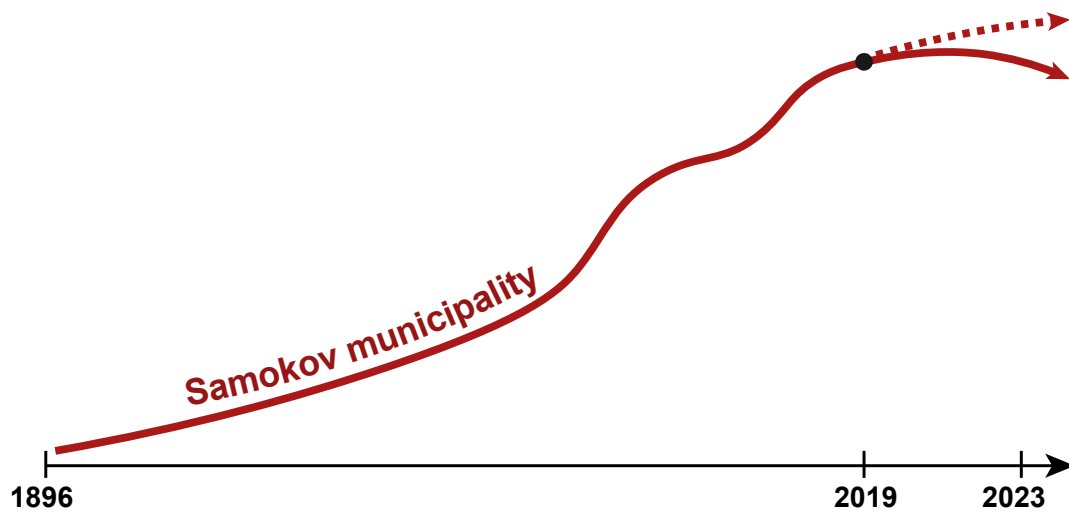


Fig. 3 Life cycle of the tourism destination Samokov municipality

Simultaneously, utilizing the Boston Consulting Group's matrix for strategic analysis and planning, spa and balneological tourism, rural and cultural tourism, ecotourism, and adventure, event, and golf tourism are all currently in the development phase within the territory of Samokov municipality.

V.2.3. Conclusions and summary

As a result, the following summary and conclusions are presented:

1. Butler's (1980) TALC model is a good basis for studying the tourism development of a given tourism destination.
2. However, the development of the destination cannot be reflected solely based on the number of tourists as an indicator.
3. As suggested by several foreign and Bulgarian researchers, numerous other indicators have been included in our study to determine the TALC of Samokov municipality – 28 in total.
4. Particular attention, in our opinion, should be paid to the indicators of average stay, number of beds, number of tourists and overnight stays, occupancy rate, tourism function, and tourism intensity.
5. The relatively long period of stagnation (Fig. 61) that the destination is experiencing should serve as an incentive for governing bodies, tourism organizations, and individual entrepreneurs to seek ways to move toward destination revitalization in order to avoid its decline. It should be noted that while the possibility of a subsequent stage of revitalization exists after maturity or consolidation in the case of the TALC,

there is no such possibility with the TPLC. This means that either new products must be introduced, or the quality and focus of existing products, with all their tangible and intangible components, must be radically changed. Detailed suggestions to this effect are listed in Table 4 in Chapter Two (Dwyer & Kim, 2003).

6. The individual tourist territorial entities in the Samokov destination are also at different stages of their lifecycle –Borovets National Resort (stagnation) with some elements of renovation (renovated bed base and new activities, such as theatre in the mountain, spa, and wellness), the village of Belchin - Belchin Bani (new formation with accelerated development), the villages (accelerated growth), and the town of Samokov (moderate growth). Fig. 60
7. There was a significant period (until 2015-2019) during which the destination relied on only a few types of tourism – summer, winter, sports, hunting and fishing, and rural tourism (Fig. 59). Since 2019, there has been strong dynamic development of alternative types of tourism sub-products, with the latest ones showing significant growth rates (see Fig. 59). At the same time, mass tourism has experienced stagnation and decline.

V.4. Guidelines for further sustainable development of tourism in tourist destination of Samokov municipality

Specific measures for sustainable tourism development need to be developed and implemented immediately, including *the development of new products, higher-quality packages, new market segmentation, and new marketing policies.*

CONCLUSION

In this thesis, the lifecycle of the tourism area is considered as a composite of the lifecycle(s) of the tourism products offered within its territory. This perspective is supported by several foreign authors.

The most important results of the study are:

- The different trends and perspectives in the scientific literature regarding the TALC have been identified.
- A revision of the original model of the TALC is needed, considering the number of stages, their names, their sequence, etc.
- Different studies have been found to use different indices and parameters to determine the stage of the TALC.

- In the present study, all available indicators, obtained as secondary or primary information, as well as several models and schemes from different authors, were used to determine the lifecycle stage of the tourism destination of Samokov municipality – 28 in total.
- Some tourism products in Samokov municipality are in the stage of growth or even introduction.
- It has been established those distinct territories within the Samokov tourism destination (referred to here as tourist territorial entities) are at different stages of their lifecycle—some are in stagnation, while others are experiencing growth at varying rates.
- It is difficult to establish the general stage of the lifecycle of the tourism product in the Samokov destination due to differences in the development of the individual tourism sub-products and territorial entities. Generally, it can be argued that the product and the destination are in more than one stage, namely growth (development) and stagnation, with growth being different for each sub-product and territorial entity.
- Although there are no set timeframes for the duration of the different stages, we believe that Samokov municipality has been stagnating or maturing for too long (at least 20 years), and if no external changes occur, this could become a permanent state. In this sense, local government and planning authorities should assess the situation and take measures for further development.
- In addition to the indicators mentioned by some authors that should be used in determining the stage of the TALC alongside the absolute number of tourists (e.g., average stay, growth rate of indicators, population dynamics), additional indicators have been identified that can also help clarify the overall picture – level of tourism function, number of beds, occupancy rate, etc.
- It has been established that the two-year period of the COVID-19 pandemic in the country did not lead to a complete cessation of the evolution of the Samokov destination. The destination managed to begin its recovery as early as the following year, although not fully, and is now again in the stagnation phase.
- The local population and entrepreneurs and governing bodies in the tourism sector are not very optimistic about the future tourism development of the destination. Nonetheless, some private investors are attempting to reorient this development to

a certain extent and incorporate new products into the TALC, which could eventually lead to a stage of revitalization.

It can be argued that the research has achieved its goal, the set tasks have been fulfilled, and the research questions have been answered.

The hypothesis formulated in the Introduction is confirmed by the empirical study of the tourism destination of Samokov municipality and its territorial entities, as well as its tourism product, composed of a number of traditional and new sub-products.

It is uncertain to what extent the results of the TALC research can inform tourism planning and management. They can serve as the basis for developing strategies and guidelines for further tourism development in a destination, but the fragmented private tourism industry decides for itself how and what tourism products to implement and develop. The private sector and investors, who are predominant in the destination of Samokov municipality, are much more flexible, respond quickly, and do not comply with state and municipal planning documents.

It can be argued that the COVID-19 pandemic, besides being a crisis, has provided an opportunity for product and market restructuring, and the development of territorial entities specializing in new and modern types of tourism – such as the resort complexes of Malyovitsa, Belchin and Belchin Bani, Okol Lake Park, and other new projects.

On the other hand, the sustainable development of tourism requires targeted and sustained efforts by local authorities in partnership with other stakeholders, as well as efforts at the national level through the implementation of a coherent state policy. This policy should, on the one hand, include a clear strategic and legislative framework and on the other – a well-targeted marketing and advertising policy in line with current trends in tourism demand and dynamically changing consumer behaviour. The implementation of a centralized system ensures better management. Consequently, in the context of sustainable development, maximum organizational, economic, and social efficiency can be achieved.

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SCIENTIFIC AND APPLIED CONTRIBUTIONS

As a result of the research work, the following scientific and applied contributions can be outlined:

1. An extensive and in-depth analysis of the concepts available in the scientific literature on the lifecycle of the tourism product and the tourism destination has been carried out using the example of Samokov municipality, thus enriching the existing knowledge on the lifecycle of mountain destinations.
2. Through a constructive and critical analysis of Butler's (1980) classical model of TALC, additional indicators are proposed to be used in its determination.
3. It has been empirically established that individual tourism sub-products and tourism territorial entities in a given destination can be, and almost always are, at different stages of their lifecycle, confirming the thesis of several authors that a tourism destination and its product can be at more than one stage of their lifecycle.

LIST OF PUBLICATIONS ON THE DISSERTATION TOPIC

1. Янева В. (2024) „Антропогенни туристически ресурси в община Самоков и възможности за развитие на алтернативен туризъм“ - XIX Международна научна конференция на МВБУ „Икономически растеж, бизнес перспективи, пазарно позициониране в условията на криза“ 12-13 април 2024 г., София.
2. Yaneva V. (2024) “The Impact of COVID-19 on Destination’s Life Cycle (the case of Samokov municipality, Bulgaria), 10th ERAZ Conference on *Knowledge Based Sustainable Development*, Lisbon, Portugal (под печат)
3. Янева В. (2024) Възможности за развитие на алтернативни видове туризъм в дестинация община Самоков - В: *География и регионално развитие (научна конференция Созопол)*, Фондация „ЛОПС“, ISSN 1313-4689