



## **RESPONS**

**Responsible Skills Alliance for Sustainable Management of Small Hotels and Restaurants**

**539920-LLP-1-2013-1-BG-LEONARDO-LMP**

**National Field Research Report**

**Country: Bulgaria**

**CCI - Dobrich**



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## Chapter 1. The survey base and sample

The development of modern tourism in Bulgaria is characterized by increasing competition between tourist destinations in the area of quality and prices and with growing variety of offered tourist services.

The new tourist destinations are developing dynamically compared to the existing markets and namely, because of the proposal of something new and unknown.

The recent years, Bulgarian tourist industry follows a lasting trend of rapid growth. Due to its natural and historical diversity within a relatively limited area, Bulgaria has a great potential for development of tourism. Such potential have not only the Black Sea coast and the mountains, which occupy more than 1/3 of the country, but also the sites included in the World Heritage List of UNESCO, more than 600 mineral water sources, thousands of local traditional and cultural attractions; more than 5% of the country has the status of a protected area (including 3 national and 11 natural parks), 40 000 historical monuments, 160 monasteries, more than 330 museums and galleries, rich traditions of festivals and holidays, preserved ethnographic heritage, cuisine and quality wines, etc. The country has officially announced 142 resorts, of which 58 are spa, 56 mountains resorts and 28 sea resorts.

Nevertheless the considerable support for public structures in the field of tourism in the recent years, the main actor in the sector are touristic SMEs, which are not bound by state tourist policy and are not secured by financial resources. Analysis of the Bulgarian tourism show that in terms of competitiveness, quality and variety of services and established destinations in the international market, the Bulgarian tourism is on the average level compared to developed tourist countries.<sup>1</sup>

The target group of “RESPONS” project is the representatives of SMEs in tourism – small hotel and restaurant managers. Their need for training and improving competencies is the focus of the planned activities.

The survey conducted within Work Package 2 should contribute to assess the situation in each part of the project and set the basis on which the remaining project activities will be upgraded.

Potential respondents who correspond to the sample in the survey received a letter with an online questionnaire (<https://www.surveymonkey.com/s/7KLD89C>) or an electronic form (Appendix 1) to be returned by email to the partner. 35 hotels and 15 restaurants have been invited to take part in the survey.

33 questionnaires have been filled-in (14 accommodations and 19 restaurants) or, respectively, 66% of all invited companies have answered the questionnaire; only one respondent answered online, 9 returned a completed questionnaire by e-mail, and the other 23 were received through individual interviews conducted face-to-face or by telephone.

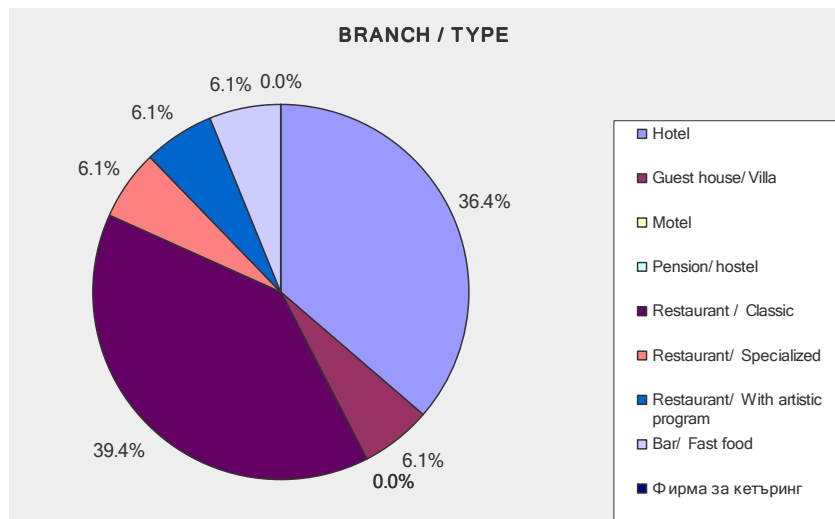
### CHARACTERISTICS OF THE RESPONDENTS:

Depending on the location of the activities of SMEs:

- 14 – Balchik;
- 12- Dobrich;
- 3 – Varna;
- 1 – in Sofia, “Albena” resort, Obrochishte, Kranevo.

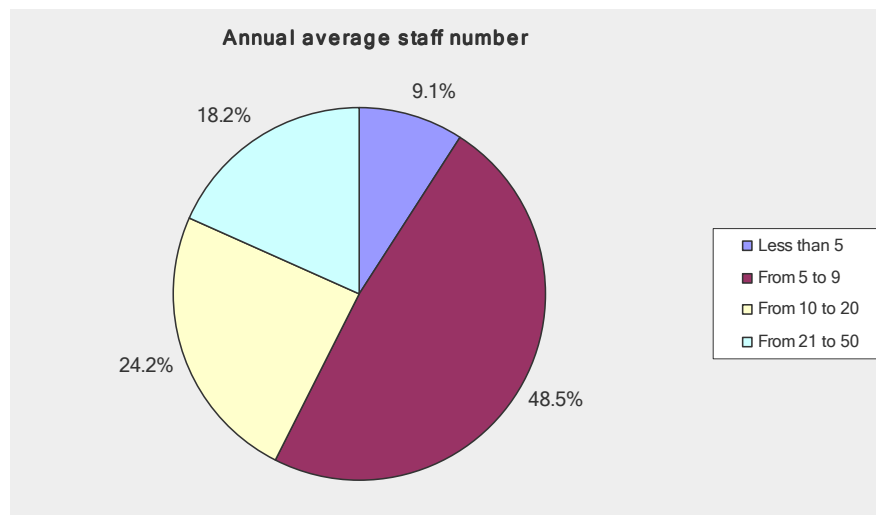
Depending on the type of activity of SMEs:

- Accommodation – hotel, guest house/villa, motel, pension/hostel - 42.5% of respondents, respectively:
  - o hotel – 36.4%;
  - o guest house/villa – 6.1%.
- restaurants - 57.5%, of which:
  - o classic - 39.4%;
  - o specialized - 6.1%;
  - o with an artistic program - 6.1%;
  - o bar / fast food - 6.1%.
- 2 of the interviewed restaurants offer catering as a part of their main activity.



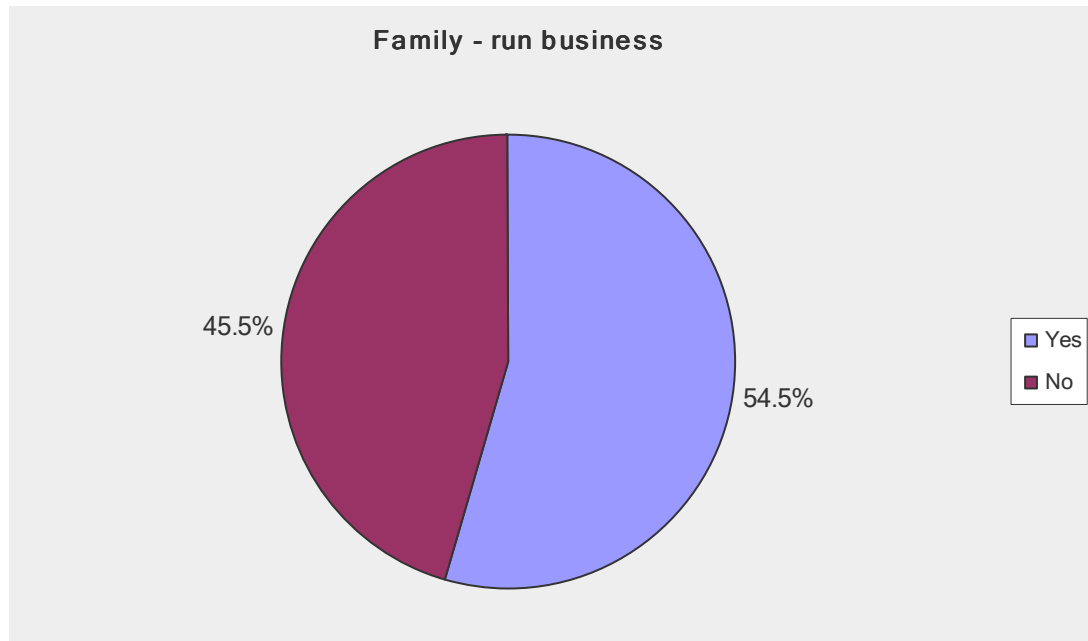
Depending on the annual average staff number, the number of employees is distributed as follows:

- Less than 5 employees - 9.1%
- From 5 to 9 employees - 48.5%
- From 10 to 20 employees - 24.2%
- From 21 to 50 employees – 18.2%



### Depending on the type of implementation of the business:

- Family-run business – 54.5%;
- Non family-run business - 45.5%.



### Conclusions regarding the main characteristics of the respondents in this survey:

- The geographical and territorial distribution of respondents is a prerequisite for receiving different opinions and different points of view;
- Approximately equal distribution of the answers depending on the type of activity is a condition for the adequacy of the subsequent recommendations and actions of the project;
- All questions have been answered by all respondents, which indicates the well-structured and clear questionnaire;
- The nepotism among the target group is twice as high as regards restaurants - 66.16% of them develop family-run business, while as regards hotels, this percentage is only 35.71%;
- The sample - the survey respondent, which will be the basis for the development of project' products is a manager of small hotel/ restaurant, he/she is usually responsible for up to nine employees; he/she is working - with a high probability (almost 50% - every second) in a family business and in a small / midsize city.



## Chapter 2. Dimensions affecting the HORECA SMEs' performances

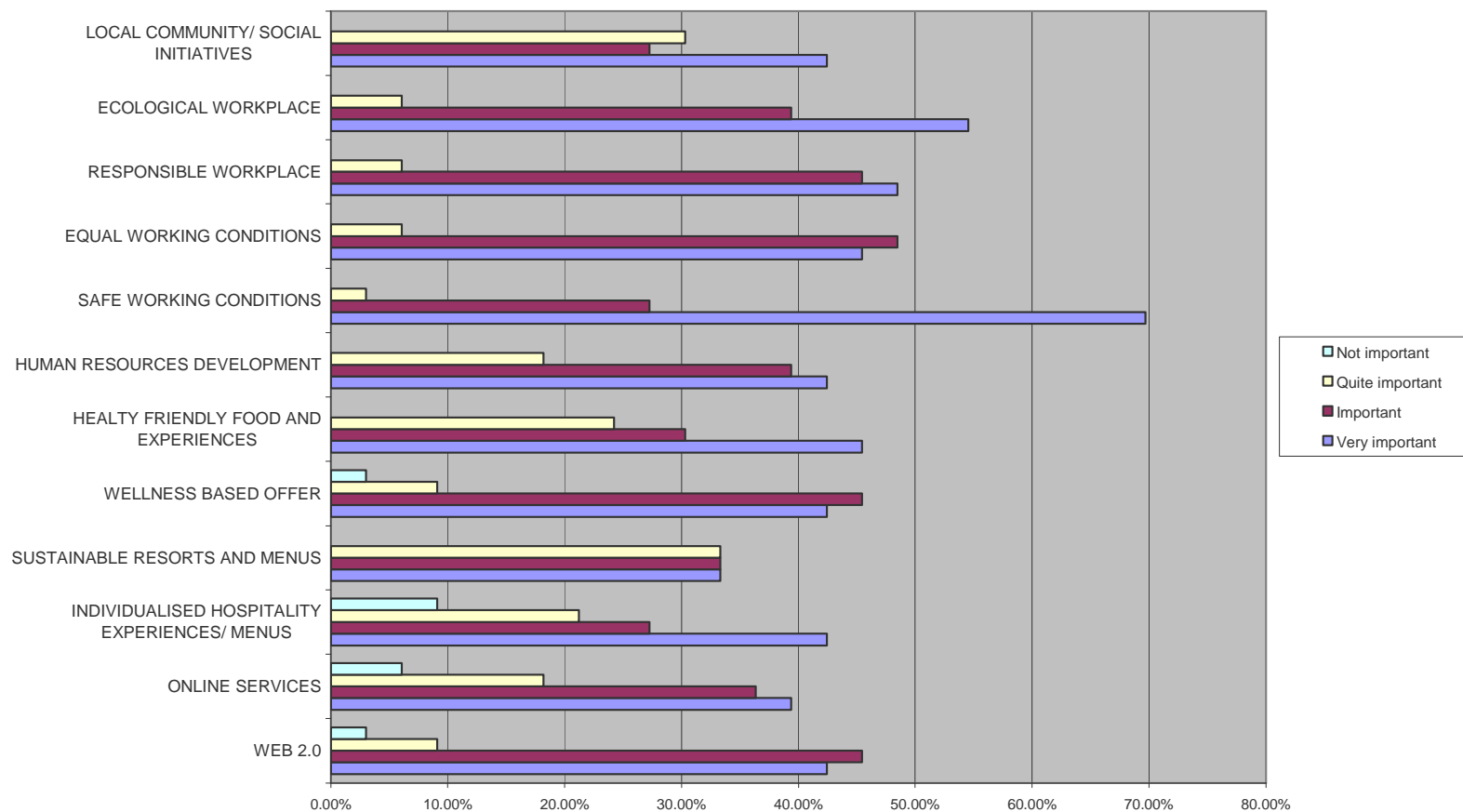
The survey aimed at understanding 1) **the importance** and the availability of 2) **company experience** regarding the innovative services and opportunities in the small hotels and restaurants.

The survey formulates 12 categories selected from the sphere of daily duties and responsibilities, and the importance of which can be evaluated. Answers allow the following conclusions:

### DEGREE OF IMPORTANCE

- All respondents highly evaluate the importance of the proposed topics and in different combination they are important and very important for over 98% of them;
- With the lowest degree of importance (from 3 to 9%) for the target group are the topics associated with **wellness based offer, Web 2.0 and the online services proposed** such as internet reservation systems, online product selection, ordering, fulfilment, tracking, payment and reporting, etc. This applies to both groups of respondents, with almost no difference in the arrangement;
- On the other hand, with the highest degree of importance are assessed topics related to "**safe working conditions**", "**ecological workplace**" and "**socially responsible workplace**" - for almost 70% of respondents providing safe working conditions is extremely important, respectively, for 65% of hotel managers and almost 74% of restaurant managers;
- To work in "**ecological workplace**" is extremely important for over 55% of respondents, respectively, for 50% of the hospitality and almost 58% for restaurateurs;
- High assessment in terms of importance to the business receives the category "**Local community and social initiatives**" - 45% of both groups believe that the opportunity to be part of the local community and contribute to the implementation of social initiatives is essential for them.

### IMPORTANCE





## COMPANY EXPERIENCE

The second group of questions examines the expertise of representatives of the project target groups, allowing each respondent to evaluate the company's experience in the same categories that respondents were already assessed in order of importance.

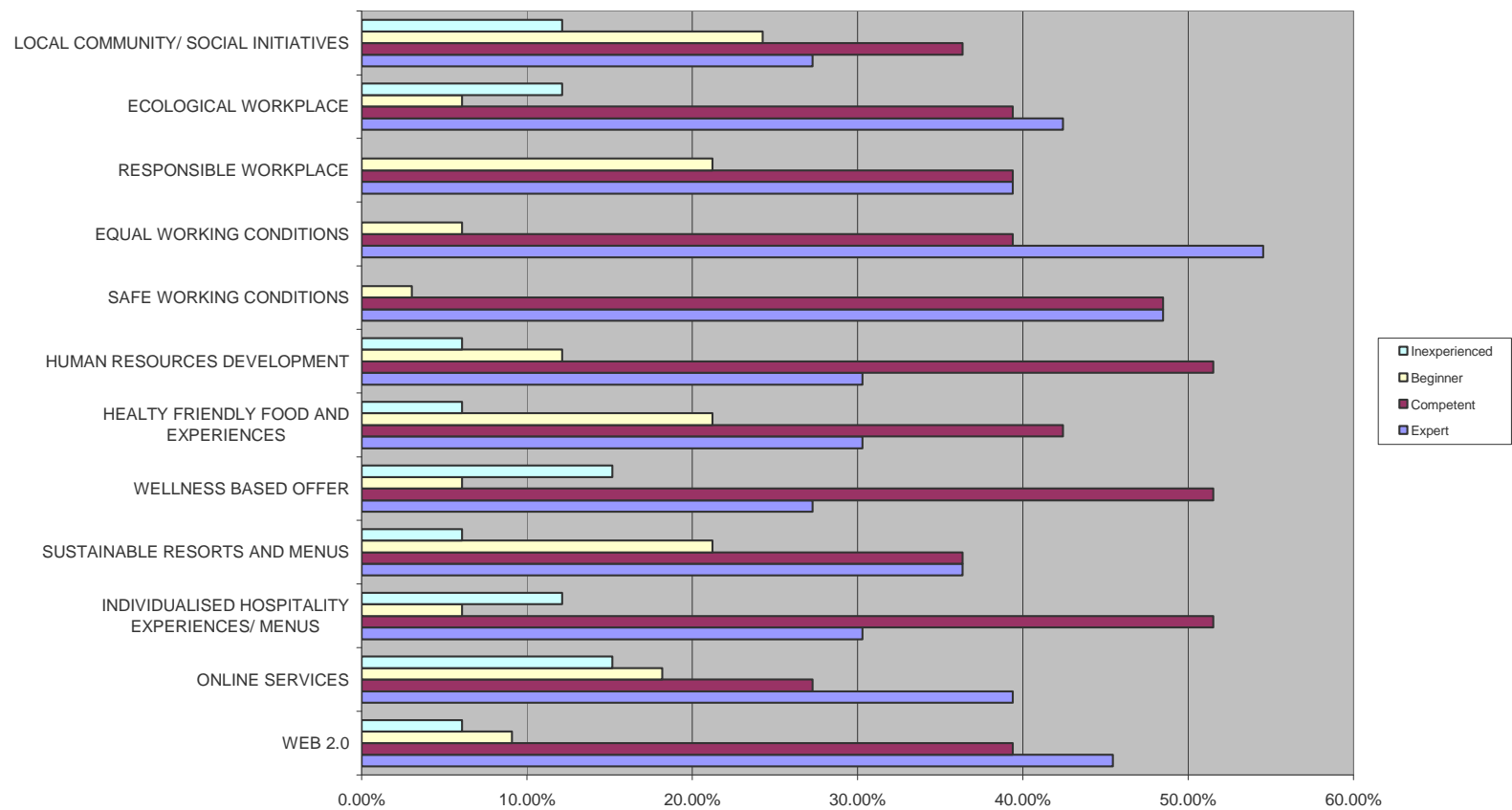
The conclusions on the basis of the answers are as follows:

- According to the company level of expertise questions concerning “**Wellness based offer**” and “**Online services**” are posed at the bottom of the scale, followed by the three categories with the same results - "Individualized hospitality experiences/menus", "Local community/social initiatives" and "Ecological workplace". Only between 10 and 15% are companies that have corporate experience related to the defined services;
- Majority of respondents from both groups declare a shortage of knowledge and skills in these areas - 14% of the hoteliers and 23.2% of restaurateurs consider themselves as "beginner" or "inexperienced";
- The group of restaurateurs shows the most limited competences at company level in “**Local community and social initiatives**” category.
- Between innovative services defined in the survey there are also those in which companies have significant expertise. 55% of total respondents highly evaluate the levels of corporate competence in most of these services as the most advanced is knowledge on “**Equal working conditions**” and “**Safe working conditions**” respectively 95% of restaurateurs and 93% of the hoteliers believe that their companies are competent in this regard.





## COMPANY EXPERIENCE



### Chapter 3. Dimensions requiring further information/ training

One of the objectives of the survey is to assess the situation and to outline the guidelines to be followed in the development of planned project products.

After respondents have rated their company's competences in defined areas, within the next group of questions they give answers to the innovative skills that the manager of a small hotel/ restaurant should have.

What conclusions can be made on the basis of shown results?

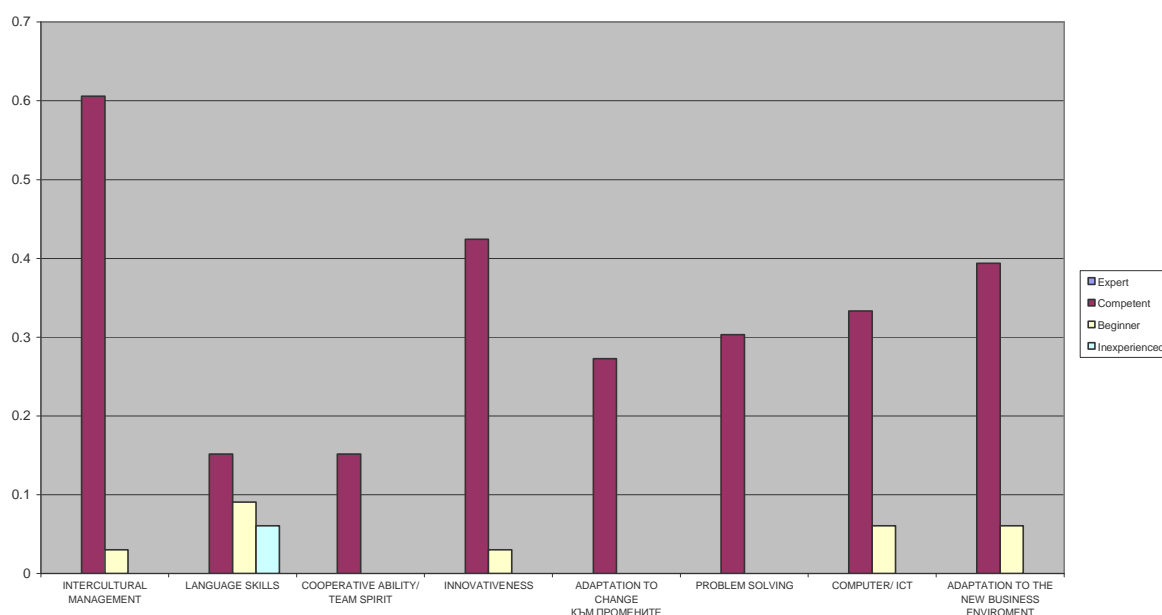
- Surveyed managers in both groups objectively assess their own competence: the lowest rates are in categories "Language skills" and "Computer/ICT", followed by "Adaptation to change and adaptation to new business environment";

- The highest level of competence that hotels and restaurants managers possess is "Cooperative ability/Team spirit" - 85% are "experienced" and 15% are "competent";

- Almost equal skills have the representatives of target groups concerning "adaptation and change" - about 70% of respondents gave the highest rating to this question;

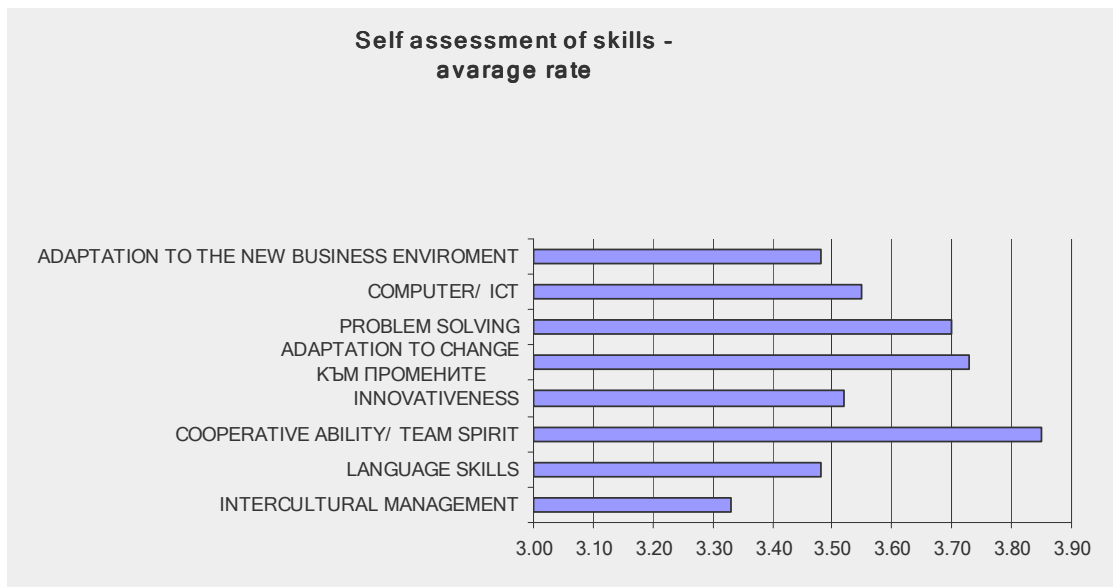
- Differences between the answers in the two groups of respondents - hoteliers and restaurateurs, are negligible, less than 2% and, cannot be taken into consideration.

Self assessment of skills





The survey allows respondents to form the average of their self-assessment in terms of defined innovative skills. Most of the answers are at the top of the scale - "4" is the upper rate and all the average values of self-assessments are between 3.33 and 3.85.



## Chapter 4. Learning and training

Lifelong learning and development of skills have been identified as key elements in response to the current economic crisis, to the population aging and to a wider economic and social strategy of the European Union<sup>ii</sup>.

Managers of small hotels and restaurants are part of tourist industry with a lot of perspectives for growth and have their responsibility regarding its increasing role for achievement of sustainable development. Becoming aware of the importance and assuming such responsibilities by managers of SMEs is a difficult and complex process that passes through increasing knowledge, skills and competencies.

The survey seeks answers to questions related to further training and education for these managers.

The conclusions that can be reached from the answers in this group allow drawing a picture of the preferred training as type and content:

- Main barrier, which creates difficulties for 66.7% of the respondents referring to participation in training programs for increasing their skills and competences, is the lack of available time, respectively 71.42% of hoteliers and 63.16% - in restaurateurs;

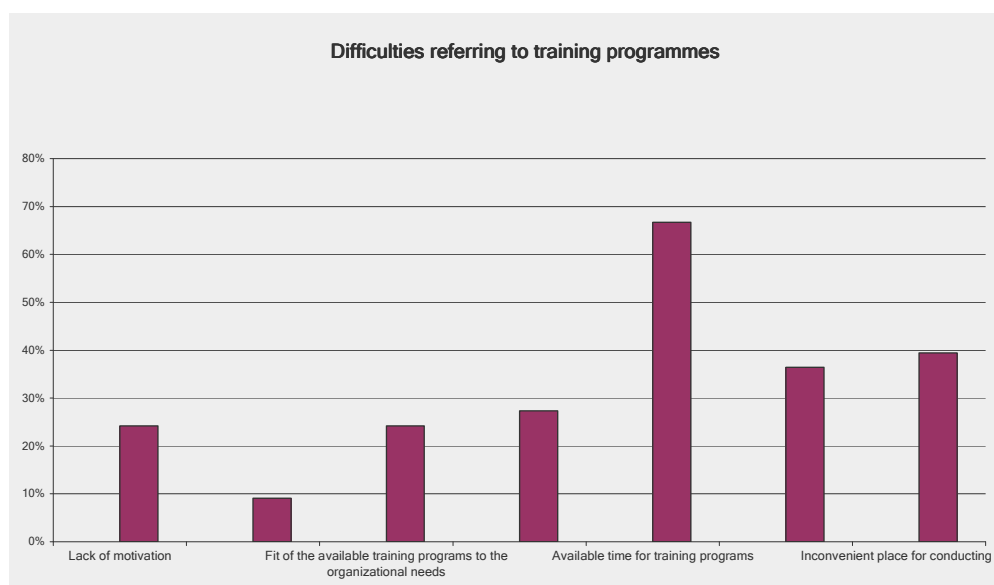
- Secondly as a problem for both groups are the problems related to the location and/ or the time of training - 39.4% of respondents indicate this as a barrier, respectively 35.7% of managers of hotels and 42.10% of managers of restaurants;

- The third difficulty, declared by the respondents, is the lack of enough information about the existing training programs - it is a problem for 36.4% of the respondents, respectively 35.7% of hoteliers and 36.8% restaurateurs do not and cannot find information about existing training programs;

- Answers of this question show for first time significant differences in the opinions based on branch:

- 31.58% of restaurant managers consider that the available training programs do not fit to the organizational needs, while this is a problem only for 14.29% of hoteliers;

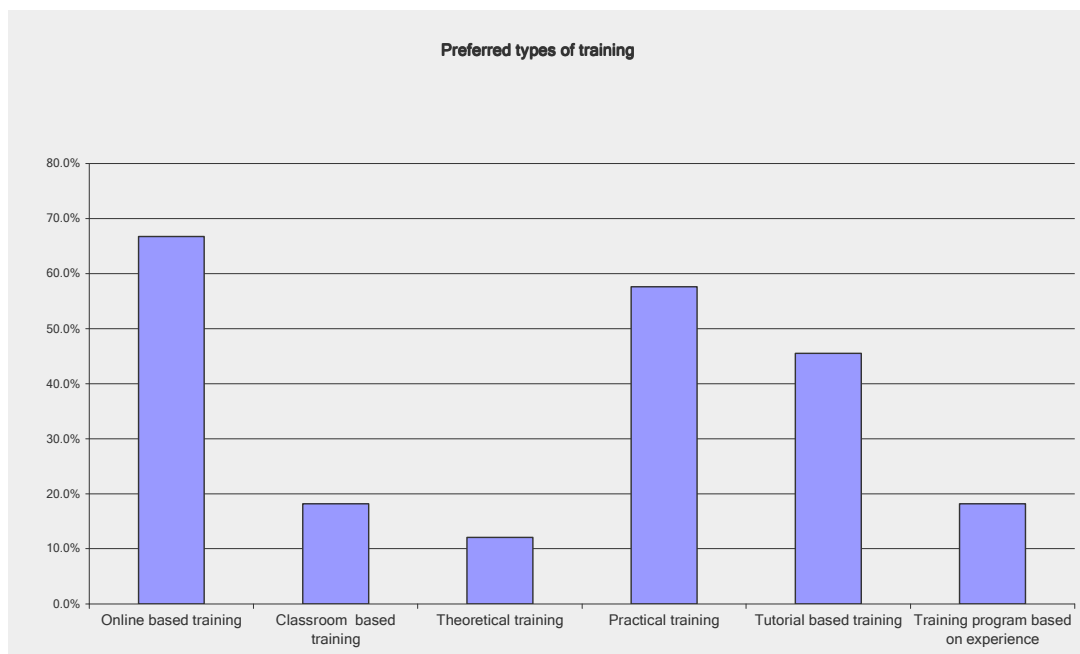
- 35.7% of hoteliers declare as a problem the higher prices of training programs, while 21.05% of restaurateurs comment the price as a factor.



The answers given to the last question confirm most of the above-mentioned conclusions.

According to the preferred type of training respondents choose the most appropriate to their needs, potential and real advantages they will benefit, expecting to receive adequate proposals in relation to the type of training:

- **Online based training** - it is important for 66.7% of all respondents, respectively for 57.14% of hoteliers and 73.68% of restaurateurs;
- Only 18% of respondents indicated **classroom based training** as an option for improving the skills, respectively 28.57% of hoteliers and 10.51% of restaurateurs;
- **Practical training** is a favorite of 57.6% (57.14% of hotel managers and 57.89% of restaurateurs);
- **Tutorial based training** is preferred by 45.5% of the respondents, respectively 50% of hoteliers and 31.58% of restaurateurs;
- **Training programme based on experience** – 18.2% of respondents, respectively 14.29% of hoteliers and 21.05% of restaurant managers.





## Chapter 7. Final conclusions

Trends in the development of tourism and the increasing competition in the sector impose that managers/ owners of small hotels and restaurants possess innovative management skills which enable them to create and manage a sustainable and socially responsible business, while keeping its local identity.

The development of a new professional profile of the manager of HORECA SMEs is provoked by the necessity to face the main challenges in the sector:

- 1) The increased demand of the tourists to the quality, attractiveness, variety and innovativeness of the touristic services;
- 2) The important role of ICT in hotels in regards of search, planning and implementation of the travels;
- 3) Finding the right balance between the autonomous development of the destinations, the protection of their environment and the development of a competitive economic activity;;
- 4) The delivery of safe and high quality services.

The survey conducted within Work Package 2 should outline the factors and trends in the sector at national level and on this basis, seek to define the needed knowledge, skills and competences.

The analysis of the received questionnaires allows making recommendations for future activities and products of the project:

### **The representative of the target group of RESPONS project's didactic materials is:**

- Manager of a small hotel/restaurant; he/she is usually responsible for up to 9 employees, working with high probability (almost 50% - every second) in a family-run business, which is located in a small/ midsize city;
- She/he has knowledge, skills and competences to perform the daily and routine management of the business, but he/she is willing and looking to enrich them by the means of innovative solutions and methods;
- Her/his daily schedule is filled-in, she/he does not have free time, and she/he is managing a small team;
- She/he is able to adapt to the changes, can work and cooperate with the team;
- She/he posses some knowledge on ICT, foreign languages, but recognizes the need to improve her/his skills;
- She/he appreciates the importance of the new realities in the business world, realizing that the information and communication technologies are a tool for communication, advertising, marketing, etc.;
- She/he recognizes that learning and improving skills and competencies are processes that depend to a great extent on her/his will and capability;
- She/he is responsible to innovations in the area;
- She/he wants to develop her/his business and to be competitive.



**The acquisition of new knowledge, skills and competences is extremely important for her/him which will allow the opportunity:**

- To manage human resources in the hotel/restaurant ensuring safe, equal and environment friendly working conditions;
- To develop her/his business in a socially responsible manner, contributing to the success of social initiatives in favour to the local community;
- To hold of innovative methods allowing her/him to be competitive;
- To attract guests and clients, acquiring communication skills for management in intercultural environment;

The training is a complex product focusing on demand and supply, expectations and results.

The realization of the main didactic relation in the process of training - between the teaching of "teacher" and the learning of "trainees" and the achievement of planned objectives depends on the extent to which both parties are aware of the expectations of each other, on what extent they are following the objectives, but first of all - what they offer and how.

**The manager of HORECA SME expects a training that is appropriate to her/his needs** and meets her/his criteria regarding:

- **Type, time and methods of conducting of the training;**
- **Program and curriculum;**
- **Interactivity, practical orientation;**
- **Innovative content;**
- **Maximum utilization of time and resources;**
- **Practical benefits for improvement of the tourist product and higher satisfaction of the end consumer.**

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<sup>i</sup> Bulgarian National Strategy for Development of Sustainable Tourism, 2009 - 2013, the Council of Ministers, State Agency for Tourism

<sup>ii</sup> Strategy "Europe 2020" for smart, sustainable and inclusive growth