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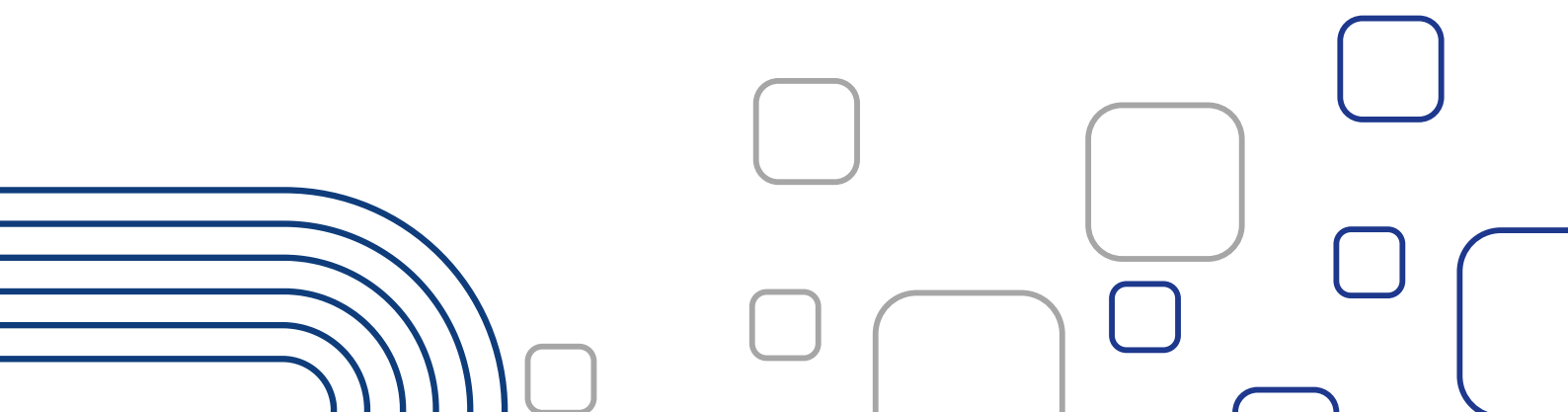


Co-funded by
the European Union

NEXT Black Sea Basin

ASSESSING COUNTRY AND REGION- SPECIFIC NEEDS: SUSTAINABILITY AND BLUE GROWTH PERSPECTIVES

POLLUTION AND WASTE AS A CHALLENGE TO BLUE GROWTH FOR BLACK SEA TOURISM



This material was developed by the research team of the International Hellenic University (Greece), The primary research data was also contributed by the teams of the Varna University of Management (Bulgaria), the Moldova State University (Republic of Moldova). and the Istanbul Development Agency (Republic of Türkiye).

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I. Introduction

The Black Sea Basin, renowned for its unique blend of natural beauty, diverse ecosystems, and rich cultural heritage, represents a significant and growing hub for tourism activities, offering vast potential for economic development and community enrichment. However, this escalating tourism growth has intensified environmental pressures, particularly regarding pollution and waste management, creating critical sustainability challenges that threaten the ecological health, aesthetic appeal, and long-term viability of tourism in the region.

This comprehensive report, developed within the scope of the INTERSMARTS project (Interdisciplinary Solutions for Smart Sustainable Tourism and Services for Blue Growth in the Black Sea Basin), addresses the crucial intersection between expanding tourism operations and environmental sustainability. It examines how current practices affect marine and coastal environments, identifies existing gaps in waste management and pollution control, and evaluates the region's readiness to adopt sustainable solutions in tourism development.

The document synthesizes extensive research, encompassing detailed demographic analyses of participants engaged in sustainable tourism discussions, broad public opinion surveys, expert insights, and targeted focus group dialogues conducted across Bulgaria, Greece, Moldova, and Türkiye. These varied data sources provide a multidimensional perspective, highlighting critical areas requiring strategic intervention to enhance sustainability.

This analysis aims to equip policymakers, industry leaders, local authorities, and community stakeholders with valuable insights and actionable recommendations. It advocates for an integrated approach to sustainable tourism development that not only addresses immediate environmental challenges but also promotes long-term economic resilience and socio-cultural enrichment. Ultimately, the report seeks to contribute significantly toward creating robust policies and practices that align tourism expansion with ecological integrity, fostering sustainable blue growth throughout the Black Sea Basin.

II. General overview of tourism in the Black Sea Basin and INTERSMARTS Countries

General Overview of Tourism and Related Services in the Black Sea Basin and INTERSMARTS Countries

The Black Sea region has a permanent population of approximately 17.5 million inhabitants, with an additional 6–8 million tourists visiting each year during the pre-

pandemic period. These numbers have been in the process of recovery and, in some cases, have even surpassed pre-pandemic levels (European Commission, 2022). The region encompasses both well-established and emerging tourism destinations, each at different stages of development in terms of infrastructure, connectivity, and brand recognition (UNWTO, 2019).

Between 2000 and 2018, international arrivals to the region grew at an average rate of 6% per year, exceeding Europe's 3% growth and the global average of 4% per year (UNWTO, 2019). However, this positive trend was significantly disrupted by the COVID-19 crisis and the war in Ukraine, both of which have had profound social, economic, and environmental consequences.

The coastal zones of the Black Sea littoral states include both land and sea areas, forming a complex socio-ecological system. This system evolves and operates under the influence of various interlinked factors, including political, social, environmental, economic, and cultural dynamics, as well as governance frameworks. The socio-economic development of coastal communities relies on the utilization of valuable natural resources such as land and water, along with their mineral, biological, and recreational components. Additionally, the prosperity of these communities is significantly influenced by socio-economic trends at both national and international levels (BSC, 2019).

Tourism and Related Services in INTERSMARTS Project Countries

Bulgaria

Bulgaria's tourism industry is a vital component of its economy, benefiting from its strategic location between Europe and Asia. The country offers diverse attractions, from Black Sea beach resorts to historic countryside towns, attracting visitors interested in cultural experiences, local cuisine, and historical sites.

Sustainable tourism is on the rise, with increasing interest in eco-friendly accommodations and outdoor activities such as hiking and skiing. The proliferation of digital booking platforms has made travel planning more accessible, while government initiatives promoting year-round tourism have boosted off-season visits, particularly for winter sports. The tourism market is expected to maintain steady growth, with a projected compound annual growth rate of 3.77% between 2025 and 2029. The Package Holidays segment is anticipated to dominate the market, with revenue projected to increase significantly by 2025 as the number of users in this segment is expected to grow from 56.9% in 2025 to 63.4% in 2029 (Statista, 2024).

Greece

Greece's rich ancient cultural heritage, renowned archaeological sites, and extensive coastline with numerous islands make it one of the world's top tourist destinations. Like

many Mediterranean countries, Greece's economy is heavily reliant on tourism, with the sector contributing over 19% to the country's GDP in 2023—the third-highest share among EU nations, following Portugal and Croatia.

In terms of employment, the combined direct, indirect, and induced effects of travel and tourism supported over 800,000 jobs in Greece in 2023, with projections suggesting this figure could surpass one million by 2034. While international tourist arrivals have exceeded pre-pandemic levels, outbound tourism from Greece has been slower to recover, with the number of Greek travellers going abroad in 2023 still approximately 20% lower than in 2019 (Statista, 2024).

Republic of Moldova

Moldova is committed to the sustainable development of its tourism sector and the promotion of its unique natural and cultural resources. Priority is given to rural, wine, and cultural (festival) tourism. However, the sector has faced significant challenges due to the COVID-19 pandemic and the military conflict in Ukraine, which directly borders Moldova. These challenges include security concerns, environmental impacts, and resilience issues.

Following a period of growth between 2010 and 2019, the average number of inbound and domestic visitors per inhabitant in Moldova sharply declined in 2020 and 2021, reverting to 2015 levels (Statista, 2024).

Türkiye

Türkiye's unique geographical position, bridging Europe and Asia, has historically made it a cultural crossroads where diverse civilizations have thrived. Its rich heritage, combined with vibrant cities, stunning landscapes, and remarkable archaeological sites, makes it an attractive destination for travellers seeking a blend of Eastern and Western influences.

Recent trends indicate a shift in tourist preferences, with visitors increasingly seeking authentic and immersive experiences beyond traditional attractions. This has led to growing interest in lesser-known destinations that offer deeper cultural connections. Sustainability efforts have also gained traction, with a rise in green hotels, sustainable tour operators, and initiatives aimed at protecting natural and cultural heritage.

Additionally, strong government support and investment in infrastructure—such as improved transportation networks and upgraded accommodations—are enhancing the overall visitor experience and driving growth in the sector (Statista, 2024). Given Türkiye's vast geographical and economic landscape, the INTERSMARTS project primarily focuses on Istanbul and its neighbouring regions that are connected to the Black Sea.

III. Methodology

The methodology employed in the INTERSMARTS project follows a structured and iterative approach designed to ensure comprehensive data collection, analysis, and reporting. This approach integrates multiple research methods to identify challenges and propose actionable solutions for sustainable tourism development in the Black Sea region.

Needs assessment serves as a fundamental planning tool for diagnosing challenges and formulating strategic, goal-oriented solutions to optimize policies and actions in sustainable tourism. By clearly defining challenges, it ensures that resources are effectively directed toward feasible interventions that enhance performance and desired outcomes. In the INTERSMARTS project, needs assessments focus on four key sustainability challenges that are studied by the project partners based on their research interests and complementary expertise, defined also as a task-force domains of the INTERSMARTS Network, and namely: (i) overdevelopment – by the Moldova State University; (ii) seasonality – by the Varna University of Management, (iii) pollution and waste – by the International Hellenic University and low innovation absorption – by the Istanbul Development Agency. The resulting Needs Assessment Reports are to propose state-of-the-art strategies for addressing these challenges, leveraging state-of-the-art research from project partners and empirical data collected with civic researchers, all aimed at fostering blue growth.

The INTERSMARTS needs assessment methodology is structured into three key phases: (1) literature review and desk research, (2) field research, and (3) the development of a comprehensive needs assessment report. These phases were executed concurrently across the four identified sustainability challenges, ensuring a holistic analysis of sustainable tourism in the Black Sea region.: (1) literature review and desk research, (2) field research, and (3) development of a needs assessment report. The process integrates collaborative contributions from all partners, focusing on sustainability in blue tourism, coastal/riverside resource management, and innovation promotion.

The literature review was aimed at reviewing how the project problem issues are explored in academic research, strategies, and policies related to blue tourism sustainability at international, national, and regional levels. The main policy-related determinants of the needs assessment, including six research perspectives or lens for field research, namely the challenges, current state, adopted solutions in business and communities, effectiveness of policies and regulations, local communities' perspective, and future needs were outlined based on the literature review and desk research. Accordingly, field research questionnaires for focus groups, in-depth interviews and general survey of the public opinion were elaborated.

The literature review was completed simultaneously in the period October 1st to 31st, 2024 by all INTERSMARTS partner institutions.

The field research component provided critical primary data from INTERSMARTS target groups, encompassing higher education institutions, SMEs, public authorities, NGOs, and other key stakeholders. This phase aims to contextualize theoretical findings, offering practical insights and interpretations essential for policy recommendations and strategy formulation., including higher education institutions, SMEs, public authorities, NGOs, and other relevant interest groups. It was necessary to explore the local context, practical insights, and interpretation of the project problems. In addition, it gave valuable interpretations and independent comments that add to the quality of the project analyses and recommendations.

The field research included three types of activities – focus groups, in-depth interviews and on-line survey for the public. The focus groups were organized on a national basis – one event per project partner country – and presented guided discussions with the interested participants on 12 main (through the lens challenges, adopted solutions and effectiveness) and 8 optional (through the lens future needs and local communities) or on sets of 3 main and 2 optional questions per challenge. The focus groups were held on 12.12.2025 in the Moldova State University with 10 participants, on 18.12.2024 in the Varna University of Management with 15 participants, on 26.12.2024 at the Istanbul Development Agency with 12 participants and on 14.01.2025 in the International Hellenic University with 8 participants.

The in-depth interviews gathered the insights of established experts from academia and practice on all four project problems and along with the six research dimensions following a 24-question template. The interviews were conducted in parallel in all project countries from November 1st, 2024, to January 15th, 2025. In Bulgaria, 17 experts were interviewed, in the Republic of Moldova, 15 experts were interviewed, in Türkiye, 16 experts were interviewed, in Greece 19 experts were interviewed.

The public survey was performed via the distribution an on-line questionnaire with 20 closed questions (5 per theme) again in parallel in all project countries from November 1st, 2024, to January 15th, 2025. It was completed by 300 persons in Bulgaria, Greece, the Republic of Moldova and Türkiye.

The data collection process was rigorously structured, with each project partner conducting surveys on four thematic areas within their respective regions. Findings were consolidated into specialized Needs Assessment Reports (NARs), which integrated results from literature reviews, focus groups, interviews, and surveys. The final reports underwent a collaborative review to ensure validity and comprehensiveness. within their country, summarized the results, and shared their findings. All partners ensured a diverse representation of target groups without strict proportional adherence to avoid bias. Next, task force leaders consolidated the data for their respective themes into specialized Needs Assessment Reports (NARs), which include summarized findings from literature reviews, focus groups, interviews, and surveys. Finally, the final reports underwent a

collaborative review by all partners to validate the accuracy and completeness of the information.

As a task-force leader on pollution and waste management, International Hellenic University performs needs analysis on pollution and waste management as a challenge to blue growth for Black Sea tourism.

IV. Need Assessment

The Need Assessment section of this report provides an in-depth analysis of the current sustainability and environmental management needs in tourism within the Black Sea Basin, focusing specifically on pollution and waste management as critical challenges to blue growth. This comprehensive assessment integrates demographic insights, public perceptions, expert analyses, and stakeholder input collected through surveys, in-depth interviews, and focus group discussions conducted across Bulgaria, Greece, Moldova, and Türkiye.

This section begins with a demographic analysis that characterizes the respondents—comprising public participants, tourism professionals, experts, and policymakers—highlighting their roles, expertise, and geographic distribution. Subsequently, the analysis addresses sustainability awareness among tourists, their willingness to financially support environmentally sustainable practices, and the primary information channels utilized for sustainable tourism decisions.

Public perceptions are explored, shedding light on the impact of pollution and waste on tourism sustainability, while stakeholder insights provide detailed qualitative data on environmental practices, investment patterns, and constraints faced by the tourism sector. Lastly, focus group findings identify specific sustainable tourism challenges and opportunities, aiming to inform policy development and strategic initiatives that foster environmental sustainability and responsible tourism management across the Black Sea Basin.

Demographic Analysis of participants: Public, Experts, and Focus Groups

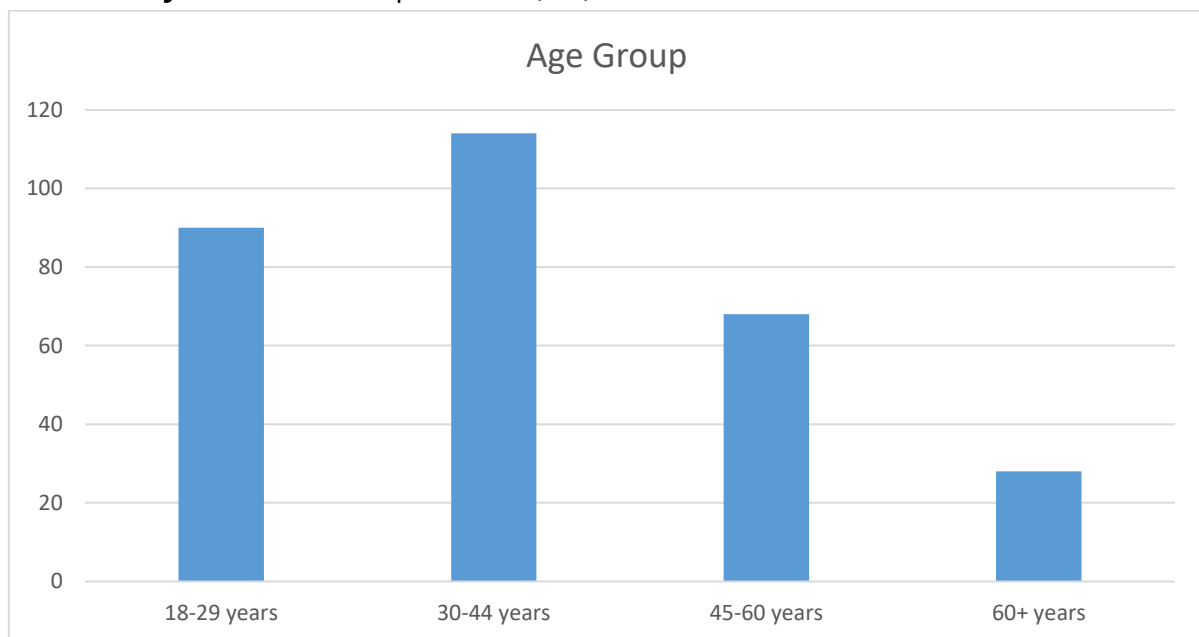
The following analysis presents a detailed examination of the demographic and professional characteristics of respondents participating in a survey on sustainable tourism in the Black Sea region. The dataset consists of 300 individuals, with key variables including age, country of residence, role in the tourism sector, and level of experience in tourism and sustainability. This analysis aims to provide insights into the composition of the respondent pool, facilitating a deeper understanding of their perspectives and expertise in the domain of sustainable tourism.

General Public Demographic Profile and Insights

1. Age Distribution

The age distribution of respondents indicates a strong representation of younger individuals actively engaged in discussions on sustainable tourism:

- **18–29 years old:** 90 respondents (30%)
- **30–44 years old:** 114 respondents (38%)
- **45–60 years old:** 68 respondents (23%)
- **60+ years old:** 28 respondents (9%)

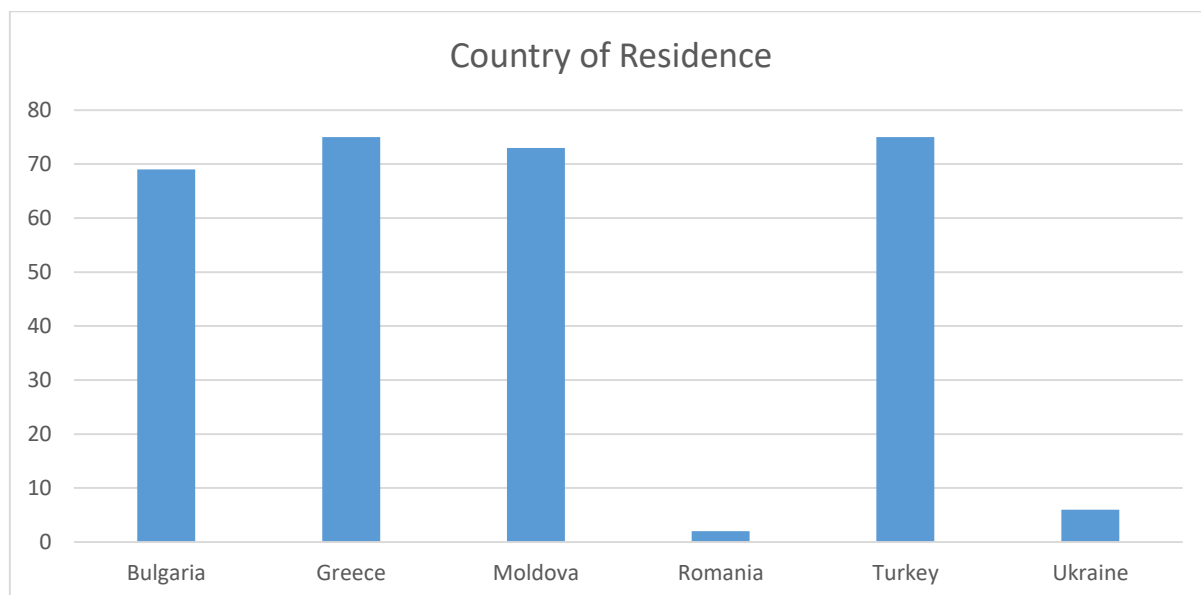


Collectively, **68% of respondents are under the age of 45**, highlighting a predominance of early to mid-career professionals. This demographic distribution suggests that younger generations are increasingly involved in tourism-related activities and sustainability initiatives, potentially driving innovation and policy shifts in the sector. The relatively lower representation of respondents aged 60 and above may indicate limited engagement from senior professionals, which could be explored further in future studies.

2. Geographic Representation

The survey captures responses from six countries within the Black Sea Basin, distributed as follows:

- **Greece:** 75 respondents
- **Türkiye:** 75 respondents
- **Moldova:** 73 respondents
- **Bulgaria:** 69 respondents
- **Romania:** 2 respondents
- **Ukraine:** 6 respondents



The survey captures responses from six countries within the Black Sea Basin, distributed The geographic distribution reflects a balanced representation of key countries in the region.

3. Occupational Roles in the Tourism Sector

Respondents represent a range of professional roles within the tourism industry:

- **Business Owners:** 32 respondents
- **Employees:** 69 respondents
- **Tourists:** 87 respondents
- **Researchers:** 51 respondents
- **Other Roles:** 61 respondents (including students and policymakers)

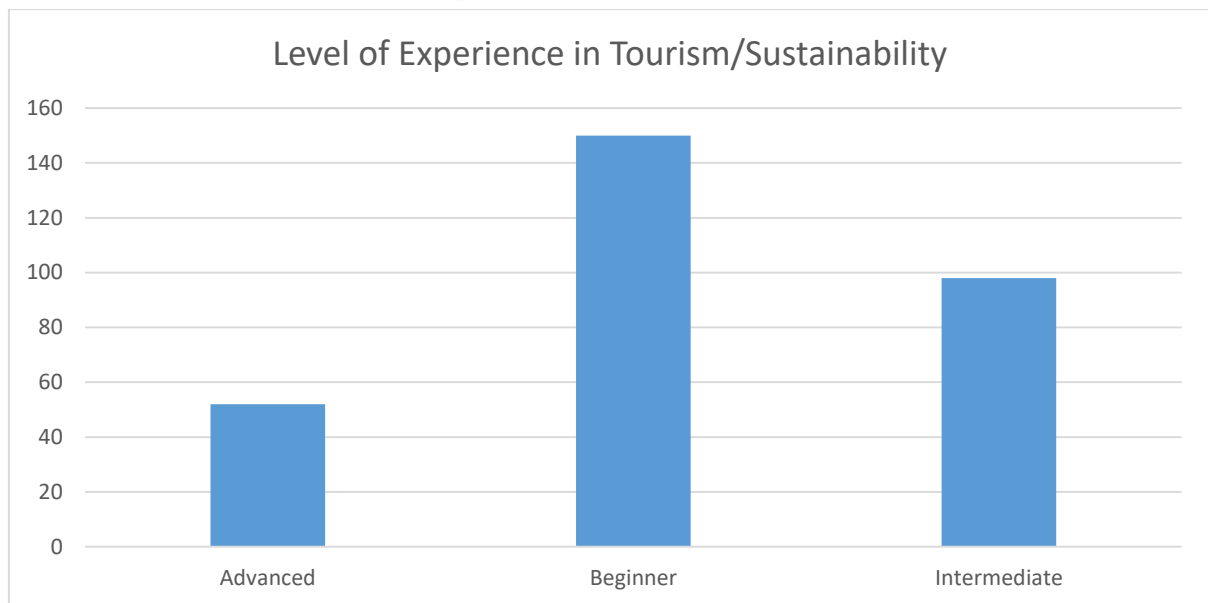


The presence of both **industry stakeholders (business owners and employees)** and **non-industry participants (students and tourists)** suggests that the survey results encompass both supply-side and demand-side perspectives on sustainable tourism. This diversity enhances the validity of the findings, as it reflects a holistic understanding of challenges and opportunities from multiple vantage points.

4. Experience in Tourism and Sustainability

The distribution of respondents based on their level of experience in tourism and sustainability is as follows:

- **Beginners:** 150 respondents (50%)
- **Intermediate:** 98 respondents (33%)
- **Advanced:** 52 respondents (17%)



The data indicates that **half of the respondents are beginners** in the field, signifying a substantial proportion of individuals who are either new to tourism or still developing expertise in sustainability practices. The relatively smaller proportion of intermediate and advanced respondents suggests a potential gap in specialized knowledge and experience, which may have implications for the successful implementation of sustainable tourism initiatives. These findings underscore the need for enhanced training programs, professional development opportunities, and knowledge-sharing platforms to bridge the experience gap in the sector.

Demographic Profile of Experts from In-Depth Interviews

In addition to the survey respondents, in-depth interviews were conducted with experts from various sectors within the tourism industry. These professionals provided insights based on their extensive experience, representing a diverse set of organizations across multiple countries in the Black Sea region.

Bulgaria:

- Experts from education institutions, guesthouses, hotels, eco-villages, travel agencies, and chambers of commerce.
- Experience levels ranged from 3 years to over 10 years, with a significant number having extensive experience in the private sector.

Greece:

- Participants included professionals from the Ministry of Tourism, municipal representatives, hotel owners (3-star, 4-star, and 5-star hotels), travel agencies, tour operators, airlines, and shipping companies.
- The majority had over 10 years of experience in the private sector, contributing expertise in various aspects of sustainable tourism and hospitality.

Moldova:

- Representatives included managers from guesthouses, tourism clusters, public associations, and regional councils.
- Experts from the public sector, NGOs, and private businesses, with experience levels ranging from less than 3 years to over 10 years.

Türkiye:

- Participants included experts from ministries, tourism companies, development programs, municipal authorities, travel agencies, and research institutions.
- The private sector had strong representation, with many participants having more than 10 years of experience in managing tourism businesses and development programs.

This diverse set of expert perspectives complements the findings from the broader survey and offers valuable insights into the operational and strategic challenges faced in implementing sustainable tourism practices.

Demographic Overview of Focus Group Participants

In addition to the in-depth interviews, a focus group discussion was conducted with experts representing various sectors within the tourism industry. These professionals contributed valuable insights based on their extensive experience, spanning multiple countries within the Black Sea region.

Bulgaria:

- Experts from tourism businesses, NGOs, and educational institutions, including researchers and students.
- Strong private sector representation with extensive industry knowledge.

Greece:

- Participants included tour guides, hotel managers (3-star, 4-star, and 5-star), travel agency owners, and tour operators.
- Majority of participants had over 10 years of experience in their respective fields, emphasizing hands-on industry insights.

Moldova:

- Involvement of tourism business managers, experts, and owners.
- Significant representation from the private sector, focusing on sustainable tourism operations.

Türkiye:

- Participants from ministries, municipalities, hotel associations, tourism development agencies, and universities.
- Diverse representation, including public sector professionals and academic researchers contributing to sustainable tourism policies.

The focus group discussions provided an additional layer of qualitative insights, complementing both the survey and in-depth interviews. These findings help shape a more comprehensive understanding of sustainable tourism challenges and opportunities within the Black Sea region.

Comparative Demographic Analysis and Key Insights

General Public Insights

1. **Youth Dominance:** The prevalence of younger respondents suggests a high level of interest in sustainability among emerging professionals in the tourism sector. This may be indicative of a generational shift towards greater environmental and social consciousness in tourism-related decision-making.
2. **Experience Gaps in Sustainability:** The dominance of beginners suggests that the tourism sector may lack extensive expertise in sustainability practices, emphasizing the necessity for capacity-building initiatives, policy incentives, and industry-wide training programs.
3. **Youth Engagement in Sustainable Tourism:** Many respondents (68%) are under 45 years old, indicating a strong engagement from younger professionals. This suggests that emerging generations are more receptive to sustainable tourism practices, which may drive future policy and industry innovations.
4. **Knowledge Gaps in Sustainability:** With 50% of respondents classified as beginners in tourism and sustainability, there is a pressing need for training programs and professional development opportunities to enhance industry-wide expertise in sustainable practices.

Insights from In-Depth Interviews

1. **Industry Leadership in Sustainability:** Experts from in-depth interviews, predominantly with over 10 years of experience, provided a nuanced perspective on sustainability challenges and opportunities. Their insights emphasize the necessity of industry leadership in integrating sustainable practices into mainstream tourism operations.
2. **Sector-Specific Challenges:** The interviews revealed that professionals in private and public sectors face distinct sustainability challenges—such as funding constraints, policy misalignment, and operational limitations—highlighting the need for cross-sector collaboration to address these issues effectively.
3. **Emerging Trends:** Experts emphasized the rising importance of eco-tourism, circular economy principles, and digital innovation in shaping the future of sustainable tourism in the Black Sea region.

Insights from Focus Groups

1. **Collaborative Solutions:** The focus groups provided an additional qualitative layer of insights, with discussions emphasizing the importance of collaboration between government entities, NGOs, and private sector stakeholders to implement sustainable tourism strategies.
2. **Sustainability Across Different Business Models:** Participants from diverse backgrounds, including hospitality, travel agencies, and municipal organizations—highlighted that sustainability solutions must be adapted to different business models, recognizing that a one-size-fits-all approach is ineffective.

Key Insights and Challenges in Sustainable Tourism Participation Across the Black Sea Basin

The analysis of respondent profiles in the survey on sustainable tourism in the Black Sea Basin reveals key trends. The balanced participation from Greece, Türkiye, Moldova, and Bulgaria enables meaningful regional comparisons. Additionally, the diversity in professional backgrounds, including business owners, employees, students, and other stakeholders, ensures that the survey captures both industry challenges and consumer expectations.

This demographic and occupational analysis highlights significant engagement from younger professionals and key regional stakeholders. However, gaps remain in geographic representation and experience levels. Addressing these gaps through targeted outreach and educational initiatives will be crucial to fostering a more inclusive and knowledgeable tourism community committed to sustainability.

Future research should focus on achieving a more balanced age distribution, increasing participation from underrepresented countries, and exploring strategies to enhance sustainability expertise in the sector. These efforts will contribute to a more comprehensive understanding of the evolving dynamics of sustainable tourism in the Black Sea Basin.

Analysis of Sustainability Awareness in Tourism: Practices, Willingness to Pay, Information Channels, and Policy Strategies

Sustainability awareness among tourists plays a crucial role in shaping environmentally responsible travel behaviours. This section of the report presents an in-depth analysis of sustainability awareness in tourism, focusing on key factors influencing travellers' sustainable choices in Bulgaria, Greece, Moldova, and Türkiye.

The analysis examines travellers' engagement with sustainable practices, their willingness to pay more for environmentally friendly services, the primary sources of information on sustainable tourism, and their perspectives on policies for sustainable infrastructure. The findings provide valuable insights into regional trends, highlighting areas where sustainability awareness is high and aspects that require further promotion.

By identifying the most and least prioritized sustainability practices, this section aims to support policymakers, businesses, and stakeholders in designing targeted interventions that encourage responsible tourism in the Black Sea Basin. The report further outlines key recommendations based on consumer behaviour, economic willingness to support sustainability, and awareness channels, contributing to the ongoing development of sustainable tourism strategies in the region.

1. Tourists' Sustainable Practices: Prioritization and Preferences

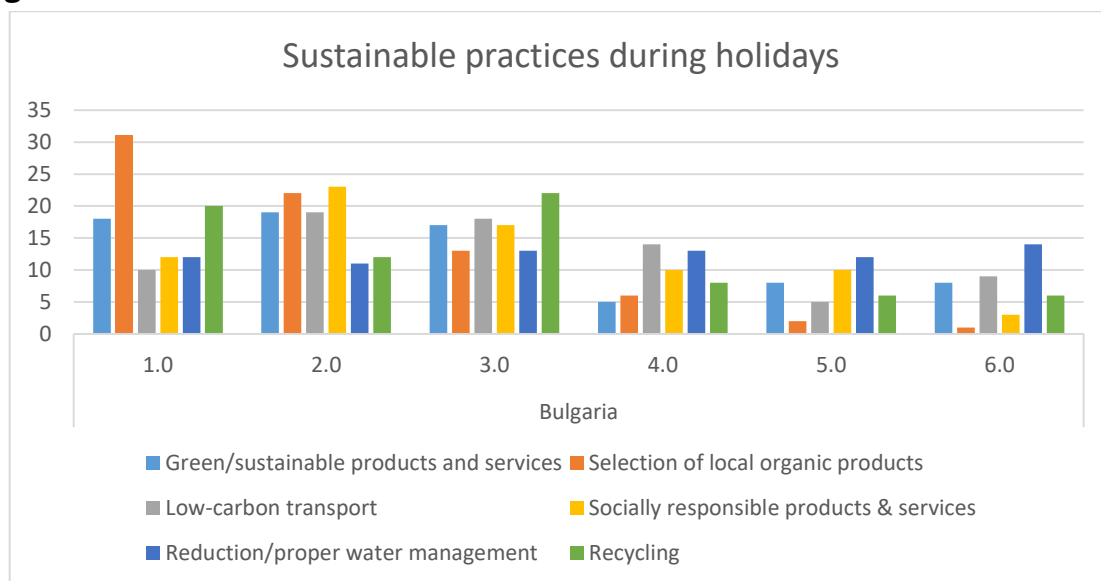
Understanding the sustainable practices that tourists prioritize during their travels is crucial for promoting environmentally responsible tourism. This section explores the question: *"What sustainable practices do you adopt during your holidays? Rank the following options in descending order?"*

This report analyses the sustainable practices adopted by travellers during holidays in four countries (Bulgaria, Greece, Moldova, and Türkiye) and the overall trends in the Black Sea Basin (BSB). The priority scale used in the data indicates that 1 represents the most important practice and 6 the least important.

The sustainable practices analysed include:

- *Green/sustainable products & services (blue)*
- *Selection of local organic products (orange)*
- *Low-carbon transport (light blue)*
- *Socially responsible products & services (purple)*
- *Reduction/proper water management (pink)*
- *Recycling (green)*

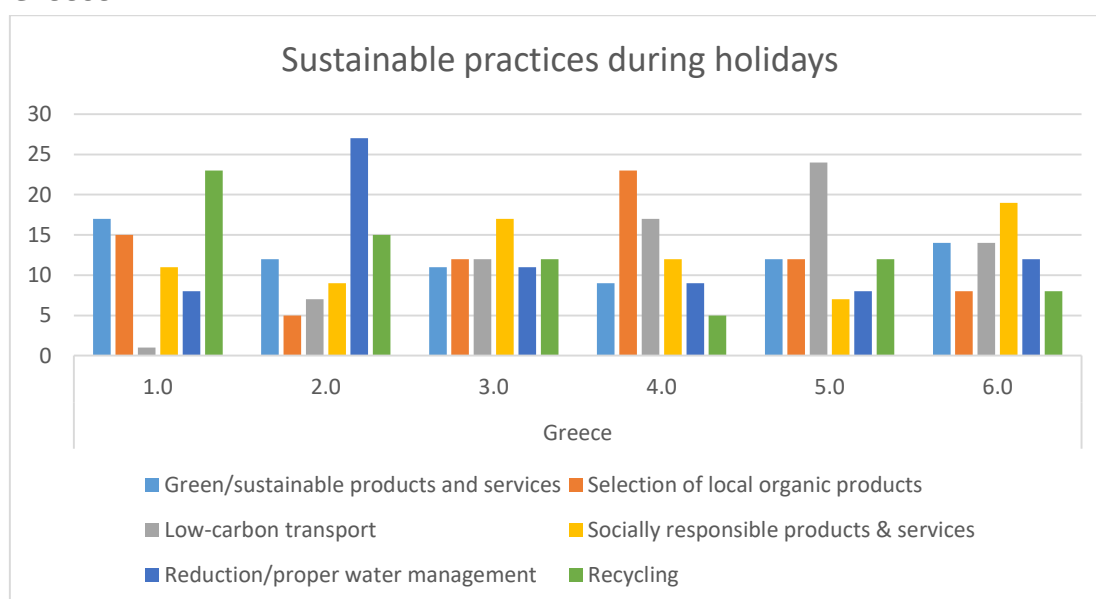
Bulgaria



Bulgaria

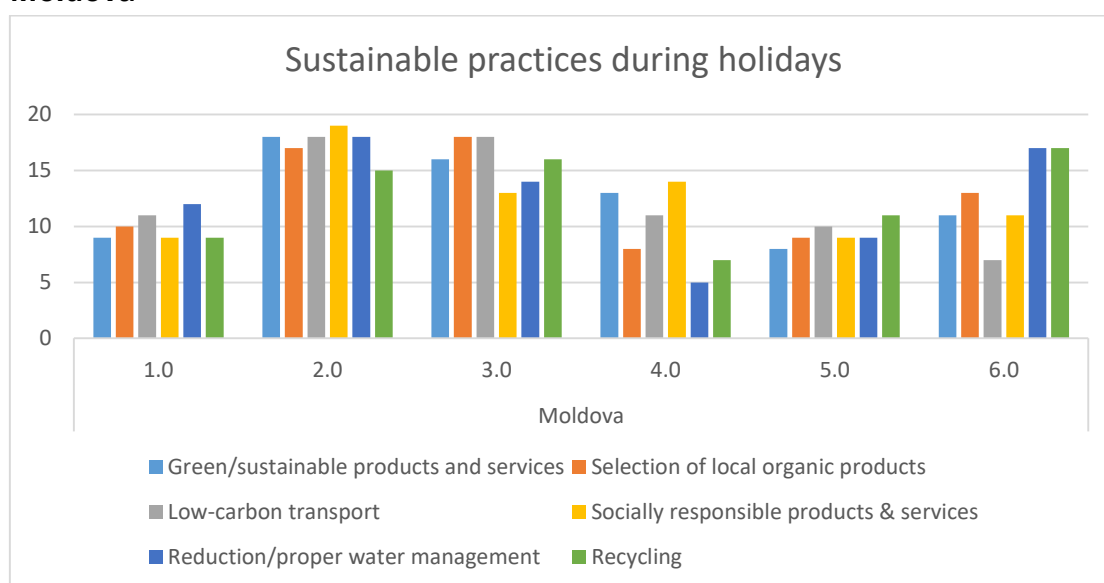
- **Selection of local organic products (orange) is the highest priority (1.0)**, showing that travellers prefer local and organic options.
- **Recycling and low-carbon transport (green and light blue) are also highly valued**, particularly in the first few priority levels.
- **Social responsibility and water management are lower in priority**, indicating that they are considered less critical.
- **From priority 4.0 onwards, the importance of all categories decreases**, confirming that the most sustainable practices are not always a top concern for travellers.

Greece



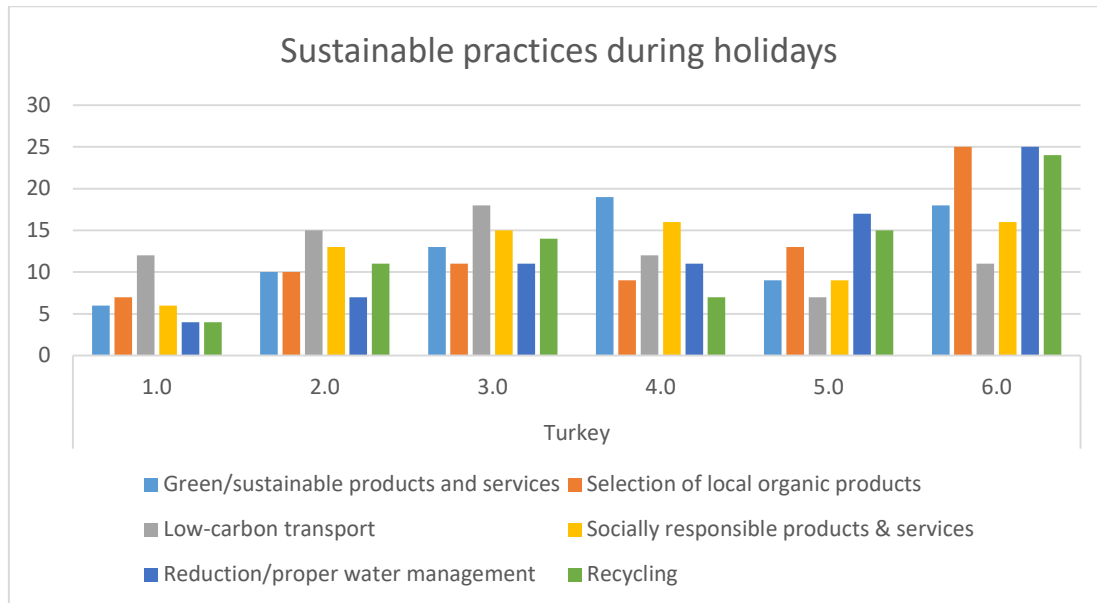
Greece	<ul style="list-style-type: none"> • Water management (pink) is an important priority in Greece, ranking higher than in other countries. • Recycling maintains high values across all priority levels, showing that it is a well-established practice. • Low-carbon transport and sustainable products are consistently prioritized throughout the ranking. • Socially responsible products & services rank lower, similar to Bulgaria.
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Moldova



Moldova	<ul style="list-style-type: none"> • There is no extreme variation among different priorities, indicating that travellers do not have strong preferences for specific sustainable practices. • Green products, low-carbon transport, and recycling rank among the highest priorities. • Social responsibility is consistently ranked lower, confirming a similar trend seen in other countries. • Compared to other nations, Moldova has more balanced distribution across all categories.
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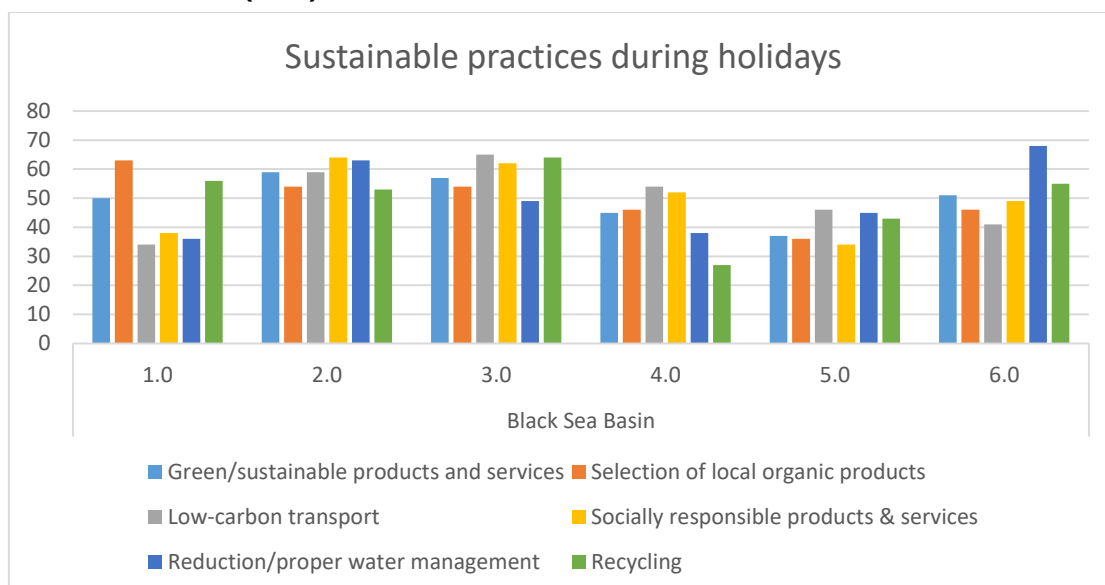
Türkiye



Turkey

- Low-carbon transport and recycling are among the top priorities (1.0 - 2.0).
- Selection of local organic products (orange) is more significant at the lower-priority levels (6.0), indicating it is a popular but not essential practice.
- Sustainable products and services are consistently prioritized.
- Social responsibility and water management rank lower, similar to the other countries.

Black Sea Basin (BSB) Overview



Total	<ul style="list-style-type: none"> • Recycling and sustainable products are the most significant sustainable practices across the entire region. • Low-carbon transport ranks high in importance, especially in categories 1.0 and 2.0. • Selection of local organic products is not considered a top priority, as it appears higher in the lower-priority levels (6.0). • Social responsibility and water management are ranked lower in importance, mirroring the trends in individual countries.
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Key Findings

- Recycling and low-carbon transport are the top sustainable practices across all countries**, indicating strong environmental awareness.
- The selection of local organic products is a popular choice but not a top priority**, as it ranks higher in lower-priority categories.
- Water management is particularly important in Greece**, while in other countries, it ranks lower in priority.
- Social responsibility consistently ranks lower across all countries**, suggesting that travellers are less focused on this aspect of sustainability.
- Türkiye and Greece have more balanced prioritization of sustainable practices**, while Moldova presents the least variation in preferences.
- Overall, the Black Sea Basin demonstrates a strong commitment to sustainability**, particularly in recycling and the adoption of green products.

2. Willingness to Pay for Environmentally Sustainable Tourism Services

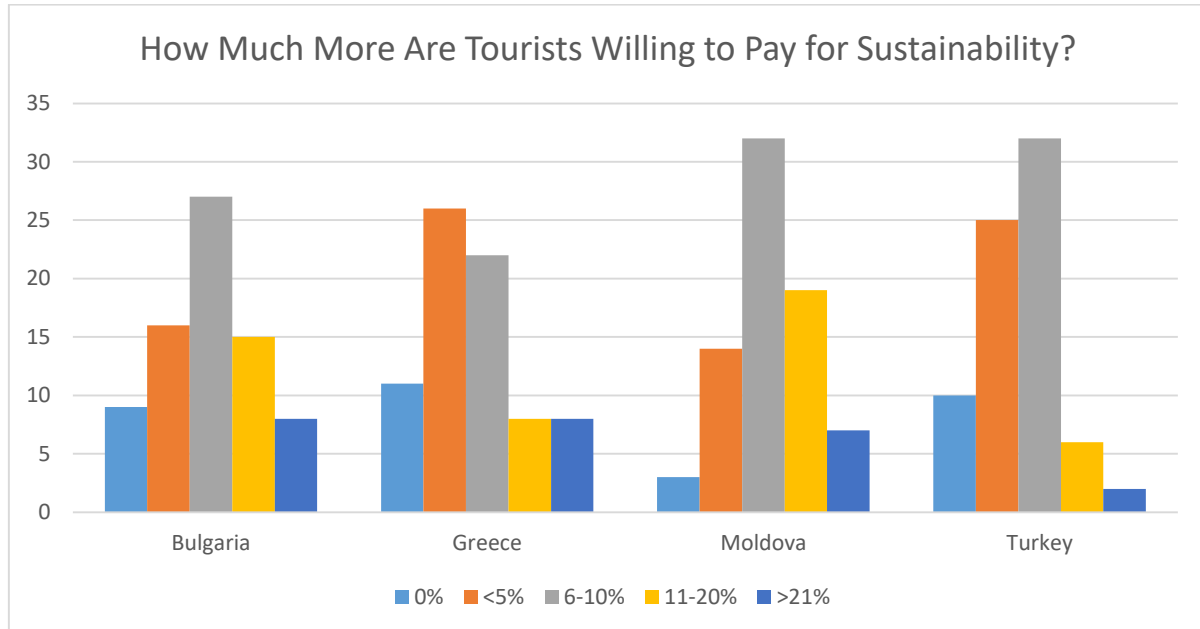
As sustainability becomes a significant factor in travel decision-making, assessing tourists' financial commitment to eco-friendly services is essential for shaping future sustainable tourism policies. This section addresses the question: *"How much more would you be willing to pay for a restaurant/hotel or tour agent that implements environmental sustainability practices?"* This report analyses the willingness of tourists in **Bulgaria, Greece, Moldova, and Türkiye** to pay extra for environmentally sustainable practices in tourism-related services. The study categorizes responses based on how much more tourists are willing to pay for sustainability, ranging from **0% (not willing to pay more) to more than 21% extra**.

Two visual representations of the data were analysed:

- Country-based comparison, which shows how responses differ across Bulgaria, Greece, Moldova, and Türkiye.

- b. Willingness-based comparison, which categorizes all responses by percentage increase rather than by country, providing a clearer view of overall pricing trends.

2.1 Comparative Analysis by Country



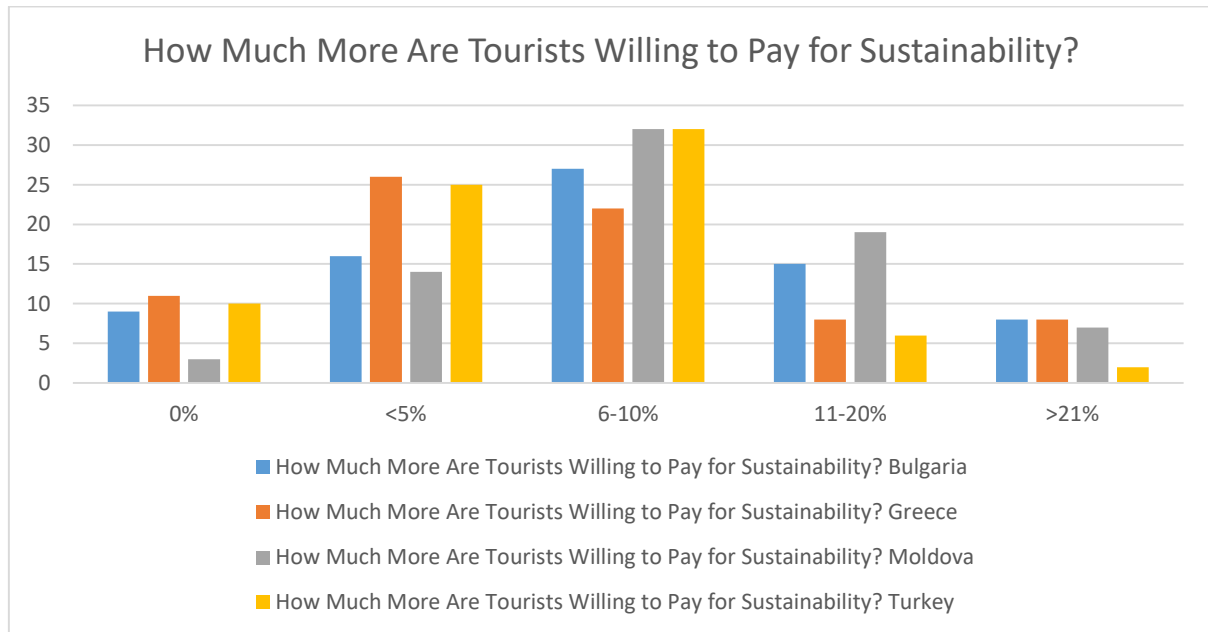
This diagram provides a direct comparison of responses in **Bulgaria, Greece, Moldova, and Türkiye** based on the percentage tourists are willing to pay for sustainable services.

Key Observations by Country:

- **The 6-10% increase category (Green) is the most common response across all four countries**, indicating that most tourists accept a moderate price increase for sustainability.
- **Moldova and Türkiye have the highest percentage of respondents selecting 6-10%**, exceeding 30%. This suggests a strong interest in sustainability, with a reasonable expectation of cost increases.
- **Greece and Türkiye have a significant portion of respondents in the <5% category (Orange)**, suggesting that while tourists value sustainability, they prefer only a minor price increase.
- **The 11-20% increase category (Light Blue) is particularly notable in Moldova and Greece**, showing that a small but significant number of travellers are willing to pay a higher premium for sustainability.
- **Very few respondents chose the >21% category (Purple)**, indicating that most travellers have a **price sensitivity threshold** and are not willing to pay significantly more for sustainability.

- **The 0% category (Dark Blue) remains relatively low in all countries**, meaning that most tourists acknowledge the importance of sustainability and are willing to pay at least a small additional amount.

2.2 Comparison by Willingness Level



This diagram reorganizes the data by **percentage increase** rather than by country, making it easier to identify broad trends in price sensitivity.

Key Observations Across All Countries:

- **The 6-10% category (Green) is the dominant response**, confirming that most tourists across all countries prefer a moderate increase in pricing for sustainable practices.
- **The <5% category (Orange) is the second most common response**, particularly in Greece and Türkiye, where tourists show greater price sensitivity.
- **The 11-20% category (Light Blue) sees a sharp decline**, indicating that while some tourists are willing to pay more, the majority prefer smaller increases.
- **The >21% category (Purple) has the lowest response rate**, confirming that very few tourists are willing to pay a premium beyond 20%.
- **The 0% category (Dark Blue) is relatively low**, meaning that an overwhelming majority of tourists acknowledge the need for sustainability and are willing to contribute financially, even if modestly.

2.3 Country-Specific Insights

Bulgaria

- Tourists in Bulgaria show strong support for sustainability, with the majority willing to pay a 6-10% premium.
- A moderate percentage prefer a <5% increase, indicating some level of price sensitivity.
- The willingness to pay 11-20% is relatively low, and very few travellers accept a price increase beyond 21%.

Greece

- Greek tourists exhibit the highest level of price sensitivity, with a large percentage preferring a <5% increase.
- Despite this, a significant portion still supports a 6-10% price increase for sustainability.
- Willingness to pay 11-20% is more visible than in Bulgaria but remains a minority preference.

Moldova

- Moldovan tourists are the most accepting of price increases, with the highest percentage choosing 6-10% and 11-20%.
- This indicates a strong awareness of sustainability and a readiness to invest in environmentally friendly services.
- The 0% and >21% categories remain low, confirming that Moldovan tourists neither reject sustainability nor accept extreme price increases.

Türkiye

- Similar to Moldova, Turkish tourists demonstrate strong support for sustainability, with high acceptance of a 6-10% price increase.
- A significant portion also selects <5%, indicating that while sustainability is valued, price remains a concern.
- Willingness to pay 11-20% is visible but remains lower than the dominant 6-10% group.

2.4 Key Findings & Trends

1. The majority of tourists (especially in Moldova and Türkiye) are willing to pay 6-10% more for sustainable tourism services.

2. Greek and Turkish tourists demonstrate the highest price sensitivity, with a strong preference for <5% increases.
3. Very few travellers are willing to pay more than 20%, establishing a clear price limit for sustainability efforts.
4. Moldova and Türkiye have the highest willingness to pay more, while Greece and Bulgaria show a more cautious approach.
5. Overall, sustainability is important to tourists, but they expect reasonable pricing, with most accepting an additional cost of up to 10%.

2.5 Recommendations for the Tourism Industry

Pricing Strategies

- Businesses should keep sustainability-related price increases within the 6-10% range, as this is the most widely accepted premium.
- For more price-sensitive markets (e.g., Greece and Türkiye), offering incremental sustainability options with a <5% increase may encourage greater participation.
- Since very few tourists accept price increases above 20%, companies should avoid excessive surcharges for sustainability initiatives.

Marketing and Communication

- Highlighting the benefits of sustainability (cost savings, health benefits, ethical tourism) could encourage tourists to accept slightly higher premiums.
- Educating travellers about the real impact of sustainable tourism may lead to higher willingness to pay in the future.

Targeting Different Markets

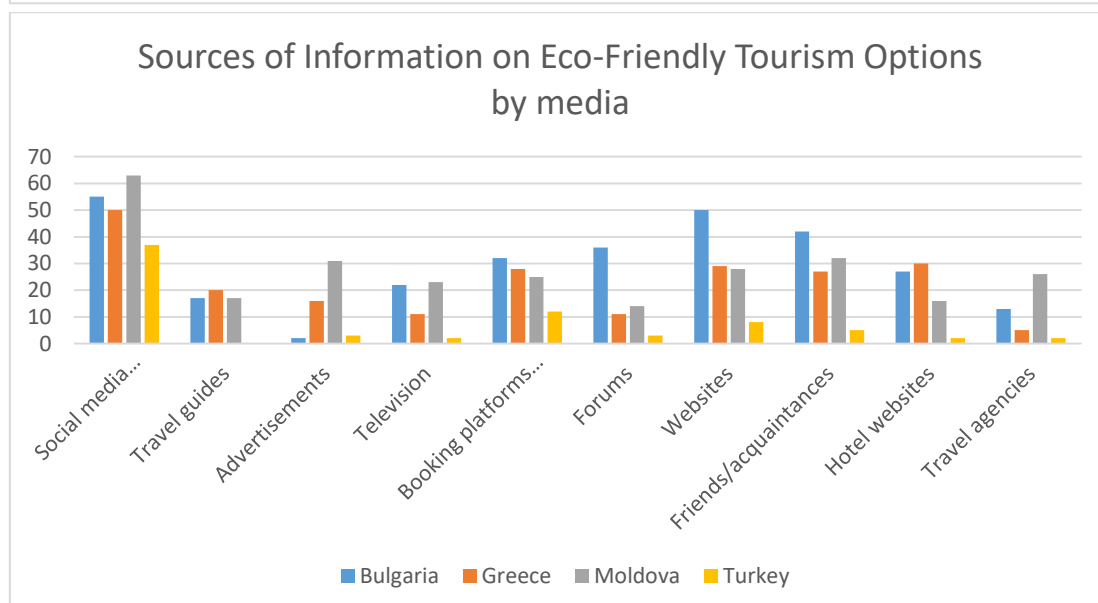
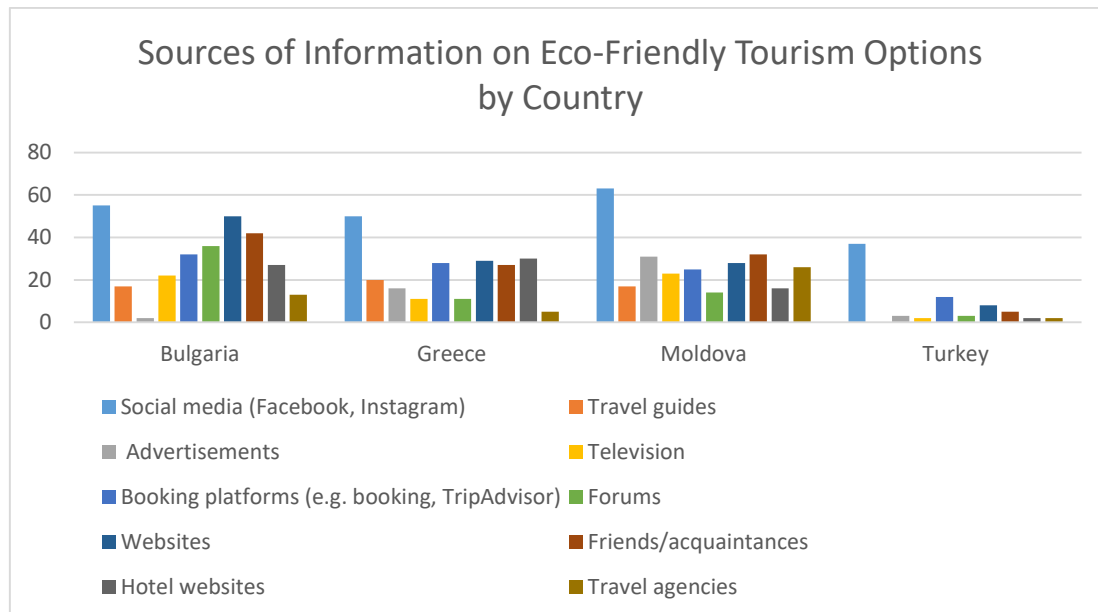
- For Moldova and Türkiye, businesses can implement more ambitious sustainability strategies, as tourists in these countries are more accepting of price increases.
- For Greece and Bulgaria, emphasizing small, affordable sustainability improvements will likely generate better engagement.

3. Sources of Information on Sustainable Tourism

Sustainability is becoming an essential factor in travel decision-making, prompting tourists to seek information about environmentally friendly options in tourism. This section explores the question: *“Where do you get information about environmentally friendly options that you can find in tourism?”* This report analyses where tourists in **Bulgaria**,

Greece, Moldova, and Türkiye obtain information about eco-friendly tourism services, such as sustainable hotels, restaurants, and travel agencies.

The data highlights **various sources of information**, including **social media, travel guides, advertisements, television, booking platforms, websites, forums, personal recommendations, and travel agencies**. By understanding how tourists access sustainability-related travel information, businesses and policymakers can refine their communication strategies to promote sustainable tourism effectively.



3.1 Key Findings and Analysis

➤ Digital Sources Are the Most Influential

The findings indicate that **social media (Facebook, Instagram) is the most dominant source of information across all countries**. Moldova and Bulgaria show the highest

reliance on social media, confirming its role as the primary platform for discovering eco-friendly tourism options. This trend aligns with the increasing digitalization of the travel industry, where influencers, travel bloggers, and businesses actively promote sustainable travel experiences.

Additionally, **booking platforms (such as Booking.com and TripAdvisor) play a crucial role, particularly in Moldova and Bulgaria.** Many tourists rely on these platforms for reviews, eco-certifications, and sustainable accommodation options. Similarly, **travel-related websites, including forums and hotel websites, are significant sources of information,** reinforcing the importance of strong digital presence for businesses promoting sustainability.

➤ **Traditional Media and Print Are Less Significant**

Compared to digital sources, **traditional media channels such as television and travel agencies rank among the least utilized sources of information.** This suggests that sustainability-related content is not effectively communicated through TV programs or conventional travel agencies. **Travel guides and advertisements maintain a moderate influence,** particularly in Greece and Bulgaria, but they are not primary sources of information.

➤ **The Role of Word-of-Mouth Recommendations**

Personal recommendations from **friends and acquaintances play an important role, particularly in Moldova and Greece.** This highlights the impact of word-of-mouth marketing, as travellers tend to trust recommendations from their social circles more than advertisements or corporate promotions. Sustainable tourism businesses could leverage referral programs or influencer partnerships to capitalize on this trend.

➤ **Differences Between Countries**

While general trends remain consistent across all four countries, some notable differences emerge:

- **Moldova and Bulgaria exhibit the highest engagement with digital sources,** particularly social media and booking platforms.
- **Greek and Turkish tourists show greater reliance on travel guides and advertisements,** indicating a mix of traditional and digital information sources.
- **Türkiye shows generally lower engagement with most sources,** suggesting that sustainable tourism awareness may be less prominent or that information is accessed through alternative channels.

3.2 Key Insights

1. **Social media is the most influential platform for eco-friendly tourism information,** making it a key marketing tool for promoting sustainable travel.

2. **Booking platforms and travel-related websites are essential sources**, particularly in Moldova and Bulgaria, where digital research plays a major role in travel decisions.
3. **Traditional sources such as television and travel agencies have limited influence**, suggesting a shift towards digital and peer-based information channels.
4. **Word-of-mouth remains an important factor, especially in Moldova and Greece**, highlighting the value of personal recommendations in shaping travel choices.
5. **Türkiye shows lower engagement with the listed information sources, indicating a potential gap in sustainability awareness or alternative information channels not captured in the data.**

3.3 Recommendations

- **Strengthening Digital Marketing Strategies**
 - Businesses should prioritize **social media campaigns and influencer collaborations** to reach eco-conscious travellers effectively.
 - **Enhancing visibility on booking platforms and sustainable travel websites** will help businesses attract environmentally conscious tourists.
- **Leveraging Word-of-Mouth & Community Engagement**
 - Encouraging **customer reviews and referral programs** can increase trust and awareness of sustainable options.
 - Partnering with local communities and travel bloggers can **expand outreach through authentic recommendations**.
- **Addressing Gaps in Sustainability Awareness**
 - In Türkiye, businesses should **identify alternative channels** to engage with tourists who may not rely on social media or booking platforms as heavily.
 - More sustainability-focused content in **travel guides, advertisements, and mainstream media** may help expand awareness beyond digital-native travellers.

4. Strategies for Promoting Sustainable Infrastructure and Managing Over-Tourism



Over-tourism poses significant challenges to popular destinations, leading to environmental degradation, resource depletion, and negative impacts on local communities. Sustainable infrastructure and responsible tourism management are essential to preserving natural and cultural heritage while ensuring a high-quality experience for both visitors and residents. This section explores the question: *“What measures do you think would be effective in promoting sustainable infrastructure and managing the impacts of over-tourism?”* This report analyses the effectiveness of various measures in managing over-tourism and promoting sustainable infrastructure in Bulgaria, Greece, Moldova, and Türkiye, based on survey responses. The measures evaluated include:

- **Limiting tourist numbers during peak seasons**
- **Increasing entrance fees to support environmental protection**
- **Promoting alternative, less crowded destinations**
- **Campaigns for responsible tourist behaviour**
- **Fines for irresponsible/inappropriate tourist behaviour**
- **Increasing entrance fees to support environmental protection**
- **Introducing zones with limited construction**

4.1 Key Findings and Analysis

➤ Managing Over-Tourism Through Visitor Distribution

One of the most favoured strategies across all countries is promoting alternative, less crowded destinations. This measure ranks the highest in Greece and Moldova, suggesting that tourists and stakeholders in these countries recognize the benefits of diversifying tourist flows to relieve pressure on over-visited sites. Similarly, limiting tourist numbers during peak seasons is also widely supported, particularly in Bulgaria and Türkiye. These results indicate that strict visitor controls and dispersing tourism to lesser-known areas are considered key solutions.

➤ Encouraging Responsible Tourist Behaviour

Another significant approach is campaigns for responsible tourist behaviour, which receive consistent support across all four countries. This suggests that public awareness and education are widely seen as effective tools in reducing the negative impacts of tourism, such as littering, damage to natural sites, and cultural insensitivity.

Additionally, fines for irresponsible tourist behaviour are proposed as a preventive measure, though this approach appears to have lower support compared to awareness campaigns. This indicates that while penalties are necessary, education and positive reinforcement are preferred over punitive measures.

4.2 Infrastructure and Environmental Protection Measures

- Increasing entrance fees to support environmental protection is a moderately favoured measure across all countries, suggesting that tourists and stakeholders are open to financial contributions for conservation efforts, provided they see tangible benefits.
- Introducing zones with limited construction is also supported, reflecting awareness of the need for sustainable urban planning in tourism-heavy regions. This measure is particularly valued in Bulgaria and Moldova, where concerns over unregulated tourism development may be more pronounced.

4.3 Country-Specific Insights

Bulgaria

- Limiting tourist numbers and responsible tourism campaigns receive strong support.
- There is moderate support for increasing entrance fees and zoning restrictions.
- Fines for irresponsible behaviour rank lower, suggesting a preference for education over punishment.

Greece

- Promoting alternative destinations is the most supported measure.
- Public awareness campaigns are widely accepted, indicating an emphasis on education.
- Fines and entrance fee increases receive moderate support.

Moldova

- There is a strong preference for promoting alternative destinations.
- Tourists and stakeholders also favour visitor behaviour campaigns.
- Infrastructure-related measures, such as limited construction zones, receive notable support.

Türkiye

- Limiting tourist numbers is among the most supported measures.
- Sustainable tourism campaigns and promoting alternative destinations are also highly valued.
- Moderate support exists for increasing entrance fees and establishing restricted construction zones.

4.4 Key Takeaways and Recommendations

- Promoting alternative, less crowded destinations is the most widely supported measure, indicating a strong preference for redistributing tourist flows.
 - *Recommendation: Governments and tourism boards should develop and market secondary destinations to reduce pressure on overcrowded areas.*
- Limiting tourist numbers during peak seasons is another highly supported measure, particularly in Bulgaria and Türkiye.
 - *Recommendation: Authorities could introduce visitor quotas for fragile sites and establish time-slot entry systems to prevent overcrowding.*
- Public awareness campaigns are widely accepted, highlighting the importance of education in sustainable tourism.
 - *Recommendation: Governments and tourism businesses should invest in educational initiatives and responsible travel campaigns.*
- Fines for irresponsible tourist behaviour are less favoured than awareness campaigns, suggesting that preventive measures are preferred over punitive actions.

- *Recommendation: While fines can serve as a deterrent, their effectiveness may increase when combined with incentives for responsible behaviour, such as eco-tourism certifications or discounts for eco-conscious travellers.*
- Entrance fee increases and zoning restrictions receive moderate support, showing that financial and infrastructural solutions are important but secondary to behaviour-focused strategies.
 - *Recommendation: If entrance fees are raised, revenue should be transparently allocated to conservation efforts to maintain public trust and acceptance.*

5. What do you think is the most important form of support needed for local communities to adopt innovative sustainable tourism practices?



For local communities to successfully adopt innovative sustainable tourism practices, they require various forms of support, including financial aid, education, access to technology, research partnerships, and marketing assistance. This report examines the most important types of support needed in Bulgaria, Greece, Moldova, and Türkiye, based on survey results.

The findings provide insights into how policymakers, businesses, and development organizations can best assist communities in transitioning toward eco-friendly and responsible tourism models.

5.1 Key Findings and Analysis

➤ Financial Assistance as the Top Priority

- Financial assistance or grants for innovation is the most significant form of support across all countries, especially in Bulgaria and Moldova.
- This indicates that a lack of financial resources is a major barrier to adopting sustainable tourism practices.
- Funding could help local businesses and communities invest in eco-friendly infrastructure, training programs, and innovative projects.

➤ The Importance of Training and Education

- Training and education on sustainable and innovative practices ranks as a high priority, particularly in Greece and Moldova.
- This highlights the need for capacity-building programs to help local stakeholders understand and implement sustainable tourism strategies.
- Educational initiatives could cover waste management, energy efficiency, eco-tourism certification, and customer engagement in sustainability.

➤ Access to Eco-Friendly Technology and Materials

- Access to sustainable technology and materials receives moderate support, suggesting that while important, it is secondary to financial and educational support.
- Investment in renewable energy, water conservation systems, and sustainable construction materials can enhance sustainability efforts.

➤ Research Partnerships for Innovation

- Partnerships with research institutions have lower support levels in all countries, indicating that while collaboration with universities and research centres is beneficial, it is not seen as the most urgent need.
- However, such partnerships can play a role in developing innovative solutions tailored to local environmental and cultural contexts.

➤ Marketing Support for Sustainable Initiatives

- Marketing support is the least prioritized form of assistance across all countries.

- While promotion is important for attracting eco-conscious tourists, it appears that local communities first need funding and knowledge before focusing on marketing efforts.

5.2 Country-Specific Insights

Bulgaria

- Financial assistance is the top priority, suggesting that economic constraints are a major barrier to sustainable tourism development.
- Training and education rank second, indicating a need for knowledge transfer and skills development.
- Moderate support for eco-friendly technology access reflects interest in practical sustainability solutions.

Greece

- Training and education are the most valued, showing strong interest in skill-building for sustainable tourism.
- Financial support is also significant, highlighting the importance of economic resources.
- Access to technology and research partnerships receive moderate support but are not seen as top priorities.

Moldova

- Financial assistance is the highest priority, similar to Bulgaria, showing that economic factors are a key challenge.
- Education and training are also highly valued, indicating a strong need for knowledge-sharing programs.
- Eco-friendly technology access and research partnerships receive moderate attention.

Türkiye

- Türkiye shows lower engagement across all categories, suggesting either a lack of awareness about sustainability support needs or different challenges not captured in this survey.
- Financial assistance and training remain the top responses, aligning with trends in other countries.

5.3 Key Takeaways and Recommendations

- Financial assistance is the most critical need, particularly in Bulgaria and Moldova.

- *Recommendation: Governments and international organizations should expand grant programs and low-interest loans for sustainable tourism projects.*
- Training and education are essential for implementing sustainable tourism, especially in Greece and Moldova.
 - *Recommendation: Capacity-building initiatives should focus on eco-certifications, green business models, and resource management.*
- Access to eco-friendly technology is important but secondary to funding and education.
 - *Recommendation: Policymakers should facilitate access to renewable energy solutions, water-saving systems, and eco-friendly infrastructure materials.*
- Research partnerships are beneficial but not seen as an immediate necessity.
 - *Recommendation: Universities and research institutions should develop applied research programs tailored to the needs of local tourism stakeholders.*
- Marketing support ranks lowest, indicating that communities need foundational support before focusing on promotion.
 - *Recommendation: Once sustainable practices are in place, marketing strategies should target eco-conscious travellers to generate long-term benefits.*

Public Perceptions on Pollution and Waste Management as a Challenge to Blue Growth for Black Sea Tourism

The sustainable development of tourism in the Black Sea Basin is inextricably linked to effective pollution and waste management strategies. As a region characterized by a diverse marine ecosystem and a dynamic tourism sector, the Black Sea faces mounting environmental pressures resulting from increased tourist activity, urbanization, and industrial expansion. Within this context, pollution and waste management emerge as critical determinants of the region's capacity to sustain long-term blue growth—an approach that emphasizes economic development through the sustainable use of marine and coastal resources.

This study examines public perceptions regarding pollution and waste management in the Black Sea Basin, particularly in relation to their implications for sustainable tourism. Public attitudes and concerns are essential indicators of societal readiness to engage in environmental conservation efforts and serve as a foundation for policy formulation and intervention strategies. By analysing qualitative and quantitative data collected through surveys, in-depth interviews, and focus group discussions across multiple Black Sea

countries, this report provides insights into the perceived effectiveness of current waste management practices, regulatory frameworks, and community involvement in environmental sustainability.

The findings highlight a prevailing concern over the inadequacy of waste collection infrastructure, inconsistent enforcement of environmental regulations, and the lack of widespread adoption of sustainable waste disposal practices in coastal and tourism-intensive areas. Furthermore, the study reveals a demand for stronger governance mechanisms, public-private partnerships, and educational initiatives aimed at promoting responsible consumption and waste reduction within the tourism sector. Respondents also express the need for more rigorous monitoring of pollution levels and greater accountability in mitigating marine litter and coastal degradation.

By contextualizing public perceptions within the broader discourse of environmental governance and sustainable tourism management, this study contributes to the ongoing scholarly dialogue on blue growth in the Black Sea region. The insights presented herein underscore the importance of an integrated, multi-stakeholder approach to pollution and waste management that aligns with the best international practices in sustainable tourism and marine conservation. Addressing these challenges is imperative for safeguarding the ecological integrity of the Black Sea while fostering an environmentally resilient and economically viable tourism industry.

1. Perceived Environmental Impact of Tourism by Sector

Tourism significantly influences the environment, impacting **natural resource consumption, waste production, infrastructure capacity, air pollution, and marine pollution**. This report analyses the perceived extent of tourism's negative environmental effects in **Bulgaria, Greece, Moldova, Türkiye, and the Black Sea Basin as a whole**.

The analysis is based on responses to the question:

"To what extent is tourism considered to have a negative impact on the environment in each of the following sectors?"

The key environmental impact areas examined in this report are:

- **Consumption of natural resources** – Excessive use of water, energy, and land resources driven by tourism activities.
- **Waste production** – The increase in solid waste, plastic pollution, and inadequate waste disposal management in tourist destinations.
- **Burden on infrastructure (e.g., sewerage network)** – Overuse of public services such as sewage, transportation, and water supply systems.
- **Air pollution** – Increased emissions from transportation (planes, cars, cruise ships) and energy-intensive tourist facilities.

- **Marine pollution** – Waste discharge, oil spills, and chemical runoff affecting coastal and marine ecosystems.

The findings focus on perceptions from **Bulgaria, Greece, Moldova, Türkiye, and the Black Sea Basin as a whole**, helping identify key challenges and priority areas for sustainable tourism policies and environmental management strategies.

Understanding these perceptions helps **identify priority areas for sustainable tourism policies and environmental management strategies**. The data is categorized into five levels of perceived impact:

- **Too much** (highest negative impact)
- **Very much**
- **Enough**
- **A little**
- **Not at all** (no perceived impact)

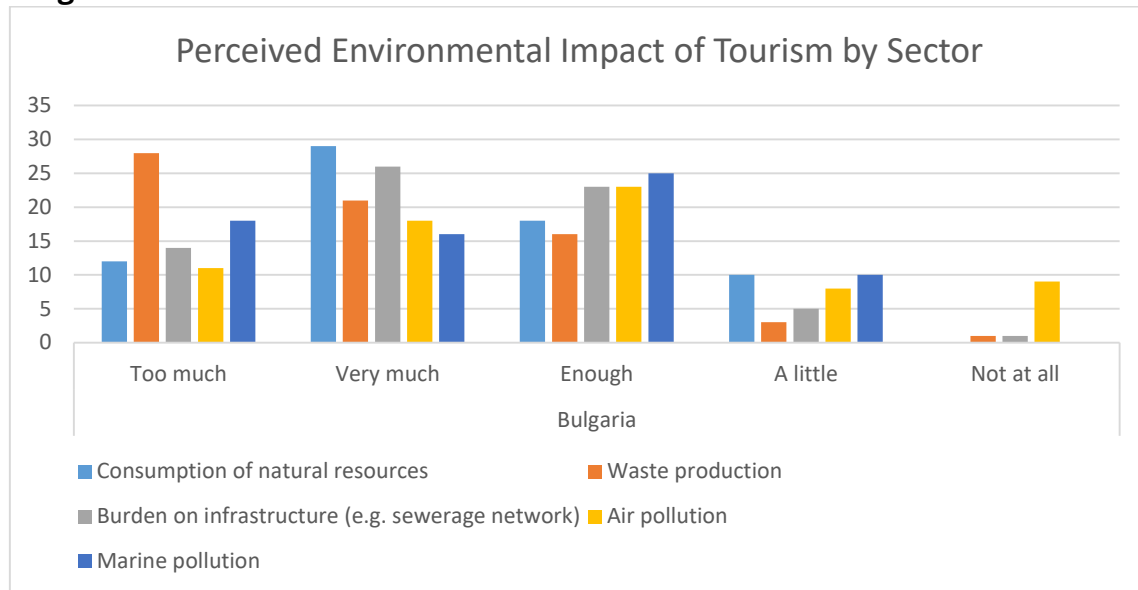
1.1 Key Findings and Analysis

The Most Concerning Issues Across All Countries

- **Waste production and the burden on infrastructure are considered the most significant negative impacts of tourism.**
- **Consumption of natural resources also ranks high**, showing concerns over water, energy, and land use in tourism-heavy areas.
- **Marine and air pollution are seen as secondary issues**, although still relevant in coastal regions.
- **Most respondents believe tourism contributes "too much" or "very much" to environmental degradation**, highlighting a strong perception of negative impact.

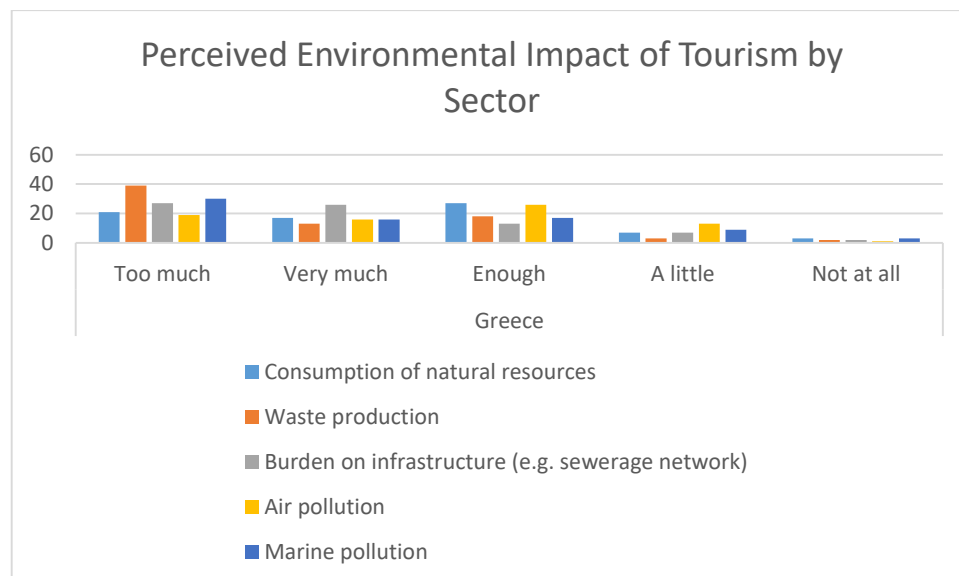
1.2 Country-Specific Insights

Bulgaria



- **Waste production and infrastructure burden are the most concerning issues.**
- **Natural resource consumption is also perceived as a major problem.**
- **Air and marine pollution have lower but still notable concerns.**
- **Few respondents believe tourism has little or no impact.**

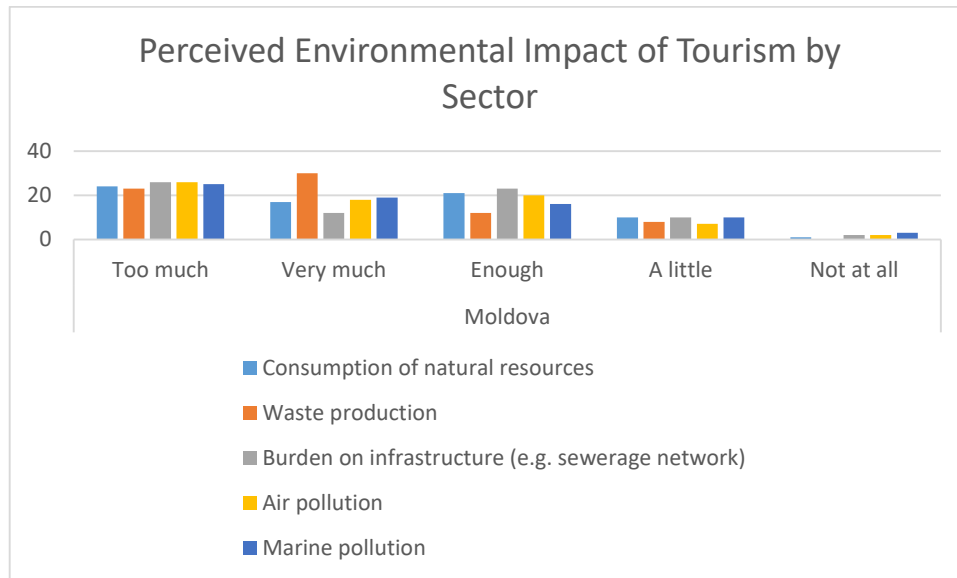
Greece



- **High concern for waste production and marine pollution, likely due to Greece's coastal tourism industry.**

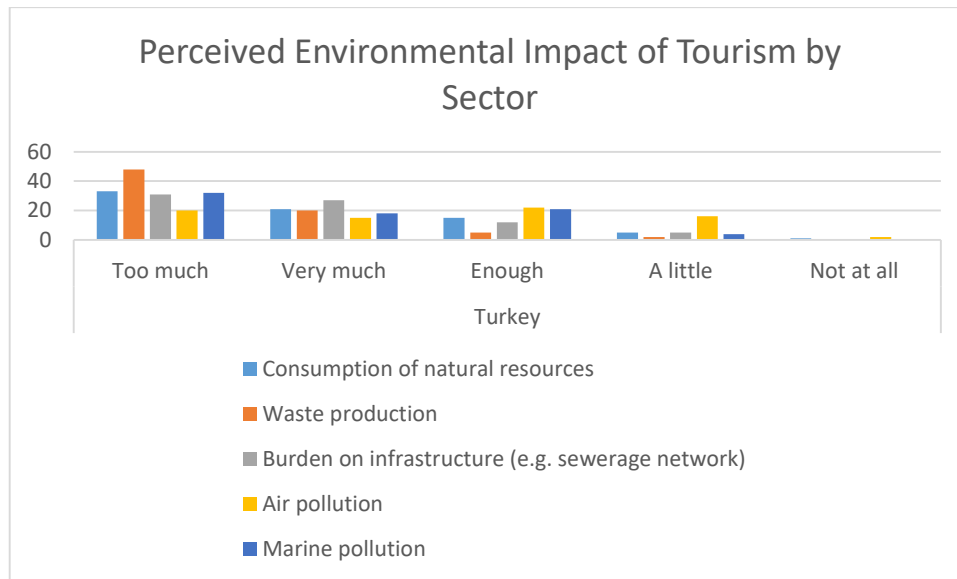
- Infrastructure burden and natural resource consumption are also significant issues.
- Air pollution is seen as less critical compared to other environmental factors.
- Tourism is overwhelmingly perceived as having a strong negative impact.

Moldova



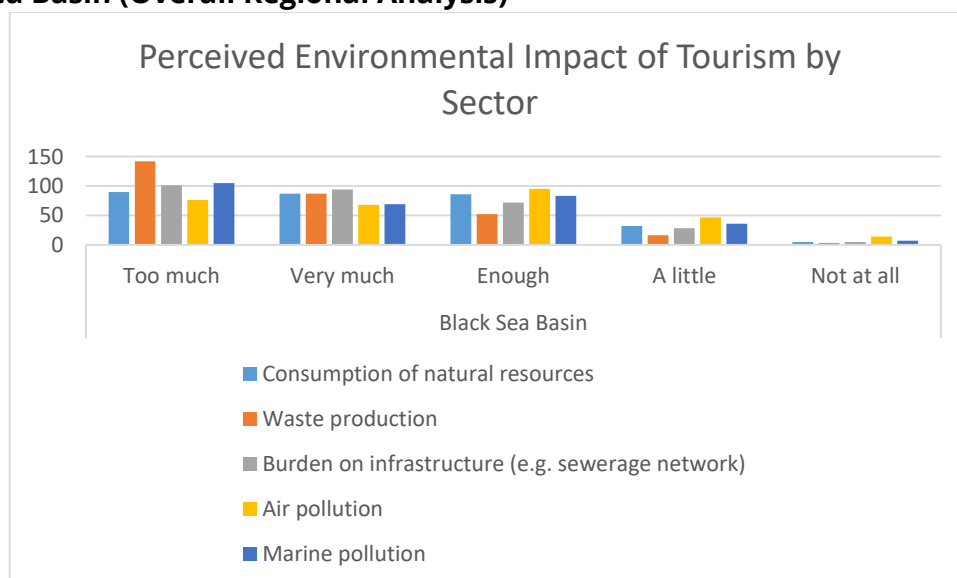
- Waste production is perceived as the most severe issue.
- Infrastructure burden and natural resource use are also major concerns.
- Marine pollution is less relevant due to Moldova's landlocked geography.
- Few respondents believe tourism has a minimal impact, reinforcing overall environmental concerns.

Türkiye



- **Waste production, marine pollution, and natural resource consumption are key concerns.**
- **Infrastructure burden is also noted but ranks slightly lower than in other countries.**
- **Air pollution is considered a moderate issue, similar to Bulgaria and Moldova.**
- **Overall, Türkiye aligns with other countries in recognizing tourism's strong environmental impact.**

Black Sea Basin (Overall Regional Analysis)



- **Tourism's impact is perceived as highest in waste production and infrastructure burden.**

- **Natural resource consumption remains a major issue across the region.**
- **Marine pollution is a bigger concern in coastal countries, particularly Greece and Türkiye.**
- **Few respondents believe tourism has little or no impact, reinforcing the widespread perception of environmental harm.**

2. Necessary Sustainability Practices in "Green" Facilities

Sustainability in tourism is an essential factor for modern travellers when selecting accommodations, restaurants, and other hospitality facilities. To understand which sustainability practices are considered most important, this report analyses responses to the question:

"What sustainability practices do you consider necessary when choosing a 'green' facility (e.g., hotel, restaurant, etc.)?"

The analysis focuses on three key areas:

- a. **Energy consumption** – Efficient energy use, renewable energy sources, and energy-saving technologies.
- b. **Water management** – Water conservation techniques, water recycling, and efficiency improvements.
- c. **Waste management** – Waste reduction, recycling, and responsible disposal practices.

2.1 Key Findings and Analysis

Energy Consumption

Energy efficiency is a top priority for green facilities, with strong support for practices that reduce energy waste and promote renewable energy. The most valued measures include:

- **Installation of special low consumption LED lamps** – Highly prioritized across all countries as an effective way to reduce electricity consumption.
- **Installation of sensors to provide lighting only when needed** – Smart lighting systems that turn off when not needed are seen as essential.
- **Supply of low-consumption electrical appliances** – Tourists expect hotels and restaurants to use low-consumption electrical devices.
- **Power supply/ cut-off mechanism at the entrance of the rooms (e.g. magnetic card)** – Systems such as magnetic key cards to prevent energy waste when rooms are unoccupied are widely supported.

- **Fitting of double glazing on the doors and windows of the buildings** – Seen as crucial for reducing heating and cooling energy demand.
- **Utilization of solar and geothermal energy** – Renewable energy sources are highly valued, especially in Greece and Türkiye, where solar energy is widely available.
- **Training staff in energy-saving methods** – Recognized as an important measure to ensure sustainable operations.

Country-Specific Insights on Energy Consumption

- **Bulgaria** and **Greece** show high prioritization of energy-efficient technologies, such as LED lighting, sensors, and smart appliances.
- **Türkiye** demonstrates strong support for both energy efficiency and renewable energy sources.
- **Moldova** lags in implementing these measures, with many respondents indicating that no significant actions have been taken yet nor are planned for 2024-2025.

Water Management

Water conservation is another critical sustainability factor, with multiple measures being highly valued:

- **Controlled flow mechanisms in taps and toilets** – Widely supported as a key water-saving strategy.
- **Linen and towel reuse programs** – Guests prefer having the option to reduce unnecessary washing.
- **Minimization of water use in gardens and open spaces** – Efficient irrigation methods are expected in outdoor areas.
- **Use of recycled “grey water” for irrigation** – A popular measure, particularly in Türkiye and Greece.
- **Collection and utilization of rainwater** – Supported across all regions as a sustainable water source.
- **Training staff in water-saving methods** – Considered essential to ensure proper implementation of conservation strategies.
- **Encouraging customers to save water** – Awareness campaigns and educational materials are viewed as useful tools.
- **Regular maintenance of water systems to prevent leaks** – Identified as a necessary long-term strategy for sustainable water management.

Country-Specific Insights on Water Management

- **Türkiye** shows the highest support for water-saving technologies and infrastructure improvements.
- **Greece** and **Bulgaria** emphasize both customer awareness and infrastructure-based solutions.
- **Moldova** again has the lowest implementation levels, with many facilities lacking significant water-saving initiatives.

Waste Management

Waste reduction and responsible disposal are major concerns for environmentally conscious travellers. The most important waste-related sustainability practices include:

- **Avoidance of disposable items** – Tourists prefer facilities that eliminate plastic waste and promote reusable alternatives.
- **Use of recycled products** – A widely supported measure across all countries.
- **Special bins for recycling** – The presence of dedicated bins for paper, plastic, glass, and aluminium is considered essential.
- **Composting of organic waste** – More significant in Türkiye and Greece, where organic waste management initiatives are growing.
- **Food waste reduction and management** – Seen as an important sustainability measure in hotels and restaurants.
- **Use of eco-friendly cleaning products** – Avoiding chemical detergents is a priority for many travellers.
- **Training staff in waste management** – Considered crucial to ensure proper handling of recyclables and food waste.
- **Encouraging guests to participate in waste reduction** – Awareness campaigns and educational materials are expected.
- **Development of a waste management plan** – Supported as a long-term sustainability measure.

Country-Specific Insights on Waste Management

- **Türkiye** and **Greece** lead in waste reduction efforts, including recycling and organic waste composting.
- **Bulgaria** places strong emphasis on waste sorting and reducing disposable items.

- **Moldova** has the lowest adoption rates of waste management practices, similar to trends seen in energy and water management.

2.2 Key Takeaways and Recommendations

a. Energy Efficiency Should Be a Priority

- Facilities should invest in LED lighting, energy-efficient appliances, and smart lighting sensors.
- Expanding renewable energy use, especially solar and geothermal energy, can further enhance sustainability.
- Staff training in energy conservation is essential for long-term efficiency improvements.

b. Water Conservation Measures Need to Be Strengthened

- Hotels and restaurants should implement controlled flow mechanisms, towel reuse programs, and water recycling initiatives.
- Rainwater collection and grey water reuse should be expanded, especially in regions facing water shortages.
- Regular maintenance of water systems is necessary to prevent leaks and wastage.

c. Comprehensive Waste Management Strategies Are Essential

- Facilities should eliminate disposable plastics and prioritize reusable and recycled products.
- Waste sorting and composting programs should be implemented, particularly in food service operations.
- Customer and staff engagement in waste reduction should be encouraged through education and awareness campaigns.

3. Report: Importance of Certification in Tourism and hospitality industry

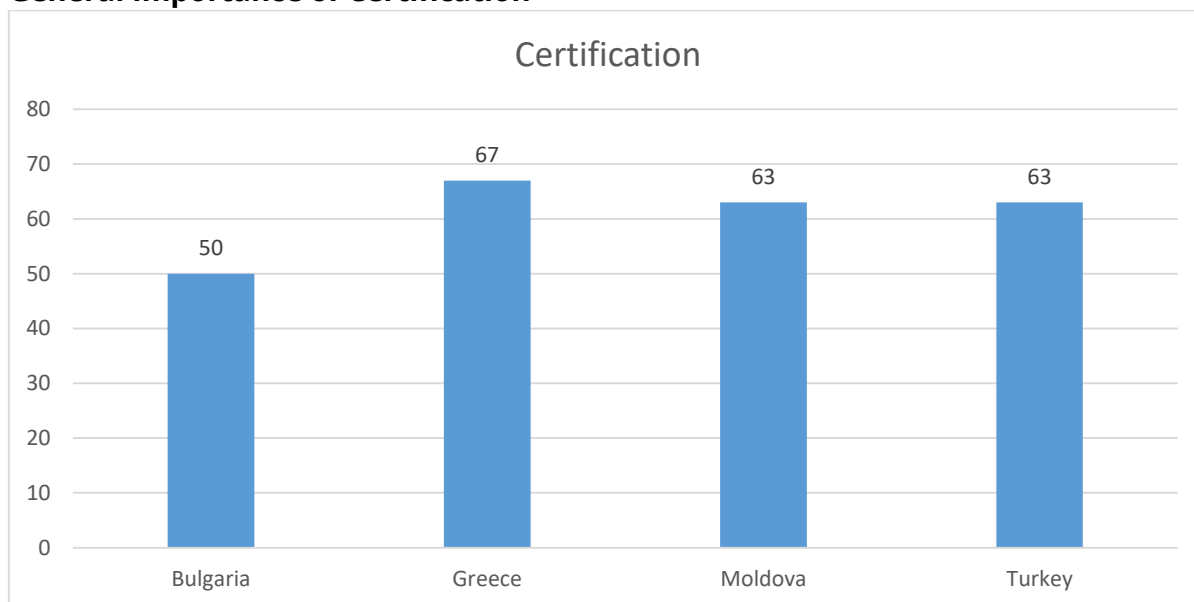
As sustainability becomes a growing concern in the tourism and hospitality industry, certifications play a key role in ensuring **eco-friendly practices and quality standards** in hotels and restaurants. This report analyses responses to the question:

"Does the certification of a hotel or restaurant matter to you? And if so, which of the following?"

The analysis is based on data from **Bulgaria, Greece, Moldova, and Türkiye**, examining both **general attitudes toward certification** and **preferences for specific certification schemes**.

3.1 Key Findings and Analysis

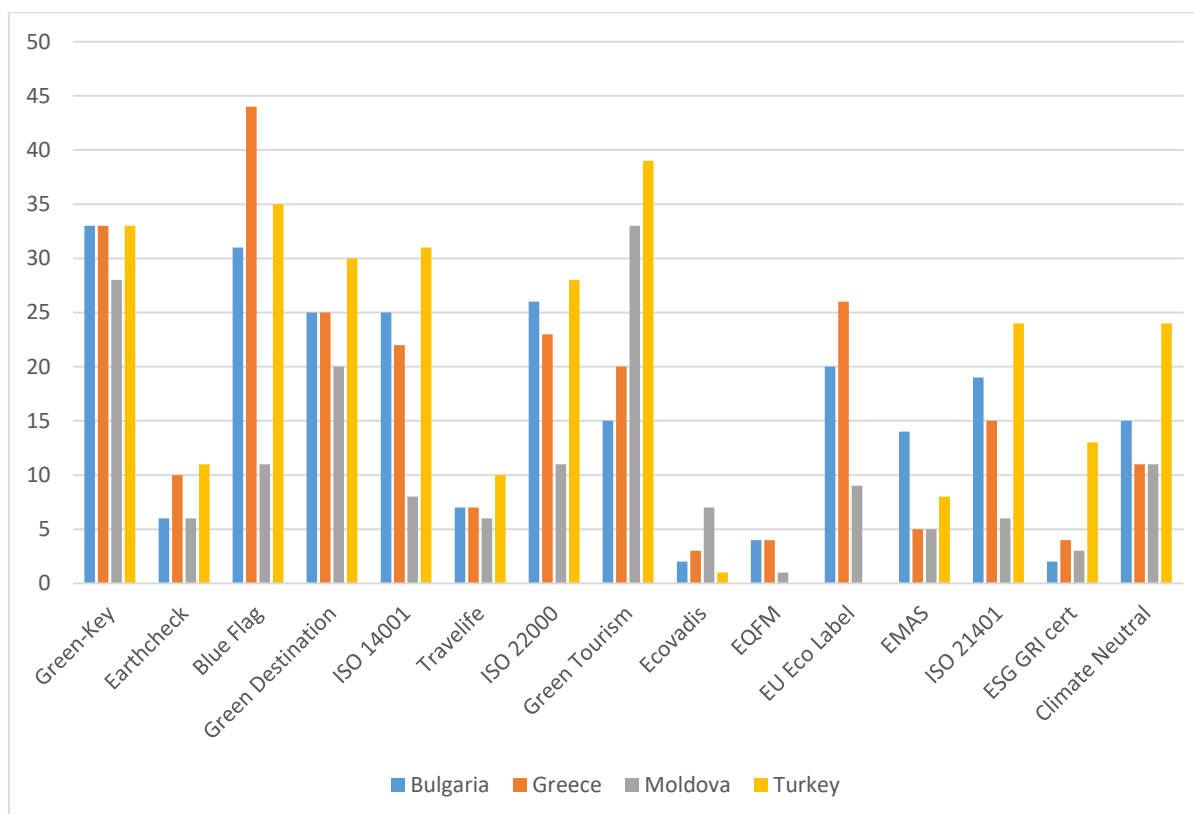
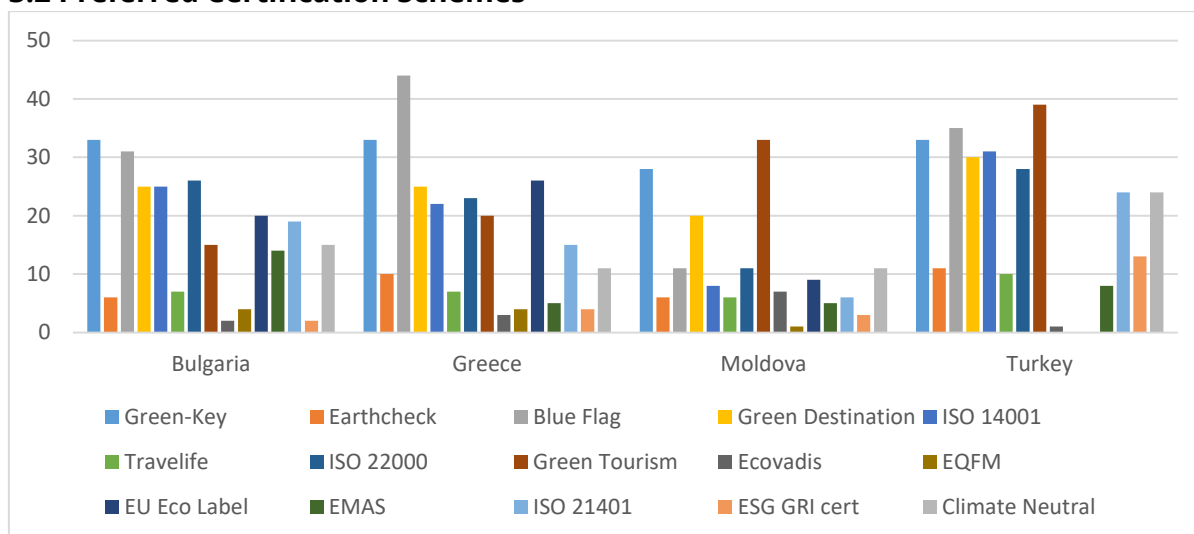
General Importance of Certification



The first chart illustrates how important certification is for travellers in each country:

- **Greece, Moldova, and Türkiye show the highest importance placed on certification**, with **over 65%** of respondents indicating that they consider it important.
- **Bulgaria has the lowest percentage of respondents who prioritize certification**, but it remains a significant factor for more than half of travellers.
- **Overall, certification is widely valued in all four countries, suggesting that travellers prefer accommodation and restaurants that adhere to recognized sustainability and quality standards.**

3.2 Preferred Certification Schemes



The second and third charts break down **specific certification programs** that travellers consider important when selecting hotels and restaurants. The most notable findings include:

Most Popular Certifications Across All Countries:

1. **Green Key** – One of the most recognized certifications, widely preferred in **Bulgaria, Greece, and Türkiye**.

2. **Blue Flag** – Particularly important in **Greece and Türkiye**, likely due to the high number of coastal tourism destinations.
3. **ISO 14001 (Environmental Management Systems)** – Highly valued across all four countries, showing demand for **structured environmental policies**.
4. **EU Eco-Label** – Especially significant in **Greece and Türkiye**, demonstrating strong support for European sustainability standards.
5. **Green Destination** – Greece shows the highest interest, reflecting the country's efforts to promote sustainable tourism destinations.

Country-Specific Certification Preferences:

- **Bulgaria:**
 - **Green Key and Blue Flag rank as the most preferred certifications.**
 - ISO 14001 and Travelife are also important.
 - Interest in ESG (Environmental, Social, Governance) and Climate Neutral certifications is relatively low.
- **Greece:**
 - Strongest preference for **Blue Flag and Green Destination**, aligning with Greece's focus on coastal and eco-tourism.
 - **Green Key and ISO 14001** are also widely recognized.
 - **EU Eco-Label and Travelife** show moderate importance.
- **Moldova:**
 - **ISO 14001 and Travelife certifications rank highest**, emphasizing environmental management over tourism-specific labels.
 - **Green Key and EU Eco-Label** are also notable.
 - **Lower recognition of Blue Flag and Green Destination**, likely due to Moldova's landlocked geography.
- **Türkiye:**
 - **Green Key, ISO 14001, and EU Eco-Label are the most preferred certifications.**
 - **Blue Flag is also significant**, reflecting Türkiye's strong coastal tourism sector.

- **Climate Neutral certification is more recognized than in other countries.**

3.3 Key Takeaways and Recommendations

- a. **Certification is an important factor for most travellers, especially in Greece, Moldova, and Türkiye.**
 - **Recommendation:** Hotels and restaurants should actively seek recognized sustainability and environmental certifications to attract eco-conscious tourists.
- a. **Green Key, Blue Flag, and ISO 14001 are the most recognized certifications across all four countries.**
 - **Recommendation:** Businesses should prioritize these certifications to align with traveller expectations and industry standards.
- a. **Greece and Türkiye show high interest in coastal and destination-based certifications (Blue Flag, Green Destination).**
 - **Recommendation:** Coastal resorts and beachfront properties should focus on obtaining **Blue Flag certification** to appeal to environmentally conscious visitors.
2. **Moldova places greater emphasis on environmental management certifications such as ISO 14001 and Travelife.**
 - **Recommendation:** Hotels in Moldova should **focus on structured environmental policies and management systems** to gain credibility.
3. **Climate Neutral and ESG certifications have lower recognition but are gaining importance in Türkiye and Greece.**
 - **Recommendation:** Businesses that are ahead in sustainability efforts should consider **climate-focused certifications to differentiate themselves** in the market.

Stakeholder Perspectives on Environmental Sustainability and Waste Management in Tourism: Insights from In-Depth Interviews in the Black Sea Basin

The Black Sea Basin region, renowned for its rich natural landscapes and cultural heritage, has experienced significant tourism growth, presenting both economic opportunities and environmental challenges. To explore the multifaceted impacts of this development, particularly regarding environmental sustainability and waste management, a series of in-depth interviews were conducted with stakeholders from Bulgaria, Greece, Moldova, and Türkiye as part of the INTERSMARTS project (Interdisciplinary Solutions for Smart Sustainable Tourism and Services for Blue Growth in the Black Sea Basin, Project No BSB00332). The primary aim of these interviews was to gather qualitative insights into how stakeholders perceive and respond to challenges posed by pollution and waste within the rapidly evolving tourism industry. The diverse participants included public authorities, business owners, NGO representatives, and academic experts, each bringing distinct experiences and perspectives from their respective sectors. This report synthesizes the findings from these interviews, highlighting key practices, barriers, and innovative approaches adopted across different regions. By capturing the nuanced experiences and opinions of stakeholders directly involved in managing the impacts of tourism, the report seeks to inform policy-making, promote best practices, and foster greater regional cooperation for sustainable tourism development in the Black Sea Basin.

1. In which areas have your company/organisation invested in environmental sustainability?

Energy management	
Bulgaria	<ul style="list-style-type: none"> • installation of special low-power LED lamps • installation of sensors to provide lighting only when needed • installation of low consumption electrical appliances • ensuring good thermal insulation in buildings • double glazing of doors and windows in buildings • training of staff in energy saving methods • encouraging customers to save energy (e.g. through leaflets)
Greece	<ul style="list-style-type: none"> • Replacing conventional lamps with LEDs. • Installing automated lighting and air conditioning systems. • Using smart cards to manage electricity in rooms. • Installing photovoltaic panels for electricity production. • Using solar water heaters for hot water. • Investing in heat pumps for cooling and heating. • Using natural lighting and ventilation to save energy. • Creating green roofs and vertical gardens.
Moldova	<ul style="list-style-type: none"> • Adoption of energy-efficient technologies • Reduction of harmful emissions

	<ul style="list-style-type: none"> • Use of renewable resources in daily operations • Encouragement of green energy adoption • Installation of photovoltaic panels in rural areas • Implementation of water and electricity-saving measures
Türkiye	<ul style="list-style-type: none"> • Implementation of renewable energy sources to reduce carbon footprint. • Adoption of climate change adaptation strategies in tourism operations. • Integration of environmental and energy policies into institutional frameworks.

Water management

Bulgaria	<ul style="list-style-type: none"> • change of linen / towels, when the customer declares it - not daily • minimise water use in gardens and open spaces • use of water recovered from the biogas plant/"grey water" (e.g. for irrigation) • collection and use of rainwater (grey water) • training staff in water saving methods • encouraging customers to save water (e.g. through leaflets) • minimising water use in kitchens/ laundry services/ swimming pools • establishing a water management/water saving plan
Greece	<ul style="list-style-type: none"> • Installing low-flow taps and showers. • Implementing smart water management systems.
Moldova	<ul style="list-style-type: none"> • Responsible resource management • Implementation of afforestation and reforestation initiatives • Installation of water treatment plants in rural areas • Implementation of sustainability-focused educational activities on water conservation
Türkiye	<ul style="list-style-type: none"> • Research and technological advancements in marine and freshwater management. • Development of water treatment solutions to improve sustainability. • Conservation initiatives for biodiversity protection in tourism areas.

Waste management

Bulgaria	<ul style="list-style-type: none"> • avoiding single-use items (plastic bags/cups, non-returnable bottles, etc.) / incorporating reusable items • use of items from recycling • placing special containers for recycling (paper, plastic, glass, aluminium)
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	<ul style="list-style-type: none"> • composting of organic waste • management and reduction of food residues and waste • operation of a biological purification plant for waste water treatment • avoiding the use of chemical detergents
Greece	<ul style="list-style-type: none"> • Sorting waste at the source and increasing recycling. • Reducing single-use plastics and using biodegradable materials.
Moldova	<ul style="list-style-type: none"> • Implementation of sustainable waste management practices • Reduction of food waste • Promotion of the circular economy and selective waste management • Development of waste transfer platforms to eliminate illegal landfills • Investment in integrated waste management projects • Organization of tree planting and recycling competitions • Support for local businesses in adopting sustainable practices • Establishment of eco-active clubs to engage local communities • Awareness-raising, education, and training programs on sustainability
Türkiye	<ul style="list-style-type: none"> • Promotion of resource efficiency and circular economy principles. • Implementation of waste reduction and recycling initiatives. • Enhancement of waste collection and disposal systems at municipal levels. • Need for improved technical capacities and financial resources in waste management. • Reduction in single-use materials across tourism operations. • Availability of recycling bins and waste separation systems.

2. What sources of funding have you used in your business/organisation to implement sustainability practices? And what kind of practices/actions/measures have you already implemented so far or do you intend to implement within 2024-2025 regarding environmental activity?

Funding Sources for Sustainability Practices	
Bulgaria	<ul style="list-style-type: none"> • Own Capital: Used by 13 participants (76%) as the primary source of funding. • Loan Financing: Utilized by 3 participants (18%) to support sustainability initiatives. • Unspecified Funding Source: 1 participant (6%) did not specify a funding source. • Implemented and Planned Sustainability Measures (2024-2025)

	<ul style="list-style-type: none"> • Energy Management & Waste Management: Implemented or planned by 13 participants. • Water Conservation Practices: Adopted by 10 participants. • Carbon Footprint Reduction: Implemented or planned by 5 participants. • Biodiversity Conservation: Implemented or planned by 4 participants. • No Participants reported a complete lack of sustainability initiatives.
Greece	<ul style="list-style-type: none"> • European Programmes: Funding from NSRF 2021-2027 for sustainable development projects. • National Programmes: Participation in the "Greece 2.0" programme for the green transition. • Private Investment: Use of equity capital for environmental actions. • Implemented & Planned Actions (2024-2025) • Energy Efficiency: Installing LED lamps and automation systems. • Water Management: Using water-saving technologies and grey water recycling. • Renewable Energy: Installing solar panels for hot water. • Recycling: Expanding waste and kitchen oil recycling programmes. • Certifications: Obtaining eco-labels (e.g., Green Key) to enhance environmental sustainability.
Moldova	<ul style="list-style-type: none"> • Private Sector: Own investments, non-reimbursable grants, training programs. • Public Sector: Strategic partnerships, international funding (World Bank, EU programs). • Non-Governmental Sector: International grants (USAID), revenue from sustainability training, fundraising campaigns. • Joint Entities & Clusters: EU funding, support from regional initiatives (EU4Moldova), government-backed programs (PARE 1+1). • International Collaborations: Partnerships with global organizations, integration of sustainability in policies. • Implemented & Planned Actions (2024-2025) • Resource Efficiency: Solar panels, ecological sewage systems, water & electricity-saving measures. • Circular Economy: Green procurement, eco-friendly packaging, recycling programs. • Sustainable Tourism: Platforms to reduce tourism pressure, eco-tourism development.

	<ul style="list-style-type: none"> • Education & Awareness: Training programs, environmental education, fundraising for sustainability. • Standardization & Recognition: National sustainability certification, alignment with global standards.
Türkiye	<ul style="list-style-type: none"> • International Financial Institutions & Grants • Funding from EU programs (Horizon 2020, Horizon EU, IPA). • Support from international organizations for climate resilience and sustainable tourism. • Public-private partnerships enabling large-scale environmental projects. • Municipal & Public Sector Budgets • Local government funding for climate action and waste management. • Applications for international funding to expand sustainability initiatives. • Planned investments in waste-to-energy projects to reduce pollution. • National & Research Institution Funding • Collaboration between universities, public institutions, and private sector. • Utilization of national funding (e.g., TUBITAK projects) for sustainability research. • Development of scientific and technological solutions for environmental policies. • Future Plans for Funding • Plans to seek support from development agencies and EU funds. • Need for increased financial assistance to integrate sustainability at the operational level. • Implemented & Planned Sustainability Practices (2024-2025) • Operational-Level Environmental Measures • Reduction in paper consumption and digitalization of processes. • Energy-saving initiatives and improvements in thermal insulation. • Reduction in plastic use across operations. • Technological & Infrastructure Investments • Expansion of waste-to-energy projects for better waste management. • Adoption of sustainable technologies in public and private sector initiatives. • Community-Focused Sustainability Practices • Increased focus on sustainability projects benefiting local communities.

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| | <ul style="list-style-type: none"> Integration of environmental awareness campaigns and training programs. |
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3. How have your sustainability investments changed in the last year? What is your investment budget for sustainability practices in the coming year?

Changes in Sustainability Investments (Last Year)	
Bulgaria	<ul style="list-style-type: none"> 80% of respondents reported a slight decrease or no change in sustainability investments. 20% of respondents noted a slight increase in their investment levels. Investment Budget for Sustainability Practices (Coming Year) 11 participants (65%) have a budget in the smallest range among the given options. 6 participants (35%) do not have a budget for sustainability investments.
Greece	<ul style="list-style-type: none"> Increase in renewable energy use, especially solar panels in hotels and resorts. More energy-efficient systems, such as LED lighting and smart automation. Growing interest in sustainability certifications (e.g., Green Key, Travelife). Slow adoption of large-scale green projects due to high costs and limited incentives. Investment Budget for the Coming Year Focus on small-scale improvements like waste reduction and water-saving measures. Larger hotels investing in solar energy to cut long-term energy costs. Many small businesses lack a dedicated sustainability budget. Dependence on EU and government funding to support green initiatives. Limited investment in sustainability due to financial constraints in the sector.
Moldova	<ul style="list-style-type: none"> Private Sector Trends: Some businesses expanded sustainability investments, linking modern infrastructure to customer appeal, while others faced financial constraints and market unpredictability. Public Sector Challenges: Insufficient budgets for sustainability projects led to reliance on external funding sources (e.g., international grants), limiting progress. Non-Governmental Sector Leadership: NGOs secured international funding for large-scale environmental projects,

	<p>focusing on awareness, education, and circular economy initiatives, but remain dependent on external support.</p> <ul style="list-style-type: none"> • Tourism Sector Awareness: Growing recognition of sustainability importance, with some businesses integrating certifications, but lacking structured financial commitments. • Investment Budget for the Coming Year • Private Sector: Budget allocations vary, with some businesses expanding investments, while others depend on revenue fluctuations. Sustainability remains a low priority for many, relying on favourable external conditions. • Public Sector: Structural constraints and lack of dedicated financial allocations hinder progress, highlighting the need for targeted policies and sustainability budget planning. • NGOs & Circular Economy Initiatives: Investments in sustainability education and business development continue, but long-term planning is limited due to funding dependence. • Future Considerations: Cross-sector collaboration, better budget planning, and structured financial strategies are crucial to accelerating sustainability adoption at a national level.
Türkiye	<ul style="list-style-type: none"> • International and Institutional Commitments • Expansion of sustainability-focused investments across UNDP projects. • Structured environmental sustainability investments by TUBITAK MAM. • Increased funding allocations by municipal authorities, particularly in waste management. • Technological Advancements in Energy Efficiency • Greater focus on solar energy for savings and pollution reduction. • Expansion of technological solutions for energy efficiency in public & private sectors. • Potential for integrating sustainable practices in the tourism industry. • Challenges Limiting Investment Growth • Insufficient financial resources restricting sustainability projects. • Limited access to national and international funding for large-scale projects. • Need for greater integration of awareness & education programs. • Investment Budget and Future Goals (2024-2025) • Planned Expansion of Sustainability Investments • Strengthening renewable energy investments, particularly in solar power.

	<ul style="list-style-type: none"> • Development of energy-efficient equipment and infrastructure. • Expansion of waste management improvements at municipal & institutional levels. • Financial Strategy for Growth • Increased access to national & international grants for sustainability projects. • Encouraging private-public partnerships to co-finance sustainability initiatives. • Expanding financial commitments to awareness & education programs.
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4. What are the constraints that prevent you from investing more in sustainability?

Bulgaria	<ul style="list-style-type: none"> • High investment costs: Identified as a major barrier by 59% of respondents. • Lack of relevant skills within the company: Cited by one participant (6%). • Low interest or weak market demand: Mentioned by one participant (6%).
Greece	<ul style="list-style-type: none"> • High investment costs – Many hotels and tourism businesses struggle with the high expense of green upgrades. • Regulatory restrictions – Urban planning and building laws often limit eco-friendly renovations. • Lack of skilled staff – Few trained professionals in sustainability make implementation difficult. • Uncertainty about return on investment – Businesses hesitate due to unclear financial benefits. • Limited market demand – Low customer interest in sustainability reduces motivation to invest.
Moldova	<ul style="list-style-type: none"> • Challenges in Sustainability Investments • High investment costs – Many businesses struggle with the high expense of adopting sustainable technologies and infrastructure. • Regulatory restrictions – Complex regulations, high taxes, and lack of incentives hinder sustainability efforts. • Lack of skilled staff – Shortage of trained professionals in environmental management slows implementation. • Uncertainty about return on investment – Businesses hesitate due to unclear financial benefits and long payback periods.

	<ul style="list-style-type: none"> • Limited market demand – Low consumer interest in sustainability reduces motivation for businesses to invest. • Public sector underfunding – Insufficient financial support and bureaucratic delays limit sustainability project execution. • Infrastructure limitations – Inadequate recycling facilities and space constraints prevent sustainable business expansion. • Weak collaboration – Limited coordination between public, private, and NGO sectors restricts large-scale green initiatives." • "Opportunities for Overcoming Constraints • Strengthening public-private partnerships – Improved cooperation between government, businesses, and NGOs can drive sustainability projects. • Introducing supportive legislation – Policy reforms can encourage eco-friendly investments and reduce regulatory barriers. • Enhancing financial incentives – Grants, tax benefits, and subsidies can make sustainability projects more feasible. • Promoting sustainability awareness – Educational programs and consumer engagement can increase demand for green initiatives. • Encouraging innovative planning – Resource-efficient strategies can maximize sustainability impact despite financial limitations.
Türkiye	<ul style="list-style-type: none"> • Challenges in Sustainability Investments • High investment costs – Many businesses struggle with the high expense of adopting sustainable technologies and infrastructure. • Regulatory restrictions – Complex regulations, high taxes, and lack of incentives hinder sustainability efforts. • Lack of skilled staff – Shortage of trained professionals in environmental management slows implementation. • Uncertainty about return on investment – Businesses hesitate due to unclear financial benefits and long payback periods. • Limited market demand – Low consumer interest in sustainability reduces motivation for businesses to invest. • Public sector underfunding – Insufficient financial support and bureaucratic delays limit sustainability project execution. • Infrastructure limitations – Inadequate recycling facilities and space constraints prevent sustainable business expansion. • Weak collaboration – Limited coordination between public, private, and NGO sectors restricts large-scale green initiatives." • Financial Constraints

	<ul style="list-style-type: none"> • Limited financial resources restricting the scale of sustainability projects. • Difficulty in obtaining necessary approvals from management due to budget constraints. • Need for improved access to national and international funding sources. • Underutilization of European Union funds. • Human Resource Challenges • Shortage of qualified personnel in sustainability-related fields. • Disruptions in planning and implementation due to lack of expertise. • Structural and Administrative Barriers • Some organizations prepare projects but fail to obtain necessary approvals.
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5. Does your business/organisation have a Sustainability Certification? If yes, which certification does it have? And what do you consider to be its main benefits?

Certifications	
Bulgaria	<ul style="list-style-type: none"> • Only one survey participant holds a Green Key certification for two consecutive years (2022 and 2023). • In 2022, it was the only hotel on the Bulgarian Black Sea coast with this certification, out of 10 certified hotels that year. • In 2023, it was one of five hotels in Bulgaria to receive the certification. • Blue Flag Certification: • In 2022, 21 beaches and one private marina in Bulgaria were awarded the Blue Flag certification. • One resort received the Blue Flag for the 28th time. • Only 7% of the 300 beaches along the Bulgarian Black Sea coast were Blue Flag certified in the past year. • Other Certifications: • None of the other survey participants hold sustainability certifications. • The Travelife certification and ISO standards (ISO 14001, ISO 22000, ISO 21401) are known but not widely adopted in Bulgaria. • No public information is available regarding Bulgarian organizations holding these certifications.
Greece	<ul style="list-style-type: none"> • ISO 14001 – Environmental management certification to reduce environmental impact.

	<ul style="list-style-type: none"> • ISO 9001 – Quality management certification to improve service efficiency. • Green Key – Recognizes sustainable tourism efforts, improves hotel image, and attracts eco-conscious travellers. • ISO 21401 – Focuses on sustainable management in tourism, enhancing environmental performance and social responsibility. • Key Benefits of Sustainability Certifications • Cost Savings – Lower water and electricity consumption reduces operating costs. • Attracting Eco-Conscious Visitors – Certifications help draw travellers who prioritize sustainability. • Credibility & Reputation – Validates sustainability claims, building trust with customers and partners. • Regulatory Compliance – Ensures adherence to environmental laws and reduces legal risks. • Improved Financing Conditions – Some hotels gain easier access to funding and better financial terms.
Moldova	<ul style="list-style-type: none"> • No formal sustainability certifications have been widely implemented across sectors. • Public institutions have not prioritized certification in policies or strategic plans. • Private businesses face financial constraints, lack of awareness, and unclear benefits of certification. • NGOs focus on sustainability projects but lack official recognition through certification frameworks. • Tourism sector acknowledges certification value but lacks structured programs for adoption. • Regulatory barriers and bureaucratic challenges slow down certification processes. • Limited financial resources make certification costly, especially for SMEs. • Absence of national certification frameworks prevents structured implementation.
Türkiye	<ul style="list-style-type: none"> • Compliance with Sustainable Development Goals (SDGs) as a guideline for defining sustainability objectives. • Implementation of Quality and Environmental Management System Standards (ISO 9001 and ISO 14001) to ensure sustainability and meet quality standards. • Adoption of national certification programs, such as the Zero Waste Certificate, to enhance waste management and environmental awareness. • Main Benefits of Sustainability Certification

	<ul style="list-style-type: none"> • Documents environmental sensitivity, increasing recognition at national and international levels. • Helps organizations clearly define and align their sustainability objectives. • Enhances waste management practices, particularly in public spaces. • Supports quality and environmental standards within institutional operations.
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6. Are there specific department or senior management positions and roles dealing with sustainability issues in your company/organisation? And how do you train your staff?

Bulgaria	<p>Department:</p> <ul style="list-style-type: none"> • Majority (35%) have senior management overseeing sustainability without a dedicated department. • 29% lack any specific sustainability roles or departments. • Only one respondent has a specialized sustainability department. <p>Staff Training:</p> <ul style="list-style-type: none"> • Regular training: 29% • Periodic training: 41% • No formal training: 29%
Greece	<p>Department:</p> <ul style="list-style-type: none"> • Large hotels/chains have dedicated sustainability departments or environmental managers. • Smaller hotels and family businesses typically handle sustainability informally through owners or general staff. <p>Staff Training:</p> <ul style="list-style-type: none"> • External consultants provide seminars and workshops in large hotels. • Smaller businesses rely on informal internal updates and online training resources.
Moldova	<p>Department:</p> <ul style="list-style-type: none"> • Formal structures: Organizations like E-CIRCULAR Training Centre and ANTRIM have dedicated departments or individuals overseeing sustainability. • Emerging structures: VIA Cahul Tourism Cluster and Regional Centre for Social Initiatives rely on volunteers and collaboration; sustainability gradually integrated.

	<ul style="list-style-type: none"> • Minimal integration: Small private and agro-tourism businesses handle sustainability informally due to limited resources. <p>Staff Training:</p> <ul style="list-style-type: none"> • Structured training programs primarily within well-established entities (ANTRIM, E-CIRCULAR). • Informal, internal training prevalent in small businesses.
Türkiye	<p>Department:</p> <ul style="list-style-type: none"> • Sustainability integrated across departments, particularly in large-scale projects. • Dedicated oversight by specialized units (e.g., Quality Management Unit at TUBITAK MAM). <p>Staff Training:</p> <ul style="list-style-type: none"> • Large-scale training programs, such as zero waste training by municipalities. • Regular employee training and internal audits at institutional level (e.g., TUBITAK MAM). • Universities and schools contribute significantly to community sustainability awareness.

Exploring Sustainable Tourism Challenges and Opportunities: Focus Group Insights from the Black Sea Basin

The Black Sea Basin region, renowned for its rich natural landscapes and cultural heritage, has experienced significant tourism growth, presenting both economic opportunities and environmental challenges. To explore the multifaceted impacts of this development, particularly regarding environmental sustainability and waste management, a series of focus groups were conducted with stakeholders from Bulgaria, Greece, Moldova, and Türkiye as part of the INTERSMARTS project (Interdisciplinary Solutions for Smart Sustainable Tourism and Services for Blue Growth in the Black Sea Basin, Project No BSB00332). The primary aim of these focus groups was to gather diverse perspectives on the impacts of tourism development on pollution and waste management within the region. Participants included public authorities, business owners, NGO representatives, and academic experts, each bringing distinct experiences and insights from their respective sectors. This report synthesizes the findings from these discussions, highlighting key practices, barriers, and innovative approaches adopted across different regions. By capturing the nuanced experiences and opinions of stakeholders directly involved in addressing the environmental impacts of tourism, the report seeks to inform policy-making, promote best practices, and foster greater regional cooperation for sustainable tourism development in the Black Sea Basin.

1. In which area do you think that businesses/organisations in the tourism sector should invest in environmental sustainability?

<p>Bulgaria</p>	<ul style="list-style-type: none"> ☐ Energy: <ul style="list-style-type: none"> • Energy-efficient technologies (LED lighting, motion sensors) • Thermal insulation and double-glazed windows • Renewable energy (photovoltaic systems, solar heating) • Staff training and customer engagement in energy saving ☐ Water: <ul style="list-style-type: none"> • Rainwater and reclaimed water usage • Optimizing linen/towel usage frequency • Regular inspection and maintenance to prevent leaks • Staff and customer education on water conservation ☐ Waste Management: <ul style="list-style-type: none"> • Transition from single-use items to reusable alternatives • Installation of recycling bins and effective food waste management systems • Integrated waste management plans and staff training • Encouraging active customer participation in waste reduction ☐ General Observations: <ul style="list-style-type: none"> • Importance of cultural environment, stakeholder motivation, and awareness • Need for educational programs, financial incentives, and targeted marketing
<p>Greece</p>	<ul style="list-style-type: none"> ☐ Waste Management: <ul style="list-style-type: none"> • Reduction of single-use plastics; use of biodegradable alternatives. • Mandatory recycling bin installation in tourist locations. • Financial incentives and mandatory certification for eco-friendly waste management practices. • Composting systems and surplus food donations. • Implementation of food waste tracking technologies. ☐ Water Management: <ul style="list-style-type: none"> • Adoption of greywater recycling systems for irrigation and cleaning. • Investment in advanced wastewater treatment facilities. • Installation of smart water-saving technologies in hospitality establishments. • Promotion of public-private partnerships to enhance wastewater infrastructure. ☐ Sustainable Procurement & Circular Economy: <ul style="list-style-type: none"> • Prioritization of locally sourced, sustainable, and recyclable products.

	<ul style="list-style-type: none"> • Transition toward circular economy principles, emphasizing reuse and repurposing. • Regulatory support to encourage sustainable procurement practices. <p>□ Education & Awareness:</p> <ul style="list-style-type: none"> • Campaigns to educate tourists on responsible environmental behaviour. • Mandatory training programs for staff in sustainable tourism practices. • Workshops and certification programs to enhance knowledge and application of eco-friendly practices among hospitality personnel.
Moldova	<p>Moldova</p> <ul style="list-style-type: none"> • Promotion and Education: <ul style="list-style-type: none"> ◦ Campaigns promoting waste management through positive tourist examples ◦ Environmental education targeting locals and tourists • Composting Initiatives: <ul style="list-style-type: none"> ◦ Training and practical implementation of composting systems • Child-Focused Sustainability Education: <ul style="list-style-type: none"> ◦ School-based ecological circles, educational tours, waste sorting demonstrations ◦ Long-term sustainability education programs and nursery school projects ◦ Integration of ecological education into formal school programs • Ecological Certification: <ul style="list-style-type: none"> ◦ Certification programs for eco-friendly tourist establishments ◦ Increased visibility and attractiveness of certified businesses • General Conclusions: <ul style="list-style-type: none"> ◦ Emphasis on collaboration between public authorities, NGOs, educational institutions, and private enterprises ◦ Importance of community-supported partnerships for lasting impact
Türkiye	<p>Türkiye</p> <ul style="list-style-type: none"> • Energy: <ul style="list-style-type: none"> ◦ Energy-efficient lighting systems and building automation ◦ Increased utilization of renewable energy (solar, geothermal)

	<ul style="list-style-type: none"> ○ Expansion of certification programs promoting energy savings and carbon footprint reduction ○ Financial incentives and training programs to promote energy-saving practices • Water: <ul style="list-style-type: none"> ○ Water-saving technologies (low-flow faucets, water recycling systems) ○ Rainwater harvesting and greywater reuse for irrigation ○ Guest participation in water-saving practices (linen/towel reuse) ○ Collaboration with local authorities for effective water management plans • Waste: <ul style="list-style-type: none"> ○ Expansion of the Zero Waste Project across tourism businesses ○ Organic and food waste recycling programs ○ Reduction in single-use plastics and use of reusable products ○ Promotion of recycling through widespread use of separate recycling bins ○ Training and raising awareness among staff and guests • General Recommendations: <ul style="list-style-type: none"> ○ Strengthened financial incentives, local government support, and public authority involvement ○ Expanded training and awareness initiatives ○ Broader implementation of innovative technologies and sustainable practices
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2. What are the constraints that prevent you from investing more in sustainability?

Bulgaria	<ul style="list-style-type: none"> • High initial investment costs • Urban planning and building restrictions limiting sustainable investments • Limited human resources and capacity of staff • Difficulty in identifying viable sustainable alternatives to current products/services • Lack of certified or qualified personnel with sustainability expertise • Uncertainty about return on investment from sustainable practices

	<ul style="list-style-type: none"> • Insufficient knowledge regarding additional sustainable practices to implement • Low consumer demand and interest in sustainable options
Greece	<ul style="list-style-type: none"> □ High Initial Investment Costs: <ul style="list-style-type: none"> • Significant upfront costs for sustainable infrastructure (solar panels, water recycling systems) • Difficulty for small and medium-sized enterprises (SMEs) to afford initial investments • Proposed solutions: government subsidies, tax incentives, and public-private partnerships □ Lack of Access to Funding and Grants: <ul style="list-style-type: none"> • Complex bureaucratic processes and rigid eligibility criteria for EU and national sustainability funds • Proposed solutions: simplifying funding application processes and providing advisory support centres for businesses □ Uncertain Return on Investment (ROI): <ul style="list-style-type: none"> • Difficulty for businesses in predicting financial returns, discouraging long-term investments • Proposed solutions: providing clear case studies, data-driven ROI analyses, and offering low-interest loans or extended payback periods □ Regulatory and Bureaucratic Barriers: <ul style="list-style-type: none"> • Lack of clear, stable sustainability policies and regulations • Bureaucratic delays in obtaining permits and approvals for green projects • Proposed solutions: streamlined regulatory frameworks and fast-track approval processes for sustainable investments □ Limited Consumer Demand for Sustainable Services: <ul style="list-style-type: none"> • Many tourists prioritize cost over sustainability • Proposed solutions: educational awareness campaigns and promoting eco-labels to encourage consumer interest in sustainability □ Lack of Skilled Workforce and Expertise: <ul style="list-style-type: none"> • Insufficient availability of trained sustainability professionals • Proposed solutions: training programs, workshops, and collaborations with educational institutions to develop expertise
Moldova	<ul style="list-style-type: none"> □ Lack of Qualified Specialists: <ul style="list-style-type: none"> • Shortage of experts in ecological basin design and hydrotechnical fields □ Inadequate Local Strategies for Natural Risks: <ul style="list-style-type: none"> • Absence of comprehensive strategies for mitigating natural hazards (floods, landslides)

	<ul style="list-style-type: none"> • Necessity for local-level strategies explicitly addressing environmental protection <p>□ Bureaucratic and Legal Barriers:</p> <ul style="list-style-type: none"> • Inefficient legal mechanisms for local authorities to rapidly respond to environmental risks • Proposed solutions: improved legal instruments enabling local authorities to intervene promptly <p>□ Limited Collaboration and Institutional Capacity:</p> <ul style="list-style-type: none"> • Need for effective partnership between local and central administrations • Strengthening institutional capacity through adequate budget allocation for preventive measures and rapid interventions
Türkiye	<ul style="list-style-type: none"> • High cost of sustainable technologies, infrastructure, and innovative recycling systems • Restrictive minimum investment thresholds (e.g., 3 million TL for solar panels), limiting access by SMEs • Long payback periods discouraging small and medium-sized enterprises from investing • Limited access to and awareness of available EU-funded programs and government incentives • Insufficient knowledge and technical guidance available for waste management and pollution control practices, especially in rural areas • Shortage of qualified personnel skilled in environmental sustainability and technical solutions • Limited market demand and consumer interest in sustainable tourism options • Higher costs of eco-friendly materials compared to conventional plastics • Lack of stringent regulations and effective penalties for unsustainable practices (e.g., excessive plastic use) • Recommendations include broader incentives, technical support mechanisms, enhanced educational programs, and stronger enforcement of sustainability regulations

3. Do you think that "green" certification is necessary for businesses/organisations in the tourism sector? And how can they benefit from it?

Bulgaria	<p>□ Necessity of Certification:</p> <ul style="list-style-type: none"> • Viewed as essential for promoting sustainability and environmental responsibility.
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	<ul style="list-style-type: none"> • Encourages collective industry effort rather than individual competition on sustainability. • Enhances city development, improves quality of life, and increases tourist appeal. <p>□ Recommended Certifications:</p> <ul style="list-style-type: none"> • Green Key, Green Tourism, ISO 14001, EMAS, Climate Neutral, Ecovadis, ISO 22000, EFQM, EU Eco Label, ISO 21401, Green Destination. <p>□ Benefits of Certification:</p> <ul style="list-style-type: none"> • Improves visitor experience and satisfaction. • Cost savings through efficient resource management. • Ensures compliance with legal and regulatory requirements. • Enhances employee satisfaction and loyalty through a sustainability-focused culture. • Increases revenues by attracting environmentally conscious tourists. • Strengthens competitiveness and aligns businesses with market trends. • Facilitates access to funding and improves supplier relations.
Greece	<p>□ Necessity of Certification:</p> <ul style="list-style-type: none"> • Essential for credibility and competitive advantage, particularly in attracting eco-conscious travellers. • Crucial for accessing international partnerships, booking platforms, and sustainability-focused funding. <p>□ Recommended Certifications:</p> <ul style="list-style-type: none"> • Green Key, ISO 14001 prominently mentioned. <p>□ Benefits of Certification:</p> <ul style="list-style-type: none"> • Allows businesses to charge premium prices due to increased customer willingness to pay for sustainable services. • Enhances brand reputation, customer trust, and long-term sustainability. • Provides eligibility for EU and international sustainability grants and incentives. • Reduces operational costs through improved resource efficiency (energy, water, waste management). • Increases customer loyalty and positive reviews from eco-conscious travellers. <p>□ Barriers and Proposed Solutions:</p> <ul style="list-style-type: none"> • Complexity, cost, and time involved in certification processes deter SMEs. • Suggested solutions include government subsidies and simplifying certification processes.

Moldova	<p>□ Necessity of Certification:</p> <ul style="list-style-type: none"> • Considered essential for attracting tourists and promoting environmental responsibility. • Requires active state support due to implementation costs and challenges. <p>□ Benefits of Certification:</p> <ul style="list-style-type: none"> • Enhances tourist attraction and marketability. • Contributes positively to environmental protection. <p>□ Challenges and Proposed Solutions:</p> <ul style="list-style-type: none"> • Additional costs and compliance requirements are significant barriers. • State support through funding programs, training, and simplified resource access mechanisms is necessary. • Importance of collaborative efforts between authorities and the private sector to integrate sustainability criteria and enhance competitiveness.
Türkiye	<p>□ Necessity of Certification:</p> <ul style="list-style-type: none"> • Recognized as essential for achieving Türkiye's sustainability goals in tourism. • Provides a competitive edge in the international tourism market and aligns businesses with global trends. • Supported by the "Türkiye Sustainable Tourism Program" and similar initiatives. <p>□ Recommended Certifications:</p> <ul style="list-style-type: none"> • Green Key, Blue Flag, ISO 14001, EU Eco Label highlighted as well-known and effective. <p>□ Benefits of Certification:</p> <ul style="list-style-type: none"> • Attracts environmentally conscious visitors, enhancing customer satisfaction. • Results in significant operational cost savings (energy, water, waste). • Facilitates compliance with environmental regulations. • Improves access to financing and attractiveness to investors. • Enhances international visibility and market competitiveness. <p>□ Current Status and Recommendations:</p> <ul style="list-style-type: none"> • Primarily adopted by large hotels; broader adoption needed among smaller businesses. • Increased training, awareness, and incentives recommended to promote wider certification implementation.

4. In your opinion, what are the most effective ways of training staff and informing customers about anti-pollution and waste management in tourism businesses/organisations?

<p>Bulgaria</p>	<p>▣ Staff Training:</p> <ul style="list-style-type: none"> • Seminars and workshops emphasizing sustainability and waste management. • E-learning and online training tools for continuous learning. • On-the-job training demonstrating sustainable daily practices. • Creation of ecological regulations for active staff participation. <p>▣ Customer Information:</p> <ul style="list-style-type: none"> • Information campaigns using audiovisual materials in public areas. • Events and awareness activities (e.g., "green days," visits to recycling centres). • Leaflets and brochures in multiple languages detailing sustainability efforts. • Digital apps encouraging participation in pollution reduction activities.
<p>Greece</p>	<p>▣ Staff Training and Workplace Engagement:</p> <ul style="list-style-type: none"> • Regular mandatory training sessions focused on waste management. • Integration of sustainability policies in employee handbooks. • Workshops by environmental experts on waste sorting, composting, and reducing single-use plastics. • Incentive programs rewarding staff for active participation in waste reduction. <p>▣ Educating Tourists:</p> <ul style="list-style-type: none"> • Clear signage, digital screens, and QR codes in tourist areas. • Information provided at check-in about local recycling and waste reduction practices. • Incentives for guests participating in sustainability efforts (e.g., discounts, rewards for using reusable items or joining cleanup activities). <p>▣ Community Engagement:</p> <ul style="list-style-type: none"> • Collaboration with local communities, municipalities, and environmental NGOs in cleanup events. • Campaigns involving both tourists and residents to clean beaches, trails, and natural sites. • Support and promotion of local businesses using sustainable packaging. <p>▣ Policy and Infrastructure Support:</p> <ul style="list-style-type: none"> • Advocacy for improved waste collection infrastructure in tourism areas.

	<ul style="list-style-type: none"> • Elimination of single-use plastics in hotels through refillable toiletries and reusable shopping bags. • Participation in circular economy initiatives and adoption of compostable products.
Moldova	<ul style="list-style-type: none"> □ Staff and Community Training: <ul style="list-style-type: none"> • Organizing training sessions on best practices for waste reduction and recycling for both staff and local communities. □ Customer Information: <ul style="list-style-type: none"> • Use of informative displays, brochures, panels, and infographics in accommodations and reception areas to educate guests on waste management. □ Infrastructure Improvements: <ul style="list-style-type: none"> • Installation of selective waste collection stations in tourist-accessible locations to facilitate proper waste disposal. □ General Conclusions: <ul style="list-style-type: none"> • Emphasis on involving local communities, staff, and tourists to collectively promote sustainable tourism practices and reduce environmental impact.
Türkiye	<ul style="list-style-type: none"> □ Staff Training: <ul style="list-style-type: none"> • Seminars and workshops focusing on sustainability and waste management. • Flexible training via e-learning and digital resources. • Practical, on-the-job training emphasizing sustainable daily activities. • Ecological regulations encouraging active staff participation in sustainability efforts. □ Customer Information: <ul style="list-style-type: none"> • Public area information campaigns using audiovisual content. • Organization of awareness-raising events and activities ("green days," recycling centre tours). • Multilingual brochures and leaflets detailing sustainability initiatives. • Digital tools and applications encouraging guest participation in anti-pollution and waste management efforts.

V. Policy Recommendations

Based on the comprehensive needs assessment and stakeholder insights from Bulgaria, Greece, Moldova, and Türkiye, the following policy recommendations are proposed to effectively address the critical challenges of pollution and waste management, and to promote sustainable tourism practices within the Black Sea Basin:

Financial Incentives and Support Mechanisms

- Establish targeted financial support programs (grants, subsidies, tax incentives) to encourage SMEs and tourism operators to adopt sustainable technologies, particularly in energy efficiency, water management, and waste reduction.
- Simplify bureaucratic processes for accessing national and European funding schemes, offering advisory services and streamlined application procedures, especially for smaller businesses lacking administrative capacity.

Strengthening Regulatory Frameworks

- Develop and enforce clear, consistent, and stable sustainability regulations and guidelines to facilitate long-term investment planning and implementation of eco-friendly infrastructure.
- Introduce mandatory standards and certifications for sustainable practices in tourism businesses, such as waste recycling protocols, wastewater treatment requirements, and energy efficiency criteria.
- Establish fast-track approval procedures for eco-friendly projects to reduce bureaucratic delays.

Capacity Building and Education

- Implement regular, structured training programs for tourism employees and managers, covering waste management, energy conservation, and water-saving practices.
- Encourage partnerships between tourism businesses, educational institutions, and research centres to facilitate knowledge exchange, innovation, and adoption of best practices.
- Provide specialized training to address skill shortages in sustainability, especially in eco-design, sustainable tourism management, and environmental certifications.

Promotion of Green Certifications

- Actively promote recognized sustainability certifications (e.g., Green Key, Blue Flag, ISO 14001, EU Eco Label) across the tourism sector, highlighting their benefits in attracting environmentally conscious consumers.

- Offer financial support or subsidies to help SMEs obtain and maintain green certifications.
- Conduct awareness campaigns to educate tourists about the significance of eco-certified accommodations and services, thus increasing consumer demand.

Infrastructure and Technology Improvements

- Invest in modern waste collection and recycling infrastructure in key tourism hotspots, ensuring easy access to recycling facilities and proper disposal systems.
- Expand the use of renewable energy sources (e.g., solar, photovoltaic, geothermal) in tourism facilities, supported by appropriate financial and technical assistance.
- Encourage the adoption of smart technologies (e.g., automated energy and water management systems, food waste monitoring applications) to optimize resource use and reduce operational costs.

Community Engagement and Public Awareness

- Launch comprehensive public awareness campaigns highlighting the importance of responsible tourist behaviour, sustainable practices, and local community involvement in environmental protection.
- Facilitate community-driven initiatives such as local cleanup events, sustainability workshops, and joint environmental projects between tourists and residents.
- Develop clear, multilingual informational materials for visitors to enhance awareness and encourage active participation in sustainability efforts.

Enhancing Cross-Sector Collaboration

- Foster stronger cooperation between government agencies, local authorities, NGOs, private sector stakeholders, and educational institutions to jointly address sustainability challenges.
- Establish public-private partnerships (PPPs) to co-finance and implement larger-scale sustainability infrastructure projects, such as wastewater treatment facilities, eco-tourism developments, and circular economy initiatives.
- Encourage cross-border collaboration within the Black Sea Basin region for sharing experiences, resources, and strategies in sustainable tourism management and environmental protection.

By implementing these comprehensive policy recommendations, the Black Sea Basin can effectively address current sustainability challenges, enhancing the region's resilience and attractiveness as a leading sustainable tourism destination.

VI. Annexes

Questionnaire for Focus Groups

PROFILES

Name:

Organization/Company Name:

Position/Role:

Type of Organization:

Years of Experience in the Tourism/Sustainability Sector:

Region of Operation:

- ☐ Bulgaria
- ☐ Greece
- ☐ Moldova
- ☐ Türkiye

Primary Focus Area of Expertise:

- ☐ Tourism Development
- ☐ Environmental Sustainability
- ☐ Policy and Regulation
- ☐ Innovation and Technology
- ☐ Waste Management
- ☐ Community Engagement
- ☐ Other (please specify)

QUESTIONS FOR THE FOCUS GROUP

Section "Pollution and waste"

- Effectiveness of Current Waste Management Practices:
- In which area do you think that businesses/organisations in the tourism sector should invest in environmental sustainability?
- Challenges in Implementing Waste Reduction and Pollution Control:
- What are the constraints that prevent you from investing more in sustainability?
- Policies: Do you think that "green" certification is necessary for businesses/organisations in the tourism sector? And how can they benefit from it?

Extra questions

- Engaging Local Communities and Tourists in Waste Reduction:
In your opinion, what are the most effective ways of training staff and informing customers about anti-pollution and waste management in tourism businesses/organisations?

Questionnaire for In-depth Interviews

GENERAL QUESTIONS (PROFILE)

Name (Optional):

[Text box]

Organization/Company Name:

[Text box]

Position/Role:

[Text box]

Type of Organization:

☐ Private Sector

☐ Public Sector

☐ NGO

☐ Academic/Research Institution

☐ Other (please specify): [Text box]

Years of Experience in the Sector:

☐ Less than 3 years

☐ 3-5 years

☐ 6-10 years

☐ More than 10 years

Region of Operation:

☐ Bulgaria

☐ Greece

☐ Moldova

☐ Türkiye

Focus Area of Expertise: (Select all that apply)

☐ Tourism Management

☐ Environmental Sustainability

☐ Policy and Regulation

☐ Innovation and Technology

☐ Waste Management

☐ Other (please specify): [Text box]

INTERVIEW QUESTIONS

Section "Pollution and waste"

- In which areas have your company/organisation invested in environmental sustainability?
- What sources of funding have you used in your business/organisation to implement sustainability practices? And what kind of practices/actions/measures have you already implemented so far or do you intend to implement within 2024-2025 regarding environmental activity?
- How have your sustainability investments changed in the last year? What is your investment budget for sustainability practices in the coming year?
- What are the constraints that prevent you from investing more in sustainability?

- Does your business/organisation have a Sustainability Certification? If yes, which certification does it have? And what do you consider to be its main benefits?
- Are there specific department or senior management positions and roles dealing with sustainability issues in your company/organisation? And how do you train your staff?

General Survey

PROFILE QUESTIONS

Age Group: ☐ 18-29 ☐ 30-44 ☐ 45-60 ☐ 60+

Country of Residence: ☐ Armenia ☐ Bulgaria ☐ Georgia ☐ Greece
☐ Romania ☐ Türkiye ☐ Ukraine

Role in Tourism Sector: ☐ Business Owner ☐ Employee ☐ Tourist ☐ Policy Maker ☐ Researcher ☐ Other

Level of Experience in Tourism/Sustainability: ☐ Beginner ☐ Intermediate ☐ Advanced

QUESTIONS FOR THE GENERAL SURVEY

Sustainability Awareness

What sustainable practices do you adopt during your holidays? Rank the following options in descending order?

- ☐ Green/sustainable products and services
- ☐ Selection of local organic products
- ☐ Low-carbon transport
- ☐ Socially responsible products & services
- ☐ Reduction/proper water management
- ☐ Recycling

How much more would you be willing to pay for a restaurant/hotel or tour agent that implements environmental sustainability practices?

- ☐ 0%
- ☐ <5%
- ☐ 6-10%
- ☐ 11-20%
- ☐ >21%

Where do you get information about environmentally friendly options that you can find in tourism?

- ☐ Social media
- ☐ Travel guides
- ☐ Advertisements
- ☐ Television
- ☐ Booking platforms (e.g. booking, TripAdvisor)

- ☐ Forums
- ☐ Websites
- ☐ Friends/acquaintances
- ☐ Hotel websites
- ☐ Travel agencies

What measures do you think would be effective in promoting sustainable infrastructure and managing the impacts of over-tourism?

Limiting tourist numbers during peak seasons

Increasing entrance fees to support environmental protection

Promoting alternative, less crowded destinations

Campaigns for responsible tourist behaviour

Other (please specify)

What do you think is the most important form of support needed for local communities to adopt innovative sustainable tourism practices?

Financial assistance or grants for innovation

Training and education on sustainable and innovative practices

Access to eco-friendly technology and materials

Partnerships with research institutions for innovative solutions

Marketing support to promote sustainable initiatives

Section "Pollution and waste"

To what extent is tourism considered to have a negative impact on the environment in each of the following sectors?

Sectors	Too much	Very	Enough	A little	Not at all
Consumption of natural resources					
Waste production					
Burden on infrastructure (e.g. sewerage network)					
Air pollution					
Marine pollution					
Other					

What sustainability practices do you consider necessary when choosing a "green" facility (e.g. hotel, restaurant, etc.)?

SECTION	POLICIES
Energy	<ul style="list-style-type: none"> <input type="checkbox"/> installation of special low consumption LED lamps <input type="checkbox"/> installation of sensors to provide lighting only when needed <input type="checkbox"/> supply of low-consumption electrical appliances <input type="checkbox"/> power supply/ cut-off mechanism at the entrance of the rooms (e.g. magnetic card) <input type="checkbox"/> ensuring good thermal insulation in the building installations <input type="checkbox"/> fitting of double glazing on the doors and windows of the buildings <input type="checkbox"/> installation of photovoltaic systems

	<input type="checkbox"/> utilisation of solar energy to provide hot water <input type="checkbox"/> utilisation of geothermal energy for space heating/cooling <input type="checkbox"/> use of LPG for cooking <input type="checkbox"/> training of staff in energy saving methods <input type="checkbox"/> encouraging customers to save energy (e.g. by means of brochures) <input type="checkbox"/> no action/measure has been implemented so far, nor is it planned for 2024-2025
Water	<input type="checkbox"/> placement of controlled flow mechanisms in taps/toilets <input type="checkbox"/> change of linen/towels, when the customer so declares; not daily <input type="checkbox"/> minimisation of water use in gardens and open spaces <input type="checkbox"/> use of water recovered from the biological/"grey water" (e.g. for irrigation) <input type="checkbox"/> collection and utilisation of rainwater <input type="checkbox"/> training of staff in water saving methods <input type="checkbox"/> Encouraging customers to save water (e.g. through leaflets) <input type="checkbox"/> minimising water use in kitchens/laundry services/pools <input type="checkbox"/> introduction of a water management/water saving plan <input type="checkbox"/> regular inspection and maintenance of the water supply system to avoid leaks <input type="checkbox"/> measurement and analysis of water consumption <input type="checkbox"/> no action/measure has been implemented to date, nor is it planned for 2024-2025
Waste	<input type="checkbox"/> Avoidance of disposable items (plastic bags/cups, non-returnable bottles etc.) / incorporation of reusable items <input type="checkbox"/> use of items from recycling <input type="checkbox"/> placing special bins for recycling (paper, plastic, glass, aluminium) <input type="checkbox"/> composting of organic waste <input type="checkbox"/> Management and reduction of food residues and waste <input type="checkbox"/> operation of biological purification of waste water treatment <input type="checkbox"/> Avoidance of the use of chemical detergents <input type="checkbox"/> training of staff in methods of procurement of environmentally friendly products, reduction or recycling of solid waste <input type="checkbox"/> encouraging customers to reduce their waste and to throw it in the appropriate bins (e.g. by leaflets) <input type="checkbox"/> drawing up a waste management plan <input type="checkbox"/> no action/measure has been implemented so far, nor is it planned for 2024-2025

Does the certification of a hotel or restaurant matter to you? And if so, which of the following?

Yes

No

<input type="checkbox"/> Green-Key (Green Key)	
<input type="checkbox"/> Earthcheck	
<input type="checkbox"/> Blue Flag (Blue Flag)	
<input type="checkbox"/> Green Destination	
<input type="checkbox"/> ISO 14001	
<input type="checkbox"/> Travelife	

<input type="checkbox"/> ISO 22000	
<input type="checkbox"/> Green Tourism	
<input type="checkbox"/> Ecovadis	
<input type="checkbox"/> EQFM	
<input type="checkbox"/> EU Eco Label	
<input type="checkbox"/> EMAS	
<input type="checkbox"/> ISO 21401	
<input type="checkbox"/> ESG GRI cert	
<input type="checkbox"/> Climate Neutral	

VII.

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