

Glocalization strategies and current transformations of innovative city tours of Sofia, Bulgaria

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Abstract.

Research background: The rise of innovative (alternative) guided tours around the world and especially in Europe embody the idea of ‘glocalization’, since these tours and associated new business models (comprising both ‘free’ and paid offers) represent a global phenomenon that utilizes ‘localness’ as a major asset. Therefore, glocalization strategies of the tour providing companies are worth studying and so are the current transformations in their business models. The Bulgarian capital city of Sofia is an appropriate case study area, being recently denoted as an emerging tourist destination on the international scene, with a number of innovative city tours developed over the last years that form a particular aspect of Sofia’s urban experience.

Purpose of the article: Building upon a previous study, the paper seeks to uncover glocalization strategies applied and current transformations observed in the innovative city tours of Sofia in terms of COVID-19 induced market change, product development, and delivery system adjustment.

Methods: Subjected to analysis are five tour providers selected on the ground of their business models, tour content and market success. The study involves in-depth interviews with company managers and tour guides, personal observations, and information retrieved from social media and websites.

Findings & Value added: The study results contribute to better understanding of how global trends are implemented in a local context and reveal the challenges triggered by the current COVID-19 induced shift of scales from global to local in terms of markets, product development, and service organization.

Keywords: *glocalization; guided tours; tour providers; COVID-19; transformations*

JEL Classification: *L83; Z13; Z32*

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1 Introduction

The rise of innovative (alternative) city tours around the world and associated new business models combining ‘free’ and purchased offers has recently attracted academic interest, since these tours have substantial impacts on local tourism businesses as well as on the image and visibility of destinations, especially in Europe [1, 2]. They are generally discussed within the context of post-industrial tourism turn towards independent travelers demanding individual approach, flexibility and authentic experiences, and, therefore, are considered a perfect illustration of the transformation processes in conventional tourism services down by the global market trends [1]. It might be claimed that guided tours in general and alternative city tours in particular embody the idea of ‘glocalization’, since they represent a global phenomenon that utilizes ‘localness’ as a major asset. While overall, the global-local nexus is considered a fertile ground for study in the field of tourism [3], specific research findings indicate that tour guides are remarkable front-runners of the globalization process [4-6] and business owners act as similar agents [3].

Innovative city tours are often associated with the concept of free walking tours because it introduced to the market the innovative model of offering both pay-as-you-wish and prepaid products, which is quite popular among flexible and creative city tour providers. Having emerged from a company established in Berlin in 2003, this concept has quickly spread throughout Europe and beyond, shaping the patterns of a successful transnational business. On the one hand, in the core of the concept lays the classical freemium-premium business model that promotes the paid products of a company via offering free ones. On the other hand, the concept implements the principles of sharing economy by providing everyone with easy access to affordable products. Consequently, in academic literature it is seen as a hybrid of capitalist and collaborative economy practices that represents a non-technological innovation [2] as well as a disruptive network innovation [7].

Generally, innovative city tour providers following the above model are newcomers to the tourism industry and are far from well-studied, despite of their global market success and increasing impacts on local tourism development. Deeper understanding of both their mechanisms of operation and underpinning philosophies has recently been called for [1, 2, 7]. Since such understanding refers to a global concept implemented in various local contexts, one particular sphere of interest might be that of specific glocalization strategies applied in different countries, which would also respond to the call for investigating the process of glocalization in regards to the conceptual application of innovations such as the alternative economy [8].

Building upon recent research of the aspects of innovativeness and key success factors of novel city tours of Sofia, Bulgaria [9, 10] this paper aims to identify glocalization strategies applied as well as the current COVID-19 induced transformations related to the ongoing market change, product development, and delivery system adjustment of this particular segment of the tourism industry. Sofia represents an appropriate case to study, being recently denoted as an emerging tourist destination on the international scene [11] with a number of innovative city tours developed over the last ten years that have strongly contributed to the local tourism product development and customer value creation [12] taking advantage of global market trends and new business models.

Considering various interpretations of ‘glocalization’ in the social scientific literature [13], in the current paper the concept is associated with a business strategy emphasizing particularism of a global theme, product, or service [14, 15]. However, it is not investigated in the context of a typical multinational or transnational corporation, but as a process of implementation of a global business model—that of free walking tours established by SANDEMANs New Europe (SNE)—by independent local providers in Sofia, Bulgaria.

2 Methods

The study is focused on five independent providers of Sofia city tours that fall within the scope of the above mentioned innovative (alternative) tourist services [1, 2]. Providers under study vary in terms of their legal status: two of them are registered as non-profit organizations, two are trade companies, and one operates as a physical person. They all implement the concept of free walking tours by offering a combination of tip-based and fixed-price products. The majority of the tours are thematic in content, though the most popular one is the “classical” introductory Free Sofia Tour dating back to 2010, which has been ranked as Sofia’s number-one tourist activity on TripAdvisor for almost a decade.

The study takes a qualitative approach within the interpretive paradigm [16], applying in-depth interviews with managers and tour guides as a primary method. Participatory observation of selected city tours as well as providers’ websites and social media pages are used as additional sources of information.

Personal interviews dedicated to globalization and current transformations took place in the period June-July 2020. Information from previous interviews conducted by the author in 2019 regarding overall concepts, mechanisms of operation, and dimensions of innovativeness of the studied tour providers has also been used. Specific questions aimed to check the relevance of various globalization strategies derived from literature [4-6, 8, 14, 15, 17] and to uncover new ones, as well as to identify ongoing COVID-19 induced transformations in terms of market change, product development, and delivery adjustment.

Altogether ten interviewees took part in the study: five owners or representatives of the management team of the studied providing organizations and five tour guides. It has to be stressed that the owners / managers are also acting as tour guides, which provides them with a decent view of a wide range of issues: from strategic to operational. Interviews took the form of a face-to-face conversation, including pre-formulated questions and a free discussion lasting between half an hour and two hours. Only one of the interviews was conducted by phone, since such a form was preferred by the participant. Most of the interviews were taped to ensure the subsequent downloading of the entire information. In three of the cases memos were written down immediately after the conversation.

Transcripts of all interviews were subjected to open coding in two stages [18]. Free comments were first classified in several thematic groups, and then subgroups were outlined to go into deeper detail with the reference to identified approaches, practices, and opinions. The structure of analysis follows the two major topics of interest: globalization strategies and current COVID-19 induced transformations. The results presented below contain direct quotations that support the findings and ensure thicker description.

3 Results and discussion

3.1 Globalization strategies for adapting the model of free walking tours

As mentioned above, the concept of ‘free’ (tip-based) walking tours was pioneered in 2003 by SNE, a company established in Berlin that is currently running free tours and purchased products in 20 cities across Europe, the Middle East and the USA, with over 600 guides [19]. Since its early days the concept has obtained great popularity around the world, with Europe staying firmly at the center of this growing trend [20]. A recent study has identified 75 operators of free walking tours in Europe, many of them claiming to be local firms driven by local people [2]. Yet, SNE is the biggest operator on the market that along with being a flagman of innovation may be also seen as a transnational company. Since part of its mission is “to redefine industry standards” [19], in the current paper SNE is considered a

leading agent of globalization in the sector of innovative guided tours. The following analysis uncovers the main glocalization strategies applied by local independent tour providers in Sofia, Bulgaria to adapt the original SNE concept to the local context.

3.1.1 Loose implementation of the established business model

Although the free walking tour concept is associated with collaborative economy [2, 7, 20], the present study results clearly indicate that, as in traditional economy, central to the business model is profit. All of the interviewees see the concept as a business: people start it with the idea that they can make money (either as a main or additional source of income), although many of them have other motives as well. One of the managers admits that: *“emphasizing the shared economy principles is rather a marketing ploy while, internally, everything is thought through the business logic”*.

Yet, the business logic seems to be much stronger in the case of SNE compared to the local independent tour providers in Sofia. Some of the study participants who had been working for SNE while living abroad before they came back to Bulgaria and established their own businesses, describe SNE as an analogue to corporations with a strict business model entirely focused on the company’s interest. SNE tour guides are obliged to pay a fee per each tour participant, regardless of whether they received a tip and how much it was. Due amounts are closely controlled through the tour pre-booking system and also by taking pictures of each group at the start of the tour, on the basis of which the number of participants is precisely counted. The required fee (around €5 per tourist) guarantees a considerable fixed income for the company but puts the guides in an unfavorable position, which in turn results in tourists being pushed to pay more. According to one of the interviewed tour managers, the strict SNE business model would not work in Bulgaria: *“Their example is too harsh and too focused on the company’s interest. We operate in a different way, thinking more about the guides than about the organization”*.

In Sofia, too, the guides are obliged to pay the tour providing organization in order to fund its operational costs, marketing activities, etc. However, the model works mainly on the basis of trust and friendly relations. The guides report themselves the amount of tips received and contribute to the organization a certain percentage, which varies among different providers from 30% to 40%. Mechanisms of control are implemented, but they are rather informal. One of the interviewees explains: *“if a guide’s reported tips are consistently significantly lower, there are two options: either he/she is hiding money or he/she is not doing well. In both cases, managers check the situation and take action”*.

Such a loose implementation of the original business model that does not require fixed fees payable to the organization contributes to the overall quality of the experience, since tourists are not pushed to pay. Some of the managers even claim that they make purposeful efforts to prevent guides from putting pressure on customers to tip. Personal observations of the author have shown that tour participants in Sofia most often pay between €5 and €10, though the tips may vary largely. The majority of travelers are already well acquainted with the free walking tour concept and many of them do appreciate the more relaxed approach towards tipping implemented in Sofia compared to similar products offered in other cities in different countries they had visited before.

3.1.2 Local guides ensuring the experience

Acting as a transnational company that is an epitome of globalization in the alternative guided tours sector, SNE is known for working almost entirely with tour guides who live in the respective city but are native speakers of English or Spanish, i.e. come from the USA, Canada, UK, Ireland, Spain, etc. According to one of the interviewees, such an approach to

guides recruitment is motivated by two main reasons. First, this is a way to guarantee their excellent language skills which are essential to the overall quality of the tour. Second, it is suggested that guides who know the city well but, similarly to tourists, come from 'outside' would be more neutral to the local context and present a more objective stance, thus catering better to customers' needs and expectations.

In the case of Sofia the approach is just the opposite: innovative tour providers work exclusively with local guides who tell the story of their own country. The guides are not necessarily native to the city of Sofia; some of them come from different parts of the country. Still, it does not compromise the main idea that foreign visitors do not just learn about local history and culture, but also meet a real Bulgarian and can ask her/him whatever they want. Some of the interviewees particularly stress the importance of telling personal stories as a means to establish a deeper connection with customers and make people better understand what real Bulgarian life is. Usually a deep personal connection emerges from conversations that have nothing to do with the specifics of the tour: *"Because not many people know Bulgarians, that's why they are interested [in casual personal communication]. We try to reveal Bulgaria in different ways related to everyday life"*. Informal communication is seen as a substantial part of the tour content. A strategy emphasized by one of the tour providers is that they are trying to *"make tourists feel not like going around with a guide, but going out with a local friend"*, with the main principle at work being *"60% information, 40% personal connection / fun"*. Therefore, the personality of a guide is of crucial importance. Founders of the first innovative tours of Sofia (established about ten years ago) were young enthusiasts with a broad cosmopolitan viewpoint, who had returned to Bulgaria after studying abroad. They wanted to "move Sofia up" and "open it to the world" by utilizing their international experience. Nowadays, the guides' international experience is not considered of crucial importance, though it is always helpful. What matters most is their excellent command of foreign language, personal charisma, and creativity. In contrast to other findings [4, 6], studied tour guides in Sofia do not purposefully pretend to be more 'local' than they really are, since 'authenticity' is not sought for by positioning Bulgaria "outside-of-the-modern-world".

A universal glocalization strategy [8] which is clearly seen in the case of the studied city tours of Sofia is that of revealing a sense of humor and self-irony in regards to historical past, present-day political issues or urban landscape. Generally, the guides are honest enough to tell "peppery" jokes and awkward historical facts in order to show the 'whole picture'. In this regard, a manager says: *"We are trying not to take ourselves too seriously. We have to be able to tell our weaknesses as well; such an honest approach creates stronger connection with our guests and positions us [the Bulgarians] as normal people"*.

While the guides are free to express personal opinions on various questions related to politics, religion, cultural preferences, etc., they are also specially trained to understand that tourists come from different parts of the globe, where they know a certain version of the rest of the world, including Bulgaria. Moreover, the groups are composed of individual travelers of mixed nationalities, so tension might arise among some tour participants (e.g. Israelis and Palestinians, visitors from different Balkan countries, etc.). As a rule, possible misunderstanding in regards to Bulgarian history and the wider local context is not taken personally and the guides are particularly taught to demonstrate tolerance and diplomacy when clarifying 'sensitive' questions and solving various intercultural issues.

A specific strategy implemented by some of the guides is that of lowering expectations towards the tour experience in a local context. For example, one of the interviewees usually tells tourists that the sites of interest in Bulgaria are generally small in size and Sofia is not an 'iconic destination', thus setting the ground for nice surprises. According to him, this is a way to emphasize local specificity and make people appreciate "small enchantments", ending up with happy customers due to exceeded expectations.

3.1.3 Formal and informal partnerships among independent providers

While SNE operates as a transnational corporation with a classical top-down structure [7], innovative city tours of Sofia are provided by independent local entrepreneurs some of which are trade companies and others are NGOs opting for co-ownership and collective management. The existence of various providers is seen as an advantage in terms of product development, since *“everyone comes up with their own ideas and some innovative products [such as the Balkan Bites Free Food Tour] would otherwise not have been created”*.

What is specific in the case of Sofia and might be considered a glocalization strategy is that most of the studied providers are connected in an informal local network and, in a sense, act as sister organizations. A recent study [9] has outlined that same guides lead tours of different providers and it even happens that a single person manages staff recruiting of competitive organizations. Such a tricky situation is explained by the scarcity of people with needed capabilities who, therefore, "spill over" from one organization to another and / or work for several providers. The interviewees comment that the system abroad is not that liberal, but they do not see its modification in the Bulgarian context as a serious problem. According to them, so far the pros of collaboration among local competitors are outweighing the cons: some professional secrets are transferred from one organization to another, but this is not necessarily bad, and also creates opportunities for cross promotion of various products provided by different players on the market.

Going back to the established SNE model, the company has created a broad international network of subsidiaries, which is a strong marketing advantage, since customers recognize its tour brand and use the company services when they visit cities in different countries. The studied tour providers in Sofia have transformed the above model and sought for the same marketing advantage through implementing the opposite bottom-up approach. They have established international partnerships with other independent enterprises operating abroad. For example, the United Free Europe Network (UFEN) was created soon after 2010 to join efforts of independent tour providers from a number of Central and East European countries with the primary goal of mutual promotion. A study participant recalls: *“We wanted to oppose the globalization of free walking tours in the face of SNE. At the time, we had just emerged on the market and needed to find a way for more people to know about us”*. In terms of ‘opposition’, mainly efficient marketing is regarded, although UFEN might be also seen as a knowledge exchange network [2] that has helped independent providers across Europe develop their products and establish specific business practices. In a similar vein, the local company that has introduced the innovative free food tour in Sofia is currently looking for international partnership with other organizations that have already adopted the idea in Amsterdam, San Francisco, etc. According to the company manager: *“We are not as strong as SNE is, but we can also be successful on a global scale if we join efforts and maintain a common web-page of free food tours world-wide”*.

3.2 Ongoing COVID-19 induced transformations

The unprecedented lockdown that took place in 2020 due to the COVID-19 pandemic has shaken the global economy, with transport and tourism being among the strongest suffering sectors world-wide. The segment of guided tours and innovative city tours in particular made no exception, with scheduled activities of city tour providers around the world being cancelled for months due to banned travel and other restrictions. Considerable transformations have been observed on the guided tours scene to meet the new COVID-19 induced market conditions, customer expectations, and safety requirements. The study of Sofia city tour providers has revealed two major transformations: 1) market-driven product change and 2) delivery system and revenue model adjustment.

3.2.1 Market-driven product transformations

In March 2020, the COVID-19 crisis virtually halted international travel to Bulgaria and deprived Sofia of the significant number of individual foreign tourists, who had previously accounted for more than 95% of the studied city tours attendees. This situation has forced tour providers cease their on-the-ground activities for at least three months and re-think the products offered and their audiences. While the outbreak of virtual tours around the world is probably the most notable illustration of ongoing product innovations within the sector globally, such innovations have been limited in the case of Sofia, since the city is not among the 'iconic destinations' that people from abroad would be eager to visit virtually.

In the absence of foreign customers, the studied tour providers turned towards local audiences. However, drawing the attention of Bulgarians appeared quite a challenge, since most of them had never before thought seriously about the domestic market and appeared unprepared to meet its specific requirements in terms of thematic content and type of communication. Although several products were designed especially for locals, in most of the cases providers just slightly re-shaped what they had already developed for foreigners delivering it in Bulgarian language, which definitely did not work well.

Some interviewees admit they are currently interested in the local market just because "*something is better than nothing*" but do not take it seriously in a longer term because of its limited potential: "*no matter how well a Sofia city tour is developed, only a small group of local people would be interested, i.e. demand would run out in a few months*". Another participant says that the domestic market is difficult to serve, since it is highly diversified in terms of the level of knowledge and interest: "*It is much easier to work with foreigners because they all know nothing about Bulgaria*". Currently, most of the studied tour providers think about new products suitable for local audiences (e.g. companies interested in team buildings, families with kids, etc.) that would be easy to adapt for foreigners in the future. Yet, planning is problematic because the situation is constantly changing and there is no way to prepare a longer-term strategy. According to the interviewees, it will take at least two years for the international market to recover, although they target the most flexible independent tourists who are generally not afraid of travelling.

On the other hand, one of the tour providers feels very comfortable with the domestic audience and is determined to develop his products targeted at the local market in the future. In fact, he had turned to the local customers even before the corona crisis, looking for an appropriate niche market to offer highly specialized themed products dedicated to Sofia's history and culture. During the lockdown period he developed a number of new special interest virtual tours that were broadcasted on Facebook and reached an audience of 300-400 people each. When the restrictions for going out were lifted he resumed guided city walks, gathering large enough audience of local residents. According to this provider, until recently, the domestic market had been unfairly neglected in the favor of tourists from abroad. Additionally, he finds providing tours to locals very rewarding, since customers themselves give ideas for the product development and share personal memories and family archives, thus helping enrich the content of the tours, as well as create new ones.

3.2.2 Product delivery and revenue model transformations

City tours that had operated on a daily basis before the corona crisis have been gradually resumed since June 2020 but are currently held only on weekends. Overall, the activity of the studied tour providers in 2020 is negligible, accounting for 5%-10% of the last year.

To ensure social distancing, the size of the groups has been limited to 10-20 people, although in most of the cases the actual number of tour participants is much smaller, especially in regards to foreigners. As part of the newly introduced health and safety

measures, guides wear either masks or shields, and guests are encouraged to bring their own masks. To limit physical contact, customers are not any more provided with leaflets and other printed materials. To cope with the high level of uncertainty, pre-booking is required for some of the tours. Yet, in such a way the tours lose their flexibility as a major competitive advantage. Therefore, most of them still operate on “come-as-you-wish” basis.

Transformations have been observed in regards to the established revenue model. In the current situation, some providers keep offering a combination of ‘free’ and paid tours, though their income has dropped dramatically. To support tour guides during the most difficult period, one of the providers allowed them keep the full amount of tips and not pay a fee to the organization in the first several weeks when the tours were gradually resuming. However, this measure lasted for only about a month and the previous funding system was soon restored to cover considerable fixed operational costs of the organization.

Other providers have entirely switched to fixed-price products in order to guarantee some income. According to the interviewees, they do not give up the tip-based business model but consider it inappropriate during the pandemic, especially in regards to virtual tours: “[...] *it strongly depends on the audience but many people would watch the tour online and then forget to pay for it. So, we decided not to take the risk and set a price*”.

On the other hand, the above mentioned provider who is very successful at the domestic market claims that Bulgarians are no less solvent than foreigners visiting the city, and, since many of them are already experienced travelers, they are willing to pay for the ‘free’ tour service as well as for various purchased products. He is satisfied with the financial result of the pay-as-you-wish model of his virtual tours during the lockdown as well as with the revenue from paid on-the-ground city walks and is even considering raising the price, since “*people are ready to pay because they are thirsty for more knowledge and deeper contact with local history and culture*”. Furthermore, some local residents have already become his regular customers, and have even started supporting him via an online Patreon monthly membership that makes it possible for a guide to get recurring income from patrons [21].

4 Conclusions

This paper deals with two topics of particular interest in regard to innovative city tours that present a strong global trend with considerable local impacts on urban destinations and tourism businesses: glocalization strategies and COVID-19 induced transformations.

The concept of glocalization is associated with a two-way process of ‘global inclusion’ and ‘local adaptation’ in creating products or services aimed for the global market, as well as incorporating certain global processes into the local setting [15]. Thus, glocalization is seen as a variety of globalization [14] and a key to success [17], since implementing global models locally requires adaptation, with no single approach being right in all instances [14].

According to [2] free walking tours are a ‘localized’ phenomenon, produced mainly in cities where the impact of tourism is significant. In the current paper the mixed model of offering both tip-based and purchased tours established by SNE is seen as a glocalized phenomenon, since it is spread globally and is implemented with modifications (not only by the company subsidiaries) in different countries, including Bulgaria. The study found some differences in the operating patterns of local tour providers in Sofia compared to the original SNE model of ‘alternative’ tour services. Identified differences are considered glocalization strategies, since they illustrate how the SNE model has been adapted in the case of the Bulgarian capital city. These glocalization strategies are outlined in three groups: 1) loose implementation of the SNE business model; 2) working with local guides, and 3) establishing formal and informal partnerships among independent tour providers.

The first strategy modifies the strict business model of SNE which is entirely focused on the company’s interest into a milder variation rather based on trust and friendly

relations, which leads to a more relaxed approach towards tipping and the related guides' motivation and customers' satisfaction. The second strategy emphasizes the importance of local guides as 'real life' communicators who do not pretend to be more 'local' than they really are but rely on honesty, humor and self-irony to help foreign tourists better understand and accept even the not-so-pleasant aspects of the local context, while at the same time demonstrate tolerance and diplomacy in regards to cultural differences. The third strategy refers to the significance of formal and informal partnerships among independent providers at both local and international scale to ensure competitive product development, efficient cross promotion, and global market access.

Considering the second topic of investigation, two major COVID-19 induced transformations have been outlined: 1) market-driven product change and 2) delivery system and revenue model adjustment. The first group of transformations refers to the clearly observed recent turn towards local audiences, generally forced by the absence of foreign tourists. It is well known that domestic market is a source of stability in times of crisis [22] and the current corona-virus crisis is no exception. However, the findings have revealed that re-positioning of established products and business practices is quite a challenging task for most of the studied city tour providers, since domestic customers require deeper thematic content and different type of communication.

The second group of transformations outlines measures undertaken to meet the 'new normal' safety requirements and ensure income for the guides and the tour providing organizations, despite of the dramatic drop in their activity. Besides the universal safety measures, a considerable shift in the revenue model is currently observed. Some of the tour providers have not given up the 'pay-as-you-wish' practice, while others have entirely switched to fixed-price products. Additionally, a new revenue model has emerged in the face of online platforms allowing guides to get recurring income from patrons. In the current situation local audiences have appeared more affluent than the international market, but only for those providers who have been able to meet the customers' expectations in terms of offering deeper knowledge and meaningful contact.

Since all providers under study are featured by flexibility and creativity [10], they will probably soon find a new way out of the present crisis. It will be hardly possible for them to fully return to their established business models. Products offered will be re-designed and, in particular cases, a complete change of scale and perspective will be inevitable. It seems that local audiences will have an increasingly important role to play in the COVID-19 and the post-COVID-19 shifts on the guided tours scene. Yet, global processes will remain a major development driver, so re-shaping of Sofia city tours will need a combination of unique local approaches and glocalization strategies to be applied.

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