

SUSTAINABLE (RE)DEVELOPMENT OF TOURISM DESTINATIONS AS A PLEDGE FOR THE FUTURE – A CASE STUDY FROM THE WESTERN BALKANS

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Abstract: The study aims to analyse and thus obtain a comprehensive understanding of the current situation, issues, needs, and challenges related to the tourism sector in the five Western Balkans economies in the post-COVID-19 context. The survey collects and analyze information for each of the five Western Balkans economies and explores the needs and trends of the current stakeholders in the tourism sector and how sustainable tourism can be used to overcome future uncertainties. The results are further discussed from the point of Western Balkans economies and tourism destination to make their management more sustainable for the future. Western Balkans countries have the potential for sustainable tourism development, but to better position themselves in the tourist market, they need to achieve a competitive advantage. Bearing in mind the changes that occurred during and after the crisis, it is necessary to have a good plan for the re(development) of tourist destinations.

Keywords: crisis management, destination management, sustainable tourism, post-COVID-19 recovery, Western Balkans

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INTRODUCTION

According to Kumar and Raman (2024), the ability of tourist destinations to adapt represents a key aspect of crisis management. It is necessary to look at the problem from different angles and come up with a solution based on research and scientific results (Sun et al., 2021). The crisis during the Covid-19 pandemic showed that tourism can respond to numerous problems that tourist destinations were facing (Camară, 2022). First at all, with forms of tourism that can satisfy the primary needs of modern man: the health need (Gibson, 2019). By studying the research that supports that kind of view (Senbeto, 2022; Rastegar, 2022; Liu-Lastres et al., 2024; Gan et al., 2024) it can be concluded that numerous countries and their Tourist Organizations have responded to such forms of tourism, which have the epithet: sustainable (Antolini et al., 2024; Fu et al., 2024). Sustainable tourism (Santiago et al., 2024), i.e., “Green tourism” (Tok et al., 2024), “Environmental tourism” (Liu et al., 2022), “Agro tourism” (Susila et al., 2024), “Rural tourism” (Du et al., 2024), “Recreational tourism” (Bojović et al., 2024), “Wellness and Spa tourism” (Li and Wen, 2024) etc., have become not only a trend, but a form of sustainable development and a pledge of the tourist destinations future. So, it is quite clear that the development of precisely these forms of tourism will be increasingly represented in the tourist destinations supply, i.e., all countries that want to put themselves in the future tourism market will base their competitiveness on uniqueness and specificity in terms of sustainable tourism supply.

The paper started from the main hypothesis H that the Western Balkans has the resources for sustainable tourism development and that sustainable tourism can be the basis for achieving a competitive advantage in relation to the main competitors from the environment. The Western Balkan as a political and geographical determinant includes the economies of Albania, Bosnia and Herzegovina (BIH), Montenegro, North Macedonia, and Serbia (World Bank), which represent the

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heart of Europe (EEAS), whose rich cultural heritage is multi-layered, whose history is often colorful (Manchev, 2001) and full of challenges. Precisely, this influenced the Western Balkan region to remain undiscovered, insufficiently unknown, and to some extent even mystical for a broader European and global audience. Pandemics largely hit all five Western Balkan economies and led to a huge fall in tourist arrivals (nearly 60% on average) and overnight stays (54.7% on average) in 2020 [8], in addition to reduced tourism revenue and exports, which lessened the contribution of tourism to the total GDP and endangered many jobs. Before the Coronavirus pandemic, in 2019, the economies of the Western Balkans were visited by 12 million people, which brought a total profit of 7.2 billion euros, while tourism accounted for 10.2% of the regional GDP [8]. After the pandemic, tourism globally recovered by 70% and in the Western Balkans by as much as 92% (OECD).

These five economies face many challenges along the recovery way. In the core, they are related to the need to adapt and enhance their tourism offer to the changed travel market, improving the management of the tourism sites to provide more sustainable tourism products. This is especially important, bearing in mind the numerous potentials that can support the concept of sustainable tourism development in the direction of sustainable recovery and lasting change (OECD) adopting SDGs (Sustainable Development Goals) as the fundamental development guidelines. However, on that path, it is crucial to analyze the current situation and identify the main problems, challenges, needs, and gaps in the tourism sector of the Western Balkan region. It is essential to understand the recovery strategies these countries have developed and implemented to keep their tourism sectors stable in uncertain and turbulent times. In light of this, the paper aims to obtain a comprehensive understanding of the current situation, issues, needs, and challenges related to the tourism sector in the five Western Balkans economies in the post-COVID-19 context (EU Commission).

Although numerous authors have analyzed the negative impact of COVID-19 on the tourism sector internationally (Gunter et al., 2022; Yang et al., 2022; Korinth, 2022), even at the level of the Western Balkans economies (EBRD; Nientied and Shutina, 2020), where limited attention has been paid to identifying outstanding gaps in the tourism sector that arose in the post-COVID-19 period between valid tourism policies, measures and strategies on the one hand, and the real needs of tourists and key stakeholders (at the level of individual countries and the Western Balkans region as whole), on the other. In this sense, this study seeks to contribute to the understanding of the impact of crises on the tourism sector of the Western Balkans economies, the changed tourists' needs, and consequently, the need to take action to create conditions for the development of more sustainable and resilient tourism in the coming period, offering practical implications for stakeholders. Additionally, although at the global level, research regarding the need to create regional tourism partnerships and joint tourism products is increasing (McComb et al., 2017; Thraenhart and Morrison, 2023), in the Western Balkans, this is still an insufficiently researched part, especially from a practical aspect, which represents another research gap to which this study seeks to contribute.

Bearing all this in mind, it was concluded that all five observed WB countries share similar advantages when it comes to sustainable tourism development. Resources adequate for the development of numerous sustainable forms of tourism are singled out. With their activation, the potentials would be transformed into competitive advantages, and a better positioning among competitors would be made possible by the comparative advantages of each country, individually.

Theoretical Background

Despite the insufficiently developed general and tourism infrastructure (Mansi et al., 2020), inadequate level of tourism products development and their diversification (Lehmann and Gronau, 2019) high fragmentation of the tourism market (Nientied and Shutina, 2020) unfavourable accessibility and seasonal demand (Ndou et al., 2023), insufficiently efficient education and inadequate knowledge on benefits that sustainable development can bring (Göler, 2018; Melovic et al., 2019), resulted in a limited understanding of the concept of sustainable tourism development (Göler, 2018; Ciro, 2019), applied more competitive than co-operative approach (Nientied and Shutina, 2020; Porfido, 2020), tourism in the Western Balkans region continues to flourish mainly due to its the natural and cultural richness, but above all, the spirit of its inhabitants (Stankova and Kaleychev, 2022). In pre-pandemic period, tourism records strong growth in the Western Balkan region, proving once again that it is one of the fastest-growing global economic sectors today (Kennell et al., 2020). Among other things, the growing role of tourism in the Western Balkans region can be partially explained by its positive influence on the region's democratization process and the stimulation of European integration (Priniotaki-Ioannis and Kapsis-Stavros, 2008). Some authors go a step further (Benner, 2019) and claim that tourism will help the Western Balkans region overcome development gaps and reach the desired level of overall development.

However, the positive surge was interrupted by the COVID-19 pandemic, which strongly affected the global economy and especially the tourism sector (Hussain and Fuste-Forne, 2021). The emergence of "pneumonia of unknown origin" in Wuhan, China, in December 2019 caused unprecedented consequences on people's psychological and physical aspects (Li et al., 2021). The crisis did not avoid the tourism of the Western Balkan economies, which led to a tourism collapse, especially in countries whose economies were highly dependent on tourism, such as Albania, Croatia, and Montenegro where tourism accounted more than one fifth of total economy (Bieber et al., 2020; EBRD). The pandemic brought a sharp decline in tourism receipts and remittances due to travel restrictions and shocks in emission markets (OECD). Further, the health crisis dealt a big blow to the employment rate in tourism (Lazić and Bradić-Martinović, 2021). Hence, the backbone of the adopted measures by the competent authorities in Western Balkans region was aimed at maintaining employment and assisting the most vulnerable groups (Horwart) respecting "national values, politics and variations" of advice from local experts (Li et al., 2021:1). Nevertheless, tourism once again demonstrated its flexibility and power of relatively quick recovery, especially in the Western Balkans region. According to UNWTO data (2022a), (UNWTO, 2022) despite the forecasts, already in the first seven months of 2022, Serbia, Albania, and North Macedonia have recorded a strong recovery of tourism income of 73%, 32%, and 24%,

respectively (UNWTO, 2023). That trend continues in the first seven months of 2023, where certain countries of the Western Balkans region, such as Albania and Serbia, record double-digit growth compared to the same period in 2019: 56% and 17%, respectively (UNWTO, 2023). At the same time, Albania, Montenegro, and North Macedonia recorded an increase in income from international tourism by 82%, 77%, and 56%, respectively, compared to the pre-pandemic level (UNWTO, 2022). The structure of tourist demand in the Western Balkans region in the post-lockdown period has changed (Lazić and Bradić-Martinović, 2021), with the dominance of domestic tourists and a very intensive mutual exchange of tourists (UNWTO, 2023).

The strong recovery in the Western Balkans region has put, to a certain extent, the understanding of what bring the so-called “new normal” in the background. "New normality," considered in the context of tourism and hospitality, essentially refers to new patterns of tourist behavior and their preferences, tourist & hospitality industry responses, and decision-makers' actions, risk assessment and management (Nientied and Shutina, 2020) emphasizing that the health crisis caused by the pandemic can be a trigger for (positive) changes, in other words, a potential game changer in the tourism industry (Hall et al., 2020; Gössling, 2020) of the Western Balkans region, finally putting sustainability, resilience and green transition in the foreground, favouring smarter and safer tourism (UNWTO), which in the pre-COVID 19 periods, despite the declarative strategic determinations of Western Balkans region policymakers, and the efforts of global tourism authorities such as UNWTO and WTTC, did not occur to the expected extent (McCool, 2015). In the Western Balkans region, among others, sustainability intends to promote sustainable forms of tourism, tourism's contribution to the well-being of local communities, availability and reduction of seasonality, and the employees working conditions improvement (Radovanov et al., 2020).

A continuation of changing tourist consumption habits based on higher environmental and social awareness and concern for sustainability and social issues is expected (Del Valle, 2020). Further, research shows that awareness of green tourism and returning to nature has gained value in the post-COVID-19 period (Kupi and Szemerédi, 2020). More scholars warn (Nientied and Shutina, 2020; Porfido, 2020; Arežina, 2020; World Bank) that Western Balkans economies should not be fooled by the statistics that testify to the relatively quick tourism recovery because a return to the old means insufficient competitiveness on the global tourism market and loss in the long term (Nientied and Shutina, 2020).

Instead, decision-makers and creators of tourism policies in Western Balkans regions, whose economies are deeply integrated into the EU which represents the major source of international tourists of the region, should take into account the trends and the EU strategic determinations, which are primarily contained in the EU Green Deal and the Next Generation program. Green and digital transformation, circular economy, CO₂ emissions reduction with permanent strengthening of sustainable tourism development (World Bank; Mitić et al., 2022), and adoption of new knowledge and skills with the inclusion of new technological solutions in tourism value chains are becoming imperative. Also, latest technological solutions, including the Internet and its numerous tools, have enabled social media networks to function, allowing their users to increasingly participate in generating destination brand content (Zeng et al., 2023). Further, it is necessary to raise awareness that modern tourists are aware of climate change challenges and prefer destinations that can offer more sustainable but authentic tourist experience, which implies the need for additional diversification of the Western Balkans region's tourist offer (Porfido, 2020). On the other hand, raising awareness and, despite historical disagreements, the need to strengthen cooperation towards creating a unique tourism brand for the region is gaining more importance (Cela et al., 2022).

MATERIALS AND METHODS

Respecting research topic, the main aims of the paper will be achieved through a two-stage process of the research (Figure 1), (Huang et al., 2021; Roya et al., 2023), which includes combination of quantitative and qualitative approach: Stage 1 refers to desk research aimed to collect and analyze strategic documents for each of the five Western Balkans economies. This stage is about gathering and reviewing information on post-COVID-19 trends in Western Balkans economies, examining tourism measures introduced by Western Balkans governments, an overview of tourism strategic documents and plans for Western Balkans countries, the status of EU approach in Western Balkans economies regarding tourism, an overview of human resources in tourism sector in Western Balkans economies followed with regional documents that take into account all five economies of Western Balkans.

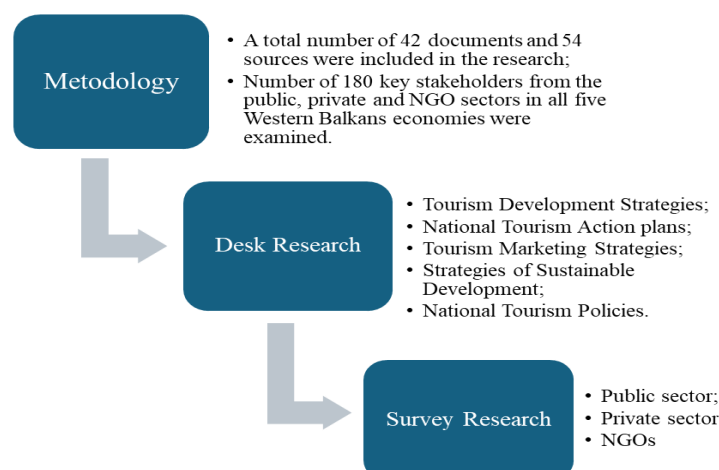


Figure 1. Methodology flow chart (Source: Prepared by the authors)

Desk research included analysis of key documents for each country, such as tourism development strategies or national tourism action plans, tourism marketing strategies, strategies of sustainable development (section related to tourism), and national tourism policies. A total of 42 documents were included in the research. A total of 9 regional documents were analyzed as well as 33 national documents: Albania (3), Bosnia and Herzegovina (7), Montenegro (8), North Macedonia (7), Serbia (8). Analysis of the plans on the local level could not be done, since the authors analyzed total of 42 documents and 54 sources on a national and regional level. Further, the analysis included documents on the national level addressing the following issues: the impact of COVID-19 on tourism development and how it is managed, analysis of the effects of COVID-19 on tourism, proposed strategies to deal with new uncertainties, analysis of strategies, policies, and achievements that are addressing or are in line with the EU Agenda and the Green Deal, existence of measures related to the further development of tourism, especially the instruments through which international organizations, donors, and creditors support tourism development, EU status in part related to the Green Agenda and SDG in tourism for Western Balkans.

Stage 2 refers to conducting survey research with tourism stakeholders in Western Balkans. The purpose of this stage is to systematically explore the needs and trends of the current stakeholders in tourism sector promotion and explore the impact of COVID-19 on the tourism sector in the Western Balkans economies and how sustainable tourism can be used to overcome future uncertainties. In order to do so, the thorough questionnaire is conducted with 180 key stakeholders from the public, private and NGO sectors in all five Western Balkans economies. The survey was conducted from January till the end of February 2023. The survey is optimized so that it can be filled out via an online link using Google forms and sent by e-mail or other means of online communication. Moreover, the part of the sample is interviewed by phone, Skype and zoom. The total sample that was targeted was 180 (approximately 48 subjects from public sector, 108 representatives of private and 24 representatives of NGOs). The questionnaire consisted mainly of open questions in order to gain some initial insights into their opinion about topic, but also some close questions analyzed through descriptive statistics.

Public representatives included the national ministries in charge of tourism, representatives of the national tourism organizations or regional tourism organizations, public tourist attractions (e.g., museums), Universities, media and other important decision-makers in tourism coming from the public sector. Representatives from the private sector are representatives from the hotel industry, travel agents, tourist attractions, entrepreneurs, media, food producers and other private tourism-related subjects connected with different types of tourism (i.e., city/town, rural, eco-tourism, cultural tourism, wellness, and business). NGOs included in the survey were NGOs related to tourism, sustainability, local development, tourism, and business associations, etc. The major topics the survey covered include demographic information about stakeholders (gender, age, education) and their position and relevance for tourism, work experience in tourism, etc; opinions, experiences, and the current situation in tourism in the post-COVID-19 pandemic context; experience and findings of tourism sector providers regarding tourists' behavior and needs in the post pandemic; and the views and opinions of stakeholders about the benefits and challenges for further promotion of tourism development in the five Western Balkans economies.

RESULTS AND DISCUSSION

Desk Research Results (Research Stage 1)

As previously mentioned, desk research included the analysis of the total of 42 documents. A total of 9 regional documents were analyzed as well as 33 national documents. The results of the overview of tourism development in five Western Balkans economies are presented in the following text:

Overview of Tourism Development and Tourism Recovery after COVID-19

The data show that Albania, Bosnia and Herzegovina and Serbia are the leading countries regarding the number of tourism arrivals, while Albania and Montenegro dominate in the number of tourists' overnight stays. North Macedonia is the least visited country in terms of both tourism arrivals and overnight stays. When it comes to the drop in tourists' visits and overnight stays after Covid-19, *Albania* succeeded in almost fully recovering in 2021, obtaining almost 98% of the tourist arrivals and 79.5 overnight stays before COVID-19 (Chamber investment forum Western Balkans). Judging by the percentage increase, Albania was the leading country in the number of tourists arriving and in the value of international tourism receipts in 2019 when compared to the previous year (2018), (Chamber investment forum Western Balkans). The earthquake in 2019 and the COVID-19 pandemic in 2020 both affected the economy and were likely to drive Albania into recession and expose its external and fiscal vulnerabilities.

Bosnia and Herzegovina has had the highest average annual growth of international tourist arrivals (14%) in the Western Balkan region during the last decade (Chamber investment forum Western Balkans). In 2021, Bosnia and Herzegovina obtained around 58.5% of the tourist arrivals and 66.1% overnight stays compared to 2019, (Agency for statistics of Bosnia and Herzegovina), showing signs of slow recovery. The Government has established the National crisis headquarters for the prevention and control of the pandemic to slow its spread and protect the health of people. Policy measures to stop emigration and more rational spending of funds due to the pandemic should bring results despite the country's very complex institutional structure and unused resources. Reforms are necessary to address structural and institutional weaknesses and strengthen competitiveness.

Montenegro has had the largest percentage increase in tourist arrivals in comparison to the previous year (2018), but in terms of the number of tourist arrivals in 2019, Montenegro is second to Albania (National Tourism Organization of Montenegro). Based on the performance overview for each country, published by the World Economic Forum 2152 (World travel tourism & tourism council), Montenegro has the best overall rank (67th). Montenegro has reached 63.1% of tourist arrivals and 68.29% of overnight stays before COVID-19, showing signs of steady recovery (Monstat).

North Macedonia in terms of the number of tourists arriving in 2019 ranks last. It has reached 59.28% of tourist arrivals and 70.91% of overnight stays before COVID-19 (Republic of North Macedonia, State statistical office), showing that the number of tourists is recovering slowly, but they stay longer at their destination.

Serbia in 2019, was second to Albania in the value of international tourism receipts and together with BIH is a leader in terms of average receipt per arrival. In 2021, it has reached 70.2% of tourist arrivals and 81% of overnight stays before Covid-19, showing signs of fast recovery (Statistical Office of the Republic of Serbia).

Regarding the total contribution of tourism to GDP, Montenegro is leading by 30.8% (World travel tourism & tourism council), while Serbia is in the last place with 5.9% (World travel tourism & tourism council) of the total contribution of tourism to GDP. When analyzing the total contribution of tourism to employment, Montenegro, Albania and Bosnia and Hercegovina are leading, while the rest of the countries still have rather small contributions of tourism to employment. The indicators of foreign exchange inflow from tourism show the leading positions of Albania and Serbia, followed by Montenegro, but it can be also noticed that Serbia in this case shows slower signs of recovery, compared to the other analyzed countries (World travel tourism & tourism council). When comparing the mentioned tourism indicators in 2019 (before COVID-19) and 2021 (after COVID-19) it is evident that tourism is still struggling to reach the levels before COVID-19, but there is a good tendency in tourism recovery. Regarding key tourism products, it is notable that the offer is very diverse, especially in the case of Montenegro, Albania and Serbia; however, the level of development of these products differs, with Montenegro having the leading position. Montenegro has the most diverse sustainable tourism offer consisting of rural, cultural and religious, health, sports and recreation, ski, adventure, nature-based tourism (hiking, biking, mountaineering), camping, glamping, golf tourism, nautical, and ethno-gastro tourism.

This is followed by Serbia, as its Strategy of Tourism Development 2016-2025 (Strategy of tourism development of Serbia) recognizes some sustainable tourism as priority tourism products namely mountain tourism, spa & wellness/health tourism, thematic routes (natural and heritage, bike routes), rural tourism, nautical tourism special interests-adventure and ethno-gastro tourism. Albania also promotes sustainable tourism products as eco-tourism, rural, adventure, special interest, wellness, and thematic routes. When it comes to North Macedonia (events, mountain tourism, spa & wellness, wine routes and adventure), Bosnia and Hercegovina (mountain tourism, spa & wellness and health tourism, rural tourism, special interests-adventure tourism and ski). The analyzed Western Balkan economies differ in their tourism recovery measures but also in measures coming from international donors, SDG's in tourism sector, human resources in tourism etc.

Post-COVID-19 Measures

In Albania, post-COVID-19 measures mainly focus on governmental support to the private sector in advancing tourism in rural areas which will enhance further tourism development. This especially refers to small, private accommodation facilities development in rural but also coastal areas. Albania is one of four destinations worldwide that lifted the travel restrictions to continue tourism. This country has made some progress in developing a tourism data collection framework and in developing a VET framework. The Albanian Government has established the national tourism recovery programme, which includes incentives to local businesses, establishing partnerships with airlines, promoting blue tourism, online promotion of Albania as a safe tourist destination, organizing events and reorienting public investments. After overcoming the crisis, economic activity and the earthquake damage recovery are expected to boost growth, but structural reforms are needed in the medium-term

Bosnia and Herzegovina also emphasized strengthening the private sector but in terms of IT skills development and digitalization. The recovery plan includes the identification of new markets to attract in short term with specially tailored marketing approaches and focus on less seasonal tourism offers. Moreover, a recommendation from the Ministry of Foreign Trade and Economic Relations of BIH is to promote domestic tourist attractions. It is extremely important to convey to the citizens the importance of traveling to local destinations in an attempt to recover domestic tourist capacity in the circumstances caused by the pandemic.

Montenegro has recognized the importance of green, smart and sustainable tourism for achieving the recovery goals such as - an increase in tourism spending, reducing seasonality and regional imbalances, but also improving the local quality of life.

Some good measures focused on recovery are related to intense targeted promotion, reduction of the grey economy and regular following of the trends and changes in the market to adapt tourist offers.

North Macedonia is, on the other hand, emphasizing on strengthening domestic tourism, cooperation of the subjects in the country but also between countries and sustainable tourism development. They strive to shift from mass tourism to individual experience design and sustainable tourism products.

Serbia has implemented some specific measures related to post-pandemic recovery such as developing the safe travel protocol (using the World Travel and Tourism Council Safe Travels standard) and creating a new support package for the tourism sector (wage subsidies, business subsidies, domestic vouchers, and business grants). Moreover, in 2020, the Government set aside 2.8 billion RSD for 560,000 tourist vouchers worth 5,000 RSD intended for (at this moment maximum) 560,000 citizens of Serbia who want to spend their vacation (or part of it) in the Republic of Serbia, to develop sustainable domestic tourism (Ministry of tourism and youth, Republic of Serbia).

Mutual key findings for Western Balkans economies

Four Western Balkans economies (Albania, Montenegro, North Macedonia and Serbia) have tourism development strategies and are committed to the development of an efficient governance structure involving inter-ministerial coordination, vertical cooperation, and dialogue with private and other tourism stakeholders. Albania, Montenegro and Serbia have made the most progress in this area. Despite efforts to develop tourism investment policies, tourism

innovation frameworks are not yet in place. Challenges include monitoring and evaluation, investment procedures, urban planning and awareness raising among private investors. The competitiveness of tourism marketing and branding remains a challenge for most Western Balkans economies and it is pivotal to increase their visibility in international markets. Digital marketing frameworks are incipient. Albania, Montenegro, North Macedonia and Serbia economies have established tourism brands. Only Montenegro, Serbia and the Republic of Srpska in BIH have valid marketing strategies that have not yet expired. Marketing strategies are under development in all other economies.

The crisis revealed gaps in tourism development that will need to be addressed in the future. The main gaps and challenges in all Western Balkans economies are similar, therefore establishing regional cooperation to address these challenges which could help each Western Balkans economy to overcome them more efficiently. All Western Balkans economies have made some progress in enhancing the overall tourism policy framework by improving the governance structure and cooperation with the private sector. Progress has been made in accommodation capacity, the quality assurance framework, in providing incentives for investment in accommodation and other tourist infrastructure as well as in tourist information availability and tourism data collection. Comprehensive natural and cultural heritage enhancement frameworks for sustainable tourism development are still incipient. The Western Balkans economies should focus on establishing effective inter-ministerial cooperation and introducing regular monitoring and evaluation of policy measures. The absence of a common regional tourism brand and marketing activities lessens the visibility of the Western Balkans as an attractive tourist destination that offers a diversity of unique tourist experiences.

SURVEY RESULTS

Profile of Respondents (Research Stage 2)

The sample includes 181 stakeholders from five Western Balkans economies, 50 of which are public, 107 are private and the rest of the sample is stakeholders from NGOs (24). The sample consists of 50.3% of male and 49.7% of female respondents. The average age of the sample is 38.69 (std. 10.175) with an age range 20-65 years. Most of the respondents are highly educated (bachelors – 28.2%, masters 28.2%, PhD 35.9%), while there is 21% of those have finished secondary school. The average work experience of the respondents is 13.7 (Std.8.45), with a range of 1-37. The basic characteristics of respondents are provided in Table 1. The number of respondents per country is provided in Table 2.

Table 1. Characteristics of respondents (N=181)

Gender		Work experience		No of respondents per institution type	
Male	50.3%	Average - 13.7 years (Std.8.45), with a range of 1-37		Public	50
Female	49.7%				
Age (Average)		No. of respondents per Country		Private	107
38.69 years, age range 20-65 years, (std. 10.175)		Albania	36		
Education		Bosnia and Herzegovina	32		
Secondary	21%	Montenegro	35		
Bachelors	28.2%	North Macedonia	24		
Master	28.2%	Serbia	54		
PhD	35.9%				

Table 2. The number and structure of respondents per country

Country	Public	Private	NGO	Total
Albania	10	21	5	36
Bosnia and Hercegovina	10	18	4	32
Montenegro	10	20	5	35
North Macedonia	6	15	3	24
Serbia	14	33	7	54

Table 3. The main strengths and weaknesses of destinations according to stakeholders' opinion

Albania
Strengths: country awakes curiosity, vivid history, rich natural and cultural heritage, gastronomy and wine, high safety, beach tourism, and cheaper than other coastal destinations. Weaknesses: lack of promotion, lack of strategic vision, tourism infrastructure, low destination awareness
Montenegro
Strengths: elite tourism, beautiful coast, diverse visitors, diversified tourism offer, rural tourism, good air connectivity with main markets. Weaknesses: high seasonality, low hotel and road infrastructure, lack of employee training, non-sustainable use of tourism resources.
Bosnia and Herzegovina
Strengths: hospitality of people, pristine nature, rich cultural heritage, central position on Balkans, gastronomy, plenty of activities in nature. Weaknesses: low connectivity with other parts of Europe, low level of digital promotion, lack of specialized restaurants, lack of cooperation between stakeholders, no existence of a central tourism organization, low destination awareness, lack of tourism products.
North Macedonia
Strengths: geographical predispositions, climate, cultural heritage, 43 lakes, more than 4,000 archaeological sites, five Roman cities, great cultural and historical wealth, gastronomy and wine tourism, developing business tourism, a wealth of thermo-minerals sources. Weaknesses: Unfavorable political situation, poor employment in industry, the unused potential for active tourism, low quality of tourism infrastructure.
Serbia
Strengths: Natural and cultural heritage, hospitality of people, rich nightlife, gastronomy, wine tourism, rural tourism. Weaknesses: low promotion and destination image, lack of tourism infrastructure, lack of walking and cycling paths, lack of good tourism interpretation, tourism signalization, lack of tourism activities that would prolong the tourism stays.

Tourism in the Post COVID-19 Pandemic Context

Firstly, the respondents were asked to state the main strengths and weaknesses of their destinations, to identify the strengths and the weak points of each surveyed destination. The answers are summarized in Table 3.

It can be seen that Western Balkan countries share a lot of common strengths and weaknesses. The major strengths of all destinations are rich cultural and natural heritage, good geographical predispositions, and hospitality of people. Some common weaknesses they share include a lack of tourism infrastructure, low connectivity, low destination awareness and promotion as well a lack of employee training. The respondents were then asked if they think that tourism of their destination is undervalued on regional and international levels. The majority of stakeholders say they strongly believe their destination is undervalued, and this attitude is the most prominent in Bosnia and Herzegovina, North Macedonia and Serbia.

Furthermore, the respondents were asked to estimate on a scale from 1- not affected at all to 5 - very affected, how much their business activities were affected by COVID-19. The results indicate that all stakeholders consider their business to be moderately affected, while stakeholders from Serbia and Bosnia Herzegovina were the least affected. This can be explained by the high increase in domestic travel in those two countries. The estimation of how much the business activities were affected is provided in Table 4. The respondents were also asked what were the most affected areas and major challenges in their business/activities during/post-pandemics. The stakeholders emphasize that their businesses were largely affected from various perspectives. They state that tourism was one of the first sectors to be deeply impacted by the pandemic, as measures introduced to contain the virus led to a near-complete cessation of tourism activities around the world.

Table 4. Estimation of how much the business activities were affected by COVID-19 (%)

Country	1	2	3	4	5
Albania	2.8	8.3	27.8	33.3	27.8
Bosnia and Herzegovina	0	0	71.9	6.3	21.9
Montenegro	0	0	44.4	30.6	25
North Macedonia	0	4.2	29.2	29.2	37.5
Serbia	0	14.7	50	20.6	14.7

The answers and their frequencies are summarized as follows: Lack of tourists and fewer people involved in tourism (12); Insufficient subsidies (21); Reduced business capacities (7); The crisis put millions of jobs in the tourism sector at risk (1); Very tangible economic and social consequences for many people, places and businesses (1); Problem with paying salaries to workers (31); Operating at a loss (15); Lack of working stuff (19); Events and large gatherings were prohibited (1); Lack of investments in tourism (5); Small and medium enterprises were largely affected (13); Lack of budget for tourist activities and new projects (5). Moreover, the majority of them state that they are in the process of recovery and the tourist and business flows are reaching higher levels. The respondents were then asked if their entity applied some measures and solutions to tackle these challenges in the post-pandemic travel market and they were asked to shortly elaborate. The majority of them state they have adapted to the COVID-19 rules and new situation but did not provide an explanation. Some of them state they applied the following changes and measures: Developed a new business strategy to attract new markets (3); Adapted the exhibition space to provide more distance between visitors (2); Focus on domestic and regional markets (15); Applying all the measures advised by the country to fight pandemics (22).

Promotion of active vacation and outdoor activities (8); New marketing approach focusing on well-being and cleanliness (6); More aggressive promotional campaigns (3); Training has been conducted with the tourism stakeholders for the introduction and the appliance of the protocols for the protection of tourists (Safe Travels) (2); Safe Travel stamp was received which added value to safety of tourists (1); Applied safety measures according to ATTA standards (1); Virtual events and exhibitions were introduced (5). In the next question, the respondents were asked to shortly explain if they know about some governmental measures to tackle post-pandemic issues in tourism. The most important governmental measures that were reported were: Reduced VAT for the accommodation and gastronomy sector (2); Removing visas for India, UAE, Egypt, Saudi Arabia etc. New markets replaced the classical western countries (1); Support of small business and individuals through payments (11); The government via Agency for tourism support and promotion participated in making the pandemic and post-pandemic promotional videos (5); The financial support for travel agencies and travel guides (8).

Regarding some external support in overcoming COVID-19 consequences in tourism, the respondents did not mention much data about how they were supported. Several stakeholders mention that the external support comes from traditional donors, such as JICA training on tourism promotion and marketing-new normal (pandemic and post-pandemic period), and the video commercials for safe travels made by Swiss Agency for Development and Cooperation.

Regarding technological innovations to support tourism products in uncertain times in their destination, most of the respondents are largely unaware of how technological solutions could help them in overcoming the negative effects of COVID-19. For North Macedonia stakeholders state that two technological solutions are needed. The first and most important one is the real time - overnights calculator, as central and local governments, will know what is the effect of the funds they invest in various events, additionally, hoteliers will know what is the number of overnights in the city/town, compared to their occupancy. The second technological innovation that should be implemented is the Satellite Account. Moreover, stakeholders mention a nationwide application with an integrated map and possible audio guides.

Concerning new socially/environmentally responsible tourism products developed to tackle post-COVID-19 issues in tourism, the respondents particularly emphasized rural and agritourism started to thrive due to the changes in the travel behavior of tourists (Albania) (2); eco-tourism and nature-based tourism (Montenegro) (5); the emergence of green destinations (such as Tivat in Montenegro) (2); Higher involvement of the governments in getting eco certifications (Montenegro)(7); Higher use of solar panels and other renewable energy sources in tourism (Albania) (1); Adventure

tourism which is mainly responsible for local communities (2); Tourism staff training – “Safe and clean” programme of education and training (Serbia) (3); and production of new souvenirs made of domestic resources (for instance wool) (1).

Tourists’ Behavior and Needs in the post-COVID-19

The first question in the second part of the survey referred to the major changes in tourists’ needs and behavior in post-pandemics that respondents have noticed. The results are presented in Table 5.

Apart from these, some respondents think that tourist are starting behaving like before pandemics, and that there were no significant changes in their travel behavior. In the next question, the respondents estimated their level of agreement (1-I totally disagree, 5-I totally agree) with the statements shown in Table 6. The respondents mainly agree that requirements for hygiene are higher, that tourists choose more nature-based activities and that open-space activities are more popular in the post-COVID-19 period. The respondents were also asked how they plan to adapt to the changed travel market. They have option to choose multiple answers and the frequency of each answer is shown in Table 7.

Table 5. The key answers related to tourists’ behavior and needs in the post-COVID-19 can be grouped as follows:

The key answers related to tourists’ behavior and needs in the post-COVID-19 (grouped responses as follows)
Keeping distance and hygiene (7)
Visitor number (tourists) has slightly increased and as well the length of staying using mainly hotels (2)
Mostly people are traveling in short distances, not for longer days especially those who travel individually and go after unpopular places (4)
Tourists are going towards smaller groups (11)
Tourists want more rural experiences, natural attractions, relaxing and meeting the locals (7)
Tourists are more concerned about health and hygiene (6)
Search for destinations in nature, outdoor activities (9)
More interest for rural vacations (2)
Tourists became for demanding (15)
More individual and family travels (4)
Longer stay at destination (5)
More concern about safety (2)
Higher use of bicycles on destinations (1)
Requests of unique destination and more local experiences (3)
Responsible Traveling (1)
Search for experiences on local tradition and food experience (2)
Less expenditure on destination (8)
Eco-friendliness and insurance policies in case of emergency (2)
More opting for “clean and safe” accommodation (5)

Table 6. Respondents’ attitudes regarding change in tourists’ behavior

	1	2	3	4	5
Tourists’ length of stay becomes longer after pandemics	3.9	22.1	35.4	23.8	14.9
Tourists avoid traveling in large groups and being in crowded places	5	1.1	29.3	32	32.6
Requirements for hygiene are higher	0.6	2.8	27.1	22.1	47.5
Tourists choose more nature-based activities	2.2	9.4	16	22.7	49.7
Open-space activities are more popular in the post-COVID-19 period	5.5	9.4	11	21	53
Social distancing at sites is required by tourists	8.8	4.4	47	31.5	8.3
Dominant travel segments changed after COVID-19	14.9	3.9	11	34.3	35.9

Table 7. Ways of adaptation to the changed trends in the travel market

Adaptation to the changed travel market	Frequency of answers
a) With new, adapted tourism products	61
b) With joint products with other subjects in tourism – i.e. travel and cultural routes	56
c) With stronger cooperation in promotional activities	36
d) By new types of product certification - i.e clean and safe, environmentally friendly etc.	31
e) Understand and track new market trends and the drivers of demand	56
f) Taking advantage of renewed interest in sustainability (in shaping tourist activities)	43
g) Implementation of stronger health and hygiene protocols in tourism	42
h) By providing clear information to visitors, avoiding uncertainty	47
i) Strengthened multi-lateral cooperation with other Western Balkans countries	42

Table 8. Types of cooperation between tourism actors

Type of cooperation	Frequency of answers
a) Joint promotion	62
b) Joint tourism products	62
c) New projects	72
d) Training and Education	63
e) No cooperation till now	22

The results show that they mainly opted for new, adapted tourism products and joint products with other subjects in tourism – i.e. travel and cultural routes, but also understanding and tracking new market trends and the drivers of demand.

Afterwards, the respondents were asked if they cooperate with other tourism actors in tackling the changes in the market and what kind of cooperation do you have. The frequency of answers is shown in Table 8. The answers indicated that all listed types of cooperation are very present with new projects being the most dominant.

The respondents were also asked to estimate what kind of support –internal and external (local, regional, national, international) they think would be the most beneficial in tackling post-COVID-19 issues in tourism. The scale that was applied to estimate their opinion was 1 (not beneficial at all) to 5 (very beneficial). The answers are presented in Table 5.

The results show that respondents think that cooperation on new tourism strategies and plan documents, projects and tourism initiatives, support in making cooperation between other tourism subjects in the region and joint promotion and branding with other Western Balkans countries are the most beneficial types of support. Regarding the technologies and tools that could be used for joint tourism promotion and branding on the Western Balkans level, the respondents state that digital branding platforms, websites for specific tourism products, and joint promotional tools for the region are the most beneficial (Table 10). The encouraging result is that all surveyed respondents would like to join some future joint work or projects with other destinations in the Western Balkans. In the last question, respondents evaluated on a scale from 1 (I totally disagree) to 5 (I totally agree) the degree of their agreement with the potential of the stated socially and environmentally responsible measures to create more resilient tourism development. The results are shown in Table 11.

Table 9. Type of support the respondents consider beneficial in fighting COVID-19

	1	2	3	4	5
Direct funding	0.6	4.4	26.5	26	42.5
Legal frameworks	0	8.8	22.7	35.4	33.1
New tourism strategies and plans	0.6	5	7.2	40.9	46.4
New infrastructural projects that will support tourism	0.6	11	7.2	33.1	48.1
Cooperation on projects and tourism initiatives	0.6	4.4	13.8	21	60.2
Support in making cooperation between other tourism subjects in the region	0.6	0.6	8.8	34.3	55.8
Joint promotion and branding with other Western Balkans countries	1.1	5	10.5	15.5	68
National stimulations/incentives for tourism development	0.6	1.1	28.7	12.2	57.5

Table 10. Technologies and tools that could be used for joint tourism promotion and branding on the Western Balkans level

Answers	Frequency
a) Destination specific websites	46
b) Websites for specific tourism products	53
c) Joint promotional tools for the region	55
d) Joint travel routes under the same umbrella brand	43
e) Digital branding platforms	63
f) Mobile application for travel	47

Table 11. The agreement with the potential of the stated socially and environmentally responsible measures to create more resilient tourism development

	1	2	3	4	5
Local employment	1.7	0	15.5	30.4	52.5
Empowerment of local entrepreneurship	0	1.7	13.8	18.2	66.3
Gender equality - empowering women-owned businesses and women tourism employees	3.3	3.9	12.7	32.6	47.5
Increasing youth employment	0	1.7	21.5	20.4	56.4
Green agenda of each tourism service provider	3.3	0.6	36.5	13.3	46.4
Preservation of environment	0	0	9.4	22.7	68
Monitoring of positive and negative effects of tourism on surroundings	0	3.3	19.3	19.3	58
Offering unique local products and services	0	1.7	17.7	20.4	60.2
Stronger cooperation between different tourism services providers	0	3.9	22.7	27.6	45.9
Joint work (partnership) with other countries in Western Balkans	0	6.6	16	30.4	47

The most dominant measures include local employment, empowerment of local entrepreneurship, preservation of the environment, and monitoring of the positive and negative effects of tourism on the surroundings. All this confirm the main hypothesis H that the Western Balkans has the resources for the sustainable tourism development and that sustainable tourism are the basis for achieving a competitive advantage in relation to the main competitors from the environment.

CONCLUSION

The Western Balkans region has high potential (natural and cultural heritage) for sustainable tourism development, ranging from mass tourism with overcrowded destinations to green and sustainable destinations, offering unique tourism experiences. However, research results regarding changes in the behavior and needs of tourists visiting the Western Balkans region indicated that tourists in the post-COVID-19 period are becoming increasingly demanding, especially in terms of safety and hygiene, and they travel in smaller groups. Aware of the challenges brought by climate change, they prioritize sustainable tourism development, which will provide them with a nature-based or even rural experience, enabling them to immerse in the local environment. These results are particularly important considering that the tourists' behavioral intentions are in a direct positive correlation with the destination's competitiveness (Zeng et al., 2021). Besides, improving the tourist infrastructure and applying technological innovations are necessary to overcome common weaknesses such as

low connectivity, low destination awareness and promotion, and a lack of employee training. To achieve this, the Western Balkan economies have to define a new strategic framework that aligns with recent changes and respects the latest tourism market trends. Further, region's economies need to additionally diversify their offer (Porfido, 2020) and disperse further tourism development to new destinations while applying and promoting the principles of sustainable tourism development. Research findings suggest that to achieve sustainable tourism development in the Western Balkans region, which will be, among other things, more resilient to some future challenges, in addition to following trends and innovations, it is primarily necessary to strengthen regional partnerships, knowing that the regional (joint) tourist offer brings advantages and multiple benefits (Thraenhart and Morrison, 2023). Open Balkan and other regional initiatives present an excellent base to create joint regional products and a common Western Balkan market, which is crucial for creating a stronger tourist image of the Western Balkans destination (Cela et al., 2022).

The Western Balkans region also needs a change in the traditional mind-set (Cela et al., 2022), which would stimulate the accelerated development of human capital and innovation (Knezović et al., 2020) as a prerequisite for the development of tourism resilience and the adoption of new business models (Reinhold et al., 2019), based on the principles of sustainability with the entire application of new technological solutions. Resilience primarily refers to establishing systems in tourist destinations that will enable them to manage adverse situations better based on the principles of trust-based coalitions, which is necessary for establishing tourism system resilience (WTTC). However, this is not a sufficient prerequisite for the progress and long-term development of sustainable tourism in the Western Balkans region. Namely, Metodijeski and Temelkov (2014) notably advocate the joint presentation and promotion of the Western Balkans region on third markets, especially long-haul ones. However, joint marketing and creating a cross-border strategic tourism brand while respecting the Western Balkans region economies' similarities, differences, and peculiarities is a relevant strategic objective. It will require the selfless sharing of knowledge and cooperation of educational institutions and experts (Ramhorst, 2021). However, above all, this process will need the Western Balkans political elites support (Petrevska, 2022). New approaches and common platforms like the Open Balkans are needed and more than welcome. They can positively impact sustainable tourism development in the Western Balkans region if the consensus of all relevant stakeholders is ensured (Petrevska, 2022). Although there are more and more studies regarding the need to create regional tourism partnerships, it is still an under-researched part of the literature (Thraenhart and Morrison, 2023). The importance of all relevant stakeholders' participation in creating regional partnerships and their potential to influence decisions was emphasized. In this sense, the findings of this research can serve as a good informative basis, aware that regional tourism partnerships are subject to constant changes and challenges.

Limitations and future research directions

Apart from the fact that this is one of the pioneer studies in Western Balkan region that analyses the responses and strategies in Post-Covid tourism recovery, focusing on authorities and decision-makers, the study also have certain limitations. The study was conducted as initial study which is rather qualitative in its nature, targeted only at authorities and decision-makers. The study represents the basis for some future quantitative research as it gave some insights into perception of the authorities and decision-makers about tourists' behavior and needs have occurred in the post-COVID-19, the level of adjustment of the existing tourism offers and capacities of the Western Balkans economies to these changes, common strategies for making entire tourism industry more competitive and resilient and awareness of the importance of technological innovations for the more sustainable tourism development. The future quantitative research should focus on visitors of Western Balkan Countries and their perceptions, needs and opinions regarding the explored elements and issues. In this way, we could capture the gap between their real time needs and the current offer at tourism destinations and define some possible necessary adjustments and improvements.

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