



REPUBLIC OF CROATIA
Ministry of
Tourism and Sport



ATTITUDES OF THE EUSAIR COUNTRIES VISITORS TOWARDS TOURISM

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NOTITIA

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List of acronyms

CBI	<i>Centre for the Promotion of Imports</i>
EU	<i>European Union</i>
EUSAIR	<i>EU Strategy for the Adriatic and Ionian Region</i>
GDP	<i>Gross Domestic Product</i>
IoT	<i>Internet of Things</i>
OECD	<i>Organisation for Economic Co-operation and Development</i>
SCP	<i>Sustainable consumption and production</i>
SDG	<i>Sustainable development goals</i>
TDGDP	<i>Tourism Direct Gross Domestic Product</i>
UN	<i>United Nations</i>
UNECE	<i>United Nations Economic Commission for Europe</i>
UNESCO	<i>United Nations Educational, Scientific and Cultural Organization</i>
UNWTO	<i>World Tourism Organization</i>
WTTC	<i>World Travel & Tourism Council</i>

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1. INTRODUCTION: SUPPORTING THE DEVELOPMENT OF SUSTAINABLE TOURISM WITHIN EUSAIR FRAMEWORK

1.1. EUSAIR framework and purpose of the study

The EU Strategy for the Adriatic and Ionian Region (EUSAIR) is one of four macro-regional strategies adopted by the European Commission and endorsed by the European Council in 2014. The Adriatic-Ionian Region covers ten countries: four EU Member States (Croatia, Greece, Italy, Slovenia) and six non-EU countries (Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, San Marino, Serbia).

The general objective of the EUSAIR is to promote economic and social prosperity and growth in the region by improving its attractiveness, competitiveness and connectivity. The Strategy is founded on four thematic priorities/pillars representing key challenges as well as key opportunities in the region:

1. Blue Growth
2. Connecting the Region
3. Environmental Quality
4. Sustainable Tourism.

For each pillar, specific topics and actions have been identified, considering the needs, urgency of the issue and added value of joint actions taken in order to solve the existing challenges or build upon the future opportunities.

The specific objectives for the Sustainable Tourism pillar (Pillar 4) are:

- Diversification of the macro-region's tourism products and services along with tackling seasonality of island, coastal and maritime tourism demand
- Improving the quality and innovation of tourism offer and enhancing the sustainable and responsible tourism capacities of the tourism actors across the macro-region.

To achieve the abovementioned objectives, this pillar focuses on two topics:

1. Diversified tourism offer (products and services)
2. Sustainable and responsible tourism management (innovation and quality).

The purpose of this professional publication/mini study "Attitudes of EUSAIR visitors towards tourism" (Study) is to be used as support in the decision-making process on specific issues related to sustainable tourism, and as support for future flagship projects of the 4th pillar of EUSAIR.

Conclusively, research objectives and thematic scope of the Study are defined as follows:

- Analysis of the basic characteristics of the EUSAIR countries
- Analysis of tourism trends generally and in the EUSAIR countries
- Surveying online the attitudes of visitors to EUSAIR countries about tourism
- Analysis and interpretation of online survey results
- Drawing conclusions and recommendations for EUSAIR countries in the area of (sustainable) tourism.

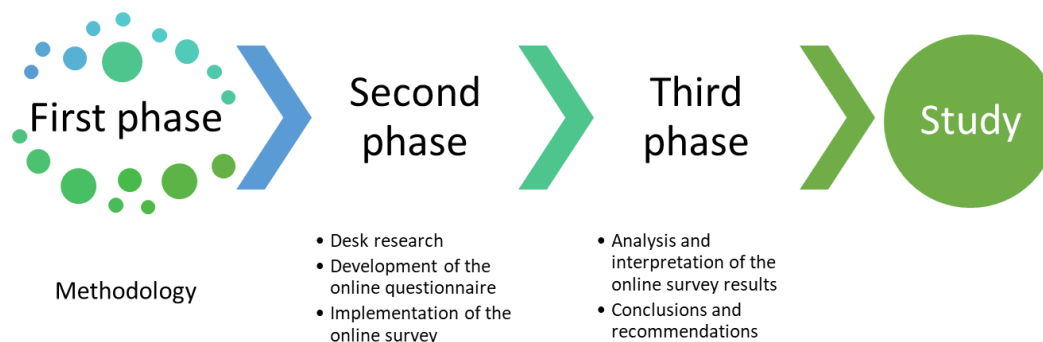
1.2. Methodological approach

To achieve the defined objectives and the purpose of the Study, specific methodological approach was applied.

The methodology used in drafting the Study was consisted of the combination of desk research and online questionnaire. The Study contains several limitations, in terms of the availability of data (some data was not available at all), and availability of recent data, for all EUSAIR countries. Consequently, the selection of methods was done according to the defined objectives of the Study and in reflection of research limitations in the optimal way.

The methodological approach can be divided into three phases. In the first phase of drafting the Study, the methodology was defined. In the second phase of drafting the Study, three activities were conducted: (i) desk research on basic characteristics of countries and tourism of the EUSAIR countries, and tourism trends generally, and in the EUSAIR countries, (ii) development of the online questionnaire and (iii) implementation of the online survey. Third phase of the drafting of the document was focused on: (i) the analysis and interpretation of the online survey results, as well as (ii) drawing conclusions and recommendations for EUSAIR countries in area of (sustainable) tourism.

Figure 1. Methodological approach



1.3. Structure of the study

According to the all above, the Study is structured into five parts. After the introductory part, the second part analyses tourism trends, with special emphasis on sustainability, and the third part brings the results of the analysis of basic characteristics, as well as tourism sector data in general for the EUSAIR region, and per country. The fourth part brings the results of the conducted online survey, while the fifth part refers to the conclusions and recommendations for EUSAIR countries in the area of sustainable tourism.

2. TOURISM TRENDS – FOCUS ON SUSTAINABILITY

2.1. Recovery and novelties after COVID-19 pandemic crisis in 2020

Like all other industries, tourism is continuously faced with new trends, innovations and other contemporary challenges. On top of contemporary challenges of tourism development, from the fields of society, economy, technology, politics, ecology and the like, the world was facing the COVID-19 pandemic, the latest health challenge and a completely new situation that represented a radical turn from the previous postulates of life, work, priorities, needs and preferences in all spheres of the global economy. For the development of tourism in the future, the basic prerequisite is the monitoring of all challenges and trends and appropriate and timely adaptation to them.

For more than half a century, tourism has been one of the leading economic sectors and therefore a key driver of economic development. Before the significant regression that occurred in the tourism sector in 2020, as a result of the COVID-19 pandemic and the global crisis that occurred with the pandemic, almost 1.5 billion international tourist arrivals were recorded in 2019 at the global level, which is also the largest achieved result ever (Statista, 2022). Also, in 2019, the income of the tourism sector at the global level was as much as USD 1.7 trillion, thus positioning it as the third largest export sector in the world. The importance of the tourism sector for economic and social well-being at the global level, especially in the context of devastating consequences of the COVID-19 pandemic, is also confirmed by the fact that 50% of the total exports of many small developing countries are precisely the exports of the tourism sector (UNWTO, 2021).

However, at the beginning of 2020, the health crisis that arose as a result of the COVID-19 pandemic permanently changed the way of living and the way of working all over the world, which fully reflected on tourism. At the beginning of the pandemic, all the world's tourist destinations introduced restrictions in all segments of the economy, including tourism, while as many as 27% of the world's tourist destinations left their borders completely closed for tourist activities (UNWTO, 2021). Consequently, as a result of the global health and economic crisis, the year 2020 recorded a globally unprecedented drop in tourism activity of as much as 74% at the global level, realizing only 381 million international tourist arrivals, which is the lowest result since 1988 (UNWTO, 2021). The above resulted in a drop in the number of international arrivals in certain regions ranging from 69% to as much as 84%. Namely, of all the regions of the world, Asia and the

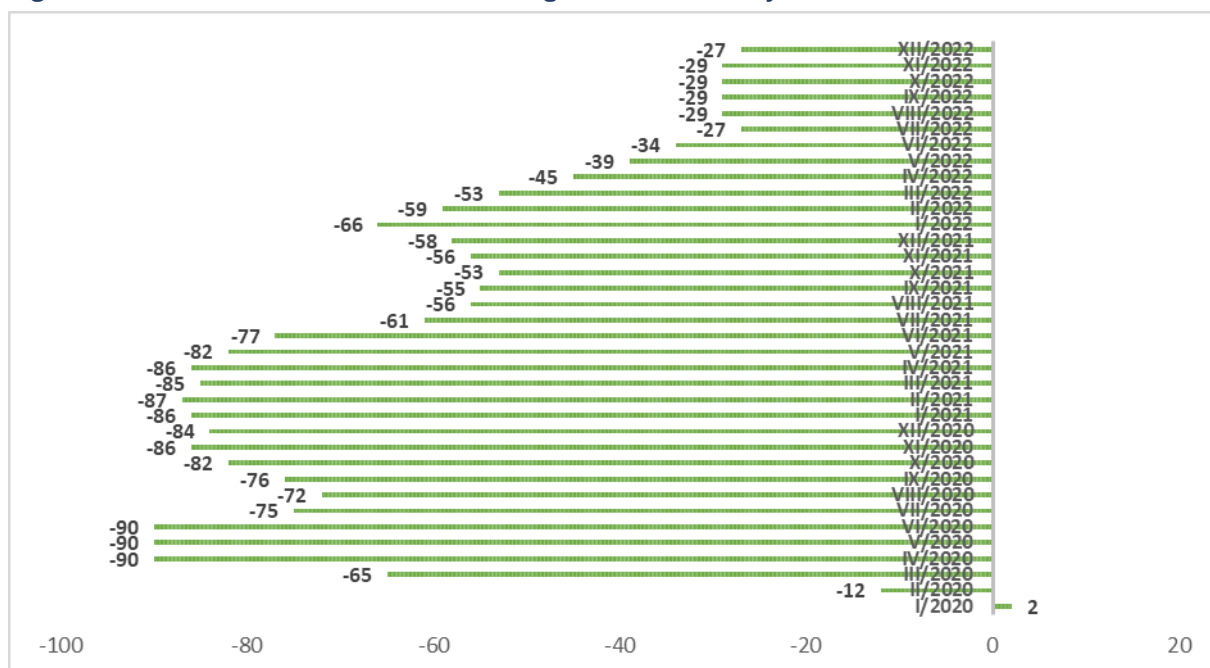
Pacific recorded the largest drop in the number of international arrivals by as much as 84%. Then came Africa and the Middle East with a drop in the number of international arrivals by 75% and Europe by 70%. The smallest decline in the number of international arrivals was recorded by America - in 2019, it recorded 219 million international arrivals, while in 2020 this number dropped to 69 million (69%) (UNWTO, 2021).

In 2019, revenues from travel and tourism on a global level amounted to as much as USD 8.9 trillion (Forbes, 2021; World Population Review, 2022), but due to the COVID-19 pandemic, the tourism sector on a global level recorded a drastic drop in revenues, according to some estimates at approximately USD 4.5 trillion (World Population Review, 2022). Consequently, as a direct result of the impact of the COVID-19 pandemic, the estimated number of jobs lost in the travel and tourism industry worldwide in 2020 was as high as 62 million (Statista, 2022). Likewise, the share of the total gross domestic product created by the global tourism sector has almost halved worldwide – in 2019 it was 10.4%, and already in 2020 due to the pandemic it fell to 5.5% (Statista, 2022; WTTC, 2021).

However, the recovery began already in 2021, when 415 million international tourist arrivals were recorded, which is a positive growth of approximately 3.8% compared to 2020 (Statista, 2022). By getting used to the new situation and adapting all spheres of life and business to different circumstances, opening borders and easing epidemiological measures, the trend of growth and recovery of tourism at the global level continued as expected in 2022, with significantly better results compared to 2021. According to the first preliminary results from the beginning of 2022, the number of international arrivals in 2022 globally increased by 130% compared to the results of 2021. Also, at the beginning of 2022, all regions in the world recorded robust growth in international arrivals, compared to 2021 - Europe recorded an increase of 199%, America of 97%, the Middle East of 89%, Africa of 51% and Asia and the Pacific of 44% (UNWTO, 2022). In 2022, despite the pandemic, Europe achieved the best results in tourism among the regions and thus maintained its leading position in the tourism sector. However, Asia and the Pacific, as a region that in 2019 ranked second in terms of the number of international arrivals, achieved the lowest growth rate of all regions in 2022.

Looking at international tourist arrivals (% change vs. 2019) monthly for the period 2020-2022, it can be concluded that the results of 2019 have still not been reached.

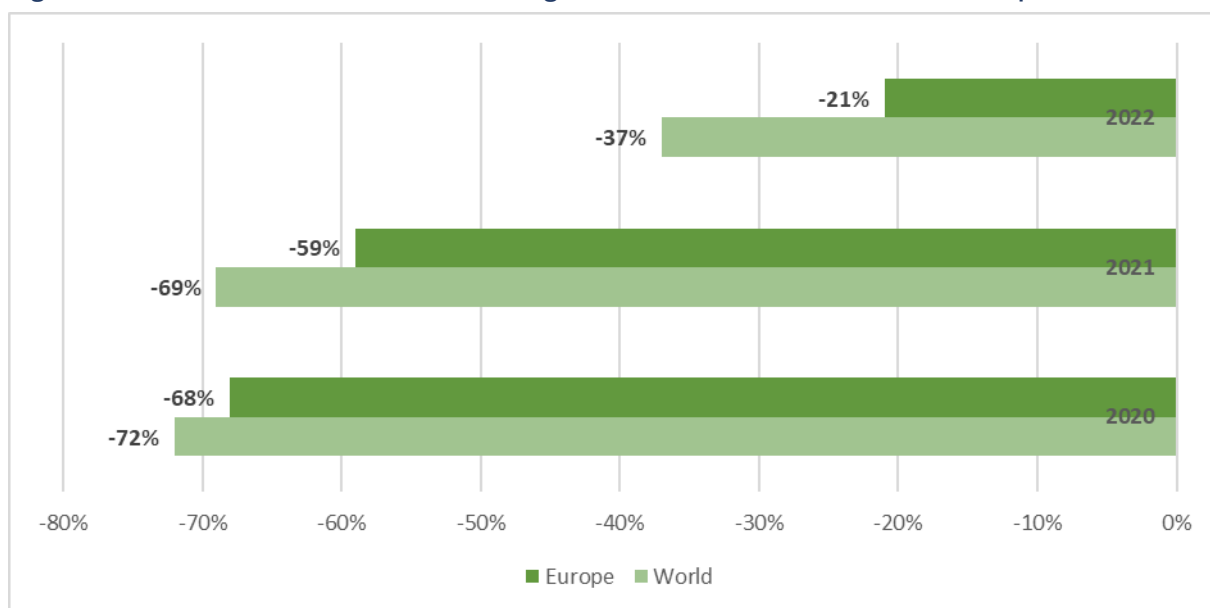
Figure 2. International tourist arrivals (% change vs. 2019) January 2020 – December 2022: World



Source: UNWTO (2023) World Tourism Barometer, Volume 21, Issue 1.

In 2022, according to UNWTO (2023), 37% of 2019 levels of international tourist arrivals was not recovered, while in Europe this percentage was 21% - this world's largest destination region recorded 585 million arrivals in 2022, and reached nearly 79% of pre-pandemic levels.

Figure 3. International tourist arrivals (% change vs. 2019) 2020 – 2022: World and Europe



Source: UNWTO (2023) World Tourism Barometer, Volume 21, Issue 1.

Nevertheless, despite the improvement in tourist activities during 2021 and 2022 compared to the "first pandemic" year of 2019, the predictions of most experts in the field of tourism dictate that a significant improvement in tourist activity and an increase in the number of international arrivals will not be realized before 2023 - that is, it can be expected as early as in 2024, or even later (UNWTO, 2022). The latest political developments in Ukraine and Russia certainly contribute to these predictions, and even make them worse, which is expected to greatly hinder and slow down further recovery of tourism at the global level. All of the above resulted in significant changes in consumer behaviour, tourist perception and, consequently, tourist spending. For example, due to various restrictions on travel due to the pandemic, but also a change in awareness about health and quality of life and increased concern about health and safety measures, there is a trend of increasing domestic travel, but also an increase in the popularity of nature, rural tourism, health tourism and road trips as primary choices for tourism activities that provide a greater level of openness, security and freedom of movement (UNWTO, 2021). Also, there was a demographic change in tourism, as a result of which the younger population stood out as more active tourists, while middle-aged and especially older-aged tourists, i.e., retirees, are the most limited in terms of travel. In addition, another significant turn of consumers is towards the principles of sustainability, authenticity, responsibility and the local dimension of tourism and travel - tourists increasingly attach importance to creating a positive impact on local communities, while increasingly looking for authenticity.

According to the World Travel & Tourism Council, in 2022, the Travel & Tourism sector contributed 7.6% to global GDP, which is an increase of 22% from 2021 and only 23% below 2019 levels. Also, in 2022, there were 22 million new jobs, representing a 7.9% increase since 2021, and only 11.4% below 2019.

Domestic visitor spending increased by 20.4% in 2022, which is only 14.1% below 2019 results. The international visitor spending rose by 81.9% in 2022, but was still 40.4% behind 2019 numbers. The total contribution of travel and tourism to the global gross domestic product (GDP) rose by 21.7 percent in 2021 over the previous year, after dropping sharply in 2020 due to the COVID-19 pandemic ([Statista, 2022](#)).

2.2. Resilient tourism is sustainable tourism

The tourism industry is well-known as a powerful driver of the economic growth of destinations. However, the international tourism landscape is not only dynamic, but fraught with an environment that is constantly changing in a very unpredictable manner. The COVID-19 pandemic

affected all segments of our society and economy. The travel and tourism industry, although mostly resilient to external shocks in the last few decades, has become one of the most affected. Pandemic could be seen also as an opportunity for all key stakeholders to reflect on the sustainability of the existing tourism practices, to develop products which will be more nature-friendly, and to respond to the new needs and expectations of changing tourist demand. The new, more sustainable, post-pandemic model of participatory governance in cultural and tourism development should involve all interested stakeholders, by developing a distinctive offer for special interest tourist segments which could disperse demand in time and space and prolong the tourism season (Afrić Rakitovac and Urošević, 2023).

The year 2022 saw a strong rebound in tourism spending, resulting in recovery of pre-pandemic levels in income across many destinations, and international tourism is set to consolidate its recovery in 2023 (UNWTO, 2023). According to research conducted by the UNWTO, tourists are expected to increasingly seek value for money and travel close to home in response to the challenging economic environment. Also, economic, health and geopolitical headwinds could weigh on the sustained recovery of international tourism and confidence levels in 2023. As the main factors that could weigh on the recovery of tourism, the following were determined: high inflation and interest rates, the spike in oil and food prices, fears of global recession, continued uncertainty derived from the Russian aggression against Ukraine and other geopolitical tensions, health challenges related to COVID-19 and workforce shortages. Based on UNWTO's forward-looking scenarios for 2023, international tourist arrivals could reach 80% to 95% of pre-pandemic levels this year, depending on the extent of the economic slowdown, the ongoing recovery of travel in Asia and the Pacific and the evolution of the Russian offensive in Ukraine, among other factors (UNWTO, 2023). Understanding travel motivations and shifts in the global tourism marketplace is critical for unpacking future travel patterns and consumption perspectives.

Sustainability is very important for maintaining tourism existence, by minimizing negative impacts on the environment and social culture, as well as contributing and providing opportunities for the local economy. Quality management is a key factor in competitive, responsible and sustainable tourism, and the success of quality management certainly depends on coordination and harmonization in the adoption and implementation of tourism policies, which is the foundation necessary for the development and management of tourism.

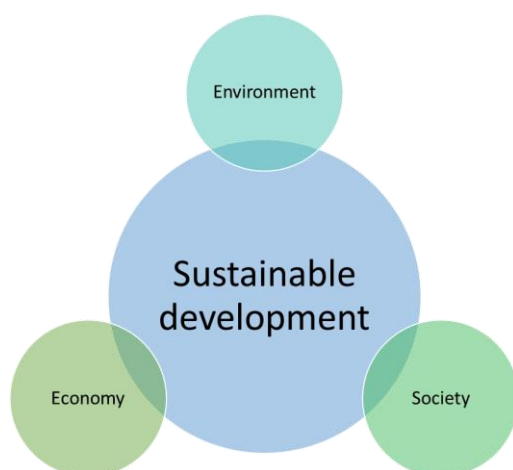
Major social, economic, political, ecological, and technological changes have created new trends in recent years, and are key challenges to the development of tourism that really significantly affect the future and development of tourism, bringing new challenges and threats, but also

opportunities. Today, sustainability is a more topical issue than ever, and people are increasingly adopting habits and lifestyles aimed at limiting their impact on the environment.

Further development of tourism in a sustainable way is a key prerequisite for continued competitiveness, and one of the main challenges of sustainable tourism development lies in the collaboration of different stakeholders in the tourism value chain in order to deliver a coherent and complete experience, but also in the creation of innovative solutions that address the main challenges of tourism development, such as identifying new market niches, reduction of seasonality and improvement of working conditions, which are missing in the tourism sector. Therefore, it is very important to identify the key tools for the development of tourism, so that its management and sustainable development are as successful as possible.

In order for tourism development to be propulsive, competitive and responsible, it must be based on sustainable principles with a focus on policy, planning, implementation and monitoring of sustainability. Sustainable development is the key to continuous, but safe, economic and social progress, without exploiting non-renewable natural resources and harming the environment and people. Quality in no aspect can be achieved or maintained without sustainable development, which has been recognized at the global level in recent years, especially after dealing with the COVID-19 pandemic and all its implications. One of the most widespread and influential ways of explaining sustainable development is to present it as the integration of three areas that represent the care of the economy, society and the environment. Although, for applying a holistic approach to sustainability UNESCO (2010) defines four dimensions of sustainable development: (1) natural, (2) economic, (3) social and (4) political. So, in addition to the three dimensions already mentioned, a fourth dimension – political dimension - was added.

Figure 4. Concept of sustainable development



In order to eradicate poverty, reduce inequality, protect the planet and ensure progress by 2030, the United Nations adopted the Sustainable Development Goals back in 2015 in New York. In total, 17 global goals of sustainable development and 169 indicators or specific sub-goals were adopted. One of the sub-goals of the Sustainable Development Goals related to sustainable and inclusive economic growth (SDG 8) is directly related to tourism: "design and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products"; while one is directly related to responsible and sustainable production and consumption (SDG 12): "develop and apply tools to monitor the impact of sustainable development on sustainable tourism that would create jobs and promote local culture and products" (UN, 2015). Besides that, a direct link can also be observed with the SDG 11 on sustainable cities and human settlements.

Figure 5. Sustainable development goals



Source: UN.

Unsustainable consumption and production practices represent one of the biggest barriers to sustainable development. Improving sustainable consumption and production (SCP) practices is also necessary in the tourism sector, in order for that sector to effectively contribute to sustainable development (UNWTO, 2019). However, although the economic sustainability of tourism is important, much more emphasis needs to be placed on the social, cultural and ecological pillars of sustainability, without which the sustainability of tourism is not possible.

Tourism has a multidisciplinary effect on different sectors of the economy: it encourages trade and provides a wide range of socio-economic opportunities. Tourism also affects natural resources and has the potential to significantly influence the protection of natural resources, and is also an important factor in the fight against the negative effects of climate change. For

example, numerous determinants of health also lie in other sectors, besides health (ecology, water, agriculture, education, employment, urban and rural life, trade, tourism, energy, etc.), and closer links between health and other sectors (especially health) are continuously being promoted. In order to ensure the sustainable and responsible development of tourism, it is necessary to invest considerable efforts in moving towards renewable energy sources, in increasing the consumption of local products and in educating all key stakeholders, including tourists. It is important to include issues of climate change and biodiversity conservation in the planning, development, implementation and monitoring of tourism and to strengthen partnerships and cooperation between the public sector, the private sector and local and regional communities. The private sector in tourism also has a role to play in the fight against the negative impacts of climate change. For example, by designing new hotels and accommodation facilities based on green principles, part of the accommodation facilities can contribute to the reduction of environmental impacts. On one hand, tourism has a negative impact on climate change, and on the other hand, negative climate change reflects on tourism itself, so this interdependence needs to be correctly directed and used in such a way that tourism mitigates climate change through timely adaptation.

Furthermore, tourism is one of the sectors with blue growth potential. Namely, tourism connects a number of different segments of the economy such as transport, communications, infrastructure, education, security, healthcare, customs, accommodation, agriculture and creative industries. Therefore, tourism represents a very inclusive activity, and it entails the growth and development of other economic activities. For this reason, it is important to strengthen tourism and at the same time see it not only as a separate economic entity, but through the prism of inclusiveness, through which inclusive tourism enables the strengthening of links and interactions between different actors in the tourism industry, forming partnerships with the private sector and stimulating the local economy, promoting integration of vulnerable groups and active involvement of the local community with emphasis on sustainability while taking into account environmental, social and economic factors. Just some of the ways to strengthen the inclusiveness of tourism and ensure its benefits are the integration of poorer local communities into tourism value chains through the active participation of the entrepreneurial sector, ensuring the fulfilment of international standards of tourism products and services, ensuring market expertise, strengthening capacities, advocating policies and formal market links, and cooperation with existing tourist destinations and suppliers. It is precisely by strengthening tourism as an inclusive activity that the improvement of quality and its successful management is ensured.

Considering the inevitability of ecological and resource degradation, and consequently social and economic degradation due to such trends of unsustainable and degrading growth, a change of

focus and direction of action towards SCP and sustainable development is imperative. The main goal of SCP is to maintain the natural capital and productivity of our planet in order to meet people's needs and sustain economic activity (UNWTO, 2019). SCP is spread across economic sectors because it focuses on sustainable and efficient management of natural resources in all stages of the value chain of products and services. It connects environmental and social issues with economic processes and markets with a holistic approach, both on the supply side and on the demand side.

For this purpose, one of the indicators within the 12th Sustainable Development Goal (12b) was set as follows: "development and implementation of tools to monitor the impact of tourism on sustainable development", which emphasizes the importance of planning and managing the sector in a relevant and timely manner, keeping in mind the limitations of the planet and ensuring the satisfaction of both the local community and visitors. It is crucial that policy makers prioritize strategic approaches that optimize the use of natural resources, in order to face the global challenges of environmental protection, as well as the continued growth of tourism (UNWTO, 2019).

As tourism depends directly on the quality of the environment in which it operates, environmental impacts must be addressed to ensure long-term competitiveness while maximizing its contribution to sustainable development (UNWTO, 2019). As a transversal economic sector, tourism has expanded and fragmented the value chain that requires the collaboration of a wide range of stakeholders to deliver a tourism product, and it implies diverse connections with other sectors which affects circularity in tourism value chains. Furthermore, tourism, like no other sector, involves direct interactions between visitors (consumers) and host communities (producers), which has an impact on individual orientation towards more sustainable tourism behaviour and demand. These features, combined with other features of the tourism sector which currently accounts for around 10% of global GDP, 7% of exports and 1 in 10 jobs worldwide and projected growth, place the sector in a unique position to systematically promote sustainable practices (UNWTO, 2019). As a result of the above, the integration of SCP practices in the tourism sector has great potential to achieve large and multiplicative effects.

Quality has become a necessary recognition factor on the local, national and global markets. In the continuously growing global tourist market, which generates more and more competitors in the form of an increasing number of popular tourist destinations, quality is a key factor in the differentiation and competitiveness of tourist destinations. The methodology used for the application of quality in tourism is determined by the specifics and distinguishing characteristics of tourism itself (interaction, simultaneity of production and consumption, sale of existential and

symbolic useful programs, immateriality of many of its components and heterogeneity), as well as by the coordination of relevant stakeholders in the tourist destination. Ultimately, quality provides the basis for sustainability in tourism, without which sustainable and responsible tourism is not possible. Sustainability shares the same principles as quality, because tourism requires long-term strategies and uses limited resources that are very sensitive, such as nature and heritage, without which tourist interest and motivation disappear. Social, cultural, economic and environmental sustainability of tourist activities are a key component of quality in tourism, and also a guarantee of long-term survival.

To the new generation of tourists, in addition to the price, the composition and the ratio of harm and benefits of each product and service are now important, and the price itself is less and less a decisive selection criterion. Earlier generations did not consider all the mentioned factors as the Millennials do, but the ratio of price and product preference was a key factor for them when buying and consuming tourist products. The special feature of today's reign of Millennials is that they research the market every day in search of the optimal tourist offer for them, while sharing their experiences and opinions both on a personal and immediate level, as well as on social networks. Therefore, it is concluded that someone's (non)recommendation is the best advertisement or discrediting of a tourist destination, product or service. Another specific feature of the millennial tourist market is the need for personalization. The tourist wishes and needs of Millennials are no longer all equal and similar to each other, but require the personalization of the tourist offer according to individual preferences. Consumers are looking for tailor-made solutions that match their character, and societies are no longer divided into homogeneous groups, but increasingly consist of different niches. The aforementioned features are slowly being taken over by other generations, and they actually reflect the long-term characteristics of the market and tourist demand around the world. In this sense, tourism is a very complex system that is multidisciplinary and multisectoral, which is why it is not easy to manage. Quality management is a key factor that provides a tool for managing a complex tourism system, while following the latest megatrends and market currents, as well as the new assumptions of the tourism of the future.

The tourism of the future is based on sustainable and regenerative vacations (CBI, 2021). Sustainable tourism development is mainly concerned with trying to find the optimal balance between the economic benefits of tourism and the negative social and environmental consequences of travel and tourism, such as the destruction of nature and agricultural land, concerns about excessive water use, unsustainable food consumption and concerns about labour practices, the well-being of animals and the generally negative impact of mass tourism and "overtourism" on the quality of life of local communities and host countries as a whole. Travelers (especially generations Y and Z) are increasingly aware and concerned about sustainability, and

the pandemic, combined with concerns about climate change. This has made them even more environmentally aware of their behaviour when booking and during their tourist stay. Research has shown that more than half of respondents prefer more responsible or sustainable travel options (Abercrombie and Kent, 2021), as well as a shift in demand and preferences towards natural, rural and open travel methods even before the pandemic (Booking.com, 2019). In terms of sustainability, regenerative tourism is considered a new stage in the development of sustainable tourism (CBI, 2021). While the focus of sustainable tourism is on minimizing negative impacts, regenerative tourism aims to leave a place or local community better than it was and use it as a tool to improve the quality of life of residents and revitalize the local community. Demand for feel-good vacations has noticeably increased, and so has the transparency of how tourism organizations use their money to build or rebuild communities. However, in order to strengthen social and environmental management of tourism, sustainable choices of tourists should be more deeply motivated and encouraged by targeted efforts on all levels of tourism governance. Besides integrated quality management, additional approach that could be successful in these efforts is the behavioural approach to tourism sustainability management, such as “nudging” for example – the approach of influencing behaviour towards a desirable direction (Nijhuis, 2020) and encouraging socially and environmentally sustainable choices in tourism consumption, through developing and providing the context, quality and infrastructure for making sustainable choices in tourism.

Sustainability must become a *sine qua non* (Rodriguez, 2022). The shift towards sustainability and preservation of the climate and environment brought significant changes to transportation as well. In addition to electric cars, the first electric ships, airplanes and helicopters also appeared in the industry, the key advantage of which is a reduced ecological footprint compared to commercial flying vehicles that use fossil fuels, as well as reduced noise emissions both in the environment and inside the vehicle (Howarth, 2022). However, electric vehicles are generally heavier due to “energy density”, i.e. because electric batteries are heavier than fuel tanks, which is why electric cars are heavier than fossil fuel cars. The same is the case with airplanes, which represents a very big problem which is getting closer to being solved (Howarth, 2022).

The offer of new, improved products and/or services adapted to modern needs using available technology makes it possible to stand out from the competition, which enables a larger number of consumers, loyalty and, in the long term, better financial results. In addition, the more innovative a company is, the better it will position itself in its own sector. Also, the stronger its reputation, the greater its reach is in its market. An innovative company will be a standard to be followed and a leader in innovation, which will result in new and better customers, but will also attract top human resources. Innovation is the cornerstone for offering added value and differentiation value, which

not only attracts customers, but also retains them, especially in the tourism sector and in the case of many tourism service providers such as hotels, restaurants and travel companies that are subject to travel restrictions, blockades and the duration of the pandemic that caused millions of losses without a clear recovery scenario. Innovations in technology in the field of tourism, such as the Internet of Things (IoT), refer to the connection that can be established between users and facilities/devices that allow consumers to personalize and remotely manage the details of their stay, from check-in to room service.

Ultimately, although the overall growth trends in this dynamic sector are positive, governments are increasingly developing policies that seek to maximize the economic, environmental and social benefits that tourism can bring, while reducing the pressures that arise when this growth is unplanned and unmanaged. Accordingly, policy measures to address these issues became a priority. For example, efforts have been made to effectively address overcrowding in popular destinations, spreading economic and other benefits to areas that attract fewer visitors, developing new products to extend the season and encourage increased productivity, better use of resources and more stable employment (OECD, 2020). To ensure that these policies actually have the desired effect, countries are strengthening coordination and implementation mechanisms, reforming destination management practices, modernizing regulations, adopting digital solutions, strengthening dialogue with civil society and involving the private sector in policy making. Governments are currently facing two critical issues in managing the tourism sector: harnessing the benefits of digital transformation and ensuring the implementation of sustainable tourism policies.

Technology continues to advance at a rapid pace and is a game changer for tourism businesses and policy makers alike. The rapid development of the sharing economy, mobile payment systems, virtual and augmented reality applications, blockchain technology and artificial intelligence will likely affect tourism products, business models, services and visitor choices. This potentially requires policy rethinking, new regulations and interventions to maximize opportunities and protect consumers. Governments have an important role to play in creating the right conditions for all businesses to engage in the digital transformation of tourism. Governments actively encourage the development of tourism, which brings clear economic benefits and provides a wider range of benefits for places, local communities, businesses, employees and visitors. Tourism success can no longer be simply measured by arrivals, jobs and income. Ensuring that local communities can benefit equally from tourism is a prevailing policy trend and progress in this area has been made.

Key policy messages include promoting an integrated forward-looking tourism policy with the aim of developing coherent forward-looking approaches, shaping tourism policies and programmes,

supporting long-term strategies and flexible action plans, as well as strengthening coordination mechanisms and delivery structures to ensure that established policies are consistently implemented at the national level and at the sub-national level, and that they engage communities and businesses to ensure that local destinations can fully share the benefits of a dynamic tourism economy (OECD, 2020). Furthermore, the key message of the policy is the preparation of tourism companies for the digital future and the active advocacy of the digital transformation of tourism by promoting a digital way of thinking, modernizing regulatory frameworks and strengthening the capacity of small and medium-sized companies to participate in digital ecosystems. The key is to encourage the adoption and investment in new technologies, skills and innovations and to support existing small and medium-sized enterprises in tourism to take advantage of digital transformation and promote the development of smart tourist destinations, but also to encourage digitally improved tourism business models, value chains and ecosystems by adopting data analytics and other enabling technologies, optimizing business practices and expanding accessible digital infrastructure, tools and solutions. Ultimately, it is also necessary to think about tourism growth in the context of sustainability by placing a greater focus on the ecological and socio-cultural pillars of sustainability, in order to provide net benefits to local communities, contribute to the achievement of the SDGs and fight against climate change. It is important to ensure that tourism development efforts take place within the broader context of city, regional and national economic development strategies, and in close collaboration with industry and civil society. It is also important that additional steps are taken to mainstream sustainability into tourism policies and industry practices in order to better support the transition to a green tourism economy with low emissions and climate change, and to provide access to comparable and timely data to inform decision-making and a better plan for the type and scale of tourism growth appropriate for individual destinations.

Ultimately, the upcoming trends and new assumptions of tourism that will define the way people experience travel vary significantly from the impact of technology in organizing and booking experiences to sustainability and business travel (Triparound, 2021).

3. EUSAIR COUNTRIES PROFILES

In the first part, the data for the whole Adriatic-Ionian Region, the total of ten countries (four EU Member States (Croatia, Greece, Italy, Slovenia) and six non-EU countries (Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, San Marino, Serbia)) are considered and countries are compared, after which a profile for each country is given.

Figure 6. EUSAIR region



Source: [European Commission](#).

3.1. The Adriatic-Ionian Region in figures

3.1.1. Basic characteristics

EUSAIR region covers the area of total of 717,981 m². In terms of area, the biggest country is Italy, with 42% of total EUSAIR region area, while Greece covers 18%, and Serbia 12% out of total EUSAIR area. Then comes Croatia with 8% and Bosnia and Herzegovina with 7% of total EUSAIR area.

Although average population density in EUSAIR region is 139 per km², it ranges from 45 in Montenegro, to 574 in San Marino, or 196 in Italy. The total population of EUSAIR region is 91.703

thousand people. Accordingly, to data on area, Italy is the most populated country of the EUSAIR region with 64% of total EUSAIR population. Greece follows with 12% and Serbia with 8%, Croatia and Bosnia and Herzegovina with 4%.

Table 1. Area and population

Country	Area (m2)	Population (1.000)	Population density (per km ²)
Albania	28,748	2,812	98
Bosnia and Herzegovina	51,197	3,453	67
Croatia	56,542	3,949	70
Greece	131,957	10,569	80
Italy	301,337	59,133	196
Montenegro	13,812	622	45
North Macedonia	25,713	2,077	81
San Marino	61	35	574
Serbia	88,361	6,945	79
Slovenia	20,253	2,108	104
<i>Total</i>	<i>717,981</i>	<i>91,703</i>	

Source: United Nations Economic Commission for Europe (UNECE).

In terms of gross domestic product (GDP), Italy is also the biggest country in the EUSAIR region with 81% of total GDP of the EUSAIR in 2022. Greece follows with 9%, then Croatia and Serbia with 3% each. Total GDP is increasing from 2020, and in 2022 it increased in all EUSAIR countries in comparison to 2021, and it crossed pre-COVID pandemic levels.

Table 2. Gross domestic product at market prices (current prices, million euro), 2018-2022

Country	2018	2019	2020	2021	2022
Albania	12,828.1	13,754.2	13,310.4	15,157.4	17,939.7
Bosnia and Herzegovina	17,354.2	18,296.5	17,755.9	19,995.1	23,317.3
Croatia	52,747.2	55,644.4	50,424.9	58,254.1	67,386.1
Greece	179,557.7	183,351.2	165,405.9	181,674.6	208,030.2
Italy	1,771,391.2	1,796,648.5	1,661,019.9	1,787,675.4	1,909,153.6
Montenegro	4,663.1	4,950.7	4,185.6	4,955.1	5,796.8
North Macedonia	10,744.0	11,262.0	10,851.7	11,688.2	12,897.8
San Marino*	1,000.0	1,000.0	1,000.0	1,000.0	2,000.0
Serbia	42,892.2	46,005.4	46,815.3	53,329.3	60,367.9
Slovenia	45,876.3	48,533.1	47,020.6	52,208.1	58,988.5
<i>Total</i>	<i>2,139,054.0</i>	<i>2,179,446.0</i>	<i>2,017,790.2</i>	<i>2,185,937.3</i>	<i>2,365,877.9</i>

Source: Eurostat (2023) Gross domestic product at market prices.

*Source: European Commission, Directorate-General for Trade (2023) San Marino, Factsheet.

Average GDP per capita for the EUSAIR region is increasing in the period 2018-2022. Although average GDP per capita in 2022 is 18,259 euros, there are big differences among EUSAIR

countries, so GDP per capita in 2022 ranged from 6,132 euros in Albania to 47,061 euros in San Marino.

Table 3. Gross domestic product per capita (euro), 2018-2022

Country	2018	2019	2020	2021	2022
Albania*	4,452	4,775	4,612	5,389	6,132
Bosnia and Herzegovina	5,026	5,299	5,142	5,791	6,753
Croatia**	12,890	13,680	12,460	14,720	17,240
Greece**	16,730	17,100	15,460	17,070	19,670
Italy**	29,580	30,080	27,940	30,230	32,390
Montenegro*	7,498	7,960	6,731	7,976	9,318
North Macedonia	5,173	5,422	5,225	5,627	6,210
San Marino*	41,894	42,918	39,959	43,612	47,061
Serbia*	6,141	6,625	6,771	7,762	9,839
Slovenia**	22,140	23,230	22,360	24,770	27,980

*Source: European Commission, Directorate-General for Trade (2023) [Factsheets](#).

**Source: Eurostat (2023) Gross domestic product at market prices, current prices, euro per capita.

***Source: Calculation according to Eurostat (2023) Gross domestic product at market prices and United Nations Economic Commission for Europe (UNECE).

According to the International Monetary Fund projections, real GDP growth will decrease in the period 2023-2028, in comparison to 2021 and 2022 levels. However, this decrease varies among countries. In 2022, average real GDP growth rate was 4.43%, while in 2023 projected average real GDP growth rate for EUSAIR region is 1.86%.

Table 4. Real GDP growth (annual percentage change), 2019-2028

Country	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Albania	2.1	-3.5	8.5	3.7	2.2	3.3	3.4	3.4	3.4	3.4
Bosnia and Herzegovina	2.9	-3	7.4	3.8	2	3	3	3	3	3
Croatia	3.4	-8.6	13.1	6.3	1.7	2.3	2.7	2.9	2.8	2.8
Greece	1.9	-9	8.4	5.9	2.6	1.5	1.4	1.4	1.3	1.2
Italy	0.5	-9	7	3.7	0.7	0.8	1.2	1.1	1	0.9
Montenegro	4.1	-15.3	13	6.4	3.2	3	3	3	3	3
North Macedonia	3.9	-4.7	3.9	2.2	1.4	3.6	3.9	3.8	3.8	3.5
San Marino	2.1	-6.7	8.3	4.6	1.2	1	1.3	1.3	1.3	1.3
Serbia	4.3	-0.9	7.5	2.3	2	3	4.5	4	4	4
Slovenia	3.5	-4.3	8.2	5.4	1.6	2.1	2.8	2.9	3	3

Source: [International Monetary Fund \(2023\) World Economic Outlook](#).

According to the same source, predictions of the International Monetary Fund projection, inflation rate in 2023 and afterwards (in the period to 2028) should be decreased in comparison to 2022 when average inflation rate for EUSAIR region was 10.45%.

Table 5. Inflation rate, average consumer prices (annual percentage change), 2019-2028

Country	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Albania	1.4	1.6	2	6.7	5	3.4	3	3	3	3
Bosnia and Herzegovina	0.6	-1.1	2	14	6	3	2.7	2.5	2	2
Croatia	0.8	0	2.7	10.7	7.4	3.6	2.2	2.2	2.2	2.1
Greece	0.5	-1.3	0.6	9.3	4	2.9	2.3	2	1.9	1.8
Italy	0.6	-0.1	1.9	8.7	4.5	2.6	2.1	2	2	2
Montenegro	0.4	-0.2	2.4	13	9.7	5	2.9	2.3	2	1.9
North Macedonia	0.8	1.2	3.2	14.2	9.2	3.5	2.3	2	2	2
San Marino	1	0.2	2.1	7.1	4.6	2.7	1.8	1.8	1.8	1.8
Serbia	1.9	1.6	4.1	12	12.2	5.3	3.5	3.2	3	3
Slovenia	1.6	-0.1	1.9	8.8	6.4	4.5	3.3	2.5	2.1	2

Source: [International Monetary Fund \(2023\) World Economic Outlook](#).

3.1.2. Tourism sector

According to UNWTO (2023) data, three EUSAIR countries are among 20 best performing destinations in the period January – December 2022 per international tourist arrivals (% change vs. 2019): Albania on the second place (+17%), San Marino on the 13th place (-1.3%) and Serbia on the 20th place (-6%). There are also three EUSAIR countries within 20 best performing destinations in the period January – December 2022 in terms of international tourism receipts (real % change vs. 2019): Slovenia on the 9th place (-1%), Greece in the 11th place (-3%) and Italy on the 14th place (-5%) (UNWTO, 2023).

Table 6. International tourist arrivals (1.000) 2019-2021

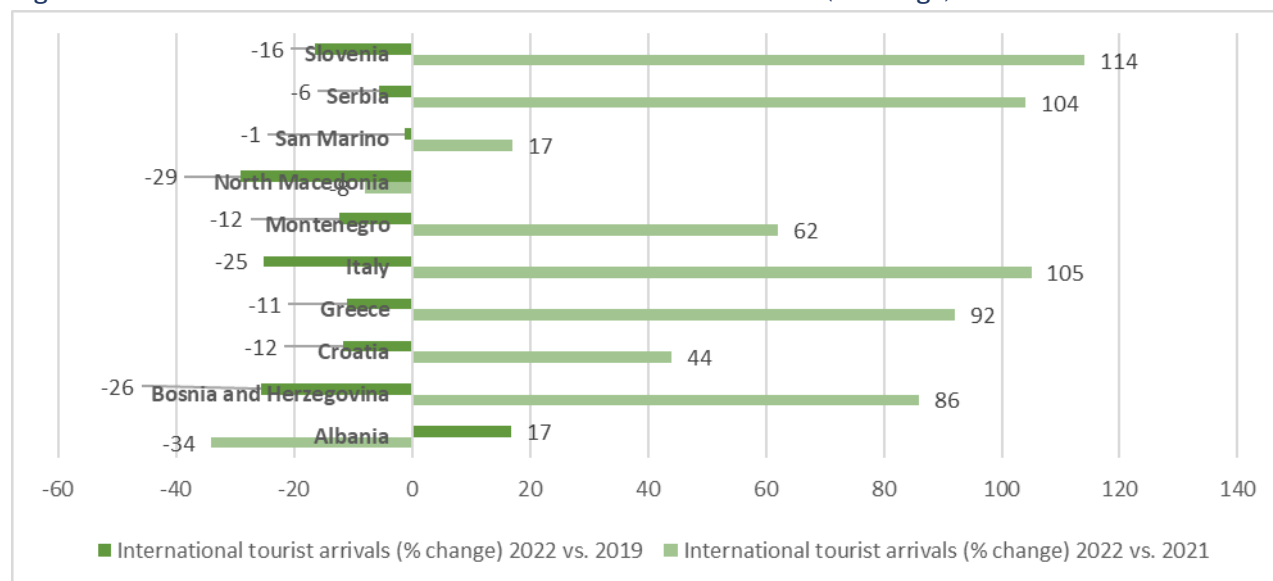
Country	2019	2020	2021
Albania	5,919	2,521	5,340
Bosnia and Herzegovina	1,198	197	501
Croatia	17,353	5,545	10,641
Greece	31,348	7,374	14,705
Italy	64,513	25,190	26,888
Montenegro	2,510	351	1,554
North Macedonia	758	118	294
San Marino	111	58	94
Serbia	1,847	446	871
Slovenia	4,702	1,216	1,832
<i>Total</i>	<i>130,259</i>	<i>43,016</i>	<i>62,720</i>

Source: UNWTO (2023a) World Tourism Barometer, Statistical Annex. Volume 21, Issue 1.

Italy has the highest share in international tourist arrivals in EUSAIR region (43%), Greece follows with 23%, Croatia with 17% and Albania with 9%.

Comparison of the international tourist arrivals in 2022 vs. 2019 and vs. 2021 among EUSAIR countries (year-to-date refers to the change in the months with data available, compared to the same period of the previous year) showed that only Albania reached 2022 levels of international tourist arrivals in 2019, while again only Albania and North Macedonia reached lower numbers of international tourist arrivals in 2022 vs. 2021. All other EUSAIR countries reached higher levels of international tourist arrivals in 2022 vs. 2021.

Figure 7. International tourist arrivals 2022 vs. 2019 and 2022 vs. 2021(% change)



Source: UNWTO (2023a) World Tourism Barometer, Statistical Annex. Volume 21, Issue 1.

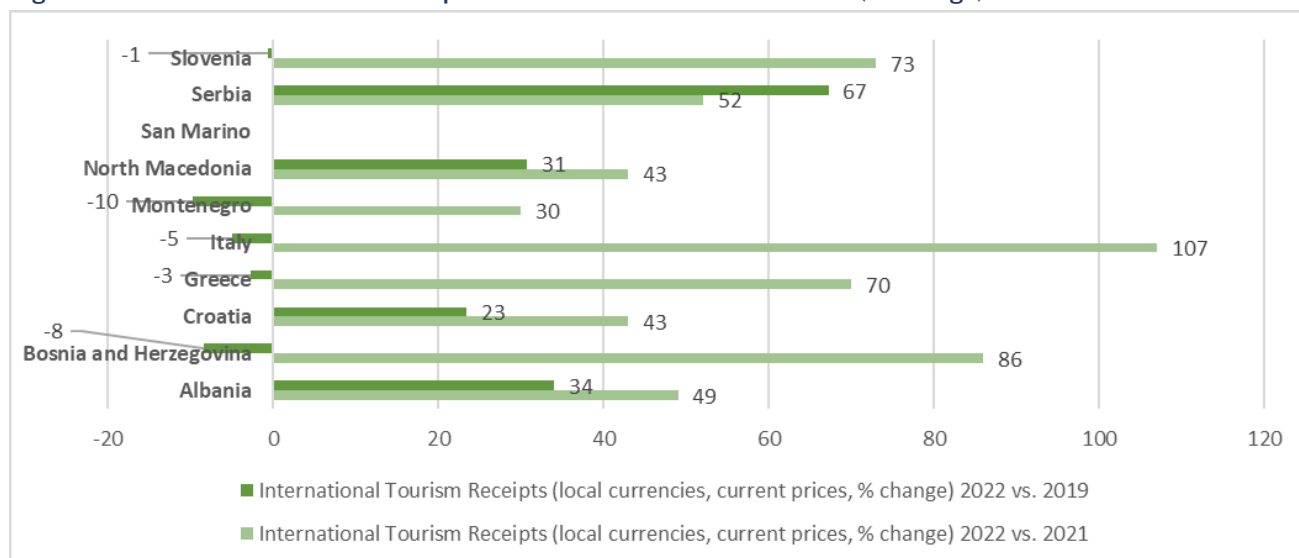
Regarding international tourism receipts, according to available data, they are increasing since the big drop in 2020. In comparison to 2019, four EUSAIR countries overcame 2019 year: Albania, Croatia, North Macedonia and Serbia. Comparing 2022 with 2021, it can be concluded that all EUSAIR countries experienced growth in international tourism receipts.

Table 7. International Tourism Receipts 2019-2021 (USD million)

Country	2019	2020	2021
Albania	2,332	1,129	2,262
Bosnia and Herzegovina	1,175	431	973
Croatia	11,753	5,569	10,759
Greece	20,351	4,933	12,422
Italy	49,596	19,797	25,151
Montenegro	1,230	165	896
North Macedonia	396	252	385
San Marino	NA	NA	NA
Serbia	1,606	1,249	1,882
Slovenia	3,183	1,413	1,992
Total	91,622	34,938	56,722

Source: UNWTO (2023a) World Tourism Barometer, Statistical Annex. Volume 21, Issue 1.

Figure 8. International Tourism Receipts 2022 vs. 2019 and 2022 vs. 2021 (% change)



Source: UNWTO (2023a) World Tourism Barometer, Statistical Annex. Volume 21, Issue 1.

Tourism Direct Gross Domestic Product (TDGDP), as percentage of GDP, decreased on the global level from 4% in 2019, to 2.2% in 2021 (UNWTO, 2023). The result for 2021 in fact represents the increase in comparison to the 2% in 2020. In Europe, TDGDP was higher in 2019 than the world average and represented 4.4%, 2.4% in 2020 and 2.8% in 2021. Recovery trend in 2021 can be seen on both world and Europe levels.

According to the projections of the World Travel & Tourism Council and World Bank, Travel and Tourism direct contribution to GDP will increase from average share in GDP for EUSAIR area 5.8% in 2023 to 6.4% in 2028, as well as total contribution to GDP will increase from 15.3% in 2023 to 16.8% in 2028.

Table 8. Travel and Tourism direct contribution to GDP, projections 2023 and 2028

	2023		2028	
	% to GDP	% growth	% to GDP	% growth
Albania	8.53	4.86	9.32	4.65
Bosnia and Herzegovina	2.97	5.09	3.41	5.74
Croatia	12.3	4.53	14.19	4.55
Greece	8.53	3.64	9.15	3.7
Italy	5.72	1.99	6.2	2.03
Montenegro	11.82	5.48	13.25	5.73
North Macedonia	1.92	3.59	1.94	2.8
San Marino	NA	NA	NA	NA
Serbia	2.56	5.32	2.89	4.13
Slovenia	3.59	4.12	4.00	4.22

Source: [World Bank, according to World Travel & Tourism Council](#).

Table 9. Travel and Tourism total contribution to GDP, projections 2023 and 2028

	2023		2028	
	% to GDP	% growth	% to GDP	% growth
Albania	26.52	4.87	28.94	4.65
Bosnia and Herzegovina	10.95	5.26	12.62	5.83
Croatia	27.8	4.25	31.68	4.31
Greece	21.09	3.9	22.7	3.7
Italy	13.43	1.73	14.34	1.79
Montenegro	25.64	5.05	27.87	5.06
North Macedonia	7.31	3.92	7.56	2.94
San Marino	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
Serbia	7.26	4.75	7.99	3.66
Slovenia	13.04	4.17	14.53	4.29

Source: [World Bank, according to World Travel & Tourism Council](#).

Also, according to the projections of the World Travel & Tourism Council and World Bank, Travel and Tourism, both direct and total contribution to employment measured in thousands of jobs, percentage share of total employment and percentage growth, is increasing in the period 2022-2028.

Table 10. Travel and Tourism direct contribution to employment, projections 2023 and 2028

	2023			2028		
	000 jobs	% of total employment	% growth	000 jobs	% of total employment	% growth
Albania	102.98	7.92	1.32	110.73	8.78	1.26
Bosnia and Herzegovina	26.62	3.72	1.48	29.7	4.4	2.57
Croatia	146.4	10.71	1.46	158.04	11.76	1.47
Greece	531.43	12.62	2.24	591.78	13.34	2.12
Italy	1580	6.65	2	1780	7.5	2.2
Montenegro	15.09	7.28	2.78	16.8	8.11	2.69
North Macedonia	13.38	1.78	1.43	13.97	1.83	0.66
San Marino	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
Serbia	37.27	1.85	1.3	39.18	2.01	0.58
Slovenia	35.34	4.21	2.19	40.04	4.79	2.3

Source: [World Bank, according to World Travel & Tourism Council](#).

Table 11. Travel and Tourism total contribution to employment, projections 2023 and 2028

	2023			2028		
	000 jobs	% of total employment	% growth	000 jobs	% of total employment	% growth
Albania	321,76	24,75	1,24	343,77	27,26	1,15
Bosnia and Herzegovina	9,62	12,95	1,46	102,79	15,21	2,46
Croatia	339,66	24,85	1,4	365,73	27,2	1,44
Greece	1120	26,51	2,81	1270	28,53	1,99
Italy	3580	15,06	1,48	3920	16,5	1,62
Montenegro	41,36	19,95	2,28	44,54	21,5	2,07
North Macedonia	50,68	6,73	1,64	53,54	7	0,67
San Marino	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
Serbia	97,93	4,87	1	101,1	5,18	0,26
Slovenia	115,02	13,71	2,04	129,04	15,42	2,21

Source: [World Bank, according to World Travel & Tourism Council](#).

In terms of number of establishments, regarding accommodation for visitors in hotels and similar establishments, average number of establishments in the EUSAIR area in 2021 was 4,668, ranging from minimum in San Marino with 22 establishments to 32,109 in Italy. Similarly, since the differences in the size of countries, the number of rooms and bed-places vary significantly among EUSAIR countries. Occupancy rate do not diverge so much - the average rate is 19.3 for the EUSAIR region for rooms, and 24.7 for bed-places.

Average length of stay is 2.5 days, with the lowest length in San Marino, and highest length in Greece.

Table 12. Accommodation for visitors in hotels and similar establishments, 2021

	Number of establishments	Number of rooms	Number of bed-places	Occupancy rate / rooms (%)	Occupancy rate / bed-places (%)	Average length of stay
Albania	<i>NA</i>	35,802	85,403	17.50	17.00	2.60
Bosnia and Herzegovina	583	16,747	35,628	17.40	21.30	<i>NA</i>
Croatia	1,036	78,677	165,102	25.50	26.10	3.85
Greece	10,098	441,536	879,255	<i>NA</i>	42.90	4.70
Italy	32,109	1,073,592	2,232,676	42.53	37.92	3.68
Montenegro*	360	18,111	41,091	<i>NA</i>	26.25	<i>NA</i>
North Macedonia	319	11,034	24,407	30.20	18.67	3.29
San Marino	22	660	1,463	<i>NA</i>	<i>NA</i>	1.60
Serbia**	829	28,135	56,560	23.02	22.13	2.92
Slovenia**	1,325	25,560	58,447	37.20	34.70	2.81

Source: UNWTO, [Accommodation in hotels and similar establishments](#).

*Data for 2019.

**Data for 2020.

Interestingly, EUSAIR countries are among 167 world countries with World Heritage Properties, with the total number of 111 sites (out of 1157 in the world). Italy has the largest number (52% of total number in EUSAIR region), while Greece follows with 16% and Croatia with 9%.

Table 13. World heritage sites per country (number, April 2023)

Country	Number
Albania	4
Bosnia and Herzegovina	4
Croatia	10
Greece	18
Italy	58
Montenegro	4
North Macedonia	2
San Marino	1
Serbia	5
Slovenia	5
<i>Total</i>	<i>111</i>

Source: UNESCO (2023) World Heritage List.

3.2. The Adriatic-Ionian Region countries profiles

3.2.1. Albania



Area (m²): 28,748

Population (1.000): 2,812

Population density (per km²): 98

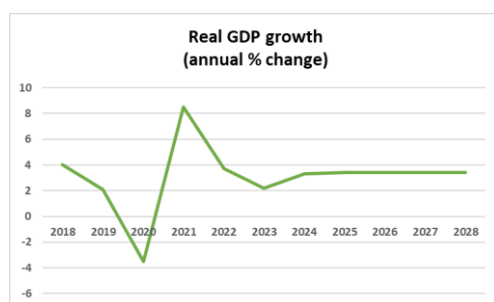
Source: UNECE.

GDP at market prices (current prices, million euro), 2022: 17,939.7

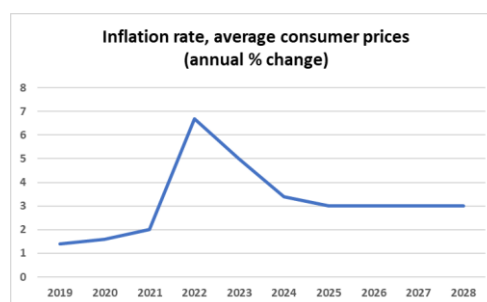
Source: Eurostat.

Gross domestic product per capita (euro), 2022: 6,132

Source: European Commission, Directorate-General for Trade.



Source: International Monetary Fund.



Source: International Monetary Fund.

International tourist arrivals (1.000), 2021: 5,340

Source: UNWTO.



Source: UNWTO.



Source: UNWTO.

Travel and Tourism direct contribution to GDP, 2022: 8.46% of GDP, 4.21% growth

Travel and Tourism direct contribution to employment, 2022: 101,630 jobs, 7.84% of total employment, 0.84% growth

Source: World Bank, according to World Travel & Tourism Council.

Travel and Tourism total contribution to GDP, 2022: 26.32% of GDP, 4.1% growth

Travel and Tourism total contribution to employment, 2022: 317,820 jobs, 24.52% of total employment, 0.62% growth

Source: World Bank, according to World Travel & Tourism Council.

Number of rooms, 2021: 35,802

Number of bed-places, 2021: 85,403

Occupancy rate/rooms, 2021: 17.50%

Occupancy rate/bed-places, 2021: 17.00%

Average length of stay, 2021: 2.60 nights

Source: UNWTO.

World heritage sites per country (number, April 2023): 4

Source: UNESCO.

3.2.2. Bosnia and Herzegovina



Area (m²): 51,197

Population (1.000): 3,453

Population density (per km²): 67

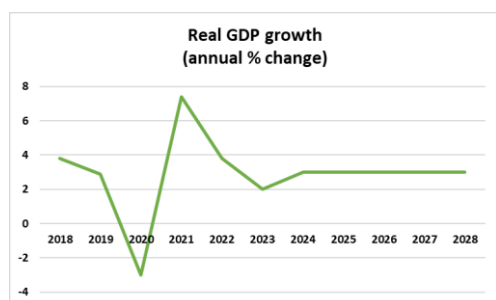
Source: UNECE.

GDP at market prices (current prices, million euro), 2022: 23,317.3

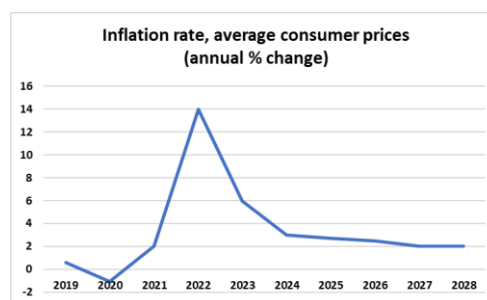
Source: Eurostat.

Gross domestic product per capita (euro), 2022: 6,753

Source: European Commission, Directorate-General for Trade.



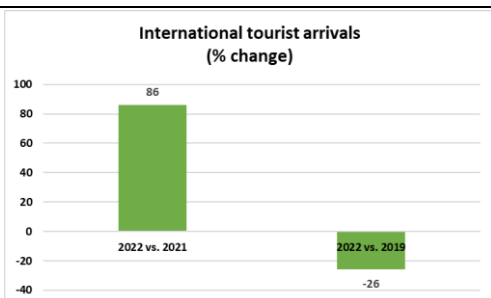
Source: International Monetary Fund.



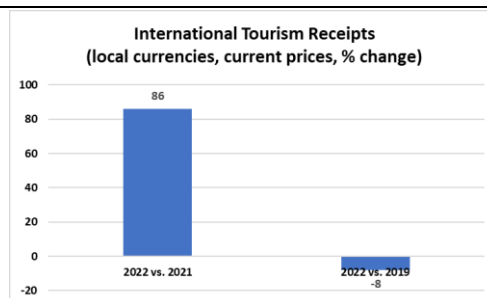
Source: International Monetary Fund.

International tourist arrivals (1.000), 2021: 501

Source: UNWTO.



Source: UNWTO.



Source: UNWTO.

Travel and Tourism direct contribution to GDP, 2022: 2.91% of GDP, 4.95% growth

Travel and Tourism direct contribution to employment, 2022: 2,623 jobs, 3.63% of total employment, 1.6% growth

Source: World Bank, according to World Travel & Tourism Council.

Travel and Tourism total contribution to GDP, 2022: 10.72% of GDP, 5.02% growth

Travel and Tourism total contribution to employment, 2022: 9,129 jobs, 12.63% of total employment, 1.51% growth

Source: World Bank, according to World Travel & Tourism Council.

Number of establishments, 2021: 583

Number of rooms, 2021: 16,747

Number of bed-places, 2021: 35,628

Occupancy rate/rooms, 2021: 17.40%

Occupancy rate/bed-places, 2021: 21.30%

Source: UNWTO.

World heritage sites per country (number, April 2023): 4

Source: UNESCO.

3.2.3. Croatia



Area (m²): 56,542

Population (1.000): 3,949

Population density (per km²): 70

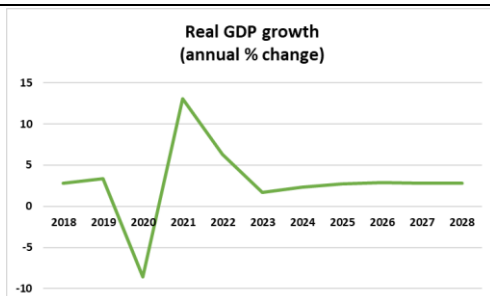
Source: UNECE.

GDP at market prices (current prices, million euro), 2022: 67,386.1

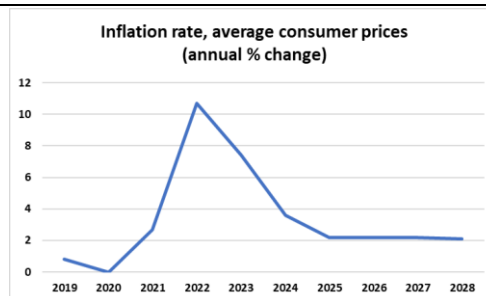
Source: Eurostat.

Gross domestic product per capita (euro), 2022: 17,240

Source: Eurostat.



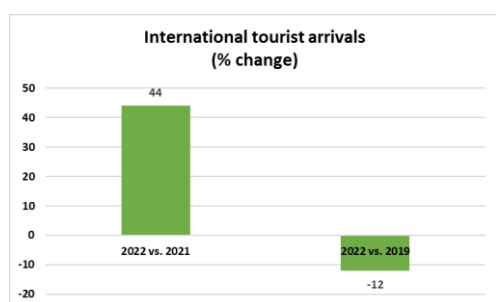
Source: International Monetary Fund.



Source: International Monetary Fund.

International tourist arrivals (1.000), 2021: 10,641

Source: UNWTO.



Source: UNWTO.



Source: UNWTO.

Travel and Tourism direct contribution to GDP, 2022: 11.97% of GDP, 3.9% growth

Travel and Tourism direct contribution to employment, 2022: 144,280 jobs, 10.53% of total employment, 0.73% growth

Source: World Bank, according to World Travel & Tourism Council.

Travel and Tourism total contribution to GDP, 2022: 27.14% of GDP, 3.65% growth

Travel and Tourism total contribution to employment, 2022: 334,980 jobs, 24.46% of total employment, 0.68% growth

Source: World Bank, according to World Travel & Tourism Council.

Number of establishments, 2021: 1,036

Number of rooms, 2021: 78,677

Number of bed-places, 2021: 165,102

Occupancy rate/rooms, 2021: 25.50%

Occupancy rate/bed-places, 2021: 26.10%

Average length of stay, 2021: 3.85 nights

Source: UNWTO.

World heritage sites per country (number, April 2023): 10

Source: UNESCO.

3.2.4. Greece



Area (m²): 131,957

Population (1.000): 10,569

Population density (per km²): 80

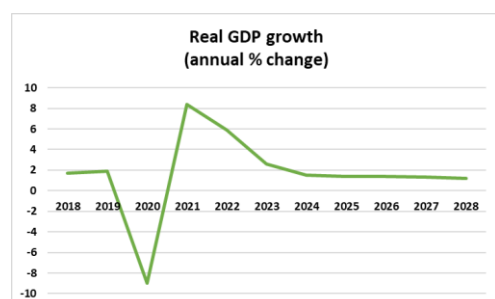
Source: UNECE.

GDP at market prices (current prices, million euro), 2022: 208,030.2

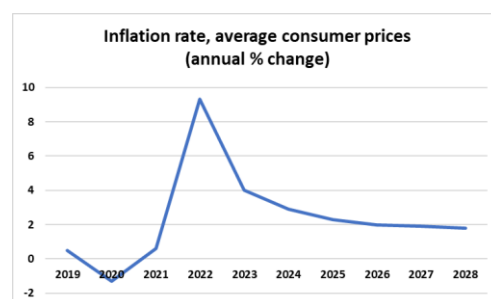
Source: Eurostat.

Gross domestic product per capita (euro), 2022: 19,670

Source: Eurostat.



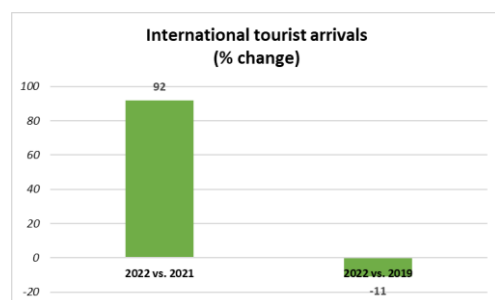
Source: International Monetary Fund.



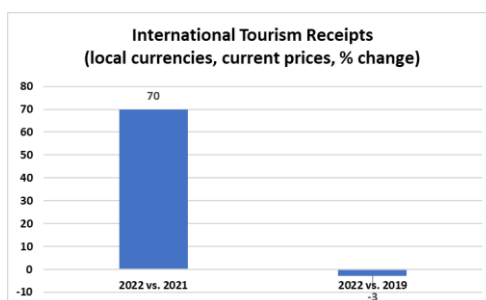
Source: International Monetary Fund.

International tourist arrivals (1.000), 2021: 14,705

Source: UNWTO.



Source: UNWTO.



Source: UNWTO.

Travel and Tourism direct contribution to GDP, 2022: 8.45% of GDP, 3.5% growth

Travel and Tourism direct contribution to employment, 2022: 519,770 jobs, 12.54% of total employment, 2.03% growth

Source: World Bank, according to World Travel & Tourism Council.

Travel and Tourism total contribution to GDP, 2022: 20.84% of GDP, 3.89% growth

Travel and Tourism total contribution to employment, 2022: 1,090,000 jobs, 26.2% of total employment, 2.71% growth

Source: World Bank, according to World Travel & Tourism Council.

Number of establishments, 2021: 10,098

Number of rooms, 2021: 441,536

Number of bed-places, 2021: 879,255

Occupancy rate/bed-places, 2021: 42.90%

Average length of stay, 2021: 4.70 nights

Source: UNWTO.

World heritage sites per country (number, April 2023): 18

Source: UNESCO.

3.2.5. Italy



Area (m²): 301,337

Population (1.000): 59,133

Population density (per km²): 196

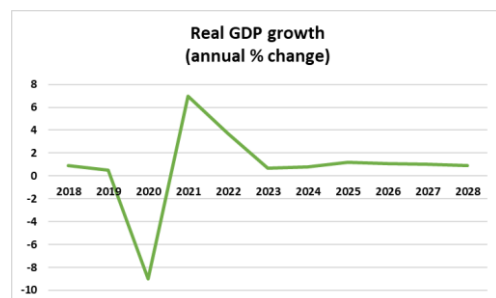
Source: UNECE.

GDP at market prices (current prices, million euro), 2022: 1,909,153.6

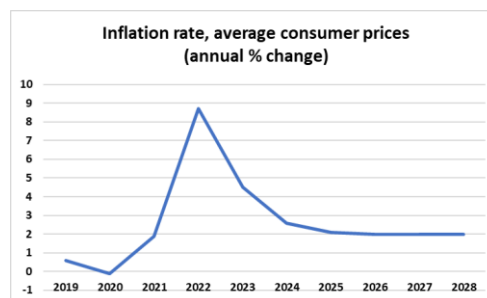
Source: Eurostat.

Gross domestic product per capita (euro), 2022: 32,390

Source: Eurostat.



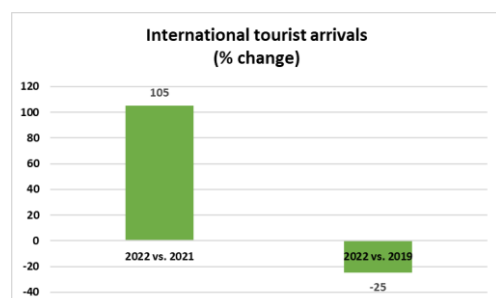
Source: International Monetary Fund.



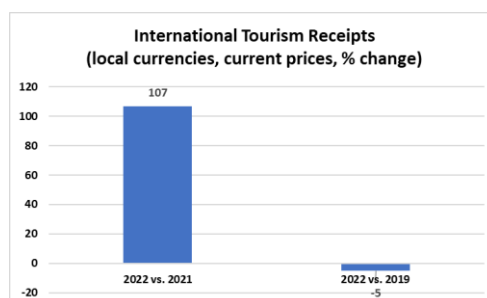
Source: International Monetary Fund.

International tourist arrivals (1.000), 2021: 26,888

Source: UNWTO.



Source: UNWTO.



Source: UNWTO.

Travel and Tourism direct contribution to GDP, 2022: 5.65% of GDP, 1.86% growth

Travel and Tourism direct contribution to employment, 2022: 1,550,000 jobs, 6.54% of total employment, 1.57% growth

Source: World Bank, according to World Travel & Tourism Council.

Travel and Tourism total contribution to GDP, 2022: 13.3% of GDP, 1.57% growth

Travel and Tourism total contribution to employment, 2022: 3,520,000 jobs, 14.89% of total employment, 1.15% growth

Source: World Bank, according to World Travel & Tourism Council.

Number of establishments, 2021: 32,109

Number of rooms, 2021: 1,073,592

Number of bed-places, 2021: 2,232,676

Occupancy rate / rooms, 2021: 42.53%

Occupancy rate/bed-places, 2021: 37.92%

Average length of stay, 2021: 3.68 nights

Source: UNWTO.

World heritage sites per country (number, April 2023): 58

Source: UNESCO.

3.2.6. Montenegro



Area (m²): 13,812

Population (1.000): 622

Population density (per km²): 45

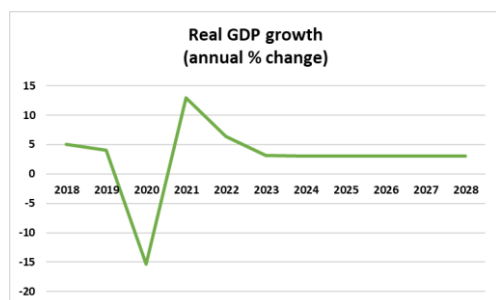
Source: UNECE.

GDP at market prices (current prices, million euro), 2022: 5,796.8

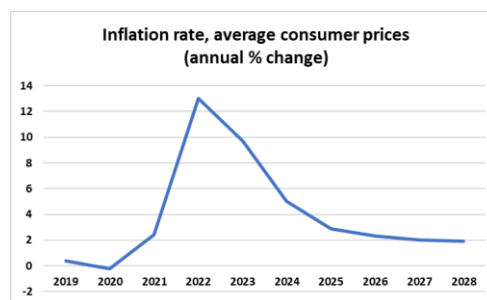
Source: Eurostat.

Gross domestic product per capita (euro), 2022: 9,318

Source: European Commission, Directorate-General for Trade.



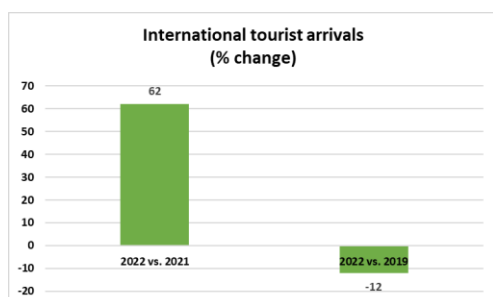
Source: International Monetary Fund.



Source: International Monetary Fund.

International tourist arrivals (1.000), 2021: 1,554

Source: UNWTO.



Source: UNWTO.



Source: UNWTO.

Travel and Tourism direct contribution to GDP, 2022: 11.54% of GDP, 4% growth

Travel and Tourism direct contribution to employment, 2022: 14,680 jobs, 7.11% of total employment, 1.31% growth

Source: World Bank, according to World Travel & Tourism Council.

Travel and Tourism total contribution to GDP, 2022: 25.14% of GDP, 4.04% growth

Travel and Tourism total contribution to employment, 2022: 40,440 jobs, 19.58% of total employment, 1.49% growth

Source: World Bank, according to World Travel & Tourism Council.

Number of establishments, 2021: 360

Number of rooms, 2021: 18,111

Number of bed-places, 2021: 41,091

Occupancy rate/bed-places, 2021: 26.25%

Source: UNWTO.

World heritage sites per country (number, April 2023): 4

Source: UNESCO.

3.2.7. North Macedonia



Area (m²): 25,713

Population (1.000): 2,077

Population density (per km²): 81

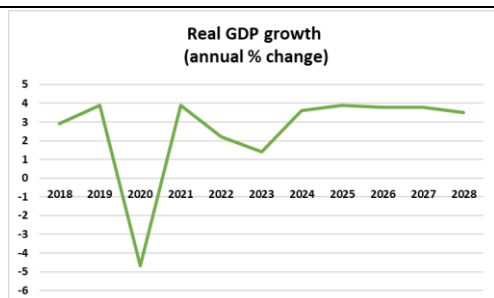
Source: UNECE.

GDP at market prices (current prices, million euro), 2022: 12,897.8

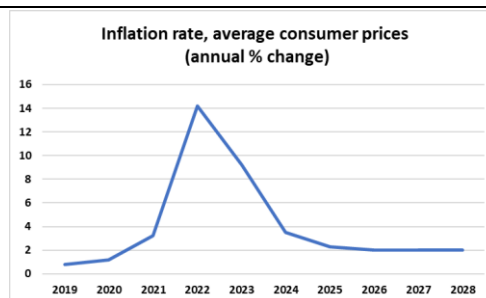
Source: Eurostat.

Gross domestic product per capita (euro), 2022: 6,210

Source: European Commission, Directorate-General for Trade.



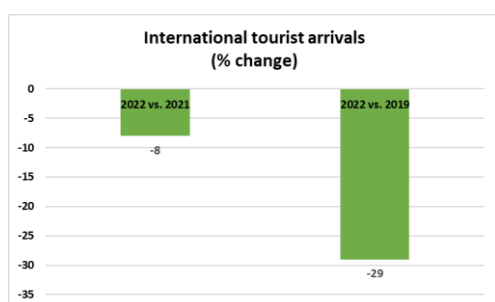
Source: International Monetary Fund.



Source: International Monetary Fund.

International tourist arrivals (1.000), 2021: 294

Source: UNWTO.



Source: UNWTO.



Source: UNWTO.

Travel and Tourism direct contribution to GDP, 2022: 1.9% of GDP, 3.48% growth

Travel and Tourism direct contribution to employment, 2022: 13,190 jobs, 1.76% of total employment, 1.04% growth

Source: World Bank, according to World Travel & Tourism Council.

Travel and Tourism total contribution to GDP, 2022: 7.23% of GDP, 3.89% growth

Travel and Tourism total contribution to employment, 2022: 49,870 jobs, 6.64% of total employment, 1.33% growth

Source: World Bank, according to World Travel & Tourism Council.

Number of establishments, 2021: 319

Number of rooms, 2021: 11,034

Number of bed-places, 2021: 24,407

Occupancy rate / rooms, 2021: 30.20%

Occupancy rate/bed-places, 2021: 18.67%

Average length of stay, 2021: 3.29 nights

Source: UNWTO.

World heritage sites per country (number, April 2023): 2

Source: UNESCO.

3.2.8. San Marino



Area (m²): 61

Population (1.000): 35

Population density (per km²): 574

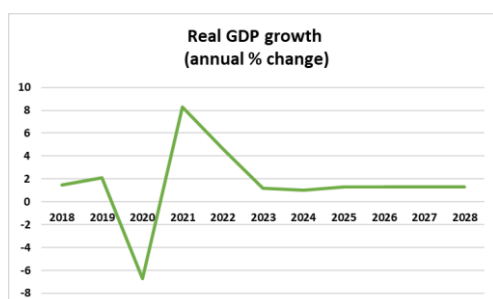
Source: UNECE.

GDP at market prices (current prices, million euro), 2022: 2,000.0

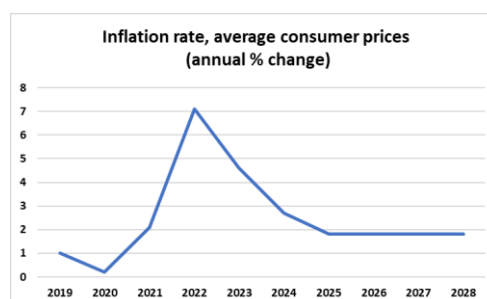
Source: European Commission, Directorate-General for Trade.

Gross domestic product per capita (euro), 2022: 47,061

Source: European Commission, Directorate-General for Trade.



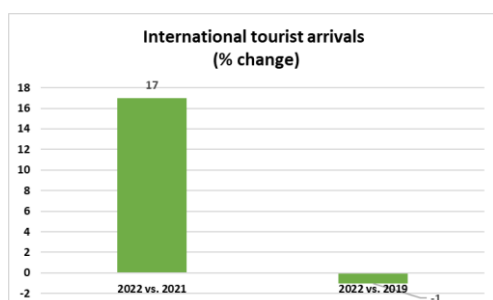
Source: International Monetary Fund.



Source: International Monetary Fund.

International tourist arrivals (1.000), 2021: 94

Source: UNWTO.



Source: UNWTO.

Number of establishments, 2021: 22

Number of rooms, 2021: 660

Number of bed-places, 2021: 1,463

Average length of stay, 2021: 1.60 nights

Source: UNWTO.

World heritage sites per country (number, April 2023): 2

Source: UNESCO.

3.2.9. Serbia



Area (m²): 88,361

Population (1.000): 6,945

Population density (per km²): 79

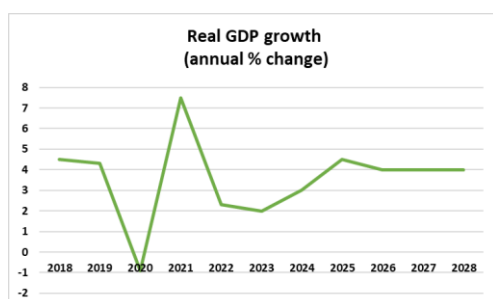
Source: UNECE.

GDP at market prices (current prices, million euro), 2022: 60,367.9

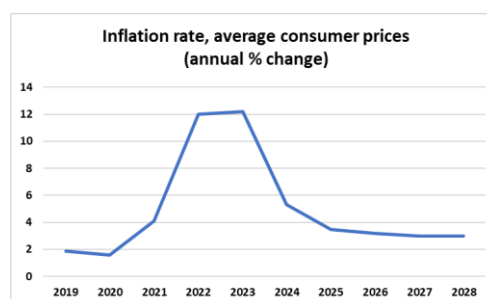
Source: Eurostat.

Gross domestic product per capita (euro), 2022: 9,839

Source: European Commission, Directorate-General for Trade.



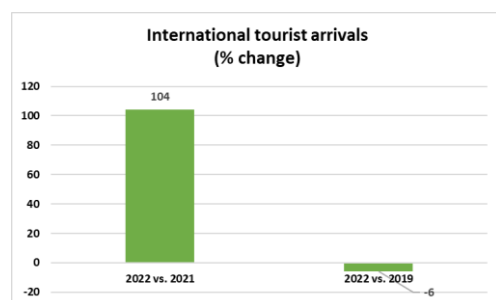
Source: International Monetary Fund.



Source: International Monetary Fund.

International tourist arrivals (1.000), 2021: 871

Source: UNWTO.



Source: UNWTO.



Source: UNWTO.

Travel and Tourism direct contribution to GDP, 2022: 2.5% of GDP, 5.11% growth

Travel and Tourism direct contribution to employment, 2022: 36,790 jobs, 1.83% of total employment, 1.01% growth

Source: World Bank, according to World Travel & Tourism Council.

Travel and Tourism total contribution to GDP, 2022: 7.12% of GDP, 4.57% growth

Travel and Tourism total contribution to employment, 2022: 96,960 jobs, 4.83% of total employment, 0.7% growth

Source: World Bank, according to World Travel & Tourism Council.

Number of establishments, 2021: 829

Number of rooms, 2021: 28,135

Number of bed-places, 2021: 56,560

Occupancy rate/rooms, 2021: 23.02%

Occupancy rate/bed-places, 2021: 22.13%

Average length of stay, 2021: 2.92 nights

Source: UNWTO.

World heritage sites per country (number, April 2023): 5

Source: UNESCO.

3.2.10. Slovenia



Area (m²): 20,253

Population (1.000): 2,108

Population density (per km²): 104

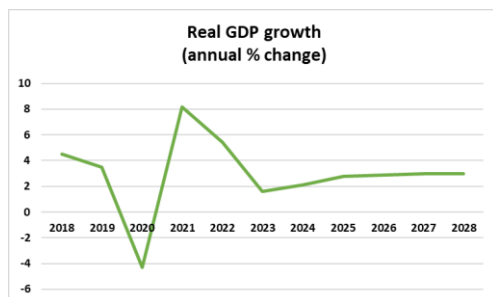
Source: UNECE.

GDP at market prices (current prices, million euro), 2022: 58,988.5

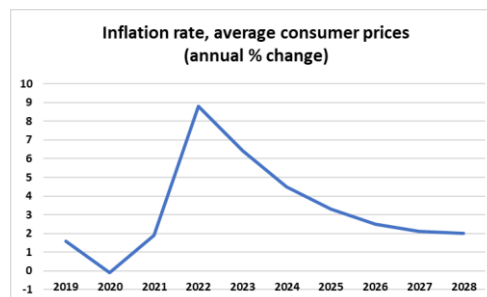
Source: Eurostat.

Gross domestic product per capita (euro), 2022: 27,980

Source: Calculation according to Eurostat and UNECE.



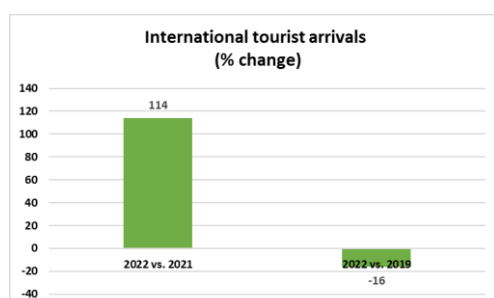
Source: International Monetary Fund.



Source: International Monetary Fund.

International tourist arrivals (1.000), 2021: 1,832

Source: UNWTO.



Source: UNWTO.

Source: UNWTO.

Travel and Tourism direct contribution to GDP, 2022: 3.54% of GDP, 3.79% growth

Travel and Tourism direct contribution to employment, 2022: 34,580 jobs, 4.13% of total employment, 2.09% growth

Source: World Bank, according to World Travel & Tourism Council.

Travel and Tourism total contribution to GDP, 2022: 12.83% of GDP, 3.89% growth

Travel and Tourism total contribution to employment, 2022: 112,720 jobs, 13.46% of total employment, 1.99% growth

Source: World Bank, according to World Travel & Tourism Council.

Number of establishments, 2021: 1,325

Number of rooms, 2021: 25,560

Number of bed-places, 2021: 58,447

Occupancy rate/rooms, 2021: 37.20%

Occupancy rate/bed-places, 2021: 34.70%

Average length of stay, 2021: 2.81 nights

Source: UNWTO.

World heritage sites per country (number, April 2023): 5

Source: UNESCO.

4. EUSAIR COUNTRIES VISITORS SURVEY

As already mentioned, online survey was conducted in the period from April 13th to May 2nd 2023. During the implementation of the survey, the target number of respondents (2,500) was successfully achieved and exceeded (2,513), as is explained in the sample description section.

The main objective of the survey was to explore attitudes of visitors to EUSAIR countries about tourism sustainability. In order to accomplish this objective, the questionnaire was developed and structured into total of 24 questions covering four different areas:

1. Respondents – sample description
2. Frequency and motives for visiting EUSAIR countries
3. Level of satisfaction
4. Attitudes towards sustainable development and tourism.

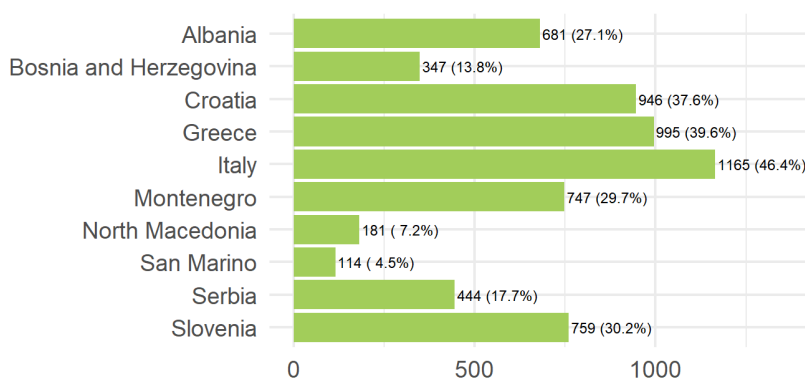
In accordance with the above, the research results are structured according to the defined parts, i.e. according to the expected results of the research through the online survey.

4.1. Respondents – sample description

Target number of participants in the online survey was set to 2,500, counting on as equal as possible distribution among 10 EUSAIR countries. Finally, the target was reached, and a total of 2,513 respondents participated in the research.

Many of the respondents visited more than one EUSAIR country. Most of the respondents visited Italy (46.4%), followed by Greece (39.6%), Croatia (37.6%), Slovenia (30.2%) and Montenegro (29.7%).

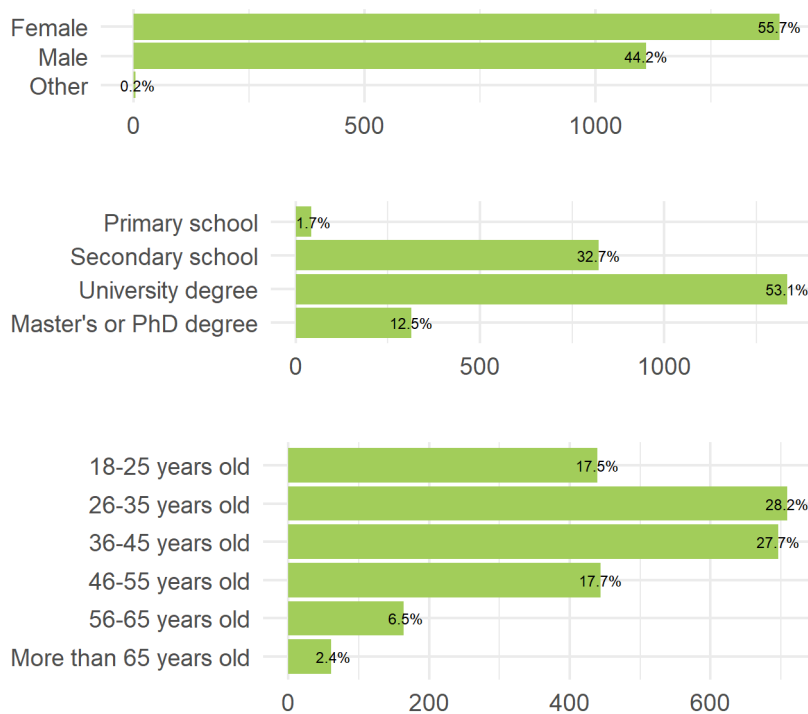
Figure 9. Distribution of respondents (visitors) among EUSAIR countries



Source: survey.

Most of the participants were females (55.7%). Also, most of the participants have a university degree (53.1%) and are from 26 to 45 years old (55.9%).

Figure 10. Sex, education and age of participants



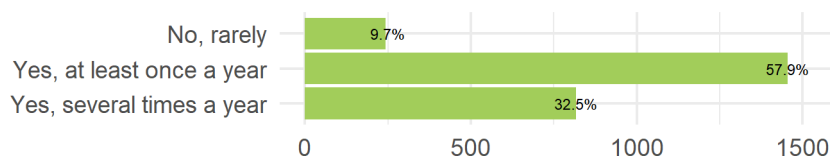
Source: survey.

4.2. Survey results

4.2.1. Frequency and motives for visiting EUSAIR countries

Most of the respondents regularly visit EUSAIR countries (90.4%), almost 58% at least once a year, and almost 33% several times a year.

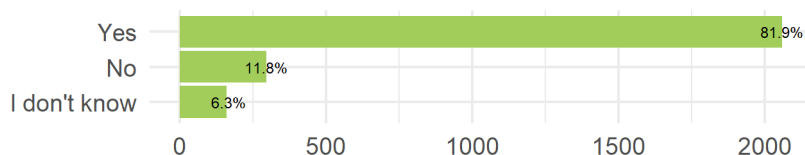
Figure 11. Frequency of visiting EUSAIR countries



Source: survey.

What is encouraging is the fact that almost 82% of respondents have already visited or will visit EUSAIR countries in 2023, while 6.3% of respondents still doesn't know.

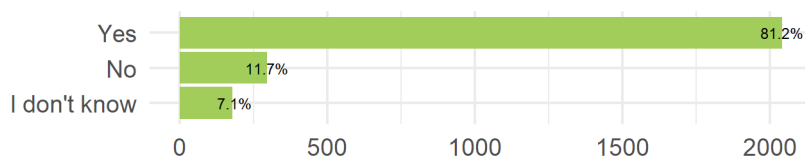
Figure 12. Visiting EUSAIR countries in 2023



Source: survey.

Not of less importance, more than 81% of respondents would recommend EUSAIR countries for a visit to friends and families. Still, almost 12% would not.

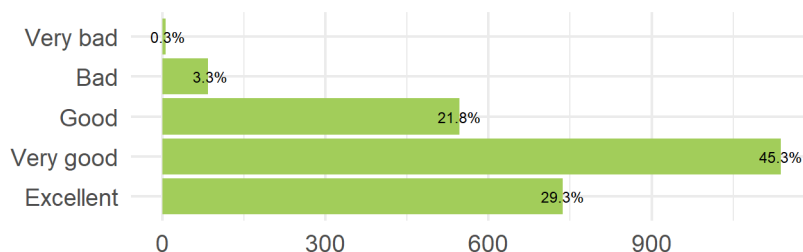
Figure 13. Recommendation of the EUSAIR for a visit



Source: survey.

Most of the respondents rated available information about the tourism offer of the EUSAIR countries very good (45.3%), or very good and excellent (74.6%).

Figure 14. Rating available information about the tourism offer of the EUSAIR countries

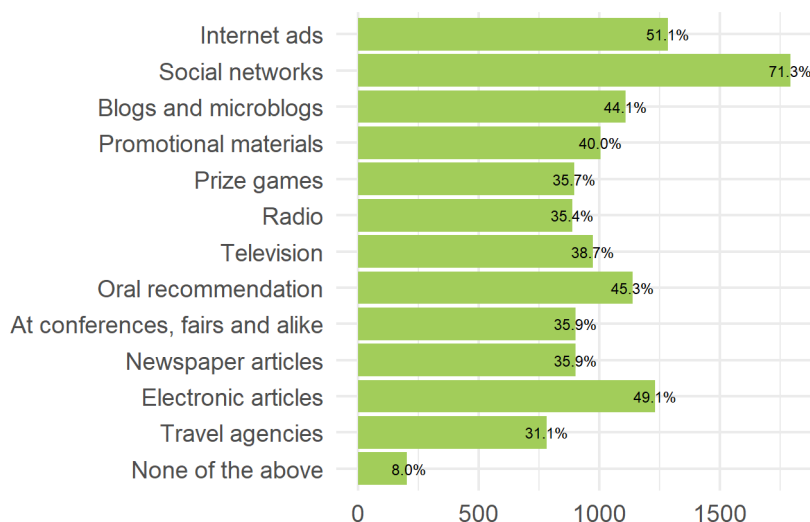


Source: survey.

Mostly, respondents are informed about the tourist facilities of the EUSAIR countries via following channels:

1. Social networks (e.g. Facebook, Instagram, etc.) (71.3%)
2. Internet ads (without social networks) (51.1%)
3. Electronic articles (on portals) (49.1%)
4. Oral recommendation (45.3%)
5. Blogs and microblogs (e.g. Twitter and others) (44.1%).

Figure 15. Channel of information about the tourist facilities of the EUSAIR countries

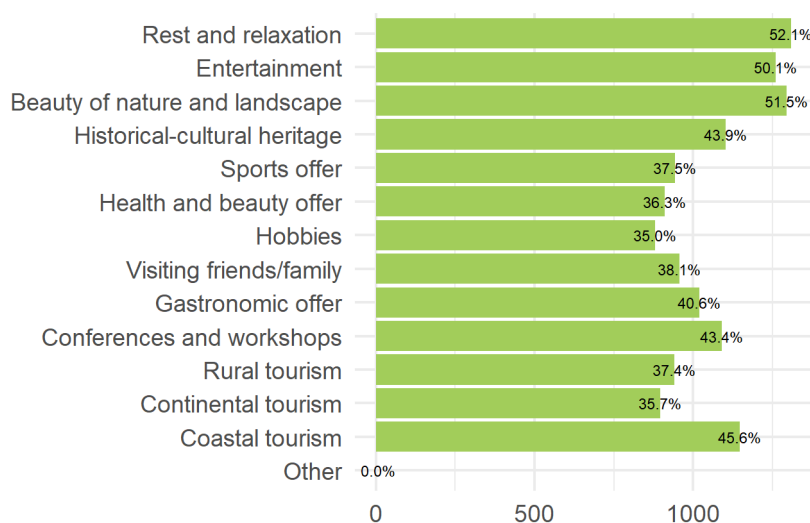


Source: survey.

Mostly, reasons for tourist visit to the EUSAIR country/destination were the following:

1. Rest and relaxation (52.1%)
2. Beauty of nature and landscape (51.5%)
3. Entertainment (50.1%)
4. Coastal tourism (45.6%)
5. Historical-cultural heritage (43.9%)
6. Conferences and workshops (business tourism) (43.4%).

Figure 16. Reasons for tourist visit to the EUSAIR country/destination



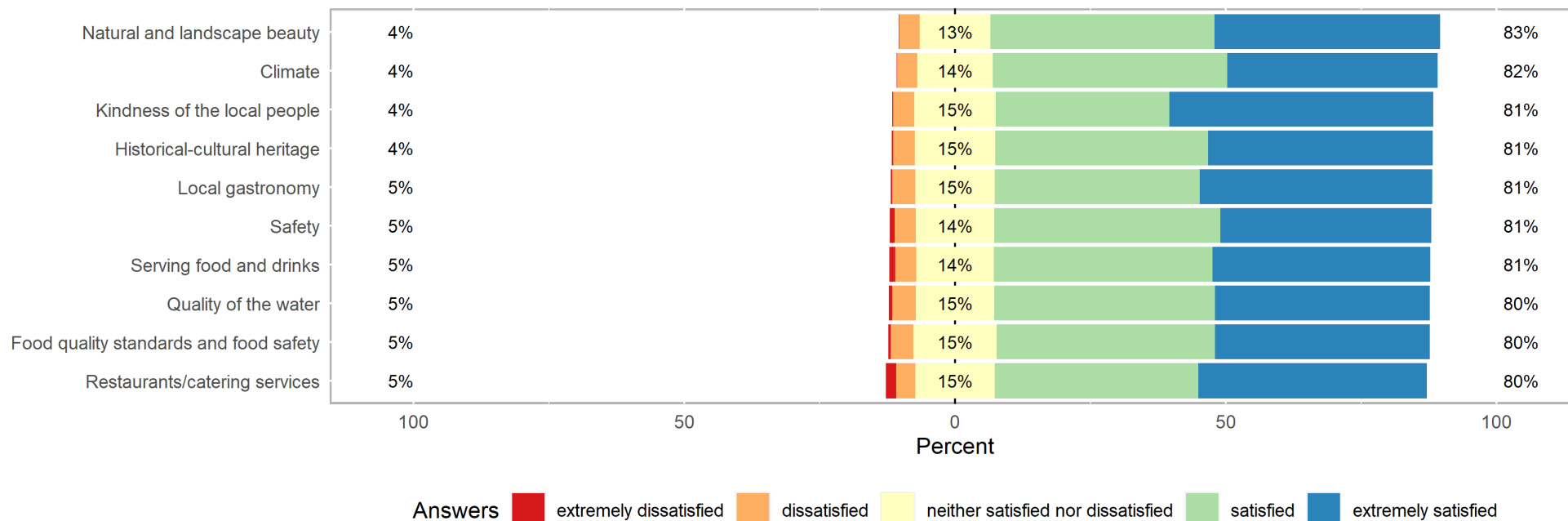
Source: survey.

4.2.2. Level of satisfaction

Visitors of EUSAIR countries are the most satisfied (the highest ranks in categories “satisfied” and “extremely satisfied”) with the following characteristics/features of the EUSAIR tourism destination/country, while some of them are even ranked equally:

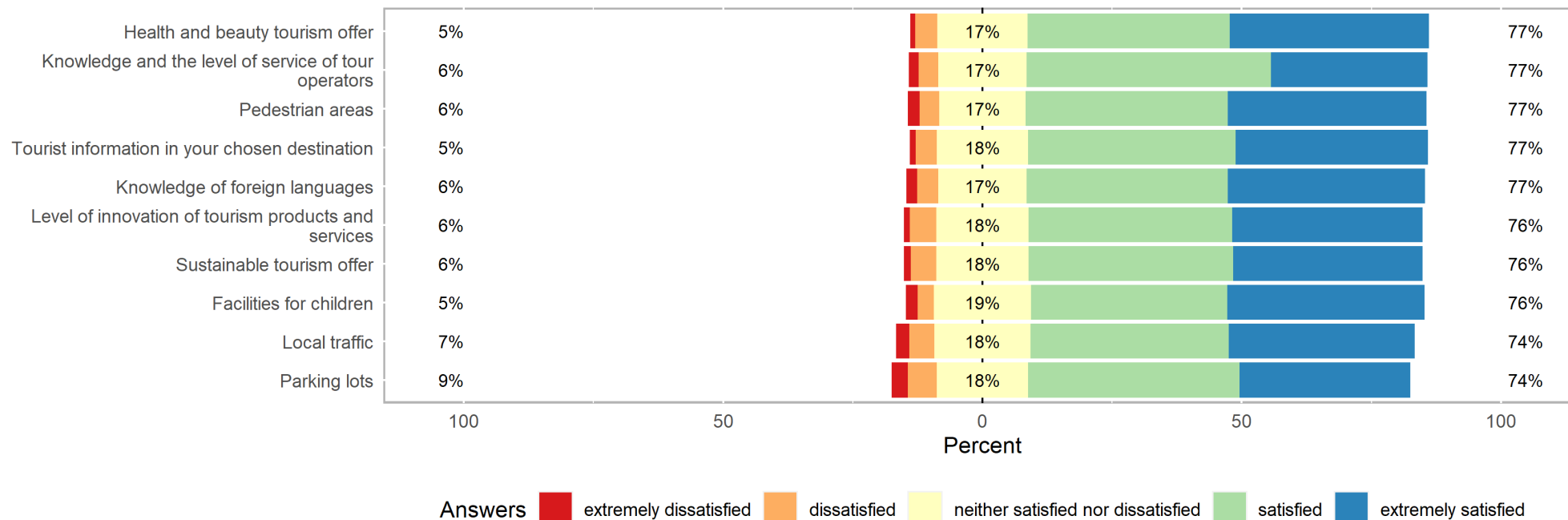
1. Natural and landscape beauty
2. Climate
3. Kindness of the local people; Historical-cultural heritage; Local gastronomy; Safety; Serving food and drinks
4. Quality of the water; Food quality standards and food safety; Restaurants/catering services.

Figure 17. Level of satisfaction with the visit to the EUSAIR tourist destination/country (Top 10)



Source: survey.

Figure 18. Level of satisfaction with the visit to the EUSAIR tourist destination/country (Bottom 10)



Source: survey.

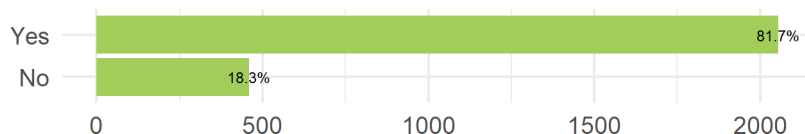
On the other hand, visitors of the EUSAIR countries are at least satisfied (the lowest ranks in categories “satisfied” and “extremely satisfied”) with the following characteristics/features of the EUSAIR tourism destination/country, with some of them ranked equally:

1. Parking lots; Local traffic
2. Facilities for children; Sustainable tourism offer; Level of innovation of tourism products and services
3. Knowledge of foreign languages; Tourist information in your chosen destination; Pedestrian areas; Knowledge and the level of service of employees in tourism; Health and beauty tourism offer.

4.2.3. Attitudes towards sustainable development and tourism

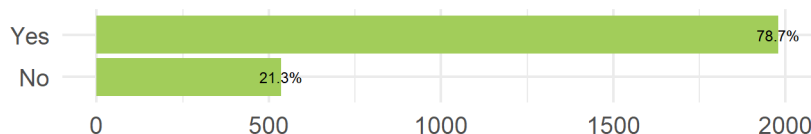
Almost 82% of the respondents are familiar with the concept of sustainable development, while almost 79% of the respondents are familiar with the concept of sustainable tourism.

Figure 19. Familiarity with the concept of sustainable development



Source: survey.

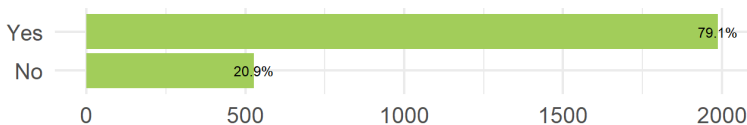
Figure 20. Familiarity with the concept of sustainable tourism



Source: survey.

Almost 80% of respondents feel that sustainability in general is important to them, considering the three dimensions of sustainable tourism (economic, social and ecological dimension).

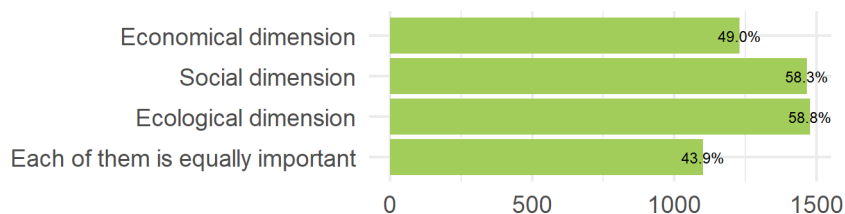
Figure 21. Importance of sustainability in general



Source: survey.

Regarding different dimensions of sustainability and their importance, respondents rated them similarly - economic dimension is a bit lagging behind two other dimensions: social and ecological dimensions.

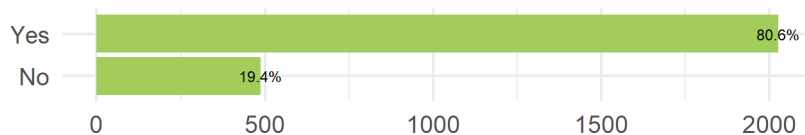
Figure 22. Importance of sustainability dimensions



Source: survey.

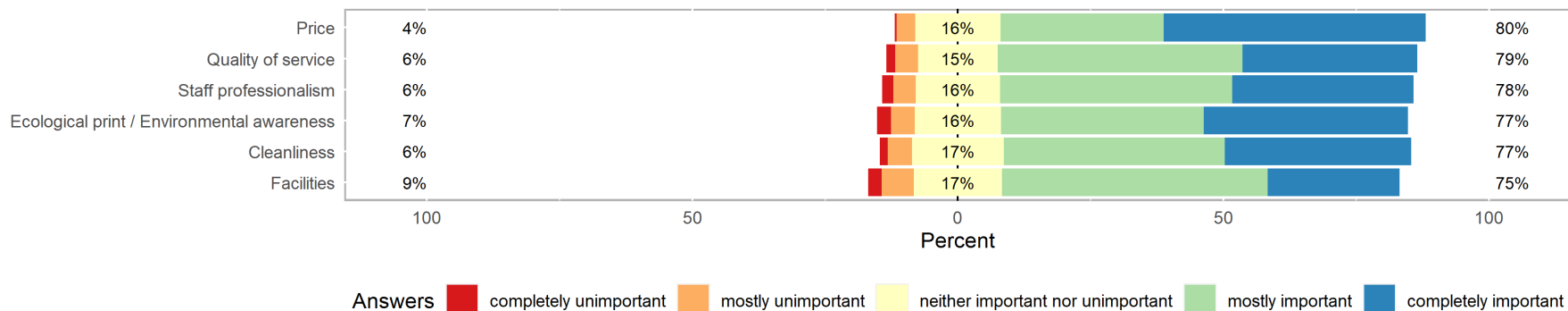
When selecting accommodation, respondents value the price of the accommodation the most (by the rank in categories “mostly” and “completely important”), while facilities are valued least (gym, spa, pool, food and beverage services, etc.). More than 80% of respondents selected an accommodation service for its (positive) social or environmental impact - for instance, choosing a hotel committed to reducing its environmental impact.

Figure 23. Selecting an accommodation service for its (positive) social or environmental impact



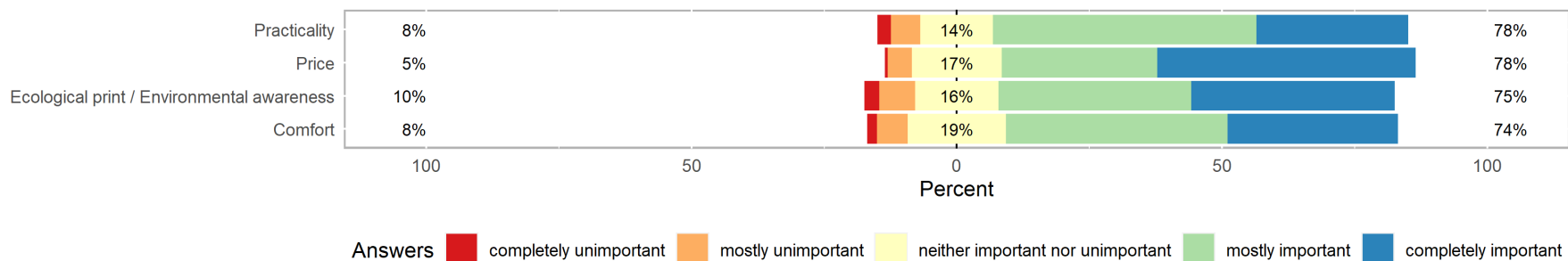
Source: survey.

Figure 24. Valuing the most when selecting accommodation



Source: survey.

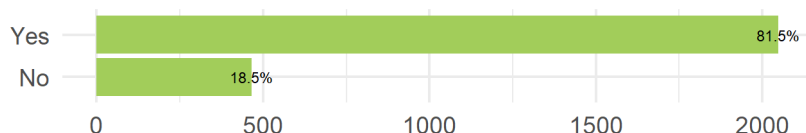
Figure 25. Valuing the most when selecting transportation mode



Source: survey.

When selecting transportation mode, respondents value practicality of the transportation mode the most (for instance, closeness of the airport from home or possibility to bring more luggage, etc. (by the rank in categories “mostly” and “completely important”)), and comfort the least. Almost 82% of respondents selected a transport mode for its (positive) social or environmental impact (for example, taking the train instead of the plane or using car sharing instead of driving alone).

Figure 26. Selecting a transport mode for its (positive) social or environmental impact

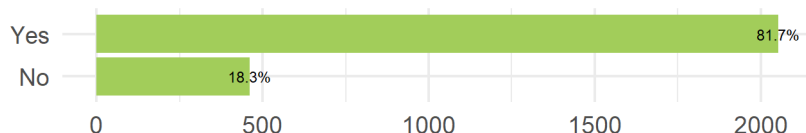


Source: survey.

When selecting destinations, respondents value tourism attractions and natural resources/heritage the most (by the rank in categories as “mostly” and “completely important”), and the ecological print/environmental awareness the least.

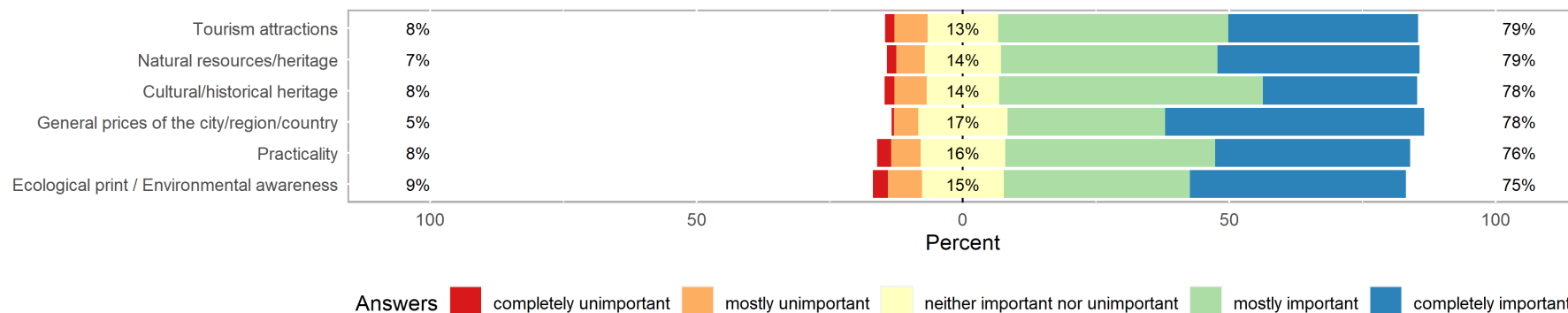
On the contrary, almost 82% of respondents selected food/beverage service (for example, bar, restaurant) for its (positive) social or environmental impact.

Figure 27. Selecting a food/beverage service for its (positive) social or environmental impact



Source: survey.

Figure 28. Valuing the most when selecting destinations

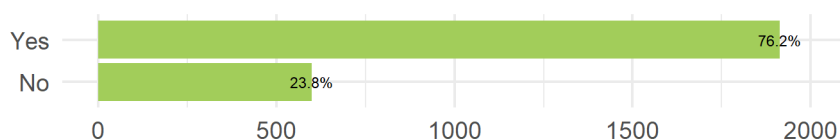


Source: survey.

Analysing the most important common factor when selecting accommodation, transportation mode and destinations in general showed that it is definitely price.

However, more than 76% of respondents feel more loyal to a brand which includes sustainable or environmental-friendly practices in its activity (tourism).

Figure 29. Loyal to a brand which includes sustainable or environmental-friendly practices in its activity (tourism)



Source: survey.

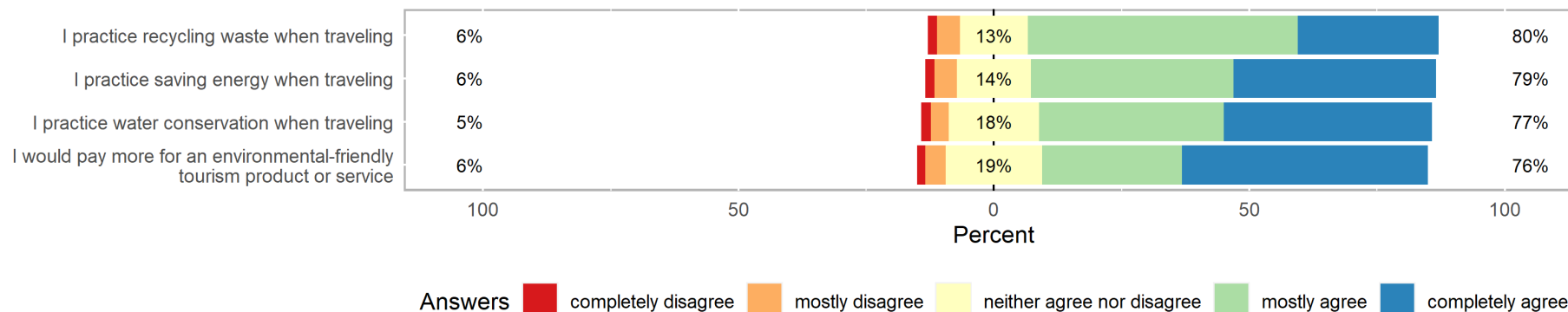
Respondents mostly practice environmental-friendly practices when travelling – mainly, they:

1. Recycle waste
2. Save energy
3. Conserve water.

Interestingly, 76% of the respondents agree mostly or completely that they would pay more for an environmental-friendly tourism product or service.

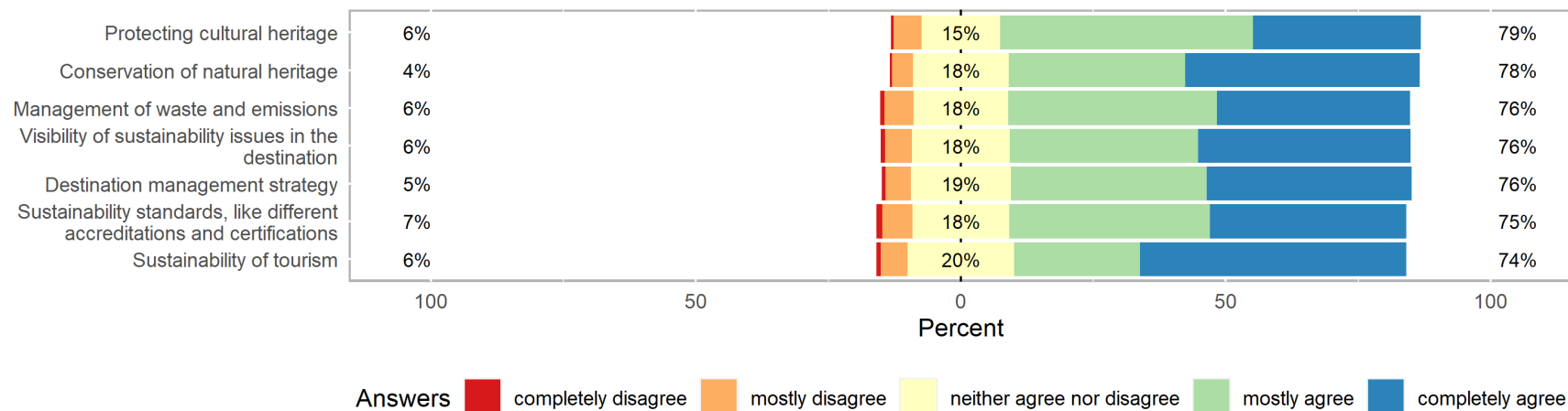
Finally, main factors influencing decision to visit a destination, are determined as follows: protecting cultural heritage and conservation of natural heritage.

Figure 30. Practicing environmental-friendly practices when travelling



Source: survey.

Figure 31. Factors influencing decision to visit a destination



Source: survey.

5. CONCLUSIONS AND RECOMMENDATIONS

Further text refers to conclusions and recommendations on topics which arose from the conducted desktop and online survey researches, as explained in the introductory section. For clarity reasons, as well as for reflecting the approach used, conclusions and recommendations are divided in relation to the following four topics:

1. Sustainable tourism trends
2. EUSAIR countries' profiles
3. Survey - attitudes of EUSAIR visitors towards tourism
4. Recommendations - enhancing sustainability of tourism in EUSAIR countries.

Sustainable tourism trends

- Tourism industry represents a powerful driver of the economic growth of destinations.

✓ *Tourism has a multidisciplinary effect on different sectors and it entails the growth and development of other economic activities.*

- International tourism landscape is constantly changing in a very unpredictable manner.
- The COVID-19 pandemic affected all segments of our society and economy. The travel and tourism industry, although mostly resilient to external shocks in the last few decades, has become one of the most affected.
- The year 2022 saw a strong rebound in tourism spending, resulting in recovery of pre-pandemic levels in income across many destinations and international tourism is set to consolidate its recovery in 2023.
- Economic, health and geopolitical headwinds could weigh on the sustained recovery of international tourism and confidence levels in 2023. As main factors that could weigh on the recovery of tourism were determined: high inflation and interest rates, the spike in oil and food prices, fears of global recession, continued uncertainty derived from the Russian aggression against Ukraine and other geopolitical tensions, health challenges related to COVID-19 and workforce shortages.
- Understanding travel motivations and shifts in the global tourism marketplace is critical for unpacking future travel patterns and consumption perspectives.
- Tourism has the potential to contribute to all sustainable development goals (SDGs) found within the 2030 Agenda for Sustainable Development, including SDG 8 on inclusive and sustainable economic growth, SDG 11 on sustainable cities and human settlements, and SDG 12 on sustainable consumption and production.

✓ *Sustainability is very important to maintain tourism existence by minimizing negative impacts on the environment and social culture, as well as contributing and providing opportunities for the local economy.*

✓ *The further development of tourism in a sustainable way is a key prerequisite for continued competitiveness.*

- There is a growing concern of today's travellers for ethical and sustainable travel options. Ecological trips include simple changes, such as the possibility of renting an electric vehicle instead of a classic vehicle and the like.

✓ *Tourists are increasingly adopting habits and lifestyles aimed at limiting their impact on environment.*

- Key recommendations of strategic approaches with the potential to accelerate the integration of sustainable consumption practices into tourism policies include prioritization of the impact areas related to biodiversity conservation and sustainable land use, waste reduction, efficient water use, waste disposal, reporting on the sustainability of companies in the tourism sector, environmental performance certification systems, use of innovations and technologies.

✓ *Unsustainable consumption and production practices represent one of the biggest barriers to sustainable development/tourism.*

✓ *Efforts have been made to effectively address overcrowding in popular destinations.*

- Despite progress in tourism statistics and monitoring, limited data on the impact of tourism on the environment at the national and subnational levels represents one of the challenges to the development of these policies.
- The offer of new, improved products and/or service adapted to modern needs using available technology makes it possible to stand out from competition.
- Use of Industry 5.0 technologies enable personalization of the touristic offer and remote management.
- Behavioural approach to encouraging socially and environmentally sustainable choices in tourism consumption is a rising trend in tourism sustainability management.

EUSAIR countries profiles

- Adriatic-Ionian Region consist of 10 countries, of different characteristics and large differences (divergences) - four countries are EU Member States, while six countries are non-EU countries.

✓ *Countries differ in size, in terms of area, population and population density. The largest country in terms of area and population is Italy (42% of total EUSAIR area, and 64% of total EUSAIR population). The smallest is San Marino, in terms of area and population, but according to population density it is on the first place among EUSAIR countries.*

✓ *Countries differ in economic performance. Italy is the biggest country in the EUSAIR region in terms of total GDP (81% of total EUSAIR GDP).*

✓ *GDP per capita ranges from 6,132 euros in Albania (the lowest rank) to 47,061 euros in San Marino (the highest rank).*

✓ *According to the International Monetary Fund projections, real GDP growth rate will decrease in the period 2023-2028, and the size of decrease varies among EUSAIR countries. Projections show also a decrease of the inflation in the same period.*

- Tourism contributes significantly to the national economies of EUSAIR countries in terms of employment creation and revenue generation, but tourism performance differs among member countries.

✓ *Italy has the highest share in international tourist arrivals in EUSAIR region (43%), Greece follows with 23%, Croatia with 17% and Albania with 9%.*

✓ *Three EUSAIR countries are among 20 best performing destinations in 2022 per international arrivals (% change vs. 2019): Albania, San Marino and Serbia.*

✓ *Three EUSAIR countries are among 20 best performing destinations in 2022 in terms of receipts (real % change vs. 2019): Slovenia, Greece and Italy.*

✓ *Travel and Tourism direct and total contribution to GDP will increase in EUSAIR countries until 2028.*

✓ *Travel and Tourism direct and total contribution to employment will increase in EUSAIR countries until 2028.*

✓ *Due to the difference in size, EUSAIR countries differ in terms of number of establishments, number of rooms, and bed-places. However, occupancy rates are similar, but on the other side, average length of stay also differs among EUSAIR countries.*

✓ *All EUSAIR countries have world heritage sites, with the highest number in Italy (52% of total number in EUSAIR countries).*

Survey - attitudes of EUSAIR visitors towards tourism

- Most of EUSAIR visitors (90.4%) regularly visit EUSAIR countries and have visited or will visit EUSAIR countries in 2023 as well (82%).

✓ *Most of EUSAIR visitors would recommend EUSAIR countries for a visit (more than 81%).*

- Available information about the tourism offer of the EUSAIR countries is considered mostly very good (45.3%) or excellent (29.3%).

✓ *The most used channels of information are (according to the importance from the categories "most important" to the "least important"): social networks; Internet ads; electronic articles; oral recommendation and blogs and microblogs.*

- The most important reasons for tourist visit to the EUSAIR country/destination are:
 1. Rest and relaxation
 2. Beauty of nature and landscape
 3. Entertainment
 4. Coastal tourism
 5. Historical-cultural heritage

6. Conferences and workshops (business tourism).
- Visitors of the EUSAIR countries are the most satisfied (the highest ranks in categories “satisfied” and “extremely satisfied”) with the following characteristics/features of the EUSAIR tourism destination/country, some of them ranked equally:
 1. Natural and landscape beauty
 2. Climate
 3. Kindness of the local people; Historical-cultural heritage; Local gastronomy; Safety; Serving food and drinks
 4. Quality of the water; Food quality standards and food safety; Restaurants/catering services.
 - On the other hand, visitors of the EUSAIR countries are at least satisfied (the lowest ranks in categories “satisfied” and “extremely satisfied”) with following characteristics/features of the EUSAIR tourism destination/country, some of them ranked equally:
 1. Parking lots; Local traffic
 2. Facilities for children; Sustainable tourism offer; Level of innovation of tourism products and services
 3. Knowledge of foreign languages; Tourist information in your chosen destination; Pedestrian areas; Knowledge and the level of service of employees in tourism; Health and beauty tourism offer.
 - Most of the EUSAIR visitors are familiar with the concept of sustainable development (almost 82%) and sustainable tourism (almost 79%).

- ✓ *Most of EUSAIR visitors feel that sustainability in general is important to them, considering the three dimensions of sustainable tourism (economic, social and ecological dimension).*
 - ✓ *Regarding different dimensions of sustainability and their importance, economic dimension is a bit lagging behind two other dimensions: social and ecological dimensions.*
 - When selecting accommodation, EUSAIR visitors value price of the accommodation the most, while facilities least (gym, spa, pool, food and beverage services, etc.).

- ✓ *More than 80% of EUSAIR visitors selected an accommodation service for its (positive) social or environmental impact - for instance, choosing a hotel committed to reducing its environmental impact.*
 - When selecting transportation mode, EUSAIR visitors value practicality of the transportation mode the most, and the comfort least.

- ✓ *Almost 82% of EUSAIR visitors selected a transport mode for its (positive) social or environmental impact - for example, taking the train instead of the plane or using car sharing instead of driving alone.*
 - When selecting destinations, EUSAIR visitors value tourism attractions and natural resources/heritage the most, and the ecological print/environmental awareness least.

- The most important common factor, when selecting accommodation, transportation mode and destinations in general, is definitely price.

✓ *More than 76% EUSAIR visitors feel more loyal to a brand which includes sustainable or environmental-friendly practices in its activity (tourism).*

- EUSAIR visitors mostly practice environmental-friendly practices when travelling – mainly, they:
 1. Recycle waste
 2. Save energy
 3. Conserve water.

✓ *76% of EUSAIR visitors agree mostly or completely that they would pay more for an environmental-friendly tourism product or service.*

- Main factors influencing decision to visit a destination, are determined as follows: protecting cultural heritage and conservation of natural heritage.

Recommendations - enhancing sustainability of tourism in EUSAIR countries

Considering everything mentioned above, especially survey results, the following recommendations in terms of further development of sustainable tourism in EUSAIR countries were defined:

- Strengthen cooperation and exchange of experiences and best practices.
- Develop unique approach to the development of sustainable tourism, considering all differences among EUSAIR countries.
- Apply holistic approach to sustainable tourism considering all dimensions of sustainable tourism.

✓ *Environmental, social and economic dimensions.*

- Recognize COVID-19 pandemic as an opportunity for all key stakeholders to reflect on the sustainability of the existing tourism practices and to develop products which will be more nature-friendly and which will respond to the new needs and expectations of changing tourist demand.
- Develop a distinctive offer for special interest tourist segments which could disperse demand in time and space and prolong the tourism season.
- Develop and implement successful cross-cutting demonstration projects and pilot locations involving different tourism value chains, to showcase the approach and examples of how to address and enhance all dimensions of tourism sustainability.
- Develop training programs on tourism market trends, changes and challenges, recommendations, case studies and lessons learned, for actors and stakeholders across tourism industry and value chains.

- Foster skills development in the tourism industry with particular emphasis on quality management and sustainability in tourism.
- Tourism contribution to SDGs underlines the need to rightly place tourism as one of the key pillars of socio-economic development.
- Recognize quality management as a key factor in competitive, responsible and sustainable tourism. The success of quality management certainly depends on coordination and harmonization in the adoption and implementation of tourism policies, which is the foundation necessary for the development and management of tourism.

✓ *Quality in no aspect can be achieved or maintained without sustainable development.*

- It is of great importance to plan new or innovative tourist content in accordance with current trends.

✓ *Acceptance of innovative approaches. Namely, sustainable tourism is dependent on the application of technologies and innovations in order to accelerate changes, and at the same time require the involvement and cooperation of numerous stakeholders. One of the key innovative approaches is circularity, a concept that is rooted in thinking about the circular economy, and which promotes a fundamental paradigm shift that aims to stimulate the efficiency of resource use with a systematic approach throughout the entire value chain. The approach focuses on ecological design and models and the responsible use of materials (reduce, reuse and recycle), in order to eventually achieve zero waste. One of the methods that supports decision-making that takes sustainability into account is certainly the product life cycle assessment method. During the life cycle, products and services fulfil their basic function, but they also contribute to the depletion of certain resources, and their production results in pressures on the environment.*

✓ *Building awareness and education about the possibilities of the circular economy.*

- Facilitate innovations for sustainable tourism.

✓ *Strengthen business and scientific partnerships for innovation.*

✓ *Develop awareness of the necessity of innovation.*

✓ *Encourage innovation in tourism.*

✓ *Support value chains in tourism.*

✓ *Build resilience and innovation through local networking of the business sector, policy makers, scientific research and education sector.*

✓ *Cultivate the Fivefold Helix approach.*

- Promote tourism with a low impact on the climate.

✓ *Ecological travel.*

✓ *Monitor trends in tourism and its impact for better management of resources and produced waste, respecting the carrying capacity of the destination.*

✓ *Application of sustainable solutions (electric mobility, promotion of pollution reduction, waste management...).*

✓ *Incentives for ecological innovation.*

- Create a favourable environment for the development of tourism/tourist destination.

- ✓ *Develop tourist offer throughout the year - development and improvement of tourist attractions, selective forms of tourism, accommodation capacities, organization of events and the like.*
- ✓ *Assess the effectiveness of existing response and recovery plans.*
- ✓ *Ensure that policies and plans adequately respond to the needs of the local population.*
- ✓ *Encourage the creation of business support institutions in tourism, both virtual and physical.*
- ✓ *Identify and increase the capacity and competitiveness of entrepreneurs in tourism.*

- Promote security in tourism.

- ✓ *Strengthen resistance to various risks (climate, pandemic, etc.).*
- ✓ *Establish crisis management.*

- Promote inclusiveness of tourism and development of platforms for the cooperation of key stakeholders in tourism.

- ✓ *Establish a continuous dialogue of national stakeholders and sharing of information in real time.*
- ✓ *Build partnerships, involvement in clusters and international associations.*
- ✓ *Pay attention to vulnerable groups and their opportunities, both on the side of tourism providers and on the side of visitors.*
- ✓ *Participate in EU co-financed projects.*

- Promote an integrated forward-looking tourism approach.

- ✓ *Monitoring trends and benchmarking analysis.*
- ✓ *Develop management mechanisms in tourism.*
- ✓ *Ensure appropriate data and information for quality decision-making.*
- ✓ *Supervise the implementation of strategies and continuous re-evaluation and rapid adjustment, if necessary.*
- ✓ *Integrated quality management in tourism.*
- ✓ *Create strategic plans for development with clearly defined roles of all stakeholders.*

- Use behavioural approach to tourism sustainability management on all levels of tourism governance ("nudging").

- ✓ *Influencing consumer behaviour towards a desirable direction and encouraging socially and environmentally sustainable choices in tourism consumption.*
- ✓ *Developing and providing the context, quality and infrastructure for making sustainable choices in tourism.*

- Build and promote the identity of a tourist destination.

- ✓ *Destination branding as a key factor for promoting competitiveness.*
- ✓ *Improve destination capacity and skills for destination brand development and management, marketing – including social media and storytelling – and effective communication and media relations.*

✓ *Promote of cultural and social values of the tourist destination.*

- Develop human resources for sustainable tourism.

✓ *Improve the capacity and skills, knowledge and competences of human resources in tourism for the purpose of the development of sustainable tourism.*

✓ *Encourage the definition of necessary new professions in tourism.*

✓ *Encourage lifelong education in tourism.*

- Apply Industry 5.0 technologies in tourism (smart tourism).

✓ *Digitalization of tourist services.*

✓ *Virtual "conversations and walks".*

✓ *Online platforms for selling local products and art.*

✓ *Augmented reality.*

✓ *Voice search and voice control.*

✓ *Reducing the digital divide.*

✓ *Education about the possibilities and characteristics of Industry 5.0 technologies and encouraging their application in tourism (big data, robots, chatbots, Internet of Things, artificial intelligence, blockchain...).*

- Maintain and increase the level of quality of touristic offer.

✓ *Maintaining: natural and landscape beauty; climate; kindness of the local people; historical-cultural heritage; local gastronomy; safety; serving food and drinks; quality of water; food quality standards and food safety; restaurants/catering services.*

✓ *Increasing: parking lots; local traffic; facilities for children; sustainable tourism offer; level of innovation of tourism products and services; knowledge of foreign languages; tourist information in your chosen destination; pedestrian areas; knowledge and the level of service of employees in tourism; health and beauty tourism offer.*

- Promote EUSAIR destinations as sustainable touristic destinations.

✓ *Promote EUSAIR countries as tourism destination offering rest and relaxation, beauty of nature and landscape, entertainment, historical-cultural heritage, business tourism, as well as coastal tourism in some countries,*

✓ *Beauty of nature and landscape, as well as historical-cultural heritage represents one of the most important reasons to visit EUSAIR countries, which requires special emphasis on the environmental and social protection, as well as measures to tackle overtourism in popular destinations.*

- Update regularly and disseminate information about the tourism offer of the EUSAIR countries using most popular/used channels of information.

✓ *Oral recommendation still represents one of the important sources of information.*

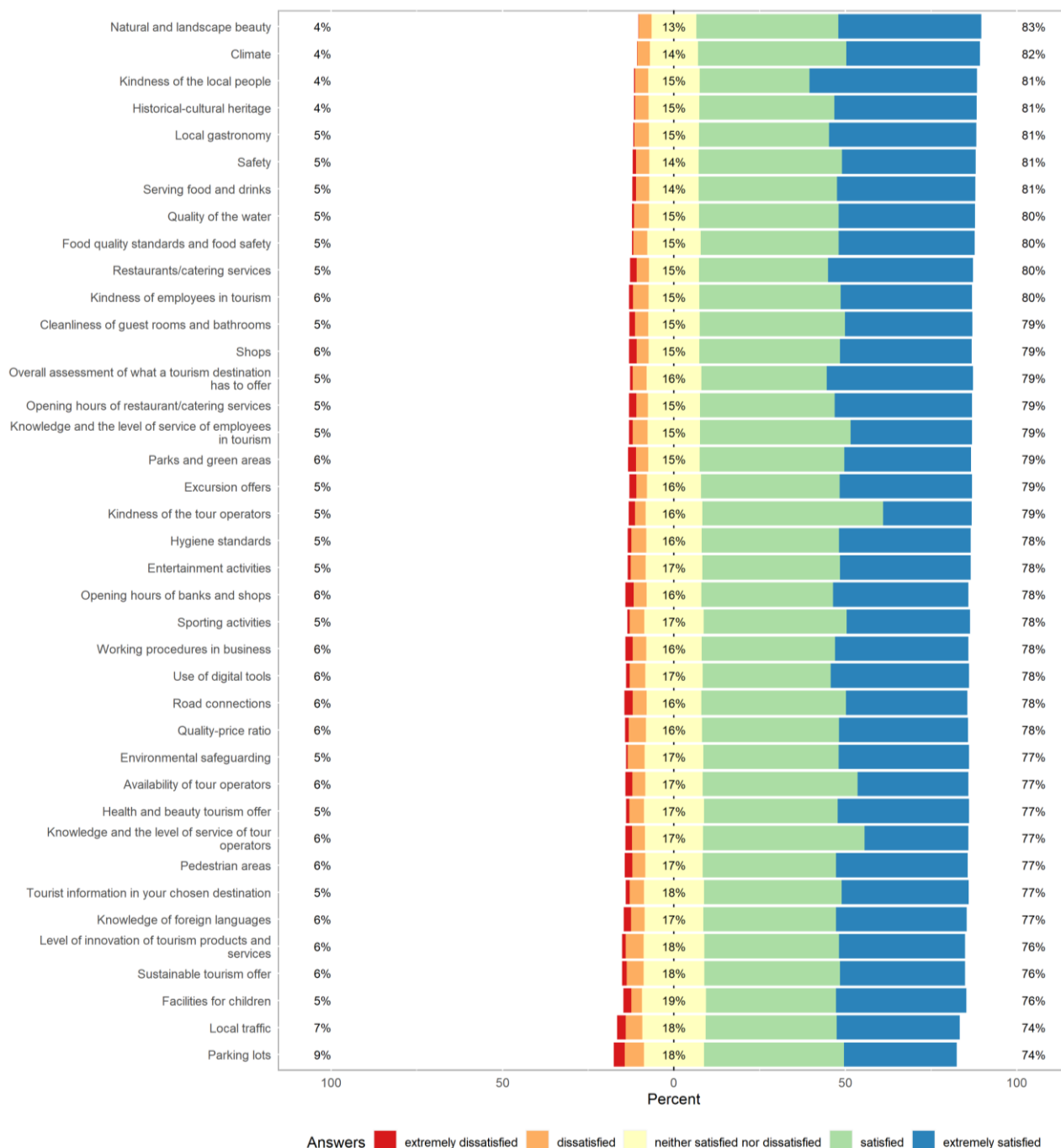
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Annex I. Level of satisfaction with the visit to the EUSAIR tourist destination/country (Total)



Source: survey.

Annex II. Online questionnaire

Respondents

1. I represent a visitor of the following EUSAIR country/countries (multiple answers are possible)

- Albania
- Bosnia and Herzegovina
- Montenegro
- Greece
- Croatia
- Italy
- San Marino
- North Macedonia
- Slovenia
- Serbia

2. Age

- 18-25 years old
- 26-35 years old
- 36-45 years old
- 46-55 years old
- 56-65 years old
- More than 65 years old

3. Sex

- Female
- Male
- Other

4. Education

- Primary school
- Secondary school
- University degree
- Master's or PhD degree

Frequency and motives for visiting EUSAIR countries

5. Do you choose EUSAIR countries regularly for your vacation?

- No, rarely
- Yes, at least once a year
- Yes, several times a year

6. Are you planning or have you already visited some of the EUSAIR countries in 2023?

- Yes
- No
- I don't know

7. Would you recommend visiting EUSAIR countries to friends or family?

- Yes
- No
- I don't know

8. **How would you rate available information about the tourism offer of the EUSAIR countries, using a scale of 1 to 5 (1 - very bad; 2 - bad; 3 - good; 4 - very good; 5 - excellent)?**

9. **You were informed about the tourist facilities of the EUSAIR countries via (multiple answers are possible):**

- Internet ads (without social networks)
- Social networks (e.g. Facebook, Instagram, etc.)
- Blogs and microblogs (e.g. Twitter and others)
- Promotional materials
- Prize games
- Radio
- Television
- Oral recommendation
- At conferences, fairs and alike (as part of an event)
- Newspaper articles
- Electronic articles (on portals)
- Travel agencies
- None of the above

10. **Reasons for your tourist visit to the EUSAIR country/destination are (multiple answers are possible):**

- Rest and relaxation
- Entertainment
- Beauty of nature and landscape
- Historical-cultural heritage
- Sports offer
- Health and beauty offer
- Hobbies
- Visiting friends/family
- Gastronomic offer
- Conferences and workshops (business tourism)
- Rural tourism
- Continental tourism
- Coastal tourism
- Nautical tourism
- Other:

Level of satisfaction

11. **Rate your level of satisfaction with your visit to the EUSAIR tourist destination/country (1 - extremely dissatisfied; 2 – dissatisfied; 3 – neither satisfied nor dissatisfied; 4 – satisfied; 5 - extremely satisfied):**

- Kindness of the local people
- Kindness of the tour operators
- Knowledge and the level of service of tour operators
- Availability of tour operators
- Kindness of employees in tourism
- Knowledge and the level of service of employees in tourism
- Knowledge of foreign languages
- Road connections
- Local traffic
- Parking lots
- Tourist information in your chosen destination

- Climate
- Pedestrian areas
- Parks and green areas
- Historical-cultural heritage
- Natural and landscape beauty
- Environmental safeguarding
- Quality of the water
- Facilities for children
- Safety
- Opening hours of banks and shops
- Shops
- Opening hours of restaurant/catering services
- Restaurants/catering services
- Working procedures in business, guest registration and check-out procedures, billing, inventory, determination of irregularities and damage, etc.
- Cleanliness of guest rooms and bathrooms
- Entertainment activities
- Sporting activities
- Health and beauty tourism offer
- Excursion offers
- Local gastronomy
- Food quality standards and food safety
- Hygiene standards
- Serving food and drinks
- Use of digital tools
- Level of innovation of tourism products and services
- Sustainable tourism offer
- Quality-price ratio
- Overall assessment of what a tourism destination has to offer

Attitudes towards sustainable development and tourism

12. Have you ever heard of the concept of sustainable development?

- Yes
- No

13. Have you ever heard of the concept of sustainable tourism?

- Yes
- No

14. Do you personally feel that sustainability in general is important to you, considering the three dimensions of sustainable tourism (economic, social and ecological dimension)?

- Yes
- No

15. Do you feel that one of the three dimensions of sustainable tourism is and should be considered as more important than the others? If yes, which one? (multiple answers are possible)

- Economical dimension
- Social dimension
- Ecological dimension
- Each of them is equally important to me

16. **What do you value the most when selecting accommodation?** (please value each of the items listed, 1 - completely unimportant; 2 - mostly unimportant; 3 - neither important nor unimportant; 4 - mostly important; 5 - completely important)
- Price
 - Facilities (gym, spa, pool, food and beverage services, etc.)
 - Cleanliness
 - Quality of service
 - Staff professionalism
 - Ecological print / Environmental awareness
17. **Have you ever selected an accommodation service for its (positive) social or environmental impact?** (for instance, choosing a hotel committed to reducing its environmental impact)
- Yes
 - No
18. **What do you usually value the most when selecting transportation mode?** (please value each of the items listed, 1 - completely unimportant; 2 - mostly unimportant; 3 - neither important nor unimportant; 4 - mostly important; 5 - completely important):
- Price
 - Practicality (for instance, closeness of the airport from home or possibility to bring more luggage, etc.)
 - Comfort
 - Ecological print / Environmental awareness
19. **Have you ever selected a transport mode for its (positive) social or environmental impact?** (for example, taking the train instead of the plane or using car sharing instead of driving alone)
- Yes
 - No
20. **What do you usually value the most when selecting destinations?** (please value each of the items listed, 1 - completely unimportant; 2 - mostly unimportant; 3 - neither important nor unimportant; 4 - mostly important; 5 - completely important):
- General prices of the city/region/country
 - Cultural/historical heritage
 - Natural resources/heritage
 - Tourism attractions
 - Practicality (distance from home city/country, accessibility, etc.)
 - Ecological print / Environmental awareness
21. **Have you ever selected a food/beverage service (for example, bar, restaurant) for its (positive) social or environmental impact?**
- Yes
 - No
22. **Do you feel more loyal to a brand which includes sustainable or environmental-friendly practices in its activity (tourism)?**
- Yes
 - No
23. **How would you rate the following statements using a scale from 1 to 5 (1 - completely disagree; 2 - mostly disagree; 3 - neither agree nor disagree; 4 - mostly agree; 5 - completely agree)?**

- I would pay more for an environmental-friendly tourism product or service
 - I practice recycling waste when traveling
 - I practice water conservation (for example, reusing towels or bed sheets in hotels) when traveling
 - I practice saving energy when traveling
24. **How would you rate the following statements, in context of visiting EUSAIR countries, using a scale from 1 to 5 (1 - completely disagree; 2 - mostly disagree; 3 - neither agree nor disagree; 4 - mostly agree; 5 - completely agree)?**
- Sustainability of tourism has a significant impact on my decision to visit a destination
 - Protecting cultural heritage has a significant impact on my decision to visit a destination
 - Conservation of natural heritage has a significant impact on my decision to visit a destination
 - Management of waste and emissions has a significant impact on my decision to visit a destination
 - Destination management strategy has a significant impact on my decision to visit a destination
 - Sustainability standards, like different accreditations and certifications, have a significant impact on my decision to visit a destination
 - Visibility of sustainability issues in the destination have a significant impact on my decision to visit a destination