

## THE PLACE OF BALKAN COUNTRIES IN WORLD TOURISM

**Abstract:** The Balkan countries are not among the most economically developed European countries. Many of them rely on tourism as a means of achieving progress and growth of the national economy. It is not accidental. Balkan countries have a diverse and attractive tourist resources. On the other hand, they are part of Europe - the largest generator of tourist flows in the world. These are two of the main prerequisites determining the potential for the development of tourism in the Balkans. The purpose of this paper is referring to the place of the Balkan countries in world tourism. The object are the Balkan countries. The subject is the current state of tourism in them, reported according to key indicators. Two types of tourism indicators are used for the purposes of the analysis – basic and synthetic (derivative). The article analyzes the tourism-geography location and transport accessibility of the Balkan countries. It considers their position in various rankings, indicative of their tourism development. The article makes some recommendations and points out guidelines for future development of tourism.

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## INTRODUCTION

The Balkans (Balkan countries) is a transitional area between Europe and the Middle East. They are crossroads of cultures, religions, civilizations and peoples that passed, settled themselves and progressed in the Balkans. Most of the Balkan countries today are a mixture of ethnicities and religions as a result of long and complex historical development. At present due to their crossroads location they are mostly known for their migratory flows. The Balkan countries are not among the most economically developed European countries. Many of them rely on tourism as a means of achieving progress and growth of the national economy. It is not accidental. Balkan countries have a diverse and attractive tourist resources. On the other hand, they are part of Europe - the largest generator of tourist flows in the world. These are two of the main prerequisites determining the potential for tourism development in the Balkan countries.

The purpose of this paper is to refer to the place of the Balkan countries in world tourism. The object are the Balkan countries. The subject is the current state of tourism in them, reported according to key indicators.

The place of the Balkan countries in international tourism statistics is determined by the World Tourism Organization (WTO), which monitors and analyzes the state of international tourism in over 200 countries worldwide.

The analysis uses two types of tourism indicators:

- basic

These are tourist arrivals (excluding transit) and their changes and revenues from international tourism. They are examined by the current statistics of WTO. We also report on the number of sites on the World Cultural and Natural Heritage list, the size of the area, the population number.

- synthetic (derivative)

Synthetic are for instance the share of arrivals in the world, Europe and the Balkans, the revenues received per tourist, the changes in the revenues from the international tourism, the share of the income from the international tourism on the basis of the income in the whole world, Europe and the Balkans, efficiency of tourism, intensity of tourism, density of the sites listed by

UNESCO. These indicators are calculated and analyzed by the author based on key indicators. Indicators which evaluate and place of the country in the ranking for tourism by the World Tourism Forum are also used.

### TOURISM-GEOGRAPHY LOCATION OF BALKAN COUNTRIES

Tourism-geography location is not a tourist resource. However, it largely affects the tourist attractiveness of the countries and regions. It is important to clarify not just where a particular site is, namely the Balkans, but above all how it interacts with the main tourist markets, what is its transport accessibility and how tourism-geography location largely determines the tourist resources' potential.

The Balkan countries' territory is located wholly or partially on the Balkan Peninsula. The Balkan Peninsula is one of three major southern European peninsula jutting out into the Mediterranean, and in particular the most eastern in location. Therefore, the Balkan countries occupy the eastern part of southern Europe. They are located entirely in the northern and the eastern hemisphere to the main axes of the Earth, namely the Equator and the Greenwich meridian.



Figure 1: The Balkan countries

Source: <http://detsatanapromyanata.blogspot.bg/2015/06/blog-post.html>

The area of the Balkan Peninsula is 505 500 km<sup>2</sup>. According to this indicator it is the third one in Europe after the Scandinavian and Iberian Peninsula. It occupies 4.8% of the continent and only 0.4% of the total area of the Earth's land. The territory of the Balkan countries is three times more (1541 thousand) because some of them possess significant territories outside the peninsula. Only 3% of the Turkish territory falls in the Balkans and 3.5% of Romania's territory. From a total of 11 countries, only 5 are located entirely on the peninsula (Bosnia and Herzegovina, Montenegro, Albania, Macedonia, Bulgaria). All Balkan countries, except Macedonia, have direct access to at least one sea. It influences positively their tourist appeal.

The Balkan countries differ in area and population (Table 1). Turkey has the greatest area, which affects positively the quantitative aspect of the tourist resources. Most Balkan countries are small in area (less than 100 thousand km<sup>2</sup>). The lowest position, according to this indicator,

takes Montenegro. This leads to dense location of tourist resources in the country. Turkey has the largest population, an indicator in which it surpasses all other Balkan countries together. The demographic potential of the country is a very good prerequisite for the proper staffing of the tourism industry in quantitative terms. The limited demographic potential of the most other Balkan countries has a negative impact in this regard, accordingly.

COUNTRIES	AREA in km <sup>2</sup>	POPULATION million	The most popular tourist places and sites - tourist symbols
Slovenia	20 250	2,1	Postojna Cave, Mount Triglav
Croatia	56 540	4,2	Dubrovnik, Plitvice Lakes National Park, Dalmatia
Bosnia and Herzegovina	51 210	3,8	Bridges in Mostar and Visegrad, Bosnian pyramids
Serbia	88 361	8,8	Mountains, SPA, monasteries
FYR Macedonia	25 710	2,1	Town of Ohrid and Ohrid Lake
Montenegro	14 026	0,6	Kotor, Budva, mountains, canyon of Tara River
Albania	28 750	2,9	Adriatic and Ionian coast, mosques
Greece	131 960	10,9	Acropolis and Parthenon
Turkey	774 820	80,6	Istanbul, Cappadocia, see resorts
Bulgaria	110 990	7,0	Black see coast, Madara Horseman, the Rila Monastery
Romania	238 390	19,3	Castles in Bran and Peles, Palace of the Parliament
total	1 541 007	142,3	

*Table 1: Basic data of the Balkan countries*

The location of the Balkan countries is **transitional** between:

- Eurasian and African lithospheric plates, which determines the diversity of major landforms and seismic instability;
- Moderately continental climate on the north and subtropical Mediterranean on the south, which is favorable for the development of various types of tourism;
- Continental land on the north (facilitates the connection with tourist flows) and the warm southern seas on the south (one of the most important tourist resources in the world);

The location of the Balkan countries is also defined as a **crossroad**. A half of the major pan-European transport corridors pass through them (№ 4, 5, 7, 8, 9, 10). This is an essential prerequisite for the traffic of people and goods, including those for the purposes of tourism and transit. These Eurocorridors are links to all parts of Europe (the largest generator of tourist flows worldwide) and also to Asia Minor. Even in ancient times the crossroad location of the Balkan countries makes them the center of civilization progress. Most ancient European civilizations originate from here. As a result of the millennia-old historical development today the Balkans are a mosaic of ethnicities, cultures and religions. This determines largely their uniqueness and therefore attractiveness for tourists.

The location of the Balkan countries is also **strategic**. They are part of a centrally positioned European countries and because of this peculiarity they are often divided and reshaped by the Great Powers. In the recent history the iron curtain passes through the Balkans separating the east from the west block. Today, they are the southeastern border of the EU and NATO. The Balkan countries are in the periphery of these powerful organisations and are a contact area with other parts of the world, which adversely affects their overall socio-economic

development, including tourism. The specific visa requirements with Russia, for instance, have limited the incoming tourist flows. The low solvency of the majority of the population in the Balkans is a prerequisite for turning them into cheap destinations.

From north to south and from west to east most socio-economic indicators in Europe are changing in a **negative** way. In this regard the location of the Balkan countries in the south and east of the continent turns out to be more unfavorable. As for tourism the negative tendency from west to east is well expressed by almost all major indicators characterizing the sector (number of arrivals, revenues from international tourism, revenues from a single tourist). From north to south the revenues of international tourism from a single tourist diminishes, but the number of arrivals increases, however, this is not a prerequisite for increased revenues from tourism.

In terms of location to the main emitive tourist markets the location of the Balkan countries it is relatively **favorable**. The European tourist region has the most intense travelling of tourists in the world, which is a prerequisite for its intensity in the Balkans as well. The territorial fragmentation and crossroad location of the countries, however, is a prerequisite for considerably sharing the transit tourist flow in many of them (Serbia, Bulgaria, Macedonia, etc.). The potential of transit tourists is substantial. For crossing the peninsula they need about one day. This implies spending at least one night in a Balkan country. If they are satisfied, they could become visitors arriving for tourism.

The most significant **generators** of tourist flows to the Balkan countries are Germany, Britain, Russia, Italy, France, the Scandinavian countries, which are among the largest generators worldwide. There is a substantial tourist flow generated by the Balkan countries themselves to their neighbors, and well expressed are the movements from the north towards the south countries in the warm half of the year, mainly for sea recreation. In winter, although on a smaller scale, the direction turns from south to north with the aim of practising winter sports. Austria is the most significant tourist generator from the neighboring countries located on the north, followed by Hungary and by Ukraine and Moldova on a more limited scale. The unenviable socio-economic and political situation in some of them prevents the formation of significant tourist flows. As far as those are generated, they are for the most part limited to excursion trips to the nearest cross-border areas. The southern location of the Balkan countries in Europe is a prerequisite for them being mainly recipients of tourist flows. The specific socio-economic situation, on the other hand, restricts the outgoing tourist flows. These are the main prerequisites for the positive balance of tourism of the Balkan countries. Turkey appears as the most significant potential generator of tourist flows among the Balkan countries, it concentrates more than a half of the population. Holidays and tourism are not yet the leading travel motive of Turkish citizens (the leading motive is visiting relatives and friends) [5], but an increase in tourist needs can be expected in relation to the growth of incomes. It can be expected that this will affect positively the tourism industry of the entire Balkan region.

We can summarize that the tourism-geography position of the Balkan countries can not be assessed unanimously as favorable or unfavorable. It has both positive and negative nuances. For the full development of their tourism the Balkan countries have to struggle with those negatives and make the most of the positives of their tourism-geography position.

#### **TRANSPORT ACCESSIBILITY**

The Balkan countries are favoured with good transport accessibility unlike, for example, those on the Iberian Peninsula. Prerequisites for this are the general openness of the peninsula to the north (1280 km) and the flat terrain in its northern border, connecting it with the rest of

Europe. On the other hand, the Balkans connect Europe with Asia Minor and the Middle East and North Africa. A large part of the main generators of tourist flows in Europe are in a radius of 2000 km. It is a necessary condition for facilitating arrivals using land transport (by car, bus or train). Water transport also has significant prospects for use. The first prerequisite for this is the considerable length of the coastline (9300 km) with access to 7 warm seas. It can be expected that the cruise and yacht trips will experience their boom in the near future. The cruise tourism expands to the north along the Danube. Its navigable feeders have preconditions for this. Despite the favorable conditions for access by land and water in many places (e.g. Greece) arrivals take place mainly by air. It is preferred by the more remote emitive markets (e.g. British and Scandinavian). Other reasons include the mountainous terrain in the western part of the peninsula, which impedes mobility, and the scatteredness of the islands in the Aegean and Ionian seas, which to some extent hampers the relations between them. These difficulties are overcome by charter flights. So air transport stands out as the fastest, most convenient and, therefore, preferred for the majority of incoming tourists. The busiest airports are in Istanbul, where the connections with Europe, Asia and Africa are carried out. They are the door for Chinese and Japanese tourists, whose number at this stage is still not great. Important regular flights also take place in the airports of Bucharest, Thessaloniki, Sofia, Athens. The number of airports serving charter flights is great, especially in Greece.

#### **PLACE AMONG THE WORLD'S TOURIST REGIONS AND SUBREGIONS**

The Balkan countries belong to the **European tourist region**. This is the region with the most developed tourism in the world at this stage. It concentrates 51% of the global tourist flows and 36% of tourism revenues worldwide [6]. In the region itself arrivals of international tourists and tourism revenues are unevenly distributed between the subregions and destinations, but are relatively balanced, compared to other international tourist regions. The leading subregion in both indicators is Southern Europe, more specifically Eastern Mediterranean, followed by Western Europe. More modestly represented are Central, Eastern and Northern Europe.

Despite its natural geographic community (the Balkan peninsula) and a number of similarities in the historical and socio-economic development, the World Tourism Organization (WTO) refers to the Balkan countries not as to only one subregion. They are divided between two tourist subregions - Southern Europe and Eastern Mediterranean and Central and Eastern Europe.

In 2015, **Southern Europe and Eastern Mediterranean Subregion**, attracted 225.2 million international tourists (WTO, 2016). This is 18.9% of the tourists in the world. The subregion has received 175.8 billion USD revenues from international tourism or 14% of the revenues from international tourism in the world [7]. The average revenues per tourist who arrived in the subregion are 780 USD [7]. Within the European tourist region the subregion of Southern Europe and Eastern Mediterranean accepts 37.1% tourist arrivals and receives 39% revenues from international tourism, and the results of these indicators are ahead of the other tourist subregions. Southern Europe and Eastern Mediterranean subregion includes a total of 17 countries, 14 of which are wholly European (Portugal, Spain, Andorra, Italy, San Marino, Malta, Slovenia, Croatia, Bosnia and Herzegovina, Serbia, Montenegro, FYR Macedonia, Albania, Greece) and 3 Eastern Mediterranean (Asian) - Turkey, Cyprus and Israel. The Balkan countries among them are Slovenia, Croatia, Bosnia and Herzegovina, Serbia, Montenegro, FYR Macedonia, Albania, Greece and Turkey.

**Central and Eastern Europe subregion** is modestly represented. In 2015, it accepted 126.6 million international tourists [7], or 11.2% of the tourists in the world. Among the subregions in Europe it is only ahead of North Europe regarding this indicator. The subregion received 50.1 billion USD revenues from international tourism [6] and only 4% of the revenues from tourism in the world. Within the European tourist region the subregion of Central and Eastern Europe accepted 20.8% of the tourist arrivals and received 11.1% of the revenues from international tourism. It takes last place in the European region according to this indicator. Revenues per tourist are significantly lower than in the other subregions in Europe - 400 USD [7]. The subregion includes a total of 21 countries, two of them (Bulgaria and Romania) are Balkan countries. Paradoxically, the subregion Central and Eastern Europe includes some Asian countries such as Kazakhstan, Kyrgyzstan, Turkmenistan, Tajikistan, Uzbekistan. Despite their common past as socialist countries of the subregion Central and Eastern Europe they have quite different geographic areas and accordingly tourism-geography characteristics. Therefore, it would be appropriate to make this division more precisely. Those countries could be divided into Central Asia subregion as a part of the Asia-Pacific tourist region.

#### KEY INDICATORS FOR TOURISM

In 2015, the Balkan countries were visited by 96.716 million foreign tourists - 8.15% of the arrivals worldwide and 15.9% of the arrivals in the tourist region (Table 2). The most visited countries are Turkey and Greece, followed by Croatia, the differences between them are important. Turkey is a country that has a place in the world's top 10 of the indicator for arrivals of international tourists. In the recent years it takes permanently the sixth<sup>1</sup> position. The lowest number of arrivals is in FYR Macedonia, Bosnia and Herzegovina. It is noteworthy that small countries like Montenegro and Slovenia feature a significant number of arrivals, while Romania and Serbia, despite their larger territories do not stand out with significant tourist flows. Therefore, the tourist resources' potential is utilized to varying degrees in different Balkan countries and they are characterized by different levels in the development of their tourism industry.

COUNTRIES	Arrivals in 2014 in thousand	Arrivals in 2015 in thousand	Change 2015/2014 in %	Share of arrivals worldwide in 2015 in %	Share of arrivals in a European tourist region in 2015 in %	Share of arrivals in Balkan countries in 2015 in %
Slovenia	2 411	2 707	+6,7	0,2	0,4	2,8
Croatia	11 623	12 683	+9,1	1,1	2,1	13,1
Bosnia and Herzegovina	536	678	+26,5	0,06	0,1	0,7
Serbia	1 029	1 132	+10,1	0,1	0,2	1,2
FYR Macedonia	425	486	+14,2	0,04	0,08	0,5
Montenegro	1 350	1 560	+15,5	0,1	0,25	1,6
Albania	3 341	3 784	+13,3	0,3	0,6	3,9
Greece	22 033	23 599	+7,1	2	3,9	24,4
Turkey	39 811	39 478	-0,8	3,3	6,5	40,8
Bulgaria	7 311	8 374*	+12,7*	0,7	1,4	8,7
Romania	1 912	2 235	+16,9	0,2	0,4	2,3
total / averaged	91 441	96 716	+11,9	8,2 %	15,9 %	100 %

<sup>1</sup> After France, USA, Spain, China, Italy

Table 2: Arrivals in the Balkan countries [7]

\* Data is missing from WTO, data is used from the National Statistical Institute of Bulgaria

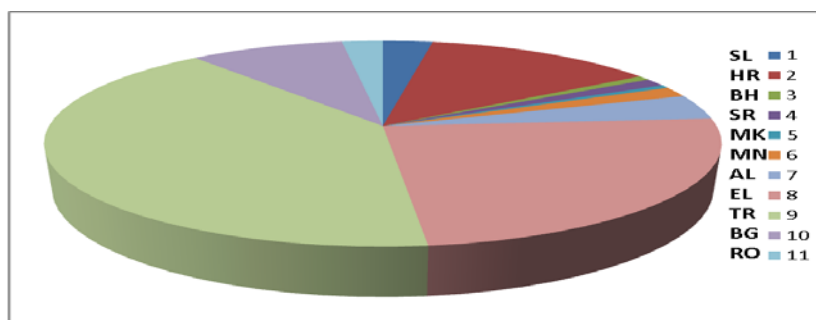


Figure 2: Distribution of incoming international tourist flows among Balkan countries

Compared to 2015 almost all Balkan countries recorded growth in arrivals. The largest is in Bosnia and Herzegovina (+ 26.5%), Romania (+ 16.9%), Montenegro (+ 15.5%), Macedonia (+ 14.2%), Albania (+13, 3%), Bulgaria (+ 12.7%). Consequently, tourism in the Balkans is developing rapidly (+ 11.9%). It is significantly higher than the European average (+ 4.7%) and the world average (+ 4,6%) [7].

Most visitors are arriving from the European tourist region. The reasons for their arrivals are various – holidays, visiting relatives and friends, participation in conferences and trade shows, cultural exchange trips, etc. A significant potential in this regard has the Middle East tourist region, as well as North Africa, due to their territorial proximity. Furthermore, the first stands out with the high solvency of their travelers.

The international tourism revenues of the Balkan countries in 2015 amounted to 62.8 billion USD (Table 3). They are nearly three times more than the revenues of the Caribbean subregion, for example, but are almost three times less compared to Western European tourist subregion. The share of the Balkan countries in world tourism according to this indicator is 4.98% and is lower compared to the share of arrivals. This gives evidence for the lower expenditure of the tourists in the Balkans. In the European tourist region, the Balkan countries receive 13.9% of the revenues from tourism. In 2014, all Balkan countries recorded an increase in revenues from tourism, the highest was in Turkey, and the lowest was in Slovenia. In 2015, however, all Balkan countries reported a decline in revenues as opposed to the increased arrivals. This testifies for the growth in rivalry between the destinations that is exhibited in price competition.

COUNTRIES	Revenues in billion USD in 2014	Revenues in billion USD in 2015	Changes in revenues 2015/2014 in %	Revenues share worldwide in 2015 in %	Share of revenues in European tourist region in 2015 in %	Share of revenues in Balkans in 2015 in %
Slovenia	2,7	2,5	-7,4	0,2	0,55	4
Croatia	9,9	8,8	-11,1	0,7	1,9	14
Bosnia and Herzegovina	0,7	0,65	-7,2	0,05	0,1	1

<b>Serbia</b>	1,1	1	-9	0,08	0,2	1,6
<b>FYR Macedonia</b>	0,29	0,27	-9,5	0,02	0,05	0,4
<b>Montenegro</b>	0,9	0,9	-0,4	0,07	0,2	1,4
<b>Albania</b>	1,7	1,5	-11,8	0,1	0,3	2,4
<b>Greece</b>	17,8	15,7	-11,8	1,2	3,5	25
<b>Turkey</b>	29,6	26,6	-10,1	2,1	5,9	42,4
<b>Bulgaria</b>	4,1	3,1	-24,4	0,2	0,7	4,9
<b>Romania</b>	1,8	1,7	-5,6	0,1	0,3	2,7
<b>total / averaged</b>	70,6	62,8	-11	4,98 %	13,9 %	100 %

Table 3: Revenues from tourism of the Balkan countries [7]

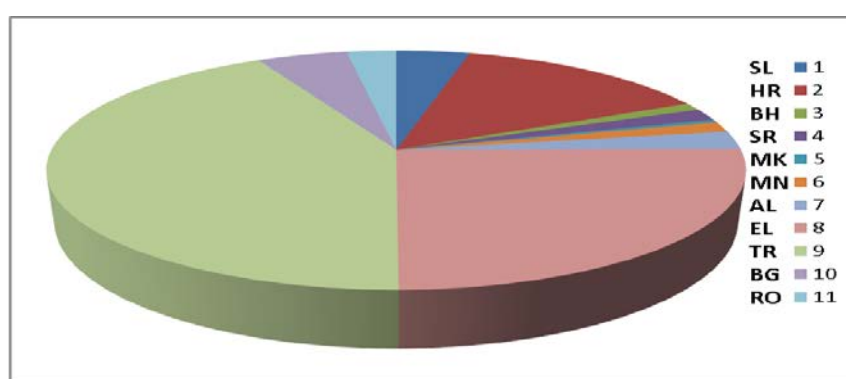


Figure 3: Distribution of international tourism revenues among Balkan countries

None of the Balkan countries has a place in the list of WTO's ten countries with the highest expenditure on international tourism. It can be explained with the not so high incomes compared to most European countries, and with the small number of the population in most countries.

#### DERIVATIVE INDICATORS

The revenues per tourist in 2014 were 773 USD. In 2015 they fell to 649 USD (Table 4). They are lower than the world average (1 062 USD) and lower than the average for the European Region (742 USD). This evidences for the current lower price level in the Balkans. The highest revenues per tourist receive Bosnia and Herzegovina, Slovenia and Serbia, the lowest they are in Bulgaria and Albania. This is directly related to the low income of the citizens of these countries and respectively their low solvency as there is no difference between the prices for foreigners and nationals. The low solvency of travelers from many Balkan countries affects the revenues from tourism of the other countries, because the most intense exchange of tourists is between the neighboring countries. The Western Balkan countries receive more tourists from their more affluent neighbors from western and central Europe, which affects positively keeping their price level.

COUNTRIES	Revenues per person in USD through 2015	Tourist intensity in 2015	Tourist efficiency in 2015 in USD
<b>Slovenia</b>	925	1,3	1 190
<b>Croatia</b>	696	3,0	2 095



Bosnia and Herzegovina	967	0,2	171
Serbia	925	0,1	114
FYR Macedonia	549	0,2	309
Montenegro	578	2,6	1 500
Albania	396	1,3	517
Greece	664	2,2	1 440
Turkey	674	0,4	330
Bulgaria	375	1,2	443
Romania	762	0,1	88
average	649	0,7	745

*Table 4: Derivative indicators characterizing tourism in the Balkan countries*

**Tourist intensity** is an indication summarizing the number of arriving tourists relative to the population in the country. For the Balkan countries in 2015, the average value was 0.7 (Table 4). An increase is recorded over the previous year, due to the increased number of tourists. The values below 1 indicate a significant potential for accepting more tourists without causing serious social conflicts and contradictions. Different Balkan countries, however, have specificities. Croatia, Montenegro and Greece stand out with their highest values for this indicator. With values above 1 are also Slovenia, Albania and Bulgaria. In these countries attracting more tourists would have a negative impact on the social environment. Therefore, they should concentrate on receiving higher revenues per tourist, for example by offering high quality tourism products. Values less than 1 are typical for Serbia, Romania, Bosnia and Herzegovina, Macedonia, Turkey, indicating that they could accept a larger number of incoming tourists.

**Tourism efficiency** is an indicator which accounts for tourist revenues relative to the population. In 2015 the average value for the Balkan countries was 745 USD, which attests to the fundamental importance of tourism in the formation of Balkan countries revenues (Table 4). The highest values of this indicator are for countries with not so large population and significant incoming tourist flows - Croatia, Montenegro, Slovenia and Greece. This accounts for the significant commitment of their economies to the tourism industry. Tourism is one of the leading industries in these countries. With lowest tourist efficiency are Romania, Serbia, Bosnia and Herzegovina. Tourism has little significance there in the formation of incomes.

It is interesting to find the place occupied by the Balkan countries in **prestigious international rankings** such as the list of UNESCO World Heritage and the rating system of tourism development, established by the World Economic Forum. The acceptance of sites in the UNESCO list is associated not only with their preservation, but it is also seen as an indicator of their quality and a kind of guarantee for tourist attractiveness.

COUNTRIES	Number of sites in UNESCO World Heritage list	Density of sites in UNESCO World Heritage list 100 thousand km <sup>2</sup>	Place in the rankings of The Travel & Tourism Competitiveness Index 2015	Assessment of The Travel & Tourism Competitiveness Index 2015
Slovenia	3	14,8	39	4,17
Croatia	8	14,1	33	4,30
Bosnia and Herzegovina	3	5,9	-	-
Serbia	5	5,7	95	3,34
FYR Macedonia	1	3,9	82	3,50

Montenegro	3	21,4	67	3,75
Albania	2	6,9	106	3,22
Greece	18	13,6	31	4,36
Turkey	16	2,1	44	4,08
Bulgaria	9	8,1	49	4,05
Romania	7	2,9	66	3,78
Total / average	75	4,9	61	3,85

Table 5: Comparison between the Balkan countries, according to UNESCO and the World Economic Forum

On the territory of the Balkan countries there are 7.1% of the sites on the **UNESCO** list of the World Cultural and Natural Heritage (Table 5). In 2016 the new sites in the Balkan countries are 3<sup>2</sup> - 14.3% of those worldwide. All Balkan countries have sites on the list but they are unevenly distributed among them. Most of the sites are in Greece and Turkey, which directly corresponds to the degree of development of tourism in both countries. Macedonia has only one site. With the highest density of sites are the countries with smaller territories - Montenegro, Slovenia, Croatia, and Greece due to the large number of sites. The smallest density is in Turkey and Romania due to the large size of the countries.

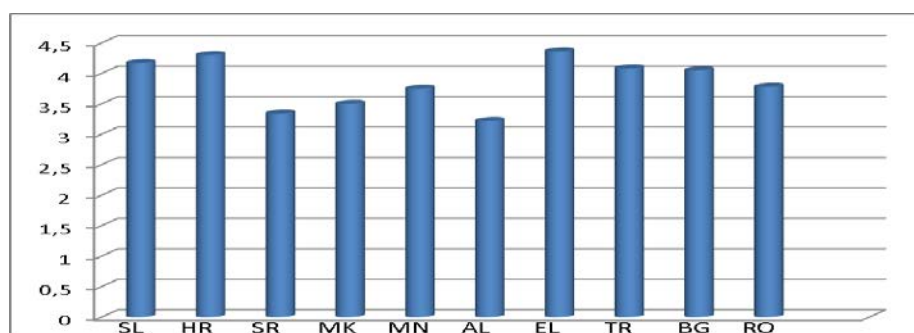


Figure 4: Rating of the Balkan countries in the ranking of tourism by the World Economic Forum

The **World Economic Forum** ranks annually over 140 countries using a variety of indicators related to the tourism industry (Business Environment, Safety and Security, Health and Hygiene, Human Resources and Labour Market, ICT Readiness). The above chart includes all Balkan countries except Bosnia and Herzegovina. Highest ratings are given to Greece, Croatia and Slovenia (Fig. 4). The lowest are assessed in Albania and Serbia. The differences between the countries in the estimates are not large but there are significant differences in their positions in the ranking.

### CONCLUSION

It can be concluded that the Balkan countries occupy a significant place in the world tourism, and more specifically in European tourism. In recent years there has been development in the tourism industry for most of them, which is mainly related to the increased number of

<sup>2</sup> These are the Archaeological Site of Ani (Turkey), the Archaeological Site of Philippi (Greece) and Stećci Medieval Tombstones Graveyards (Bosnia and Herzegovina, Croatia, Serbia and Montenegro)

incoming international tourists. The Balkan countries compete between each other for tourists arriving from other parts of Europe. This leads to lowering of prices of tourism products and receiving lower revenues from tourism. This causes lower efficiency of the tourism industry and proves the extensiveness of its development. On the other hand, the Balkan countries exchange among themselves significant tourist flows which support the development of the tourism industries mainly in the neighboring countries.

It can be expected that the tourism industry of the Balkan countries will develop dynamically in the coming years. This will be directly related to geopolitical events. For example, in 2016 the events in Turkey redirected a significant part of the tourist flows from Turkey to other destinations including other Balkan countries. Turkey may retain its leading position in the region, but will no longer be the undisputed leader. It can be expected that the Western Balkan countries will take more and better positions for they have attractive tourism resources and rely on tourism as a priority sector.

For Balkan countries it is important to become better recognizable on the European emittive tourist markets which generate significant tourist flows to them. Cooperation between them in joint tourist routes, however, would be an important asset for attracting tourists from more distant regions such as the Asia-Pacific region (China, Japan, South Korea, etc.). All Balkan countries should concentrate on raising revenues from incoming tourists, and not just on attracting more tourists. It is, therefore, necessary to focus on the qualitative aspects of the tourism industry, not only on the quantitative ones. With stable and sustainable development of tourism the Balkans could become an important region in the world tourism.

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