A Comparative Statistical Analysis of Foreign Visitors' Volume and Overnights Spent at the Balkan Locale

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ARTICLE INFO	**ABSTRACT**
	Tourism is an intertemporal field of research due to the sensitive nature of the elements that constitute the field. Heritage, religion, history, art and life make the Balkans a craving destination for tourists to visit. The simplicity of moving across continents through the Balkans enables the growth of movement. The Balkan borders and the way to demarcate them were always a topic of great conflict. Half of the Balkan countries belong entirely to the region and the rest by a small portion to half of their borders. Two clusters have been raised through the history of research, the western and the eastern Balkans. Both locals living out of the country of origin and foreigners are travelling to the Balkan area. Thus, the Balkans is a competitive destination both for its residents and the rest of the visitors. The most visited destinations are Greece and Croatia and the rest follow. An exploratory data analysis (E.D.A.), with secondary data collected from the national statistical offices of each country under study, tourist national organisations, ministries, confederations, O.E.C.D. (Organisation for Economic Cooperation and Development) and the U.N.W.T.O. (United Nations World Tourism Organisation) tourism barometer has been prepared. The secondary data analysis presents and compares, through charts, the volume of visitors per country and/or per year, their overnights and the total count for the aforementioned volumes by each country either separately or in conjunction with the rest of the Balkan locale. A growth trend in all volume numbers of tourists and their overnights is showcased until the 2019 pandemic outburst, as a progression, and from 2019-2021 the volume number has diminished due to COVID-19 and movement restrictions. From 2021 onwards volume numbers came back to their rise trend surpassing or equivalent in numbers to the benchmarks of 2019. Thus, tourism is returning to the growth numbers with no restriction assisting the situation. Countries with coastlines receive more tourism than the rest of the countries. Further research is needed to accumulate and compare data for the gender and nationality of the tourists arriving in the Balkan locale.

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1. Introduction

1.1. Balkans as a Destination and Region in the Tourism Map

Tourism, a pluralistic (multiple-aspect) phenomenon, has become a never-ending field of searching for destinations to unravel the common and the uncanny attraction. To visit, to see, to explore and to make a memory of that specific destination are some of the main reasons a person travels. The Balkans have all those common and uncanny places that popularised the region. According to Vasileva and Preslavsky (2017): "The Balkans are a mosaic of ethnicities, cultures and religions". The tourists seem to prefer attractions and destinations which comprise heritage elements, religion, brutal wars and history, myths to search for and myths to live for, folklore events, common lifestyle, music and other marvels both man-made or nature-made. Vasanicova and Kosikova (2019) as cited in Pantović et al. (2022) remark that a heritage-related destination will attract more visitors due to tourists' affinity to the more heritage-related areas that exist in a place. The case of more visitors arriving at such heritage attractions has also been observed by Marković et al. (2021). Tourists seem to be fond of the heritage areas. An explanation that came to the attention of Marković et al. (2021) and Ivanov and Achikgezyan (2017) is that Heritage brings positive emotions and pleasure through reminiscence to tourists. Thus, the Balkans became a promising destination for their rich heritage. Nowadays, more than ever, we have the best transport means to cater for the needs of the visitor on the means that a person can use to travel to the destination and through which intermediate places the travel will take place, and the best infrastructure made till now to go on holiday. Balkans offer an ease of connectivity between continents (Nešković, 2014). Thus, it is easy to bring a differentiated portfolio of tourists to a destination, by any demographic characteristics but most importantly by nationality and income. In many cases, the Balkans have great transportation infrastructure and are at great geographical coordinates (Nešković, 2014). Tourism provides a great source of employment (Selimi et al., 2017), income for employees, revenue for businesses, understanding of each culture and many more economic and human-related benefits. Pagria et al. (2022), report that several countries had tourism growth due to the growth at the G.D.P. (Gross Domestic Product) (economic growth) while for others the opposite happens.

The Balkanic Borders were always a subject of contradiction due to the excess of notions that adumbrate them Gibas-Krzak (2020). Some believe that history is the sole definer of borders, others that politics and the rest the strict geographical area but some think of the borders as the newly created borders after the war that were created Gibas-Krzak (2020). Balkan countries can be categorised as those whose geographic area belongs completely to the Balkan peninsula (Albania, Montenegro, Republic of North Macedonia, Kosovo, Bosnia and Herzegovina and Bulgaria) and those that are partially geographically located there (Greece, Serbia, Romania, Turkey (Eastern Thrace and West Istanbul) and Croatia). It is noteworthy that the existence of sea in many Balkan countries makes them more desirable as tourism destinations (Nešković, 2014). Balkan locale countries differentiate on the degree of tourism development (Porfido, 2020) with many of them being able to accomplish the differentiation through the advantage of a greater number of visitors arriving. The national authorities in each western Balkan country had or still have a policy plan towards the strategies tourism must accomplish in each case and the analogous campaigns (Porfido, 2020). Policies are effective as tools. Policies are made to provide a marketing vehicle that through the convergence (the output of the policies that have been applied) when visitors from different markets arrive at a destination we can conclude that the policies work (Pantović et al., 2022). Thus, convergence is a measuring medium for the degree of effectiveness of marketing (Pantović et al., 2022). The citizens' position in social and economic related backgrounds comes well behind Europe. The top visited countries were Turkey, Croatia and Greece (Vasileva and Preslavsky, 2017).

The safe assumption that we can gather is that without all those differences and the background the Balkans might not be such a successful destination with high demand from tourists.

1.2. Literature Review of the Balkan Tourism Research and Results from Past, to Present Situation and Future Suggestions

Tourism research in the area is mainly divided into two categories. The western Balkan region and the eastern. Balkan countries together can praise their rich cultural heritage (Webster and Ivanov, 2015). From 2009 onwards many Balkan destinations had a growth in foreign tourism flows, among them Romania (Tuţă & Micu, 2009). Further research by Bofulin et al. (2016) for the period 2005-2015, indicates that the top two destinations in the number of tourists, originating from China, in the western Balkan region destinations, are Croatia and Slovenia having a growth in incoming streams and the rest countries come after as travelling destinations of interest. Data collected by Tuţă & Micu (2009) indicate that Bulgaria, Romania and other nations in the area have also seen growth in the tourism industry. Most arrivals are by aeroplane and land transportation with sea-related transport methods to see growth in the near future for the countries that can be visited by sea (Vasileva and Preslavsky, 2017). A majority of researchers indicate that nationals of each country are a major portion of the tourism activity. Tourism in Albania had grown even after the COVID antecedent (Karma, 2023). In Albania, Albanian immigrants from around the world invested back in their country's infrastructure and they constitute half of the tourism (either inbound or domestic) (Nešković, 2014; Karma, 2023). In their on-site research in specific heritage areas in Croatia, Marković et al. (2021) found that the visitors that constitute the tourism population are both domestic and foreign tourists with the majority mass being domestic.

Nationality is an important factor in the visitors' experience and footfall (Marković et al., 2021). Repeaters were found to be more satisfied than the rest of the population Marković et al., 2021). Čerović et al. (2015) during their research in the western Balkans (Serbia, Macedonia and Montenegro) found that in all three areas, the domestic tourism stream had a decline while the inbound had seen growth, with the contribution of tourism to G.D.P. to have a positive small impact or negative small impact but the growth or decline is low from the years 2003 to 2013. Greece, Turkey and Albania need further legislation initiatives for tourism and its development (Nešković, 2014). Investments in the area will enable and facilitate the development of different types of tourism and activities, which the geography, land and culture can support (spa, culinary, winter tourism, geo-tourism, agricultural tourism, river tourism and activities, sail) (Nešković, 2014; Metodijeski and Temelkov, 2014). Some countries already had taken advantage of the alternative tourism possibilities or understood their possibilities (Metodijeski and Temelkov, 2014; Lantitsou, 2017). Irimias et al. (2016) in eastern European territory, Mileva (2018), and Ivanov and Achikgezyan (2017) in Bulgaria researched the visitors' demographics about religion, heritage and pilgrimage tourism and there were strong indications that in eastern European territory generally, some forms of tourism is part of the identity of a country after the post-communism era where religion was banished during communism and nowadays is a form of tourism. Many relics from the communist past became tourist attractions (Ivanov and Achikgezyan, 2017). In many cases though, it was found that tourism is a tool for political ideologies or to promote a different ideology through tourism effects and impacts on many aspects of a country (Ivanov and Achikgezyan, 2017; Webster and Ivanov, 2016). Moreover, it has become part of national identity. The tourist is restricted in the choices that have to be made for a trip by constraints such as transportation, funds, time and length of travelling, destination and other decisions. In the research of Karma (2023) findings through the literature review confirm that different factors explain the tourism stream volume for a destination. The public sector constitutes a vital constant in the expansion of tourism in a country. Dalakis et. al

(2018) during their research in northern Greece found that tourists in the area came from Balkan region destinations (Bulgaria, Greece and Romania) and a minority of the sample population of the research arrived from non-Balkan countries.

The effects from the review are decisive, indicating the robustness of the destination as a tourism destination both to the out-of-Balkan tourism that arrives in the area and to intra-Balkan tourism. It is a competitive destination both for inside residents and outside visitors. According to Dalakis et. al (2018), a competitive tourist destination is one that has a chain of competitiveness in each sub-sector of the economy and that provides competitive reactions in the enterprises of each country and the region.

1.3. Scope of the Research

Even though past research gives us valuable knowledge and information, the need to explore the region as a whole area and not each country or subarea separately by borders or geographical alliances exists. Clustering the countries in western and eastern Balkans countries or by other labels (like the economy, society etc.) is not imperative but rather an action of studying the subregion. The author strives away from such clustering and researches the whole area about the volume of visitors and volume of overnights. In this specific study, the author excluded Turkey even though Eastern Thrace and West Istanbul belong in the Balkanic area. Many visitors have also formed a controversial image of Turkey and its position as a destination (Alvarez and Korzay, 2008). The reason is that the area of land Turkey is located in the Balkans is small (Vasileva and Preslavsky, 2017; Metodijeski and Temelkov, 2014) and except from geography, its citizens even do not consider Turkey a Balcanic country (Gibas-Krzak, 2020). The addition of Turkey to the research will not produce accurate data for comparison for the area. The ultimate scope of this paper is to:

- research and present the volume of tourist arrivals for every aforementioned country except Turkey for the years 2013-2022, separately for each country and as a whole geographical area,
- research and present the volume of overnights that have been accomplished by the visitors for every aforementioned country except Turkey for the years 2013-2022, separately for each country and as a whole geographical area,
- compare the tourist arrivals and overnights spent before and after the COVID-19 pandemic and the ominous effects that came along with the severe restrictions on movement that were imposed in many countries that restricted tourism.

Following the introductory section of the research, materials and methods that were used for the data collection and the exploratory data analysis are presented, discussion and presentation of the results of the data with the equivalent figures and the conclusions and limitations of the research.

2. Materials and Methods

A literature review has been conducted for the Balkan region to document the trends in the area as a tourism destination. The research comprises secondary quantitative data that have been collected from the national statistical offices of each country under study, tourist national organisations, ministries, confederations, O.E.C.D. (Organisation for Economic Cooperation and Development) and the U.N.W.T.O. (United Nations World Tourism Organisation) tourism barometer.

The data that have been collected explore, refer and reflect the volume of the tourist arrivals in each country and the overnight stays of the visitors in each country. Ten from eleven countries

in the Balkan locale have been chosen for the study. The countries under study are Albania, Montenegro, the Republic of North Macedonia, Kosovo, Bosnia and Herzegovina, Bulgaria, Greece, Serbia, Romania and Croatia.

The period that the data refer to is from 2013 to 2022. Data for the year 2023 are not yet available for the majority of countries. Following the data aggregation an exploratory data analysis (E.D.A.) through the platform "Tableau Public" has been conducted to visualise the data and produce comparable figures. A comparison using several figures follows in the discussion section.

3. Discussion

Through a first glance at the produced figures from the secondary data, we can observe that after the COVID-19 pandemic, tourism returned to its original growth rate as the number of visitors soared exponentially in the last two years. Furthermore, data indicate that the countries with coastline and subsequently by the length of the coastline, with hierarchical order by volume of visitors Greece, Croatia, Bulgaria, Montenegro and Albania, receive the most visitors by far from the rest of the region. This fact is supported by the remark made by Nešković (2014) that the existence of the sea makes a destination more desirable. The majority of the visitors travel to Greece and the rest of the countries follow. Consequently, Greece has also the majority of overnights spent as a destination.
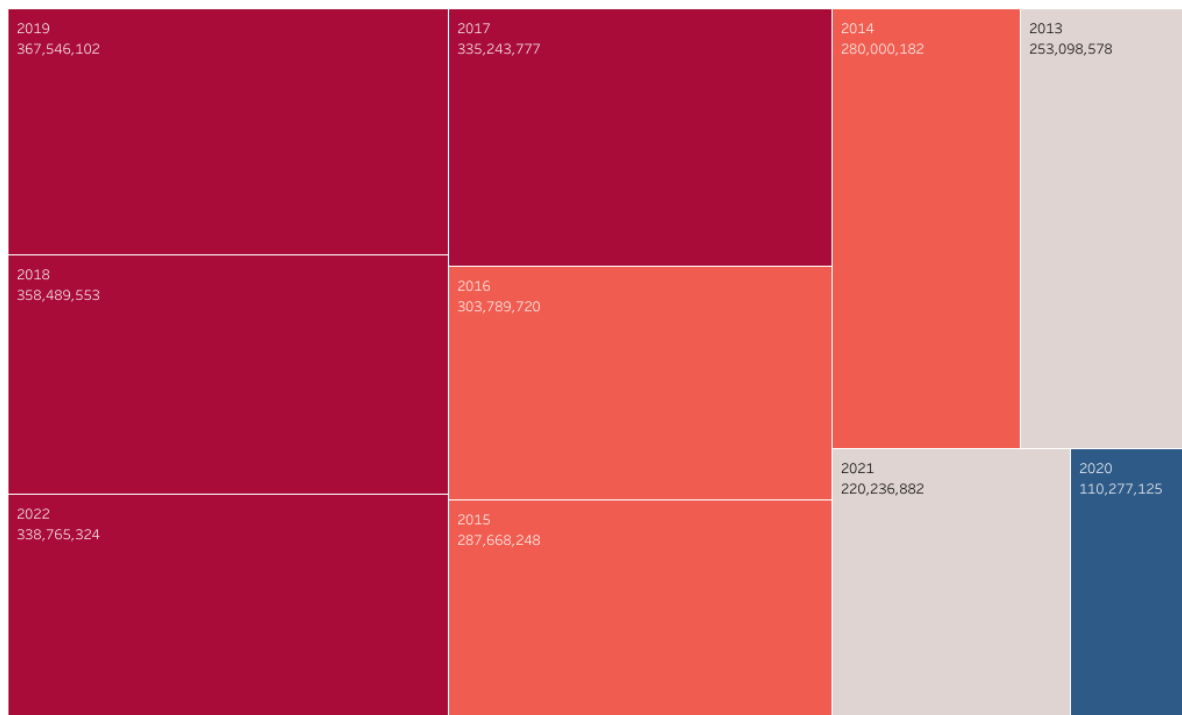

Figure 1. Total number of overnights in Balkan locale per year. Years 2013-2022
Source: Authors creation based on data from: the Agency for statistics of Bosnia and Herzegovina (2023), Agjencia e Statistikave të Kosovës (ASK). (n.d.), Croatian Bureau of Statistics (2021, 2023A, 2023B, 2023C), Institute of SETE-INSETE (2023), Albanian Institute of statistics (INSTAT). (2020, 2022A, 2022B), Ministria e turizmit dhe mjedisit Republica e Shqiperia (2017), National Institute of Statistics of Romania (2023), National Statistics Institute Republic of Bulgaria (2021, 2023), OECD (2018), State Statistical Office of the Republic of Macedonia (2023), Statistical Office of Montenegro (MONSTAT) (2017, 2018, 2019, 2020, 2021, 2022, 2023), Statistical Office Of The Republic Of Serbia (2014, 2015, 2023).

In Figure 1, the total number of nights of stay in the Balkans for the years 2013-2022 are presented. The bigger the area of the tree graph the more overnight stays have been accomplished

by the visitors. Thus, it is easier to visualise the volume of the data. The information we can deduct from the graph is that for the year 2020, the first of the two unexpected years of the COVID-19 pandemic (blue rectangle), the number of visitors drastically decreased as opposed to the previous years (2013-2019) presented as orange rectangles and the after pandemic years, 2021-2022 (red rectangles) where the growth in visitors seem to have a stable growth progression and not a downturn in the horizon is expected. The year 2022, exhibits the return to a pre-COVID number of arrivals in the Balkan region, with an almost geometrical progression running to the number of arrivals in 2019. The year 2021, the second and last year of COVID pandemic measures and restrictions, had arrivals accounting close to those arrivals 8 years before in 2013 (both grey rectangles). Inasmuch as we can make safe assumptions, Balkan tourism flows have returned to their normal rate of growth like there was not any pandemic so their overnight stays.

ALBANIA	49.136.946
BOSNIA AND HERZEGOVINA	7.302.994
BULGARIA	98.087.976
CROATIA	130.164.325
GREECE	226.932.105
KOSOVO	1.482.611
MONTENEGRO	16.301.321
REPUBLIC OF NORTH MACEDONIA	4.866.145
ROMANIA	95.985.000
SERBIA	12.508.098

Figure 2. Total number of foreign visitors in the Balkans per country under study. Years 2013-2022
Source: Authors creation based on data from Agency for statistics of Bosnia and Herzegovina (2023), Agjencia e Statistikave të Kosovës (ASK). (n.d.), Croatian Bureau of Statistics (2021, 2023A, 2023B, 2023C), Institute of SETE-INSETE (2023), Albanian Institute of statistics (INSTAT). (2020, 2022A, 2022B), Ministria e turizmit dhe mjedisit Republica e Shqiperia (2017), National Institute of Statistics of Romania (2023), National Statistics Institute Republic of Bulgaria (2021, 2023), OECD (2018), State Statistical Office of the Republic of Macedonia (2023), Statistical Office of Montenegro (MONSTAT) (2017,2018,2019,2020,2021,2022,2023), Statistical Office Of The Republic Of Serbia (2014, 2015, 2023), The World Bank IBRD-IDA. (n.d.), (UNWTO 2021).

Figure 2 depicts the total number of foreign visitors per country that visited the Balkan region for the years 2013-2022. Greece and Croatia are the two winners by far having the record of tourist visitors in the area. Cumulative the foreign visitors in Croatia, Bulgaria and Montenegro are equal to those of Greece. Bulgaria, Romania and Albania follow with a great volume of arrivals in the area and in the last positions in the list, we can find Montenegro, Serbia, Bosnia and Herzegovina, the Republic of North Macedonia and Kosovo which represent the smallest amounts of tourism in total contribution.
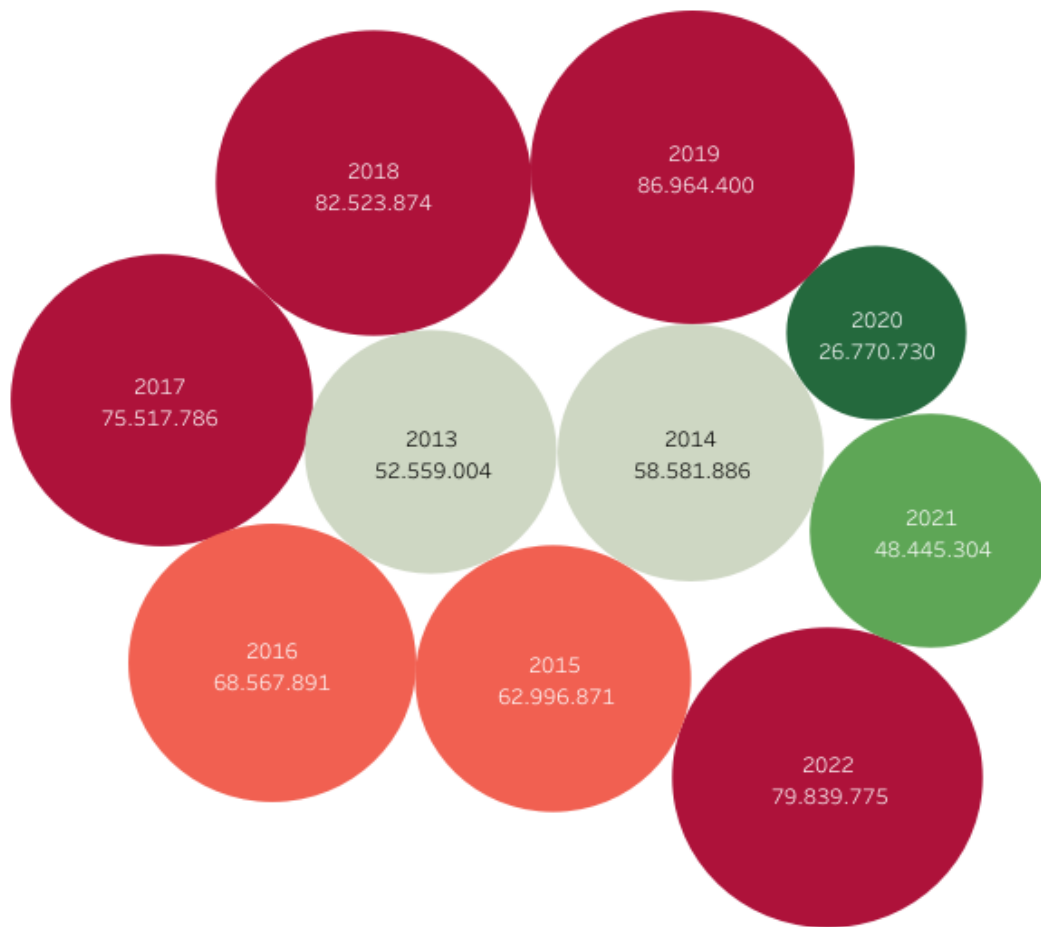
Figure 3. Total number of foreign visitors in the Balkans for years 2013-2022
Source: Authors creation based on data from Agency for statistics of Bosnia and Herzegovina (2023), Agjencia e Statistikave të Kosovës (ASK). (n.d.), Croatian Bureau of Statistics (2021, 2023A, 2023B, 2023C), Institute of SETE-INSETE (2023), Albanian Institute of statistics (INSTAT). (2020, 2022A, 2022B), Ministria e turizmit dhe mjedisit Republica e Shqiperia (2017), National Institute of Statistics of Romania (2023), National Statistics Institute Republic of Bulgaria (2021, 2023), OECD (2018), State Statistical Office of the Republic of Macedonia (2023), Statistical Office of Montenegro (MONSTAT) (2017,2018,2019,2020,2021,2022,2023), Statistical Office Of The Republic Of Serbia (2014, 2015, 2023), The World Bank IBRD-IDA. (n.d.), (UNWTO 2021).

In Figure 3, the author sums up all the tourist arrivals of foreign visitors that took place in the Balkan region for the years 2013-2022 for all the countries. As the figure indicates, the years 2017, 2018, 2019 and 2022 were the most productive for tourism in the area, tourism flourished managing to attract almost 80 million visitors in 2022 and more than 80 million in 2018-2019, while the year 2020 is a frugal year with the visitors accounting only to the one- fourth of the previous or following years. Year 2021, following, the second year of COVID restrictions, has a great growth from 2020 with more than 48 million arrivals. Taking a look down to the years 2013 and 2014 we can see the beginning of tourism growth to the degree that from 2014 to 2015 and 2018 to 2019, the Balkan locale has a growth rate of 4 million tourists and from 2015 to 2018, until the COVID-19, a growth rate of 6 million tourist arrivals per year.
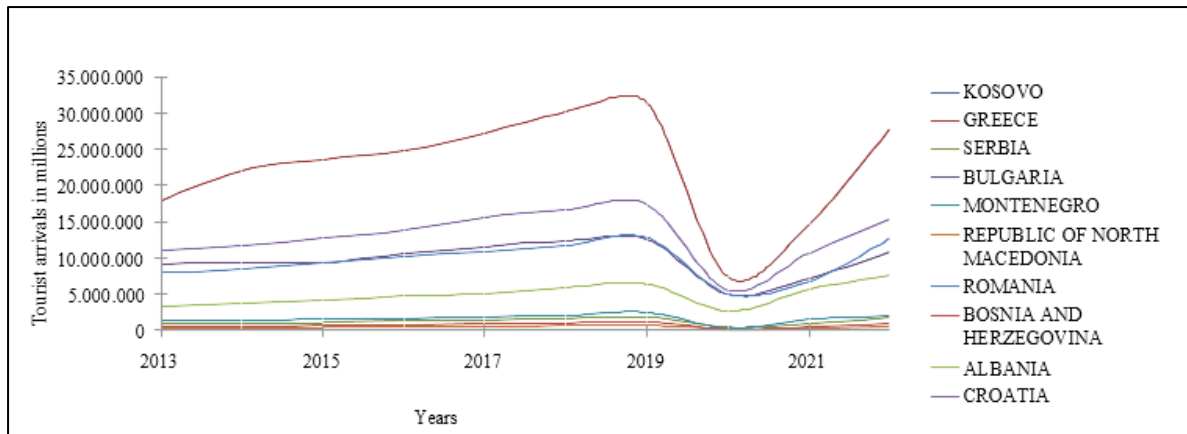
Figure 4. Foreign tourist arrivals per year, years 2013-2022, for each country under study

Source: Authors creation based on data from Agency for statistics of Bosnia and Herzegovina (2023), Agjencia e Statistikave të Kosovës (ASK). (n.d.), Croatian Bureau of Statistics (2021, 2023A, 2023B, 2023C), Institute of SETE-INSETE (2023), Albanian Institute of statistics (INSTAT). (2020, 2022A, 2022B), Ministria e turizmit dhe mjedisit Republica e Shqiperia (2017), National Institute of Statistics of Romania (2023), National Statistics Institute Republic of Bulgaria (2021, 2023), OECD (2018), State Statistical Office of the Republic of Macedonia (2023), Statistical Office of Montenegro (MONSTAT) (2017,2018,2019,2020,2021,2022,2023), Statistical Office Of The Republic Of Serbia (2014, 2015, 2023), The World Bank IBRD-IDA. (n.d.), (UNWTO 2021).

All the aforementioned results from the previous figures can also be verified in Figure 4 and Figure 5 The stable rate of growth in foreign tourist arrivals for the years 2013-2019 is presented as well as the geometrical progression from 2020 onwards. During COVID-19, all the countries arrival numbers diminished. Greece, the major arrivals destination due to the COVID had seen the biggest decline. Arrivals in Croatia follow the same pattern as the second bigger destination. Bulgaria and Romania, the third and fourth biggest destinations follow the decline line. Albania, Montenegro, Kosovo, Serbia, Bosnia and Herzegovina and North Macedonia following the list have seen the equivalent downturn of arrivals.
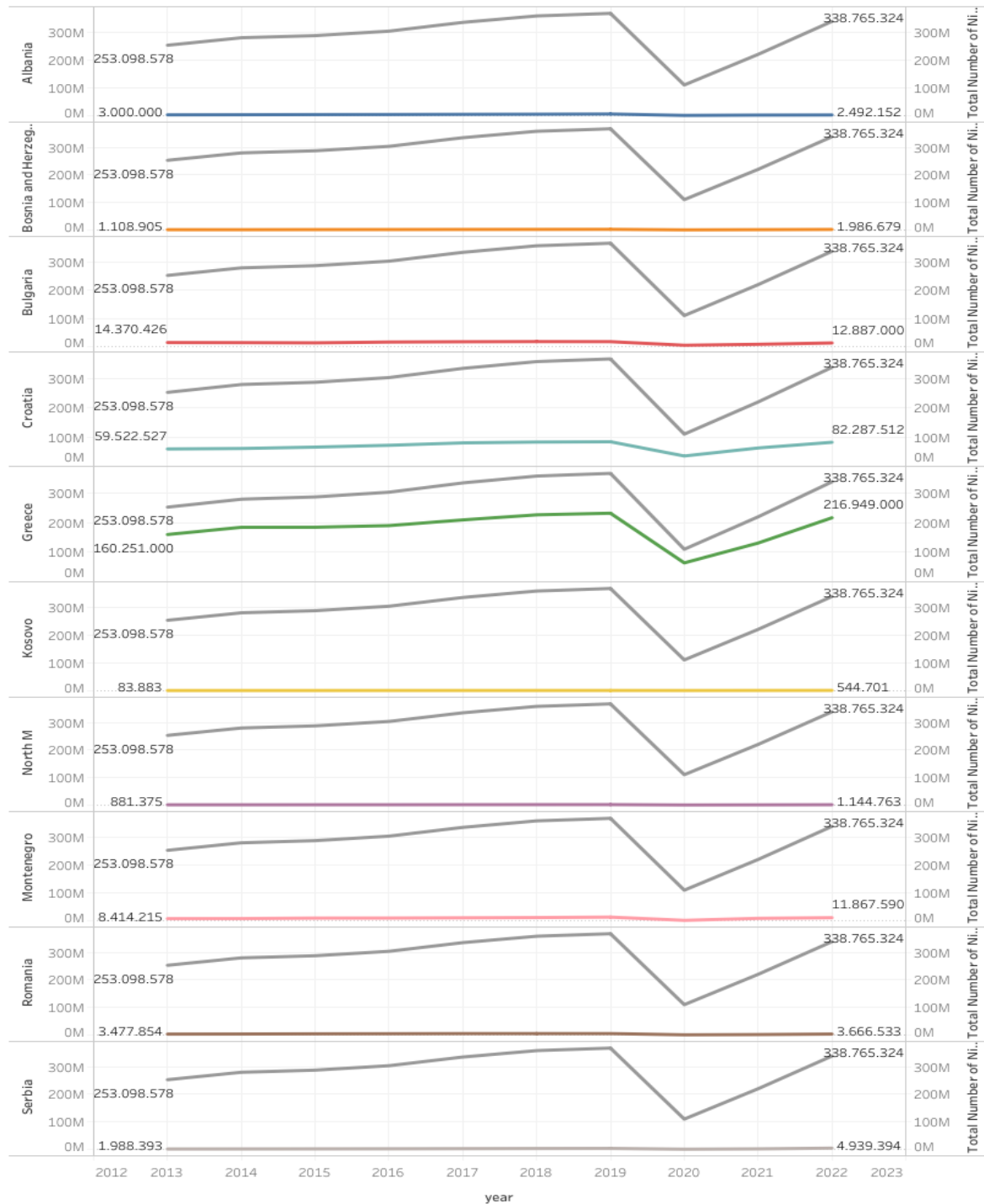
Figure 5. Total number of nights of stay per country, per year compared to the total number for the region for years 2013-2022

Source: Authors creation based on data from Agency for statistics of Bosnia and Herzegovina (2023), Agjencia e Statistikave të Kosovës (ASK). (n.d.), Croatian Bureau of Statistics (2021, 2023A, 2023B, 2023C), Institute of SETE-INSETE (2023), Albanian Institute of statistics (INSTAT). (2020, 2022A, 2022B), Ministria e turizmit dhe mjedisit Republica e Shqiperia (2017), National Institute of Statistics of Romania (2023), National Statistics In-stitute Republic of Bulgaria (2021, 2023), OECD (2018), State Statistical Office of the Republic of Macedonia (2023), Statistical Office of Montenegro (MONSTAT) (2017,2018,2019,2020,2021,2022,2023), Statistical Office Of The Republic Of Serbia (2014, 2015, 2023).

In Figure 5, in alphabetical order, there is a double axis figure with one side containing the number from each country on the nights that the foreign visitors stayed for each year under research in millions and the other axis the total nights that the foreign visitors stayed in all countries for the years 2013-2022 (grey line), in millions. Croatia and Greece have the most visitors by volume in the region for the time period under study and the greatest decline in arrivals for the years that COVID has set all countries to impose strict lockdown measures. Greece by far is the sole winner as it had more tourist arrivals than the rest of the countries have all together combined. Montenegro and Bulgaria come second in the volume of tourist arrivals with smaller decreases during COVID but with great growth after COVID. The rest of the countries, Serbia, Romania, Kosovo, Republic of North Macedonia, Albania, Bosnia and Herzegovina seem to have stable rates of incoming visitors without many fluctuations and with small rates of growth or decline. Indeed, during the pandemic years 2019-2021, the decline in their volume of tourism arrivals did not have a noticeable decline like the decline in Croatia and Greece. Notably, the reader can disguise the contribution to tourism in the area from each country and the patterns of growth or decline each year in the general volume of incoming tourism in the area as a total or at each destination. Data Vidovic and Cudic (2016) had presented also verify the tourist growth, specifically on the overnights for Bosnia Herzegovina and Croatia.

4. Conclusions

The Balkans is a promising destination on the world map that can accommodate the different interests of its visitors and the form of tourism they desire to experience. Heritage, religion, history and other factors that got the attention of tourists are also a factor of national identity for many. An uprising in the foreign tourists and their overnights is observed. All the destinations are addressed in and out of the region's tourism streams. Nationals of each country seem to comprise a great portion of the total tourism. The main destinations that come first in choice by tourists are Greece, Croatia, Albania, Bulgaria and Montenegro. The power to be an interesting destination, from most of those aforementioned countries, derives from the coastline they possess. Many researchers divide the region between the western Balkans or eastern Balkan Europe or by other interests and geographical divisions. The difference made in this research paper is that it encompasses all the Balkan locale countries except Turkey which has the majority- almost all of its territory under the Middle East region. The data that have been collected and analysed indicate that from 2013 to 2019 tourism flourished with 4 to 6 million arrivals per year until the COVID-19 pandemic and overnights growing from 250 million in 2013 to 350 million in 2019. The years 2020 and 2021 are severely less productive for the industry due to the restrictions that have been imposed. After 2021 tourism seems to be back on track with record numbers arriving in the area to be equivalent to those of 2019 and the overnights to be 335 million. Finally, we can assume that tourism is returning to the growth that had, in all the aforementioned countries, since non-restrictions exist. Further research in the area needs to be combined with those first results and is imperative to compare the tourism receipts that had occurred from the tourist economic activity for years 2013 to 2022. Apart from the nationalities which is a good data source to be included also the gender and the age of the tourists would provide important information for the formation of tourism policies and better business management and marketing. Although a portion of papers include such data, the sample population is not enough to be included in this research and more research is needed in the whole region.

5. Limitations

Although previous research in the area exists for a small number of destinations, it concentrates on no more than 3 countries per study. Usually, the focus is not on incoming tourism from abroad but on tourists that have the country's nationality. Specific geographical regions and subregions are included that do not depict the Balkans as a whole. There is no cumulative data for the region on all Balkan destinations. In this research, the author does not take into account the regions or sub-regions that have been defined to measure the Mediterranean sub-region or Eastern Europe division of the tourist geographic area even though some countries belong to one or both or more areas. Only the strict geographical borders of the Balkan peninsula with countries fully or partially belonging to this area are taken into consideration. The rest of the countries that have been characterised as Balkans for historical, cultural, lingual, national or other reasons, that give the "Balkan Country" title to their country, are being excluded. The Turkish territory that belongs partially to the Balkan region is excluded due to the small amount of area belonging to the Balkans and could potentially cause befuddlement in the data comparison. The author includes only data for the foreign visitors and their overnights in the study. Several data that contribute to the research are provisional and could change after the publication and some are estimated by the national statistics offices of each country.

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