University of Novi Sad | Faculty of Sciences
DEPARTMENT OF GEOGRAPHY, TOURISM AND HOTEL MANAGEMENT

TOURISM DESTINATION COMPETITIVENESS – EVALUATION MODEL FOR SERBIA

– MONOGRAPH –

Novi Sad, 2024.

University of Novi Sad | Faculty of Sciences

DEPARTMENT OF GEOGRAPHY, TOURISM AND HOTEL MANAGEMENT

Vanja Pavluković, Danijel Pavlović, Aleksa Panić, Nemanja Stanišić, Tatjana Pivac,
Tijana Radojević, Sanja Kovačić, Svetlana Vukosav, Uglješa Stankov, Milana Pantelić,
Miroslav Knežević, Marija Cimbaljević, Aleksandra Vujko, Tamara Jovanović

TOURISM DESTINATION COMPETITIVENESS – EVALUATION MODEL FOR SERBIA

ISBN 978-86-7031-662-1

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Publisher
Department of Geography, Tourism And Hotel Management,
Novi Sad, Trg Dositeja Obradovića 3, tel: 021/450-104
www.dgt.uns.ac.rs

By the decision number 0602-07-33/24 of the Teaching-Scientific Council of the University of Novi Sad Faculty of Sciences, at the session held on October 3, 2024, the manuscript has been accepted for publication as a monograph.

This research was supported by The Science Fund of the Republic of Serbia, GRANT No. 7739076,
Tourism Destination Competitiveness - Evaluation Model for Serbia -TOURCOMSERBIA.

CIP - Каталогизација у публикацији
Библиотеке Матице српске, Нови Сад

338.48(497.11)

TOURISM destination competitiveness - evaluation model for Serbia [Elektronski izvor] : monograph / [Vanja Pavluković ... et al.] ; [translation Vanja Pavluković ... et al.]. - Novi Sad : Faculty of Sciences, Department of Geography, Tourism and Hotel Management, 2024

Način pristupa (URL): https://tourcomserbia.com/. - Opis zasnovan na stanju na dan 23.10.2024. - Nasl. sa naslovnog ekrana. - Bibliografija.

ISBN 978-86-7031-662-1

а) Туризам - Развој - Србија

COBISS.SR-ID 155187721

This publication "Tourism Destinations Competitiveness - Evaluation Model for Serbia" has been prepared with the financial support of the Science Fund. The content of this publication is the sole responsibility of the project holder TOURCOMSERBIA and the content of the publication does not reflect the views of the Science Fund of the Republic of Serbia.

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FOREWORD

The monograph Competitiveness of Tourist Destinations - Evaluation Model for Serbia, written in Serbian and English, contains basic information about the TOURCOMSERBIA project and the most important results of the research conducted within the project. The monograph describes in detail the process of developing a model for measuring the competitiveness of tourism in Serbia, as well as its application in Serbia and the countries that have been identified as the main competitors of tourism in Serbia. Based on the results of these researches, which were carried out in the period from January 2022 to May 2024, and consultations with stakeholders in the tourism industry of Serbia, the TOURCOMSERBIA project team, i.e. the authors of the monograph, have also created recommendations for improving the competitiveness of Serbia as a tourist destination. The results of the research, which are presented in the monograph, have been published in several scientific papers in domestic and international journals and have been presented at several domestic and international conferences. The authors believe that this monograph represents a significant contribution to the professional and scientific literature in our country, but also outside the borders of Serbia, on the topic of competitiveness of a tourist destination.

The monograph Competitiveness of Tourist Destinations - Evaluation Model for Serbia is intended for the academic community, researchers and students of undergraduate, master and doctoral studies in tourism, as well as the general professional public, primarily tourism policy makers, decision-makers in tourism, and representatives of both the public and private sectors in the field of tourism.

The authors would like to express their special gratitude to the Science Fund of the Republic of Serbia, which supported the implementation of the project Tourism Destination Competitiveness - Evaluation Model for Serbia - TOURCOMSERBIA (project number 7739076), and to the reviewers Prof. Dr Kristina Košić, Full Professor at the Department of Geography, Tourism and Hotel Management at the Faculty of Science, University of Novi Sad, Dr Milica Rančić Demir, Assistant Professor at the Faculty of Tourism, University of Maribor, Slovenia, and Dr Ivana Brdar, Associate Professor at Singidunum University. Also, the authors would like to thank the Tourist Organization of Serbia, the Tourist Organization of Vojvodina, the National Association of Travel Agencies (YUTA), the Business Association of the Hotel and Hospitality Industry of Serbia (HORES), which helped in the implementation of certain project activities, and all stakeholders who participated in the research as part of the project activities.

Authors

1 INTRODUCTION

Program Ideas of the Science Fund of the Republic of Serbia	
Project name	Tourism destination competitiveness - evaluation model for Serbia
Acronym of the project	TOURCOMSERBIA
Project number	7739076
Source of funding	Science Fund of the Republic of Serbia
Scientific field of the project	Social Sciences
Scientific Research Areas	Hospitality, leisure, sports and tourism
Total budget (EUR)	194.805,09
Project duration	01.01.2022 – 31.12.2024.
The project's website:	www.tourcomserbia.com
Project leader:	University of Novi Sad, Faculty of Sciences (UNSPMF)
Project partner:	Singidunum University (SU)
Project Manager (PI):	Prof. Dr Vanja Pavluković, Full Professor at the Faculty of Sciences, University of Novi Sad
Contact	vanja.dragicevic@dgt.uns.ac.rs
Abstract of the project: Serbia is a country that is one of the growing tourist destinations and developing economies, where tourism is recognized as one of the key sectors of general economic and social development. However, Serbia's competitive position in the international tourism market is weak. Various indicators and models have been developed by numerous researchers in order to analyze certain aspects of the competitiveness of a tourist destination. However, there is no single set of indicators that can be universally applied to all destinations, but a more tailored approach is needed for each destination. This project aims to develop a new model of tourism destination competitiveness for Serbia, useful for decision-makers to evaluate the competitiveness of Serbia's tourism over time and make adequate decisions. The development of this unique model involves several steps: a comprehensive literature review, a workshop, pilot testing, and field research, involving internal and external stakeholders. Sustainability and demand perception are often overlooked in destination competitiveness studies. Therefore, the TOURCOMSERBIA project aims to fill this gap by introducing sustainable indicators and adopting a participatory approach. This approach will involve relevant internal and external stakeholders both in the development of the model and in the evaluation of Serbia's competitiveness as a tourist destination. The model will be applied in selected countries identified as part of Serbia's competitive tourism set. This will lead to the creation of a more comprehensive and applicable model, providing recommendations to decision-makers in Serbia's tourism industry on how to improve Serbia's competitiveness as a tourist destination. The project has a theoretical and practical contribution and will have an impact on tourism stakeholders and the scientific community in Serbia and abroad.	

2 ABOUT THE PROJECT

TOURCOMSERBIA project – goals and results

The overall objective of the TOURCOMSERBIA project is to create and implement a sustainable model of competitiveness adapted to the specifics of Serbia as a tourist destination, with the aim of directing decision-makers to achieve and maintain the competitive advantage of the destination. Five specific objectives have been identified in order to achieve this main objective:

1. Development of a model of competitiveness of a tourist destination with factors and indicators adapted to Serbia.
2. Testing the model to measure the current competitiveness of the tourist destination of Serbia.
3. Testing the applicability of the model in selected countries identified as part of the competitive set of tourism in Serbia.
4. Development of guidelines and recommendations for achieving Serbia's competitive advantage as a tourist destination.
5. Improving the research skills and scientific production of the project team, as well as the exchange and transfer of knowledge at the national, regional and international levels.

The University of Novi Sad, the Faculty of Science, the Department of Geography, Tourism and Hotel Management, and the University of Singidunum have jointly and successfully implemented the TOURCOMSERBIA project. The implementation plan consisted of five work packages (RPs). Although each work package is managed by one organization and one work package coordinator, the activities were carried out jointly with the participation of human and other resources from both universities. FP1 focused on the management and implementation of the project and lasted throughout the project implementation period. FP2 included continuous communication and dissemination of project results throughout the project lifetime. The development of the model of competitiveness of the tourist destination took place in FP3, while the application of the model in Serbia and selected countries of the competitive set of Serbia (Croatia, Slovenia and Hungary) was part of FP4. Recommendations for decision-makers in the tourism industry of Serbia are formulated in FP5 and disseminated to all key stakeholders as guidelines for continuous measurement and improvement of the competitiveness of the tourist destination.

The main results of the TOURCOMSERBIA project include the development of a model of competitiveness of a tourist destination for Serbia, assessment of competitiveness by internal (local residents and stakeholders in tourism) and external stakeholders (foreign tourists and foreign tour operators), comparative analysis of the competitiveness of tourism in Serbia and its competitors, guidelines and recommendations for achieving a competitive advantage for Serbia as a tourist destination, publications in peer-reviewed international journals, and the final publication of the project.

3 STATE AND PROSPECTS FOR TOURISM DEVELOPMENT IN SERBIA

3.1 Natural and social characteristics

Serbia is a country with significant and diverse tourist potential, which is located in a relatively small area. As such, it has realistic prospects to use its comparative advantages and to impose itself as one of the leaders in the development of tourism in the region in the foreseeable future (Ubavić, 2015). Serbia has natural, cultural and historical resources that are the basis for the development of attractive tourist products (Milicevic & Petrović, 2017). The country's tourism sector has seen steady growth in recent years, driven by its diverse landscapes, historical sites, and vibrant cultural scene. Understanding the natural and social characteristics of Serbia is crucial for assessing its tourism potential and competitiveness in the tourism market, as well as for devising sustainable development strategies.

Tourism products that contribute to the development of tourism in Serbia, and the improvement of its competitiveness in the international tourism market, are: ecotourism, health (spa and wellness) tourism, mountain tourism, nautical tourism, cultural tourism, urban tourism, rural tourism, business (MICE) tourism and event tourism (Tourism Development Strategy of the Republic of Serbia for the period 2016-2025).

Natural characteristics

Serbia's natural beauty not only increases tourist attractiveness, but also serves as a platform to promote environmental conservation and sustainable tourism practices. The most important natural potentials for the development of tourism in Serbia are a favorable geographical position, geomorphological values, hydrographic values, climate values and flora and fauna (Basarić et al., 2022). Serbia boasts a variety of natural landscapes, from picturesque mountains and fertile plains to winding rivers and tranquil lakes. The country's topographical diversity offers opportunities for different forms of tourism.

Protected natural areas are a special attraction as a property of great importance for the development of tourist products intended for domestic and foreign tourists, and whose preservation and further protection and improvement of the sustainable management system are important conditions for increasing tourist traffic. The estimated ecological and tourist potentials of Serbia amount to over 20% of the total territory and represent rich ecological and tourist reserves of the future on which the perspectives for the development of sustainable tourism are based on protected and preserved nature (Cvetković & Đorđević, 2011). According to WDPA data, a total of 7203 km2 is protected, which makes up 8.14% of the total territory of the Republic of Serbia (WDPA, 2024). Protected natural areas are a good basis for the development of ecotourism. According to the data from the Central Register of Protected Natural Areas (Institute for Nature Conservation of Serbia, 2024), protected areas in Serbia are classified into seven categories: 5 national parks; 20 nature parks; 31 landscapes of exceptional features; 66 nature reserves (strict and special reserves nature); 5 protected habitats; 310 natural monuments and 35 natural spaces around cultural monuments and monuments of historical importance. A significant number of wild species have also been placed under protection: 1784 strictly protected species and 865 protected wild species of plants, animals and fungi.

The main carriers of tourism in protected areas of Serbia are national parks (Fruska Gora, Djerdap, Tara, Kopaonik and Šar planina) which participate with about 10% in tourism in Serbia. In addition to national parks, protected areas of other categories such as Zasavica, Carska bara, Obedska bara, Palićko Lake, Gornje Podunavlje, Devil's Town, Mlava spring, Lazareva River canyon, Prerasti Vratne, Krupaljsko spring, Sopotnica waterfalls, Uvac river canyon and many others are visited (Cvetković & Đorđević, 2011).

The International Coordination Council of the UNESCO Programme “Man and the Biosphere” has declared two Biosphere Reserves in Serbia: “Biosphere Reserve Golija - Studenica” in 2001 and “Biosphere Reserve Bačko Podunavlje” in 2017, which also represent a great tourist potential of Serbia.

The favorable climate in Serbia, with warm summers and snowy winters, supports tourist activities throughout the year, and the conditions for the development of mountain tourism are very favorable. The most visited winter mountain center of Serbia is Kopaonik, which has the most developed offer of winter sports. With certain infrastructure investments, Stara Planina has great potential to become a major ski destination. Zlatibor offers a passive vacation, primarily intended for families with children, while for serious adventurers, Tara offers many opportunities, such as hiking or mountain biking (Milicevic & Petrović, 2017). In addition to the mentioned mountains, due to their natural beauty, the mountains of Tara, Fruška Gora, Golija, Zlatar, Divčibare, Goč, Rtanj and others have great tourist potentials.

Thermo-mineral water resources enable the development of spa tourism. The country’s thermal spas, known for their therapeutic properties, attract visitors seeking relaxation and wellness experiences. Serbia has more than 1000 springs of cold and hot mineral water, as well as a wealth of natural mineral gases and healing mud (Stanković, 2010). Also, in the immediate vicinity of thermal mineral waters, it is possible to complement the tourist offer by building aqua centers and other complementary adventure facilities, which can form a complex and market-acceptable tourist product (Bošković, 2016). The primary spa centers of significant national and prospective international importance with a year-round offer are: Vrnjačka Banja, Sokobanja, Niška Banja, Vranjska Banja, Bukovicka Banja and Banja Koviljača. Among them, the most visited is the Vrnjačka Banja. However, its primary visitors are domestic tourists, which indicates that its offer lags behind the well-known spas in the region, and therefore it is not competitive on the international market (Hrabovski-Tomić & Milicevic, 2012). Among the secondary spa towns, the following stand out: Banja Gornja Trepča, Banja Vrdnik, Prolom Banja, Selters Banja, Lukovska Banja, Banja Kanjiža, Banja Vrujci and others (Basarić et al., 2022).

Serbia does not have direct access to the sea, but it has great potential for the development of nautical tourism. The Danube River has the greatest nautical potential and connects Serbia with other countries and the Black Sea (Štetić, 2003). The Danube is the most popular river for cruises and numerous tour operators organize the docking of river cruisers in Belgrade and Novi Sad. Individual navigation on the rivers and canals of Serbia is not sufficiently developed. The main shortcoming of the development of nautical tourism in Serbia are the lack of adequate infrastructure on rivers (berths, marinas, gas stations) (Milicevic & Petrovic, 2017). In addition to the Danube, the Sava, Drina, Tisza and Velika Morava rivers also have significant tourist potential.

Social characteristics

Serbia’s cultural heritage reflects its rich history and diverse ethnic traditions. Over the centuries, various civilizations have left their mark on the country, resulting in a tapestry of architectural styles, culinary delights, and cultural festivities.

Serbia has a very rich collection of movable, immovable and intangible cultural heritage, which represents a huge potential for the development of cultural tourism. Out of 200 monuments, which have the highest level of protection according to national laws, ten cultural monuments are included in the UNESCO World Heritage List: eight medieval Serbian monasteries and churches (Studenica, Petrova Crkva, Đurđevi Stupovi, Sopoćani, Gračanica, Bogordica Ljeviška, Peć Patriarchate, Visoki Decani), the medieval town of Ras and the archaeological site of Felix Romulijana near Zaječar (Ministry of Culture of the Republic of Serbia, 2024). However, we should also mention other cultural treasures of Serbia, such as: archaeological sites (Vinča, Lepenski Vir, etc.), medieval towns and fortifications (Kalemegdan, Petrovaradin Fortress, etc.), medieval monasteries (Žiča, Ljubostinja, Mileševa, etc.). (Government of the Republic of Serbia, Ministry of Trade, Tourism and Telecommunications, 2016).

Within the UNESCO program “Remembering the World”, three movable cultural goods have been inscribed in the World Register of Cultural Documentary Heritage from the Republic of Serbia: Miroslav’s Gospel - 2005 (the oldest preserved monument of literacy written in the Serbian edition of the Old Slavonic language; end of the 12th century; National Museum in Belgrade); Personal Archive of Nikola Tesla – 2003 (Nikola Tesla Museum, Belgrade); Telegram Declaring War of Austria-Hungary on the Kingdom of Serbia (July 28, 1914; the beginning of World War I, Archives of Serbia) (Government of the Republic of Serbia, Ministry of Trade, Tourism and Telecommunications, 2016).

Serbia is dotted with charming towns and villages, each with its own unique charm and cultural identity. The most visited urban tourist destination in Serbia is the capital city of Belgrade. The basis for Belgrade's positioning on the international tourism market is based on a number of benefits it has, such as: favorable geographical position, richness of cultural and historical monuments, natural resources, tourist attractions, events, numerous diverse accommodation capacities, capacities for the development of business (MICE) tourism, developed image of the city as a city of entertainment and entertainment (Milićević & Petrović, 2017, Radojević et. al, 2018).

When it comes to the potentials for the development of business (MICE) tourism, Belgrade and Novi Sad have the largest capacities and have all the facilities necessary for the organization of large gatherings, congresses and fairs (Sava Center, Kombank Arena, Belgrade Fair, EXPO XXI), as well as hotels that provide quality services, including hotels of international hotel chains (Radisson Blu, Crowne Plaza, Falkensteiner, Holiday Inn, Best Western, Marriott), which offer conference facilities (Trajković, 2019).

In addition to Belgrade, the primary city tourist centers of international and more pronounced national importance with a year-round offer are Novi Sad, Niš, Kragujevac, Pristina and Subotica. As secondary city tourist centers, the following stand out: Sombor, Zrenjanin, Vršac, Kladovo, Valjevo, Užice, Pirot, Vranje, Peć, Prizren and others (Basarić et al., 2022).

Rural tourism, in addition to urban tourism, is an increasingly popular form of tourism, and it is characterized by authenticity and diversity of potential and content (Cvijanović & Vuković, 2014). The main attractions of rural tourism and rural areas are the proximity of nature, preserved tradition, hospitality and family atmosphere (Štetić et al., 2014). Rural tourism in Serbia is characteristic of the villages of Western Serbia, Sumadija and Vojvodina. Developed rural tourism can be a significant factor in the development of both the village and the entire municipality. A good example of the development of rural tourism is the municipality of Kosjeric, which has been receiving guests in its households for two and a half decades and generating significant income (Milicevic et al., 2015; Surla et al., 2023; Lunić et al., 2024).

Serbian hospitality is known all over the world, and the locals welcome visitors with warmth and generosity (Radojević et.al, 2019). The tradition of "hosts" nurtures a sincere connection between guests and hosts, creating unforgettable experiences for tourists. Numerous events are organized in Serbia, which are the basis for the development of manifestation tourism. Of particular interest are traditional events, through which the richness and diversity of folk creativity in Serbia is presented. The oldest tourist event in Serbia is the "Carnival of Flowers" in Bela Crkva, which was held for the first time in 1852. There are two internationally known music festivals in Serbia, EXIT in Novi Sad and the Dragacevo Trumpet Festival in Guča, which attract many foreign tourists. There are also very important cultural events that last for several decades: FEST, BITEF, BELEF, Ljubičevo Equestrian Games, Župa Harvest, Vuk's Sabor, Mokranjac Days, etc. Gastronomic events that are organized throughout Serbia should certainly be emphasized (Barbecue Festival, Cabbage Festival, Beans Festival, Bacon Festival, Prosciutto Festival, etc.). Promotion and tourist propaganda of some important events in Serbia can contribute to increasing tourist traffic to destinations that organize these events (Milicevic & Petrovic, 2017; Pivac et al., 2019; Pivac et al., 2023).

Serbia has a significant potential for the development of tourism, thanks to its diverse natural landscapes and rich cultural heritage. Despite the wealth it possesses, Serbia faces challenges such as infrastructure development, quality standards and marketing strategies in order to fully exploit its tourism potential. Based on its natural and social characteristics, Serbia can attract a wider range of tourists and valorize its tourist offer. Realizing this potential requires concerted efforts by government agencies, private sector stakeholders, and local communities to address infrastructure constraints, improve service quality, and enhance destination marketing. The practice of sustainable tourism should be a priority in order to preserve the natural beauty and cultural authenticity of Serbia for future generations. Through strategic planning, investment in tourism infrastructure and the promotion of responsible tourism, Serbia can position itself as a leading destination in the region. With its stunning blend of history, culture and hospitality, Serbia is poised to become a must-visit destination for travelers looking for authentic experiences and unforgettable memories.

3.2 State of accommodation capacities in the Republic of Serbia

Tourism activity is an important factor in increasing the economic activities of a country, and accommodation capacities are the basic elements of the material and technical base of tourism because they facilitate the stay of tourists in the destination and represent the basis for its further development. This is the reason why they are considered a key source of sustainable competitiveness of the destination, and their lack "represents a limitation in the number of overnight stays of tourists" (Ritchie & Crouch, 2003, p 246). According to the Tourism Development Strategy of the Republic of Serbia (2016), the quality and structure of accommodation capacities are the basis for the successful, continuous development of tourism activities in our country. The representation of hotels in the category of four and five stars is a prerequisite for assessing the quality of hotel services (Radojević & Borovčanin, 2022). Taking into account all the shortcomings in the implementation of the previous Tourism Development Strategy (2006), which were manifested in the high share of low-category facilities, the unfinished privatization process and minimal investments in spa centers, it can be stated that today the situation is somewhat better from all the listed aspects (Alavuk, 2023). Renovated accommodation complexes in Serbian spas, as well as the construction of new high-category ones, and additional accommodation capacities in mountain centers leave room for optimism in the sphere of tourism development in our country.

Table 1 shows the number of hotel facilities, motels, boarding houses and tourist resorts, as well as the number of accommodation units and the number of beds they have for the period 2022-2024. Based on the presented data, an increase in the number of accommodation units and the number of beds within hotel categories can be observed, although according to official data, the number of such facilities is slightly smaller. This leads to the conclusion that some hotels are expanding their capacities, due to the increased demand for their services. Also, it is noticeable that the number of facilities in other types of accommodation is decreasing, especially evident in motels, (2 out of a total of 8 have closed), which indicates a reduced demand for this type of facilities. Such a situation on the market is the result of adapting gas stations to the needs of passengers in transit, which has significantly reduced costs for these users.

Table 2 shows the structure of accommodation facilities by type and category. Based on these data, it can be noted that in the territory of the Republic of Serbia, hotels with four and five stars dominate (52.4%), while the smallest number of hotels categorized with one star is only (1.8%). This situation indicates that our tourist offer has realized the importance of providing high-quality hotel services to tourists, because such facilities are the most sought after on the tourist market, especially among foreign tourists. Increasing the number of arrivals and overnight stays of foreign tourists is certainly one of the primary goals of our country's tourism policy. A similar situation is with garni hotels, which are also dominated by high-category four-star facilities.

Table 3 shows data related to the number, category and capacity of hotels in the Republic of Serbia for the period 2022-2024, According to the dominance in the

Table 1. Overview of the number and structure of categorized hotel-type accommodation facilities for the period 2022-2024 (cross-section 31.01.2024) in the Republic of Serbia

Type of accommodation facility	Number of objects			Number of accommodation units			Number of beds		
	2022	2023	2024	2022	2023	2024	2022	2023	2024
Hotel	277	276	273	17292	17212	17492	25933	25448	25649
Garni Hotel	152	150	146	3590	3528	3415	5156	5018	4822
Apart hotel	4	4	4	316	316	316	581	581	603
Motel	8	8	6	214	213	163	344	306	223
Guesthouse	2	2	1	42	42	6	11	111	13
Tourist resort	6	6	6	285	285	285	488	488	480
Total	**449**	**446**	**436**	**21739**	**21596**	**21677**	**32613**	**31952**	**31790**

Source: Data obtained from the Ministry of Tourism and Youth and taken from , 2024.

Table 2. Overview of the number of hotel-type accommodation capacities by type and category of facilities in 2024 in the Republic of Serbia (section 31.01.2024.)

Types of accommodation facilities	Object Categories					Total
	1*	2*	3*	4*	5*	
Hotel	5	36	89	127	16	273
Garni Hotel	8	29	55	53	1	146
Apart hotel	1	2	-	1	-	4
Motel	4	1	1	-	-	6
Guesthouse	1	-	-	-	-	1
Tourist resort	-	-	1	5	-	6

Source : Retrieved from , 2024.

Table 3. Number of hotel facilities and their capacity by category for the period 2022-2024 in the Republic of Serbia (section 31.01.2024.)

Type of objects	Number of objects			Number of accommodation units			Number of beds		
	2022	2023	2024	2022	2023	2024	2022	2023	2024
Hotels									
1*	6	6	5	182	182	154	295	295	254
2*	43	39	36	1779	1755	1509	2920	2879	2439
3*	95	96	89	4735	4816	4617	7310	7318	7097
4*	118	121	127	8836	8853	9653	13026	12895	13620
5*	15	14	16	1760	1606	1649	2382	2061	2239
Garni Hotels									
1*	9	9	8	131	131	111	206	206	180
2*	30	31	29	509	522	486	766	777	710
3*	56	54	55	1275	1216	1249	1895	1797	1826
4*	56	55	53	1657	1641	1551	2268	2217	2085
5*	1	1	1	18	18	18	21	21	21
Apart hotels									
1*	1	1	1	15	15	15	15	15	15
2*	2	2	2	190	190	190	357	357	357
3*	-	-	-	-	-	-	-	-	-
4*	1	1	1	113	113	113	231	231	231
5*	-	-	-	-	-	-	-	-	-

Source: Data obtained from the Ministry of Tourism and Youth and retrieved from , 2024.

number of high-category hotel facilities, the situation in terms of the number of accommodation units and the number of beds shows the same, that these facilities have the largest number of accommodation units and beds and that they can accommodate the largest number of guests looking for high–quality services rendered. The downward trend is noticeable in hotels categorized with two stars and three stars, which is directly reflected in the decrease in the number of accommodation units and beds.

Although in 2024 there was a slight decrease in the total number of hotels, such data certainly indicate the successful implementation of the Tourism Development Strategy of the Republic of Serbia (2016-2025), given that according to it, Serbia's successful positioning on the global tourism market is conditioned by the increase in high-category hotel capacities, which can be seen from the previous data and their analysis, and we can conclude that Serbia is on the right track and that it should certainly continue in this direction of development of its the material base. The organization of the upcoming world exhibition EXPO 2027, which will be held in our country, only confirms the requirements to raise the accommodation offer of the Republic of Serbia to an even higher level and enable the satisfaction of tourist needs and the most demanding target segments (Radojević et.al, 2017).

In addition, corporate social responsibility in the hotel industry is an important element in achieving responsibility in tourism and, ultimately, forming a more conscious society in terms of preserving resources for the future. Every hotel company can achieve an appropriate level of responsible business. This rule also applies to all other businesses whose primary goal is to maximize profits. The return on profit is not immediate, but international business practice shows that in the long run, the investment pays off. At the moment, the situation in Serbia does not confirm this claim. However, it is evident that the conditions in which the business environment in the hotel industry is carried out is changing.

According to available data from the period before the outbreak of the COVID-19 epidemic, a small number of facilities in Serbia implemented the principles of ecological business. The In Hotel Belgrade, Radisson Collection Hotel Old Mill Belgrade and Zlatibor Mona Hotel were attached to the Green Key ecological label, but, in the meantime, they did not renew this designation, so they lost their status. Some hotels belonging to international hotel groups enforce internal corporate environmental standards, e.g. *Mercure Belgrade Excelsior, Mama Shelter Belgrade* (brands of *the Accor* hotel group with *the Planet 21* program), *Holiday Inn Express Belgrade-City, Holiday Inn Belgrade, Crowne Plaza Belgrade, Indigo Hotel Belgrade* (brands of *the Intercontinental Hotels Group* with the Green engage program),) and Hilton Belgrade (ISO14001, ISO5001, used to be also in the Green Key eco-label system).

What we certainly hope for in the future is that as awareness of the positive effects of environmental standards grows, so will the number of facilities with the eco-labels. An additional stimulus to the process of obtaining the eco-label would be an initiative to reduce tax liabilities for such facilities, which is a common practice in the EU (Bradić, 2022).

3.3 Analysis of tourist traffic and tourism revenues

According to the data *of the Ministry of Tourism and Youth and the RZZS, in 2024* (Table 4) in 2019, the tourism sector in the Republic of Serbia achieved record results. The number of tourist arrivals reached 3.7 million (2015: 2.4 million) with an annual growth of 15% and an equal structure of domestic and foreign arrivals. A total of 10.1 million overnight stays (2015: 6.7 million) were realized, of which domestic tourists generated 6.1 million (2015: 4.2 million) overnight stays and foreign 4.0 million (2015: 2.4 million) overnight stays. The long-term positive results in tourist traffic of the Republic of Serbia, as well as the AP of Vojvodina, were abruptly interrupted in 2020 with the outbreak of the global health and economic crisis caused by the Covid-19 virus. The epidemic has had a negative impact on the business and income level of most business entities, and the tourism and hospitality sector has probably suffered the greatest impact.

According to the Statistical Office of the Republic of Serbia, in February 2024, a total of 262,191 tourists stayed in the Republic of Serbia, who made 817,138 overnight stays. In February 2024, the number of tourist arrivals increased by 9.2%, while the number of overnight stays increased by 1.7% compared to February 2023. In February 2024, compared to February 2023, the number of overnight stays of domestic tourists increased by 2.1%, and the number of overnight stays of foreign tourists increased by 1.2%.

Measured by the number of overnight stays (Table 5), tourism in Serbia in the period from 2010 to 2013th was in a period of stagnation, in which the average number of tourist overnight stays remained at about 6.6 million per year. In 2014, due to bad weather in May and floods, with a decrease in the number of overnight stays by 7.3% compared to 2013th year, tourist traffic again experienced a strong contraction. Despite the unfavorable weather conditions at the very beginning of the tourist season, 2014 was the year that marked the beginning of the expansive growth of tourism activity in Serbia, which lasted

Table 4. Tourist traffic in the Republic of Serbia measured by the number of tourist arrivals 2010-2023

Years	Total number of arrivals	Growth rate
2010.	2.000.597	- 1%
2011.	2.068.610	+ 3,4%
2012.	2.079.643	+ 0,5%
2013.	2.192.435	+ 5,4%
2014.	2.192.268	On the same level
2015.	2.437.165	+11,2%
2016.	2.753.591	+ 13%
2017.	3.085.866	+12,1%
2018.	3.430.522	+11,2%
2019.	3.689.983	+7,6%
2020.	1.820.021	-50%
2021.	2.591.293	+42%
2022.	3.869.235	+51%
2023.	4.192.797	+8,4%

Source : Adapted based on data from the Ministry of Tourism and Youth and the RZZS, 2024

Table 5. Tourist traffic in the Republic of Serbia measured by the number of overnight stays for the period 2010-2023

	Total overnight stays	Growth rates
2010.	6.413.515	-5%
2011.	6.644.738	+ 3,6%
2012.	6.484.702	- 2%
2013.	6.567.460	+ 1,3%
2014.	6.086.275	- 7,3%
2015.	6.651.852	+ 9,3%
2016.	7.533.739	+ 13,3%
2017.	8.325.144	+ 10,5%
2018.	9.336.103	+12,1%
2019.	10.073.299	+ 7,9%
2020.	6.201.290	-38%
2021.	8.162.430	+31%
2022.	12.245.613	+35%
2023.	12.440.935	+1,6%

Source: Adapted based on data from the Ministry of Tourism and Youth and the RZZS, 2024

until March 2020. From mid-2014 to 2019, tourism activity in Serbia recorded steady growth. The year 2019 stands out in particular, which was a record year with 10,073,299 overnight stays, which was a 7.9% increase compared to the previous year. This positive trend was interrupted in 2020, when there was a decline in tourism due to the coronavirus pandemic. The recovery will occur first in the second, and then in the third and fourth quarters of 2021, when the tourism economy will gradually revive due to a somewhat more favorable epidemiological situation. The growth trend continued in 2022, when 12.2 million overnight stays were recorded. Foreigners returned to Serbia. Most guests from abroad were in Belgrade (about 3.5 million), as well as in other large cities, such as Novi Sad, Subotica and Niš. 59.8% of the total number of visitors stayed in the mountains on the domestic mountains of Kopaonik and Zlatibor. The average length of stay in the mountains is **3.75 days**. Spas also achieved good results, with 12.3 million overnight stays, and the most visited were Vrnjačka, Sokobanja, Vrdnik and Lukovska Banja. The average length of stay in spas is **4.18 days**. In spa resorts, although they record a large tourist turnover, it is mostly realized by domestic tourists. Foreign tourists on average make up about 10% of the total number of tourists who visit spa resorts, so it is evident that spas are not competitive in the international market of health and wellness tourism. In 2023, the growth trend continued, when, according to official data, 12.5 million overnight stays

Table 6. Foreign exchange inflow from tourism expressed in euros 2010-2023*. Years

Years	Foreign exchange inflow (in millions of euros)	Growth rate
2010.	605	-2%
2011.	710	+ 17%
2012.	719	+ 1,2%
2013.	792	+ 10,1%
2014.	863	+ 9%
2015.	945	+ 9%
2016.	1040	+ 10%
2017.	1180	+ 13,4%
2018.	1317	+ 11,6%
2019.	1436	+ 9,1%
2020.	1084	-24%
2021.	1596	+47%
2022.	2474	+55%
2023.	2550	+3%

Source : Adjusted based on data from the Ministry of Tourism and Youth and the NBS, 2024
** Data for first 11 months of 2023*

were realized (+ 1.6% compared to 2022). Looking at the first months of 2024, it can be noted that in the first two months of 2024, there was an increase of 11%. Although not most tourists came from China for the first two months of this year, it is by far the fastest growing foreign market, with a trend of arrivals of 97% compared to the same period in 2023, and as much as 200% compared to 2022.

Foreign exchange inflows (Table 6) amounted to 1.4 billion euros in 2019 (2015: 945 billion euros). In 2023, the Association of Hoteliers and Restaurateurs of Serbia (Hores) conducted a large survey of the behavior of foreign guests in our market, where it turned out that non-board spending has not changed in the last five years and amounts to 70 euros per day, which is the average foreign tourist spends on food, souvenirs and entertainment.

3.4 Institutional framework for tourism development

Based on the available indicators, it can be seen that tourism has a positive development tendency in the Republic of Serbia and significantly affects the overall economic development (primarily on the gross domestic product, direct and indirect employment, the balance of payments, investments), while stimulating social and technological progress in many areas (Čerović et al., 2021). Accordingly, the institutional and regulatory role of the state and its bodies in the planned development of tourism, in addition to economic measures intended to encourage development, should provide competitive rules, processes and regimes, which will contribute to more efficient work of all stakeholders operating in this area.

According to the current Law on Ministries (Sl. RS Gazette", no. 128/2020, 116/2022 and 92/2023) tasks related to: strategic development of tourism, creation of tourism policy, integrated planning of tourism development and complementary activities, development, proclamation and sustainable use of tourist space and tourist destinations of importance for tourism, tasks of particular importance for the development of tourism, categorization of tourist places, implementation of incentive measures and provision of material and other conditions for encouraging the development of tourism; The promotion of tourism in the country and abroad, the improvement of the system of values and competitiveness of tourism products, the research of the tourist market and the development of the tourist information system, the conditions and manner of performing the activities of travel agencies, hospitality activities, nautical activities, hunting and tourism activities, as well as the provision of services in tourism and numerous other activities in tourism and hospitality, as well as inspection supervision in the field of tourism and hospitality is carried out by the Ministry of Tourism and Youth (MTO).

Within the framework of the relevant ministry, these activities are carried out through:

- Tourism Sector (the largest number of activities related to the creation of tourism policy and tourism development) and
- Tourism Inspection Sector (responsible for inspection supervision).

In addition to the Ministry of Tourism and Youth, as a line ministry, the organizations responsible for tourism affairs in the Republic of Serbia are (SMPRS, 2021):

- The Tourist Organization of Serbia (TOS) is responsible for the promotion of tourism, coordination of activities of tourist organizations, businesses and other entities in tourism on the territory of the Republic of Serbia.
- The Tourist Organization of Vojvodina implements activities related to the promotion of tourism at the level of the autonomous province, as well as other prescribed activities in accordance with the Law on Tourism.
- Local Self-Government Tourism Organizations (LTOs) promote tourism at the local self-government level. A local self-government unit may establish a tourist organization or entrust the performance of these tasks to another legal entity (Article 41 of the Law on Tourism);
- Regional tourism organizations are engaged in the promotion of tourism at the level of local self-governments in which they are established (Article 30 of the Law on Tourism), which can be two or more units of local self-government;
- The Public Enterprise Ski Resorts of Serbia performs the development of ski infrastructure in mountain resorts as well as other activities related to promotion on the domestic and international markets;

- Public Enterprise Stara Planina, which performs the tasks of the development manager of Stara Planina and includes the first "greenfield" project for the development of mountain, winter and summer tourism in the Republic of Serbia;
- The Chamber of Commerce and Industry of Serbia (CCIS) defines the organization of business entities by the Law on Chambers of Commerce (Official Gazette of the Republic of Serbia, No. 112/2015, Article 12). The Association for Tourism at the Chamber of Commerce and Industry of Serbia includes hotel and other accommodations, restaurants, events, health tourism, travel agencies, tourism on rivers and lakes and rural tourism.
- Professional associations in tourism and hospitality bring together tour operators, travel agencies, hoteliers, restaurateurs, caterers, guides, etc.

Although they are not formally responsible for tourism, we must also mention the companies and institutions that significantly contribute to the development of tourism and the increase in tourist traffic in the Republic of Serbia. In the first place, it is the national airline Air Serbia. In 2016, the national airline of the Republic of Serbia supported about 100,000 jobs across the Republic of Serbia and contributed to the national economy worth one billion dollars, according to the estimates of the British consulting company "Oxford Economics". In 2023, the national airline carried over 4 million passengers, and in 2024, the company flies to over 80 destinations in regular traffic.

Belgrade Nikola Tesla Airport, which currently has a capacity of about 6 million passengers, and according to the announced investment plans that will be implemented during the concession period, the number of passengers served each year should directly rise to 15 million passengers in the next 25 years, i.e. until the end of the concession. The second largest airport in the Republic of Serbia in terms of the number of passengers received annually is the Constantine the Great Airport in Niš, and since mid-2019, the third commercial airport with international designations IATA: KVO and ICAO: LYKV is Morava Airport in Kraljevo.

Finally, there are representatives of the fair and congress industry (Belgrade Fair and Sava Center) as initiators and organizers of a large number of different events and congresses that bring together a large number of domestic and foreign exhibitors as well as domestic and foreign visitors.

3.5 Evaluation of Serbia's competitiveness as a tourist destination

For the tourism sector and government, it is of great importance to understand where the competitive position of a destination is strongest and weakest, as well as how competitiveness is changing. As shown in numerous studies (Dwyer & Kim, 2003 ; Crouch, 2011; Dwyer et al., 2014; According to Cronjé & du Plessis, 2020), no single or specific set of competitiveness indicators is always applicable to all destinations. Different factors of competitiveness will be relevant to each given destination, and this is something to consider when measuring competitiveness in tourism. In this context, it is necessary to adapt the assessment methodologies to the specificities of each destination to obtain precise and useful results (Bratić et al., 2024; Vujičić, et al, 2023). Also, continuous monitoring and updating of data on key indicators is essential for understanding the dynamics of competitiveness. The involvement of all relevant stakeholders in the evaluation and planning process is also important, as their experience and knowledge can significantly contribute to the accuracy of the assessment. Developing a comprehensive approach that encompasses the economic, social and environmental aspects of competitiveness will provide a clearer and more comprehensive insight into the position of the destination. Finally, comparisons with other destinations, primarily those considered competitive, can help create guidelines for improving competitive positions.

The evaluation of Serbia's competitiveness as a tourist destination can be seen through several studies. Dwyer et al. (2016a) use the IPA method to assess the competitiveness of Serbian tourism and tourism business strategies. Also known as Dwyer et al. (2016a, 2016b) indicate the need to achieve competitiveness through measurement of importance and performance (IPA). The application of the IPA approach in this study, on the example of Serbia, has certain advantages in the analysis of the competitiveness of a tourist destination, because it can be used to identify potential changes, but also as a guide for strategic planning and sustainable development.

Serbia was one of the many destinations where the Integrated Competitiveness Model was used to research the competitiveness of the destination (Dwyer et al., 2014). In several studies conducted in Serbia, the use of the same determinants of competitiveness and sub-determinants as in the Integrated Model has proven to be effective for comparison and advice in tourism policy (Armenski et al., 2012; Dragićević et al., 2012; Mihalić et al., 2011).

The World Economic Forum's (WEF) Travel and Tourism Competitiveness Report 2019 (WEF, 2019) clearly shows that Serbia does not have a particularly strong competitive position in the international market. So far, several authors have discussed Serbia's competitive position as a tourist destination. They applied different approaches, took into account several factors of competitiveness and, for the purposes of the research, singled out different stakeholders in the country's tourism industry. For example, Milutinovic andcolleagues (2021) concluded that the element of safety is significant in influencing the attractiveness and relevance for a better competitive position of the tourist destination after assessing the perceptions of stakeholders about the competitiveness of the destination. A significant part of the respondents believes that Serbia's weaknesses that affect competitiveness in the tourism market can be seen in the areas of garbage disposal, cleanliness and order, and nautical tourism. Petrović and colleagues (2017) highlight the importance of the local population in achieving a high-quality rural tourism offer and a more competitive position in the tourism market, including the concepts of community connection, rural tourism development, support for multifunctional agriculture and the well-being of residents.

Selecting the components of the integrated product of the destination such as attractiveness, accessibility and facilities and services of the destination, Pavlovic et al. (2016) analyze the competitiveness of two destinations in Western Serbia, which are closely related to each other, but with different tourist performances. Milicevic and colleagues (2020a), on the other hand, examine the competitiveness of one of the main spa tourist destinations in Serbia. Đeri and colleagues (2018) use the IPA approach to assess the efficiency of resource allocation focused on discrete variables and the potential for improvement of managerial strategies to improve the competitiveness of the destination in the Jablanica District in southeastern Serbia. Other authors take the implementation and use of ICT as an indicator of the competitiveness of a tourist destination (Milicevic et al., 2020b).

In order to develop a model for assessing the competitiveness of a tourist destination, many authors, (e.g. Gajić et al., 2018), adopt the 24 indicators defined by Dwyer and Kim (Dwyer & Kim, 2003). This model is similar to the one presented by Crouch and Ritchie (1999) and is often used to assess the advantages and disadvantages of tourist destinations, including Serbia (Štetić et al., 2014). The same model was used by Dragićević and colleagues (2012) who applied this approach to measure the competitiveness of Vojvodina in the context of business tourism. Drakulić Kovačević et al. (2018) assessed the attitudes of stakeholders from the public and private sectors using this model and found certain variations of opinion regarding the competitiveness of two determinants in the region of Serbia: Destination Management and Destination Policy, Planning and Development. Also, according to a study by Armenian et al. (2018), managers in the private sector are more critical of the performance of all competitiveness indicators when it comes to Serbian tourism. This shows that researchers are particularly interested in how the different perspectives of stakeholders from the public and private sectors view the issue of the competitiveness of a tourist destination.

A large number of studies that explore the competitiveness of a tourist destination use a similar methodology. Most of them are based on research by the World Economic Forum (WEF) or using the structure of previous surveys (e.g. Dwyer and Kim 1999) to generate indicators. Moreover, the IPA method is one of the models that is often used as a methodological framework for considering the issue of competitiveness in tourism in Serbia. In addition, previous surveys in Serbia have not included all the established indicators in order to gather more relevant information on Serbia's strengths and weaknesses as a tourist destination. The issue of human resource quality and labor market in the tourism sector is often not examined in detail as an indicator of Serbia's competitiveness in the tourism market (Jocić et al., 2024). After the pandemic period, the service industry in Serbia is facing a labor shortage, which is a key part of maintaining competitiveness and providing quality tourism products (Cimbaljević et al., 2023a).

From the point of view of competitiveness in tourism, the assessment of the scope, distribution and quality of infrastructure in Serbia has not often been the subject of scientific research. The accessibility of a tourist destination is one of the basic elements of competitiveness, therefore, the issue of transport accessibility, as well as the quality of tourist infrastructure and superstructure, is an important indicator that requires special attention from the scientific community. In addition, there is not much scientific research dealing with environmental management and sustainable development in terms of competitiveness. Research by Cimbaljević et al. (2023b) deals with the issues of awareness and knowledge of stakeholders in tourism in Serbia about the importance of the European Tourism Indicator System (ETIS) in assessing the sustainability aspect of the competitiveness of a tourist destination. According to stakeholders in Serbia, for most indicators, either data are not available or do not consider that there is no information on whether they are available. In addition, another problem regarding the availability of indicator data relates to environmental data. While there has been previous research dealing with sustainable tourism development and environmental management, especially in protected areas in Serbia (e.g. Obradović and Stojanović, 2022; Stojanović et al., 2014, Stojanović et al., 2021), Serbia is at the very back in these areas compared to other countries in the region. Namely, Serbia has not yet developed an appropriate system for monitoring tourists in terms of their impact on the consumption of water, electricity, air pollution or waste generation. Also, there is no data available on how much tourism companies invest in the protection of the environment and natural resources. First of all, it is necessary to raise awareness of the importance of environmental indicators for the sustainable development of tourism in Serbia and for improving its competitive position in the international tourism market. In addition, it is necessary to systematically collect and analyze data on the impact of tourism activities on the environment to ensure their sustainability.

It is important to analyze the reasons that have brought the destination to such a position, as well as what solutions can be offered to improve the competitive position in the coming period. In this sense, the development of a more efficient system for collecting and processing data on tourist flows and their impact on the environment would enable more precise and comprehensive decisions to be made and sustainable development strategies to be improved. In addition, the implementation and use of ICT in the tourism industry have not been sufficiently studied, especially in light of the constant changes imposed by modern technology, but also the possibilities of use that can be successfully applied in tourism marketing and tourism product development. Therefore, the improvement of the tourist offer through the development of new and innovative products that would take advantage of modern technology can significantly contribute to the competitiveness of the destination.

3.6 Serbia's position in the international tourism market – evaluation according to WEF T&TCI and WEF T&TDI

According to the methodology of the WEF T&TCI (Travel and Tourism Competitiveness Index of the World Economic Forum) and the WEF T&TDI (Travel and Tourism Development Index of the World Economic Forum), Serbia's position in the international tourism market can be assessed based on various factors and indicators. These indices take into account a number of elements to assess the competitiveness and development of tourism in a particular country. WEF T&TCI focuses on factors that contribute to the competitiveness of tourism, such as natural and cultural resources, infrastructure, political stability, security, as well as factors related to the business environment. The WEF T&TDI also analyses the level of tourism and travel development in the country, including tourism infrastructure, resources, political support for tourism and other relevant factors.

Attractive factors of attraction of destinations, which include natural and cultural resources, are one of the main motives that, depending on the contracting zone, are the main or complementary factors of attraction. If a destination has such values (comparative advantages) by which it will be recognizable in the competitive market, then the potentials are transformed into attractions that make tourists travel hundreds, even thousands of kilometers just to visit them. Especially the intact ones such as rocks, geological formations, height and passability of mountains, hydrography, flora and fauna, as well as the climatic conditions that prevail in the observed area, and the relationship of all these components as ecosystems, are the main components of natural potentials. In modern times, which are characterized by hecticness and exposure to stress, it is a real wealth when a country possesses natural resources of high value, which can be used for various sustainable forms of tourism, and above all ecotourism, rural tourism, sports and recreational tourism and bathing, health tourism and wellness and spa tourism. These forms of tourism contribute to the feeling of satisfaction and have a preventive effect on all potentially dangerous agents from the environment, including stress. Research conducted by Bojović et al. (Bojović et al., 2024) supports this thesis. The survey was conducted in the Fruska Gora National Park, through which, according to the author's idea, the "Danube Cycling Route" (EuroVelo 6) was retraced, with the intention of checking the attitudes of cyclists, foreigners (a total of 717 cyclists from 6 EU countries), about the advantages of cycling through the National Park. In their conclusion, Bojović and his associates presented data according to which the vast majority of respondents expressed a positive attitude regarding the retracing of the route through nature and pointed out that they would always choose to move through the natural and rural environment. Also, the respondents pointed out that the complementary tourist offers in the form of viewpoints, lakes, springs, monasteries and rich gastronomy of the region, influenced the extension of the stay in Serbia.

On the other hand, cultural resources, which include tangible and intangible goods that form part of the traditions and culture of a nation, are another part of the attractive factors of attraction of destinations. However, it is not enough to have only a rich cultural heritage, it is necessary to know how to use the potentials and transform comparative advantages into current ones. Only those resources that are to the greatest extent in the function of tourism can provide maximum economic effects.

Together with natural resources, cultural resources should form an unbreakable link and complement each other to create a more complex tourist offer.

3.6.1 State of tourism in Serbia

In the 1990s, Serbia (as part of Yugoslavia) was in a decades-long crisis caused by political instability and economic sanctions. During this period, tourism did not have the opportunity for more dynamic development. After 2000, the opening to foreign markets began, and tourism in Serbia got a chance for faster growth through repositioning and building a new image as opposed to the previous negative one. As a tourist destination in political transition (post-communist transition), Serbia has begun to occupy an important place in the market as a new developing destination. Relatively unknown and insufficiently researched, with a wide range of potential tourism products, Serbia has found a place in the market by developing products that do not belong to mass tourism. Through authenticity, Serbia offers new experiences compared to "already seen", mature destinations. The Tourism Development Strategy of the Republic of Serbia for the period 2016-2025 has identified key tourism products that can be promoted on the market in a very short period of time. Tourist destinations that have these products or can create them within the specified time limits are also classified. As a result, the Strategy defines five high-priority tourism products: MICE and business travel, mountains and lakes, short city breaks, and health tourism (spa & wellness tourism). In addition, medium-priority tourism products are defined as cruises and nautical tourism. Finally, the Strategy defines event tourism, special interest tourism, rural tourism and transit tourism as high-priority added values (Ministry of Trade, Tourism and Telecommunications, 2016)

Serbia is a growing tourist destination and a developing economy where tourism is recognized as the primary area for economic and social growth. Foreign exchange inflow from tourism in Serbia during 2021 amounted to one billion and 596 million euros, which exceeded the most successful year of 2019 (Ministry of Trade, Tourism and Telecommunications - https://mtt.gov.rs/). Foreign exchange inflow from tourism increased in 2021 by 47.2% in euros, compared to 2020 (Ministry of Trade, Tourism and Telecommunications - https://mtt.gov.rs/). This shows that tourism in Serbia is recovering very quickly and efficiently from the consequences of the coronavirus pandemic, as well as that our country is being recognized as a unique and authentic tourist destination. Measured by the number of overnight stays, tourism in Serbia first went through a growth phase in the period 2005-2008. From 2009 came a phase of contraction, which continued the following year, and from 2011 to 2013 followed a period of stagnation, in which the average number of tourist nights remained at about 6.6 million per year. In 2014, due to bad weather in May, with a decrease in the number of overnight stays by 7.3% compared to 2013, tourist traffic again experienced a strong contraction. However, despite the unfavorable weather conditions at the very beginning of the tourist season, 2014 marked the beginning of an expansive growth of tourism activity in Serbia, which lasted until March 2020. Then, due to the pandemic caused by the coronavirus, there was a ban on flights, cancellations of accommodation reservations and a general decline in activity in the tourism sector. A more favorable situation has been recorded only since March 2021, when tourist activity is gradually recovering, and the number of tourist arrivals and overnight stays (both domestic and foreign) is growing (Statistical Office of the Republic of Serbia - https://www.stat.gov.rs/). In 2021, 8.2 million overnight stays were registered, which is 31.6% more than in 2020. After a decline in January and February, tourism activity from March to the end of 2021 recorded better results. In terms of the number of tourist overnight stays, the most visited tourist places in 2021 were spas. About 2.6 million overnight stays were recorded in spas, which represents 32.3% of the total number of tourist overnight stays in the Republic of Serbia (Statistical Office of the Republic of Serbia - https://www.stat.gov.rs/). The most visited spas were Vrnjačka Banja and Sokobanja (about 1.6 million overnight stays). About 1.9 million tourist overnight stays were recorded in mountain resorts, which represents 23.1% of the total number of overnight stays. The most visited mountains were Zlatibor (about 661 thousand overnight stays) and Kopaonik (about 426 thousand overnight stays). In spa and mountain resorts, the majority of visitors are domestic tourists (90.4% and 87.2% of the total number of overnight stays) (Statistical Office of the Republic of Serbia - https://www.stat.gov.rs/). In 2021, Serbia was visited by tourists from about 50 different countries. Most overnight stays were made by visitors from Bosnia and Herzegovina, Turkey, the Russian Federation, Montenegro, India, China, Germany and North Macedonia. Visitors from these countries account for 52% of the total number of overnight stays of foreign tourists in 2021 (Statistical Office of the Republic of Serbia - https://www.stat.gov.rs/). According to the Statistical Office of the Republic of Serbia, in 2023, a total of 4,192,797 tourists stayed in Serbia, which is 8% more than in 2022. Serbia was visited by 20% more foreigners compared to 2022 and for the first time, the number of two million foreign guests was exceeded, mostly from Russia, Turkey, Germany and China. In 2023, according to preliminary data from the National Bank of Serbia, a record revenue from foreign tourists was generated in the amount of EUR 2.5 billion, which is about 80% more than in 2019, before the pandemic. Seen individually by country, the most revenue came from the arrival of guests from Bosnia and Herzegovina (289 million), while Russians spent EUR 275 million in Serbia in 2022. This is followed by Turkey, whose tourists spent 202 million euros. Of the European Union countries, guests from Germany spent the most money during their stay in Serbia - 125 million euros, followed by Croatia - 105 million euros (Statistical Office of the Republic). Belgrade was the most visited tourist destination in Serbia in 2023, but domestic tourists most often chose to spend their vacation in Sokobanja. For the first time in history, more than three million overnight stays were recorded in Belgrade - a total of 3,180,977, over a million overnight stays more compared to 2021, according to the data of the Tourist Organization of Belgrade. According to RSZ data, Sokobanja was the most visited spa in Serbia during 2022 with 767,725 overnight stays, of which 749,430 were overnight stays of domestic tourists, which is the best result of all destinations in Serbia.

Bearing in mind the potential that Serbia has, it can be stated that only with adequate approaches of decision-makers at the highest levels, including the Ministry of Tourism and Youth, Serbia can expect a future in which tourism will transform all its comparative advantages into competitive ones.

3.6.2 Evaluation of Serbia as a tourist destination according to the methodology of WEF T&TCI and WEF T&TDI

To compare Serbia's performance as a tourist destination, we use rankings for Serbia and a selected competitive set using the World Economic Forum's World Economic Forum's Travel and Tourism Competitiveness Index (WEF T&tci) and the World Economic Forum's Travel and Tourism Development Index (WEF T&TDI). The competitive set for Serbia was selected based on the defined set in the Tourism Development Strategy of the Republic of Serbia for the period 2016-2025. According to the Strategy, the competitive set includes countries in the region of Southeast Europe: Slovenia, Croatia, Albania and Montenegro, as well as the neighboring countries of Serbia, Hungary, Romania and Bulgaria (Ministry of Trade, Tourism and Telecommunications, 2016).

Table 7. Ranking of Serbia and Competitive Set by Travel and Tourism Competitiveness Index for 2019 (T&TCI, 2019)

	Global ranking (from 140 countries)	European ranking (from 46 countries)	Security	Political stability	Infrastructure	Natural and Cultural Resources
Croatia	27	17	5.1	4.8	4.7	3.6
Slovenia	36	21	5.4	4.8	4.3	2.9
Bulgaria	45	27	5.2	4.5	4.0	2.9
Hungary	48	29	5.3	4.8	4.1	2.5
Romania	56	31	5.2	4.5	3.5	2.7
Montenegro	67	34	5.2	4.4	4.0	1.9
Serbia	83	40	5.2	4.3	3.2	1.9
Albania	86	41	5.0	4.2	3.1	2.0

Source: Author's analysis according to T&TCI 2019.

Table 7 shows the ranking of countries within a particular competitive set of Serbia based on sub-index scores from the World Economic Forum's Travel and Tourism Competitiveness Report 2019 (T&TCI). Croatia maintained a strong position within this competitive set during the period under review, as confirmed by the highest scores compared to other observed nations in three of the four sub-indices. On the other hand, Serbia's position in this report is stable compared to competing countries, although the results show that it still remains one of the destinations with lower scores within this competitive set, predominantly in terms of the valorization of natural and cultural resources for the purpose of tourism.

By analyzing the framework of the World Economic Forum's Travel and Tourism Development Index (T&TDI) for 2022, which consists of five sub-indices shown in Table 8, we can conclude that Serbia is not among the best within the competitive set. It is classified in the other half of the countries studied. Serbia is ranked 70th out of 117 nations, which shows that it still has a lot of work to do to improve its competitive position. Only Albania has a lower rating and position on the T&TDI list among the competitive set, while only 5 countries on the entire continent are in a lower position than Serbia.

Table 8. Ranking of Serbia and the competitive set by the Travel and Tourism Development Index for 2022 (T&TDI 2022)

	Global ranking (from 117 countries)	European ranking (from 43 countries)	Security	Political stability	Infrastructure	T&T Demand	T&T: Sustainability
Hungary	37	23	5.1	5.0	4.2	2.4	4.4
Slovenia	39	24	5.2	4.8	4.0	2.2	4.6
Bulgaria	41	25	5.0	4.9	4.0	2.6	4.4
Croatia	46	29	4.9	4.4	4.5	2.8	4.1
Romania	53	31	5.0	4.7	3.6	2.5	4.2
Montenegro	67	36	4.8	4.3	3.9	1.5	4.2
Serbia	70	37	4.9	4.2	3.5	1.9	4.0
Albania	72	38	4.7	4.3	3.2	1.8	4.2

Source: Author's analysis according to T&TDI 2022.

International tourism is constantly evolving and this mostly affects the increased competition between tourist destinations. Modern tourists are looking for new experiences, rich content, constant product innovations, experiences, emotions and much more. Destinations compete with each other with their comparative advantages that are not enough in themselves, but to achieve success and stand out among equals, It is necessary to transform comparative advantages into competitive advantages and then to strengthen and maintain competitive advantage. Over the past few decades, various scholars have studied the importance of competitiveness for tourist destinations. According to Dwayer and Kim (2003), in order for a destination to be in a competitive position, it must have something that will set it apart from others, and that will primarily affect the unique tourist experiences and experiences. Scientists Ritchie and Crouch (2003), describe competitiveness through sustainability indicators (economic, sociological and environmental), alluding to the fact that a destination is competitive if it brings tourism income to the local population through positive interaction with tourists in a way that is responsible and sustainable (Turčinović et al., 2024, Radojević et.al, 2015; Stankov et al., 2023a; Stankov et al. 2023b). According to them, the destination must be based on the principles of the destination management , good policy by decision-makers at the highest level, an educated workforce and the most important segment, i.e., natural and anthropogenic tourist attractions. A similar view is taken by Morozov and Morozov (2018), who argue that tourist resources alone are not enough to attract tourists, but that it is necessary to transform resources into attractions, and in order for this to be achievable, it is necessary to adequately identify the attractiveness of resources by the management of the tourist destination. According to Hemdi and Hanafiah (2017), who used panel data from eight ASEAN2 member countries in their research, it is concluded that tourist attractions, combined with adequate human resources that directly affect the tourist performance of attractions, also have an impact on the ranking of destinations on the TTCI list.

Bearing all this in mind, it can be concluded that it is crucial for a certain destination, including Serbia, to extract the comparative advantages of the destination, and then, through a series of activities and adequate management, to transform comparative into competitive advantages. This means, first of all, through a series of activities on the part of the management of the tourist destination, emphasizing what makes the destination specific, thus giving it a unique identity by which it will be recognizable. Natural and cultural attractions need to be integrated into the tourist product, but in such a way that it is sustainable, which makes the identity of the destination one of the pillars of the destination's recognition.

One of the comparative advantages Of course, Sri Lanka is a tourist destination. The total number of recognized spas in Serbia is 19, 25 are urbanized, and there are slightly more than 500 mineral, thermal and thermo-mineral springs, according to the Association of Spas of Serbia (UBAS). Bearing in mind that they are In 2023, spas were the most visited tourist places in Serbia with 2.6 million overnight stays, which is 32.3 percent of the total number of tourist visits in 2021, according to data from the Statistical Office of the Republic of Serbia (RZS), the necessity of a more serious approach to the development of this type of tourism is clear. The most visited spas were Vrnjačka Banja and Sokobanja with a total of 1.6 million overnight stays in that period, according to the same data. The seriousness of the approach could also be reflected in the concretization of the implementation of the "best practice examples" that we have in the immediate vicinity. Slovenia and Hungary are just such destinations that should be looked up to. In 2018, Slovenia won the Gold Medal International Awards for Travel and Tourism in the Wellness category, which speaks of the quality of services when it comes to wellness and spa tourism. What the Spartans have done. After independence as a state, there was a consistent profiling of the spa, and then privatization, which was controlled and successful. Hungary is also one of the shining examples of spa tourism, where privatization, as in Slovenia, has been carried out "completely" and all spas are privately owned. The Hungarian and Slovenian spas are primarily focused on wellness tourism and bathing resorts, which should indicate the direction of action when it comes to Serbia.

Serbia, if it wants to improve its position in the international tourism market according to the WEF T&TCI and WEF T&TDI methodologies, should continuously work on improving all relevant factors, including infrastructure, quality of services, promotion, environmental protection, political stability and other aspects that affect the competitiveness and development of tourism. This could contribute to strengthening Serbia's position as an attractive tourist destination at the global level.

4 DEVELOPMENT OF THE TOURCOMSERBIA MODEL FOR THE EVALUATION OF THE COMPETITIVENESS OF SERBIAN TOURISM

4.1 Literature review on the competitiveness of tourist destinations

Achieving the competitiveness of a tourist destination is a continuous process of improving its position in the market, which requires constant monitoring and evaluation of competitiveness indicators. Today, several of the most important models for evaluating the competitive position of a tourist destination are most often applied. Among these models, the model of the World Economic Forum *Travel & Tourism Competitiveness Index* stands out) (WEF, 2019) as well as the World Economic Forum's TDI model with improved structure and methodology (WEF TDI) (WEF, 2022), which is one of the most widely used models with the greatest practical application (bearing in mind that it represents the World Economic Forum's official report on global competitiveness in tourism). The World Economic Forum's model integrates various factors affecting competitiveness, including infrastructure, resources, political and economic framework, as well as factors related to information technology, sustainability, etc.

A review of the literature and previous research by the authors in the field of competitiveness of tourist destinations indicate that there is no universal model of competitiveness that can be applied to all tourist destinations. The uniqueness of the approach is emphasized on the examples of a specific tourist destination, but also on those countries that make up a competitive set of destinations (destinations with more or less similar characteristics, which have similar products in tourism and/or compete for the same market segment). It is emphasized that there is a need for a model whose application is at the same time comprehensive and clear in the domain of providing complete information for decision-makers on improving competitiveness on the example of a specific tourist destination. Such approaches and conclusions suggest that an adapted methodology is needed to measure the competitiveness of tourism for a specific destination. In addition, due to the constant changes in the global market, destinations must be prepared to anticipate and anticipate changes in order to gain and maintain competitive advantages. Due to rapid global change, turbulence, tourism trends, the uniqueness of destinations and changes in the behaviour of tourists as the main drivers of tourism, existing models of competitiveness for destination evaluation should be improved and adapted to the specific destination whose competitiveness is the subject of evaluation, or new models should be developed for each destination and/or group of destinations that share similar characteristics.

By applying the competitiveness model, decision-makers at the level of a specific tourist destination can gain a deeper understanding of the dynamics of the competitiveness of tourist destinations. As such, the model is aimed at identifying the key factors that contribute to the competitive position of a particular destination, as well as those factors that represent disadvantages and negatively affect its competitive position in the international market. Such an approach allows for more efficient planning and management of the destination, especially at the national level, where this mainly applies to countries as tourist destinations.

Effective management and planning are key to maintaining and improving the competitiveness of a destination in the global tourism market. Bearing this in mind, the focus of the analysis should be on countries as tourist destinations and their competitive position, with such an approach not excluding other levels of the tourist destination within the country (in addition to the national, regional and local level, especially viewed from the point of view of destination management) where the effects of improving the competitiveness of the destination at the national level spill over to lower levels, all the way to a tourist destination.

The definition of relevant indicators during the evolution of competitiveness measurement in tourism was based on different approaches that are reflected in specific models of competitiveness, in addition to the previously mentioned models of the World Economic Forum. These approaches have led to the identification of indicators whose application is more or less justified in measuring the competitive position of a particular tourist destination in the modern tourism market.

The development of models for evaluating competitiveness and their relevance in general variability are key aspects in scientific research on the competitive position of tourist destinations and are the foundation of understanding the competitiveness of a tourist destination. The strength of the model lies in the fact that it provides a framework for distinguishing comparative from competitive advantages (Mazanec et al., 2007; Boley, Perdue, 2012). The comparative advantages of a destination are related to resources, knowledge, capital, infrastructure and tourist suprastructure, etc. Competitive advantage refers to a destination's ability to rationally use the resources at its disposal over a long period of time.

A comprehensive review of the literature indicates a strong link between the competitiveness of a tourist destination and its pursuit of sustainability. Maintaining competitiveness should also take sustainability into account (Ritchie & Crouch, 2003). This approach to considering competitiveness suggests that the competitiveness of a tourist destination and sustainability are two inseparable processes. Also, Cucculelli and Goffi (2016) emphasize the role of sustainability as a key determinant of the competitiveness of a tourist destination. They add that sustainability factors are positively correlated with competitiveness indicators. The relevance of this link between the competitiveness and sustainability of a tourism destination has been further highlighted by recent developments regarding the global effects of COVID-19 on the tourism industry and destinations (Stankov & Filimonau, 2021). Ritchie and Crouch (2003) proposed a model of tourism destination competitiveness with the aim of proposing a more comprehensive approach with an emphasis on sustainability, which served as the basis for several subsequent conceptual models (Andrades-Caldito et al., 2014). It is also important to note that an effective destination management program can increase the competitiveness of a tourist destination. In particular, marketing initiatives can enhance a destination's reputation, while management initiatives can improve a destination's competitive position. Although the list of attributes for measuring destination competitiveness in Crouch and Ritchie's model of destination competitiveness and sustainability includes five dimensions of competitiveness and 36 subfactors, Crouch (2011) further states that not all factors will have the same impact on a destination's ability to be competitive and that some are more or less significant for certain market groups. Furthermore, not all indicators are available in all destinations, which can be limiting when comparing destinations (Vila et al., 2015).

Another widely used model developed by Dwyer and Kim (2003) (called the Integrated Competitiveness Model) has largely retained the paradigm set in the model proposed by Crouch and Ritchie (1993; 2003), although there are important variations. While the model of Crouch and Ritchie (2003) helps management make decisions by emphasizing supply-side factors, the Integrated Model recognizes demand as a key factor in determining the competitiveness of a destination. Not only are demand conditions recognized as a specific determinant of a destination's competitiveness, but the proposed model also emphasizes competitiveness as a goal for regional or national economic growth. The authors provide a comprehensive list of destination competitiveness indicators for each of the factors (destination resources, management, environmental conditions, and demand-side factors). In addition, the main elements of the model are resources and destination management. Model resources, which are classified into inherited and created, enable the attraction of visitors and are perceived as important resources for increasing the attractiveness of the destination, in the domain of transforming existing potentials into attractions in order to increase the attractiveness of the tourist destination. The second element is one that can serve as the basis for a tourist-friendly offer, which in turn constitutes the basis of a competitive offer. The model differs from the Ritchie and Crouch models in that it shows cause-and-effect relationships, i.e. interdependence between the elements (Vanhove, 2010).

The analysis of the existing models clearly indicates the essence, necessity and continuous approach to the evaluation of the competitiveness of a tourist destination. In addition, other aspects for evaluation, proposed by the authors in their studies, are highlighted.

Recognizing the importance of sustainability for tourism development, Hassan (2000) introduced a competitiveness model that analyzes the relationships between all stakeholders involved in the creation and integration of added value to maintain a favorable market position in relation to other competitors (Akin et al., 2022). In addition to its commitment to environmental protection, the model emphasizes the relevance of comparative advantage, demand orientation and the structure of the tourism industry as the four key determinants of a destination's competitiveness. Although environmental protection is important for the overall competitiveness of individual countries in a way that can lead to the introduction of innovations that can further strengthen competitiveness, Hassan (2000) believes that it is particularly important in tourism, as the quality of the natural and cultural environment is an important component of the tourism experience.

The Heat-how (2003) model incorporates the basic indicators of destination competitiveness found in previous studies (Ritchie & Crouch, 2000; Dwyer & Kim, 2003) with a focus on the key factors of competitiveness and vital links. To create a comprehensive framework for the long-term sustainable competitiveness of the destination, it emphasizes the importance of the human factor in the development of tourism, as well as the creation of appropriate and mutually beneficial partnerships between stakeholders and destinations through communication and information management.

Bearing in mind the above aspects and analyses conducted through various studies and model proposals for competitiveness evaluation, one of the main goals of establishing *the TOURCOM model* was a detailed review of the literature. This approach, through the first initial step, was important to implement for the following reasons:

- A detailed review of the study on the competitiveness of the tourist destination to establish evaluation approaches;
- Mapping and filtering of the most commonly used indicators in competitiveness evaluation;
- Classification, mapping and selection of relevant indicators in the evaluation of the competitiveness of the tourist destination and prevention of their overlap;
- Establishing a wide range of indicators to analyze and apply them to the example of Serbia as a tourist destination and its competitors.

Detailed literature analysis, as the first phase in the formation of the TOURCOMSERBIA model, included a total of 559 papers available in the SCOPUS database with the main keywords "destination competitiveness" and "sustainable tourism indicators" that were selected for analysis. The papers included in the analysis are from the period from 2000 to 2020. Special emphasis is placed on the analysis of the conceptual model of destination competitiveness by Ritchie and Crouch and the integrated model Dwyer and Kim's competitiveness of the destination and their use in previous research, as well as the analysis of other studies of competitiveness in tourism, to identify a wide range of indicators to measure Serbia's competitiveness as a tourist destination. In the first phase of the analysis, 232 papers were selected as relevant for further analysis of the competitiveness indicators of tourist destinations. Consequently, from a database of 559 papers, 42% of the studies were identified as the most relevant. At this stage, a total of 4457 indicators have been singled out. In the second phase of the analysis, repeated items and those that were not relevant to the analysis of the competitiveness of the destination were removed. After a long process of refining the relevant indicators, a list of 165 indicators was singled out.

The basic conclusions that can be drawn from the literature review point to:

- Most studies rely on the three most common models: the World Economic Forum (WEF T&TCI) Model, the Ritchie and Crouch Model, and the Integrated Competitiveness Model proposed by Dwyer and Kim;
- The issue of establishing longitudinal studies in the evaluation of competitiveness as something that has been neglected or not sufficiently conducted in research;
- Methodological approach and method of data collection for the evaluation of competitiveness indicators;
- The question of the relationship between sustainability, sustainability indicators and their synthesis with the indicators of competitiveness of the tourist destination;
- Consideration of the applicability of indicators to destinations and raising questions of applicability to specific destinations;

Based on the above, the conclusions obtained from a detailed review of the literature on the competitiveness of tourist destinations are highlighted:

1. Most of the analyzed studies used previously created theoretical and practical models in looking at the competitiveness of a tourist destination, especially relying on the Integrated Destination Competitiveness Model (Dwyer & Kim, 2003) or the Ritchie and Crouch (2003) model. Several studies have explored the complex area of countries' competitiveness as tourist destinations, trying to understand the diverse factors that affect a country's ability to attract and retain tourists (e.g. Dwyer et al., 2012; Medina-Muñoz et al., 2013; Vila et al., 2015; Andrades & Dimanche, 2017; Armenski et al., 2018; Goffi et al., 2019; Bu et al., 2021; Martínez-González et al., 2021). Evaluating a country's competitiveness as a tourist destination involves analyzing various dimensions, including infrastructure, political environment, natural and cultural resources, as well as overall attractiveness to tourists.
2. Literature analysis has found that little attention is paid or little emphasis is paid to longitudinal studies in measuring the competitiveness of a tourist destination, or its elements related to competitiveness (Islam et al., 2021). Longitudinal studies are an essential tool in assessing the competitiveness of a tourist destination, providing insights into trends, policy impacts, and cause-and-effect relationships over time and the development of tourism in a destination. Such studies make it possible to observe and analyze changes in the competitiveness indicators of a tourist destination, providing insights into how competitiveness develops over time and what are the trends in the performance of tourist destinations. This information is crucial for decision-making, as decision-makers must have clear data as inputs for useful and usable information based on which decisions are made that are important for guiding the development of tourism in the destination, and in particular concerning achieving, maintaining and improving its competitive position in the market. Longitudinal data is valuable for building predictive models that forecast future trends in the process of achieving competitiveness, enabling proactive planning and strategy development. Longitudinal studies, when shared and analyzed among different stakeholders, promote collaboration, contributing to a collective understanding of the factors affecting a destination's competitiveness and instructing how to effectively solve problems in the process of achieving, improving or maintaining an existing level of competitiveness. However, conducting longitudinal studies is rare due to the associated costs, opportunities, and time constraints (Kumar et al., 2024). Regardless of such limitations, tailor-made models in specific destinations require longitudinal studies that should be the responsibility of the authorities in charge of managing the tourist destination.
3. When it comes to methodological approaches, some research on this topic has used primary data obtained through survey surveys and interviews with key representatives of the tourism industry (Goffi et al., 2019; Drakulić -Kovačević et al., 2018), residents (Bu et al., 2021), tourists (Dalakis et al., 2018; Tešin et al., 2023), while others combined qualitative and quantitative techniques (e.g., focus groups, workshops, interviews, questionnaires) (Ribeiro et al., 2021), or secondary data (Martínez-González et al., 2021). Surveys are the most commonly used method among the sources reviewed (70.3%), while others chose interviews, focus groups, and other methods. Literature analysis has shown that most research on competitiveness is conducted with a focus on the tourism supply side or key supply-side stakeholders in the destination, indicating that most of the conclusions about what makes a destination competitive come from the opinions of stakeholders or tourism industry professionals. This approach is often used because it can help to more accurately understand the full spectrum of resources of a competing destination. On the other hand, the consideration of the competitiveness of a tourist destination through the literature suggests that the perception of the competitive position of the destination by demand proves to be important because tourist profiles and preferences change over time, and especially because destinations struggle to find themselves primarily in the evoked set of destinations among tourists when making a travel decision.
4. Sustainability has become a much more prominent topic in recent research, and as of 2017, the number of scientific papers on this topic has been increasing (Rasoolimanesh et al., 2020). Although sustainability plays a key role in encouraging the development and improvement of the competitiveness of a tourist destination in modern market conditions, it is still rarely considered in tourism studies in developing countries, Like Serbia.

Therefore, the basic conclusion drawn from a comprehensive review of the literature indicated that it is necessary for the TOURCOMSERBIA model to implement a sustainability approach in evaluating the competitiveness of Serbia as a tourist destination, primarily identifying sustainable competitiveness indicators relevant to Serbia, especially from the perspective of the tourism industry.

5. While each of the comprehensive models provides exhaustive lists of factors to identify a destination's competitiveness, not all attributes are suitable for different destinations, life cycle stages, or market segments (Goffi, 2013; Mior Shariffuddin et al., 2022). However, each destination is competitive, that is, its competitiveness is viewed in relation to relevant competitors (Goffi & Cucculelli, 2018). As a result, future model evaluations should rely on a thorough selection of indicators that can provide the market with a clear value for investment and tourism development compared to competitors. Furthermore, one of the important criteria for the selection of competitiveness indicators is that they must be relevant to tourism policy (Goffi & Cucculelli, 2018), existing and future. The authors of the aforementioned models of competitiveness, as well as many other researchers, call for more detailed empirical research of various indicators of tourism development, respecting the uniqueness of the destination. Therefore, there is a need for theoretical models with a comprehensive range of indicators to be adapted by tourism experts and industry representatives, with the aim of establishing a new practical model for a particular destination. It should be emphasized that this approach is applied in the establishment of the TOURCOMSERBIA model, focusing on Serbia. The TOURCOMSERBIA model is therefore a model that provides key guidelines to decision-makers, primarily at the national level, to improve and maintain Serbia's competitive position in the international tourism market, and also to improve the sustainability of tourism in the country on all grounds.

To establish the TOURCOMSERBIA model for competitiveness evaluation, the relevant literature on competitiveness in tourism has been thoroughly reviewed, providing an updated and comprehensive overview and identifying historical trends, research areas, models, methods and the most important indicators of a tourist destination's competitiveness. It is vital for the tourism sector and key decision-makers in tourism to understand where the competitive position of a destination is strongest and what its competitiveness is the weakest aspects, as well as how the competition is changing. As many authors have pointed out (Dwyer & Kim, 2003; Crouch, 2011; Dwyer et al., 2014; According to Cronjé du Plessis, 2020), no single or specific set of competitiveness indicators is always applicable to all destinations. Different factors of competitiveness will be relevant for each destination, and this is something that should be taken into account when evaluating the competitiveness of a tourist destination, and especially in the example of Serbia as an emerging destination.

4.2 Identifying relevant indicators

The development of the TOURCOMSERBIA model required the use of a mixed methodology. This approach included a literature review explained in the previous chapter, a workshop with key stakeholders in tourism in Serbia (*workshop* - applying the *Delphi* method) and pilot testing. This methodological approach was applied to identify and select a set of indicators that will be officially included in the model before its practical application.

***The Delphi* method** was used to reach a consensus on which indicators are most relevant for measuring the competitiveness of tourism in Serbia. The main purpose of this method is to achieve consensus among experts, not compromise opinions. *The Delphi* method allows the knowledge of experts to be explicitly used to obtain knowledge about a set of criteria or standards. As such, it can serve as a reference for decision-making in the future (Aichholzer, 2009)

There is no predefined strict order for the implementation of *the Delphi* procedure. Usually, the scope of the research and the topics are determined first, after which the selection of experts who answer the questionnaires in three to four rounds is approached. The first round is mainly concerned with providing knowledge about the topic in familiarization with the research problem. Opinions are exchanged, and a consensus is reached among the experts during the subsequent rounds. During the last round, previous conclusions are submitted to experts to arrive at a definitive position (Doke & Swanson, 1995).

In the first phase of the workshop with the application of *the Delphi method*, the participants of the workshop assessed the importance of all indicators selected based on a literature review. The responses were analyzed and relevance based on the joint assessment was established for all indicators. The indicators marked as the most important were included in the second phase, where the assessment of importance and relevance was also carried out. The method focuses on experts and scientists as participants in the research, the choice of the target group was one of the key factors influencing the accuracy and relevance of the research results. On this basis, experts meet the following criteria:

- To be representative, authoritative, and persuasive;
- Possess professional diversity and integrity (too many experts in the same fields are avoided).

Tourism experts, scientists, representatives of the state and tourism authorities in the country, as well as representatives of the private sector in tourism-related fields took part to reach a strategic consensus.

The main categories of institutions and organizations involved in the survey were as follows:

- Public sector in tourism (tourism organizations, museums, galleries, etc.);
- Non-governmental organizations in tourism;
- Academic institutions: experts in the field who have conducted in-depth research on tourism in Serbia or published papers related to tourism development;
- Businessmen from the private sector: professionals who have experience and work in tourism, and hospitality as managers, or as executives in agencies or other entities on the supply side of the private sector related to tourism in Serbia.

About 60 experts were invited to participate in the study. In the first round, 42 of them answered the initial questionnaire. In the next two rounds, a total of 35 respondents participated in the evaluation of the indicators. Their profile is shown in Table 9.

Respondents were asked to assess how relevant each of the 165 indicators is for measuring Serbia's competitiveness as a tourist destination (activities, workshops and assessments in the first round). A Likert scale from 1 to 5 (1 - completely irrelevant, 5 - highly relevant) was used. A total of 42 responses were collected. After that, the responses were analyzed and the indicators were ranked based on the mean of the responses. All indicators with a mean value below 4 are marked for exclusion from the study. Also, indicators with high standard deviations are marked for discussion at the workshop. After this step, 131 indicators are extracted and included for analysis in the second round.

The response rate in the second round of *the Delphi* method was 83.3% when 35 responses were collected. After discussing the indicators, the participants were asked to fill out the questionnaire again (third round). The procedure of analysis and elimination was the same as in the first round, and in the third round, 103 indicators for evaluation entered the evaluation of significance. After repeating the procedure for the third time (35 experts), a total of 101 indicators were singled out as relevant for measuring Serbia's competitiveness as a tourist destination. It is important to note that, in ad-

Table 9. Profile of experts involved in the Delphi method

Participants	First round	Second round	Third round
Academia, researchers and professors	15	14	17
Travel organizers and travel agencies	4	1	3
Tourist Organizations	5	9	8
NGOs	4	3	2
Hotel Managers	4	2	0
Other tourism-related businesses and organizations (public and private sector)	8	6	5
Total number of experts	42	35	35
Average tourism-related work experience	22.19	20.7	17.29

dition to quantitative analysis of the data, the authors took into account the comments of experts regarding the formulation of specific indicators by breaking down certain competitiveness indicators into several more specific indicators and eliminating indicators that are identified as partially or wholly recurring or belonging to a pre-existing indicator. This combination of qualitative and quantitative approaches resulted in a final list of indicators of the competitiveness of the tourist destination, which was then pilot-tested.

Pilot testing was conducted to eliminate possible shortcomings and misunderstandings that could arise during the final research. The aim was to eliminate ambiguities and doubts to make the final research as relevant as possible. After the indicators were selected based on the literature review and the *application* of the Delphi method, they were further divided into three questionnaires for pilot testing (indicators for tourists - 63 indicators, Indicators for foreign tour operators - 64 indicators and indicators for internal stakeholders - 101 indicators, of which 75 were also evaluated by members of the local community). Pilot testing was conducted during July and August 2022 via email for internal participants, the local community and tour operators, and on-site in visitors/tourist accommodation facilities. After that, the model is designed with competitiveness factors and prepared indicators.

The aim of the pilot research, i.e. testing the model, was to eliminate possible shortcomings and misunderstandings that could arise during the next phase - the final research when the model is validated. Respondents were asked to score on a scale from 1 - strongly disagree, to 5 - strongly agree, statements regarding the current state of competitiveness of Serbia as a tourist destination. They also had the option to mark a "0" if they "didn't have enough information to answer," as well as a 6 if the question was "poorly worded." This further steered the indicators and questionnaires towards a clearer formulation for the final research.

Pilot testing for the target group of internal participants was conducted on a sample of 64 participants, of which 44 were participants directly involved in tourism and its activities, and 20 were representatives of the local community. Pilot testing was also conducted on a sample of 63 foreign tourists who visited Serbia and 5 foreign tour operators. The main characteristics of the participants who participated in the pilot study are shown in Table 10.

Table 10. Basic characteristics of respondents included in the pilot testing

Internal stakeholders	Foreign tourists
Average work experience in tourism – 11.52 years (Std. 11.11)	Male 50.8%
Academia, researchers and professors - 15.56%	Female 49.2%
Tour operators - 15.56%	Age range: 23-69 years (average 39.6)
Tourist organizations - 22.22%	First-time visitors – 14.3%
Non-governmental institutions - 6.67%	Have been to Serbia once - 55.6%
Hotel Managers - 22.22%	They have been to Serbia several times - 30.2%
Other tourism-related enterprises and organizations (public and private sector) - 17.78%	
Representatives of the local community	**Foreign Travel Organizers**
15% work in tourism	The period for which they have trips to Serbia in their offer – 15.5 years on average
Place of residence:	Countries: Russia, Montenegro, Slovenia
Belgrade – 45%	
Novi Sad - 25%	
Pine – 5%	
Kikinda – 10%	
Niš – 5%	
Kragujevac - 5%	
Kosovska Mitrovica - 5%	

4.3 Establishing the competitive factors of the TOURCOMSERBIA model

After the pilot testing, the final model of TOURCOMSERBIA was created. Based on the activities carried out so far, an extensive set of factors and competitiveness indicators relevant to measuring the competitiveness of Serbia as a tourist destination was created.

The results are presented in Table 11, which focuses on the assessment of indicators and the clarity of the item formulation.

Table 11. Indicator Assessment and Clarity of Item Formulation – Design of the Final Model

Indicators	References	Internal stakeholders			Local community			Tourists			Foreign tour operators	
		MV[1]	% II[2]	% IE[3]	MV	% II	% IE	MV	% II	% IE	MV	% II
1. As a tourist destination, Serbia has unique natural resources and the beauty of nature and landscape	Lemy, Nursiana & Pramono (2020); Krešić & Prebežac (2011); Xu, Ao, Liu & Cai (2021); Guizzardi & Stacchini, (2017); Wang, Hsu, & Swanson (2012); Nguyen (2019)	4.56	0	2.2	4.45	0	0	4.24	0	0	4.33	0
2. As a tourist destination, Serbia has unique cultural resources	Alberca & Parte (2020); Milićević, Petrović, Kostić & Lakićević (2020); Krešić & Prebežac (2011) Crouch (2011); Lemy, Nursiana & Pramono (2020)	4.39	0	4.4	4.45	0	0	4.38	0	0	4.00	0
3. Serbia as a tourist destination has unique architectural characteristics (local architecture)	Zehrer, Smeral., &Hallmann (2017); Pavić, Veljković, & Bilić (2016); Cucculelli & Goffi (2016)	4.00	0	0	3.65	0	0	4.12	1.6	3.2	4.00	0
4. The climate in Serbia is pleasant (climatic conditions are suitable for tourism)	Cronjé, & du Plessis (2020)	4.39	0	4.4	4.35	0	0	4.19	1.6	0	4.33	0
5. Tourism is well developed in protected natural areas of Serbia	Foronda-Robles, Galindo-Pérez-de-Azpillaga & Fernández-Tabales (2020); Lozano-Oyola, Blancas, González & Caballero (2019); Gomezelj & Mihalič (2008); Pavić, Veljković & Bilić (2016)	3.31	0	0.00	3.55	0	0	3.41	12.7	1.6	3.67	0
6. Serbia as a tourist destination has a rich tangible cultural heritage (monuments, buildings, archaeological/historical sites/parks, monasteries and other cultural objects, museums, etc.)	Jangra, Kaushik & Saini (2021); Guizzardi, Stacchini & Costa (2022); Pansiri (2014)	4.46	0	6.7	4.50	0	10	4.25	0	3.2	4.33	0
7. Serbia as a tourist destination has a rich intangible cultural heritage (unique traditional values, oral traditions, language, social practices, rituals, festivals, traditional craft skills, etc.)	García-Almeida & Gartner (2021); Lopes, Muñoz & Alarcón-Urbistondo (2018)	4.44	0	0.00	4.58	0	5	4.41	0	0	5.00	0
8. Serbia has diverse and high-quality hotel accommodation facilities	Vinyals-Mirabent (2019); Goffi, Cucculelli, & Masiero (2019); Bagarić & Žitinić (2013)	3.42	0	2.2	3.55	0	0	4.41	7.9	1.6	4.00	0

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[1] Mean value

[2] Insufficient information

[3] Inartfully expressed

Indicators	References	Internal stakeholders			Local community			Tourists			Foreign tour operators	
		MV^1	% II^2	% IE^3	MV	% II	% IE	MV	% II	% IE	MV	% II
9. Tourist information centers are available and of high quality	Tseng & Chen (2013); Aquilino, Armenski & Wise (2019); Lee and Xue (2020)	3.11	2.2		3.32	5	0	4.14	12.8	0	3.00	0
10. Serbia has a quality offer of restaurants (quality of food and service in restaurants)	Vodeb & Rudež (2017); Garín-Muñoz and Moral (2017); Knežević Cvelbar, Dwyer, Koman, & Mihalič (2016); Lee, Choi & Breiter (2016)	3.79	0	4.4	4.21	5	0	3.85	1.6	0	4.67	0
11. There is a quality offer of amusement and theme parks in Serbia	Armenski, Gomezelj, Djurdjev, Ćurčić, & Dragin (2012); Pavić, Veljković & Bilić (2016); Vinyals-Mirabent (2019)	3.00	6.67	0	2.80	0	0	4.39	7.9	0	3.67	0
12. There is a wide range of additional accommodation facilities in Serbia	Vinyals-Mirabent (2019); Goffi, Cucculelli, & Masiero (2019); Bagarić & Žitinić (2013)	3.32	2.2	0	3.39	10	0	3.64	14.3	4.8	4.67	0
13. Tourism activities in Serbia are of high quality and diverse	Dwyer, Cvelbar, Mihalič & Koman (2014); Blancas, Lozano-Oyola & González (2015); Blancas, Lozano-Oyola, Gonzalez, Guerrero & Caballero (2011)	3.54	0	2.2	3.65	0	0	3.94	4.8	3.2	4.33	0
14. There is a high-quality offer of nightlife and entertainment in Serbia (bars, discos, clubs, rafts, casinos, etc.)	Aquilino, Armenski & Wise (2019); Lee & Xue (2020); Kozak, Baloğlu & Bahar (2009)	4.24	0	4.4	4.50	0	0	3.81	4.8	7.9	5.00	0
15. Serbia has frequent and high-quality events (special events/festivals except for business events in tourism)	Zehrer, Smeral & Hallmann (2017); Pavić, Veljković & Bilić (2016); Armenski, Gomezelj, Djurdjev, Ćurčić, &Dragin (2012); Vinyals-Mirabent, (2019)	3.95	2.22	2.2	4.15	0	0	4.56	6.3	1.6	4.33	0
16. Tourist products in Serbia allow tourists to stay longer in the destination	Dias,González-Rodríguez, & Patuleia, (2021)	3.61	2.2	2.22	3.65	0	0	3.93	6.3	1.6	3.50	0
17. Serbia has a rich and high-quality offer of ski and mountain tourism	Hall, O'Mahony, & Gayler (2017); Bagarić & Žitinić (2013); Uysal, Chen & Williams (2000); Alberca & Parte (2020)	3.49	0	0.00	3.45	0	0	3.93	11.1	1.6	4.00	0
18. Serbia has a rich and high-quality offer of rural tourism (tourism in villages, agritourism...)	Chin, Thian & Lo (2017); Pavić, Veljković & Bilić (2016); Armenski, Gomezelj, Djurdjev, Ćurčić & Dragin (2012); Loureiro & Sarmento Ferreira (2015)	3.54	0	2.2	3.65	0	0	4.04	12.7	1.6	4.67	0
19. Serbia has a rich and high-quality offer of health, spa and wellness tourism	Han, Kiatkawsin, Koo & Kim (2020); Milićević, Petrović, Kostić & Lakićević (2020); Mihalič (2013)	3.38	0	0	3.40	0	0	3.94	14.3	3.2	3.33	0

Indicators	References	Internal stakeholders			Local community			Tourists			Foreign tour operators	
		MV[1]	% II[2]	% IE[3]	MV	% II	% IE	MV	% II	% IE	MV	% II
20. Serbia has a strong capacity for business tourism	Dragićević, Jovičić, Blešić, Stankov & Bošković (2012); Zainuddin, Radzi & Zahari (2015)	3.62	2.2	2.2	3.63	5	0	x	20.5	0	4.00	0
21. Serbia has a rich and high-quality offer of content and activities for domestic tourism	Dwyer & Kim (2003)	3.77	2.2	2.2	3.42	5	0	x	0	3.2	x	x
22. The offer of foreign tour operators for visiting Serbia is rich and diverse	Sosa, Aulet & Mundet (2021); Dwyer, Cvelbar, Mihalič & Koman (2014)	2.70	6.7	0	x	x	x	3.50	12.7	4.8	3.33	0
23. The local food and cuisine in Serbia are of high quality and authentic	Promsivapallop & Kannaovakun (2020); Kozak, Baloğlu & Bahar (2009); Lemy, Nursiana & Pramono (2020); Alegre & Garau (2011)	4.28	0	2.2	4.32	0	5	4.44	15.9	4.8	5.00	0
24. The Tourist Organization of Serbia establishes adequate connections with tourism companies (travel agencies, tour operators, airlines, hotel chains, etc.)	Mulec & Wise (2013); Dwyer & Kim (2003)	3.30	6.7	2.2	x	x	x	4.04	0	3.2	3.00	33.3
25. The visa policy for entering the country is favorable	Neto, Dimmock Lohmann & Scott (2020); Mulec & Wise (2013); Armenski, Gomezelj, Djurdjev, Ćurčić, & Dragin (2012); Ferreira & Perks (2018)	3.73	6.7	2.2	x	x	x	3.82	15.9	3.2	4.00	0
26. Serbia provides quality health services to tourists	Sánchez & López (2015); Bahar &Kozak (2007); Blancas, Lozano-Oyola & González (2015)	3.32	11.1	4.4	3.89	10	0	3.50	15.9	4.8	3.33	0
27. In Serbia, Wi-Fi, internet and telecommunications infrastructure are highly accessible to tourists	Farinha, Bienvenido-Huertas, Pinheiro, Silva, Lança, Oliveira & Batista (2021); Tavitiyaman, Qu, Tsang & Lam (2021)	3.72	0	2.2	3.58	5	0	4.05	0	3.2	3.67	0
28. In Serbia, there are applications (internet and mobile) that support the tourist experience at the destination	Tavitiyaman, Qu, Tsang & Lam (2021); Brandã, Joia & do Canto Cavalheiro (2019); Muthuraman & Al Haziazi (2019); Ranasinghe, Danthanarayana, Ranaweera & Idroos (2020)	3.35	4.44	2.2	3.18	15	0	3.96	15.9	3.2	3.00	0
29. The application of modern information technologies and e-commerce in tourism in Serbia follows the trends in the tourism market	Choi & Sirakaya (2006); Dwyer, Dragićević, Armenski, Mihalič & Knežević Cvelbar (2016)	3.05	6.7	2.2	3.24	15	0	4.06	14.3	1.6	3.00	0

Indicators	References	Internal stakeholders			Local community			Tourists			Foreign tour operators	
		MV[1]	% II[2]	% IE[3]	MV	% II	% IE	MV	% II	% IE	MV	% II
30. Serbia as a tourist destination is affordable (proximity of the destination in relation to the main markets, transport accessibility, etc.)	Cockburn-Wootten & McIntosh (2020); Milićević, Petrović, Kostić & Lakićević (2020); Vodeb & Rudež (2017)	3.74	0	4.4	4.00	0	0	3.95	3.2	1.6	3.67	0
31. Locations and attractions of importance for tourism are accessible to tourists	Benedetti, Çakmak & Dinnie (2011); Vinyals-Mirabent, (2019); Jangra, Kaushik & Saini (2021); Zhou, Maumbe, Deng & Selin (2015)	3.41	0	2.2	3.40	0	0	4.06	1.6	0	4.00	0
32. Local tourist and traffic signage meets the needs of tourists	Lee & Xue (2020); Uysal & Sirgy (2019)	3.03	0	2.2	2.85	0	0	3.92	4.8	0	3.33	0
33. The road transport system in Serbia is of high quality	Cucculelli & Goffi (2016); Flores-Romer, Pérez-Romero, Álvarez-García & de la Cruz del Río-Rama (2021); Mulec & Wise (2013)	2.95	4.4	2.2	2.74	0	5	3.26	3.2	0	2.33	0
34. The air transport infrastructure in Serbia is of high quality	Huang & Peng (2012); Dwyer, Cvelbar, Mihalič &Koman (2014); Paunović, Dressler, Nikolić & Pantić (2020); Hanafiah & Zulkifly (2019)	3.43	4.4	0	3.28	10	0	3.72	3.2	0	3.33	0
35. Cycling and hiking trails in Serbia are of high quality and adequately maintained	Parra-López & Oreja-Rodriguez (2014); Uysal, Chen & Williams (2000)	2.81	6.7	0	2.63	5	0	3.68	15.9	4.8	3.67	0
36. The local population in Serbia is hospitable	Chen C.-M., Chen S.H. & Lee (2011); Kozak, Baloğlu & Bahar (2009); Miličević, Mihalič & Sever (2017); Guizzardi & Stacchini (2017)	4.26	0	4.4	4.42	0	5	4.52	0	3.2	5.00	0
37. The atmosphere in Serbia as a tourist destination is pleasant/relaxing	Lemy, Nursiana & Pramono (2020); Zehrer, Smeral & Hallmann (2017); Chirieleison, Montrone & Scrucca (2022); Kozak &Rimmington (1999); Lee & Xue (2020)	4.21	0	4.4	4.35	0	0	4.52	0	1.6	4.67	0
38. Taxi and public transport services in Serbia are of high quality and reliable	Lee & King (2009); Vagiona & Doxopoulos (2017); Vodeb & Rudež (2017); Garín-Muñoz & Moral (2017)	3.18	2.2	2.2	2.53	5	0	3.78	3.2	1.6	3.50	33.3
39. In Serbia, there are adequate signs in English as well as menus in English in restaurants	Kozak & Rimmington (1999); Sarwar (2013)	3.13	0	0.00	3.10	0	0	3.90	1.6	1.6	3.33	33.3

Indicators	References	Internal stakeholders			Local community			Tourists			Foreign tour operators	
		MV[1]	% II[2]	% IE[3]	MV	% II	% IE	MV	% II	% IE	MV	% II
40. The local population and employees in tourism adequately use foreign languages in communication with tourists	Mulec & Wise (2013); Dragićević, Jovičić, Blešić, Stankov & Bošković (2012); Nyaporo, Rashed, Park & Eltawil (2019); Pansiri (2014)	3.42	2.2	2.2	3.53	5	0	4.10	4.8	0	3.33	0
41. The level of hygiene and cleanliness in Serbia is high	Krešić & Prebežac (2011); Alegre &Garau (2011); Kozak, Baloğlu & Bahar (2009); Zehrer, Smeral, & Hallmann (2017)	2.90	0	0.00	2.60	0	0	3.65	0	0	3.50	33.3
42. The Government shall allocate sufficient funds for the activities of the Tourist Organization of Serbia	Kubickova (2019); Liu, Ko & Chiang (2021); Ndivo & Manyara (2018)	2.92	6.7	0	x	x	x	x	x	x	x	x
43. Tourism companies in Serbia have access to funds from the tourism development program.	Liu, Ko & Chiang (2021)	3.22	4.4	0	x	x	x	x	x	x	x	x
44. There are adequate tax incentives for the tourism industry.	Ocamp, Ebisa, Ombe & Geen Escoto (2018); Dwyer & Kim (2003); Borges, Vieira & Gomes (2020)	2.54	11.1	0	x	x	x	x	x	x	x	x
45. Subsidies from the public sector for Serbian tourism are adequate and available to all actors.	Dwyer & Kim (2003);	2.74	11.1	2.2	x	x	x	x	x	x	x	x
46. The public sector has clear training programs for tourism businesses.	Mulec & Wise (2013); Dwyer, Cvelbar, Edwards & Mihalic (2012)	2.70	4.4	0	x	x	x	x	x	x	x	x
47. The existing tourism policy, planning and development are aligned with the vision of Serbia as a tourist destination.	Dwyer & Kim (2003); Goffi, Cucculelli & Masiero (2019)	3.00	6.7	0	x	x	x	x	x	x	x	x
48. The local community supports the development of tourism.	Mohamad, Jaafar & Ismail (2020)	3.50	2.2	2.2	3.63	5	0	x	x	x	x	x
49. The level and scope of public-private partnerships in Serbian tourism are at a satisfactory level.	Goffi & Cucculelli (2019); Goffi & Cucculelli (2014); Cucculelli & Goffi (2016)	2.73	6.7	0	x	x	x	x	x	x	x	x
50. Key actors in Serbian tourism are involved in the decision-making process and long-term tourism planning.	Cottrell, Vaske, Shen & Ritter (2007); Guerrero, Valdez Pérez & Ibarra (2013); Dwyer, Cvelbar, Edwards & Mihalic (2012); Dwyer, Dragićević, Armenski, Mihalič & Knežević Cvelbar (2016)	2.69	6.7	2.2	x	x	x	x	x	x	x	x

Indicators	References	Internal stakeholders			Local community			Tourists			Foreign tour operators	
		MV[1]	% II[2]	% IE[3]	MV	% II	% IE	MV	% II	% IE	MV	% II
51. Local communities in Serbia are involved in the production of food for tourism.	Sosa, Aulet & Mundet (2021)	3.14	6.7	11.1	3.24	15	0	x	x	x	x	x
52. Tourism companies/destinations in Serbia have defined risk and crisis management strategies.	Hallmann, Mueller & Peters (2015); Dwyer, Dragićević, Armenski, Mihalič & Knežević Cvelbar (2016); Armenski, Dwyer & Pavluković (2018)	2.50	2.2	0	x	x	x	x	x	x	x	x
53. The private sector in Serbian tourism recognizes the importance of sustainable tourism development.	Pavić, Veljković & Bilić (2016); Mulec & Wise (2013); Armenski, Gomezelj, Djurdjev, Ćurčić & Dragin (2012); Pansiri (2014)	3.18	4.4	0	x	x	x	x	x	x	x	x
54. The public sector in Serbia recognizes the importance of sustainable tourism development.	Pavić, Veljković & Bilić (2016); Mulec & Wise (2013); Armenski, Gomezelj, Djurdjev, Ćurčić & Dragin (2012); Pansiri (2014)	3.08	2.2	0	x	x	x	x	x	x	x	x
55. There are certified sustainability/green (eco) certification programs in Serbia as a tourist destination.	Boley, McGehee & Tom Hammett (2017)	2.74	11.1	0	x	x	x	3.25	15.9	1.6	2.50	0
56. Serbia's positioning as a tourist destination in the international market is effective.	Zehrer, Smeral, & Hallmann (2017); Cucculelli & Goffi (2016); Mulec & Wise (2013); Goffi, Cucculelli & Masiero (2019)	3.11	6.7	0	3.00	5	0	3.48	6.3	4.8	3.00	0
57. The National Tourism Organization of Serbia (TOS) clearly identifies the target markets of Serbia as tourist destinations.	Mulec & Wise (2013); Dwyer & Kim (2003)	3.11	8.9	0	x	x	x	x	x	x	x	x
58. The effects of marketing activities in Serbia are regularly monitored by TOS.	Mulec & Wise (2013); Luštický & Štumpf (2021); Dwyer & Kim (2003)	3.18	15.6	0	x	x	x	x	x	x	x	x
59. Social networks (Facebook, Instagram, Twitter) are effectively used to support the marketing activities of Serbia as a tourist destination.	Wise, Aquilino & Armenski (2018); Dwyer, Cvelbar, Edwards & Mihalic (2012); Armenski, Dwyer & Pavluković (2018); Kuhzady & Ghasemi (2019)	3.41	4.4	0	3.42	5	0	3.66	9.5	1.6	3.00	0
60. The value for money ratio in terms of tourist experience in Serbia is positive.	Gomezelj & Mihalič (2008); Cucculelli & Goffi (2016); Mulec & Wise (2013); Goffi, Cucculelli & Masiero. (2019);	3.54	2.2	2.2	3.58	5	0	4.21	0	3.2	4.00	0

Indicators	References	Internal stakeholders			Local community			Tourists			Foreign tour operators	
		MV[1]	% II[2]	% IE[3]	MV	% II	% IE	MV	% II	% IE	MV	% II
61. There are clear standards for food production and preparation in Serbia.	Sosa, Aulet & Mundet (2021); Bahar & Kozak (2007); Kozak, Baloğlu & Bahar (2009)	3.22	8.9	0	x	x	x	x	x	x	x	x
62. Travel companies monitor/conclude the satisfaction of their visitors/ service users.	Xu, Ao, Liu & Cai (2021); Zeng, Li & Huang (2021); Aguilar-Becerra, Frausto-Martínez, Pineda & Acevedo (2017)	3.08	2.2	0	3.00	25	0	3.76	17.5	3.2	4.00	0
63. Tourism companies in Serbia develop and promote innovative tourism products.	Dias, González-Rodríguez & Patuleia (2021); Custódio Santos, Ferreira, Costa & Santos (2020); Ivars-Baidal, Vera-Rebollo, Perles-Ribes, Femenia-Serra & Celdrán-Bernabeu (2021); García-Almeida &Hormiga (2017); Dwyer, Dragićević, Armenski, Mihalič & Knežević Cvelbar (2016)	3.17	2.2	4.4	3.20	25	0	3.69	14.3	4.8	2.67	0
64. In Serbia, as a tourist destination, there is a clearly defined framework for quality management in tourism.	Andrades & Dimanche (2017); Foronda-Robles, Galindo-Pérez-de-Azpillaga & Fernández-Tabales (2020)	2.77	8.9	2.2	x	x	x	x	x	x	x	x
65. Tourist products and services in Serbia are accessible to people with disabilities.	Cockburn-Wootten & McIntosh (2020); Vila, Darcy & González (2015); Andrades & Dimanche (2019); Natalia, Clara, Simon, Noelia & Barbara (2019)	2.69	6.7	0	2.50	10	0	3.15	19	4.8	3.00	0
66. In Serbia, products, facilities and activities in tourism produce a quality tourist experience.	Ghanem & Shaaban (2022); Ranasinghe, Danthanarayana, Ranaweera & Idroos (2020); Benedetti, Çakmak & Dinnie (2011)	3.44	2.2	4.4	3.65	0	0	4.09	11.1	1.6	3.00	0
67. Micro, small and medium-sized enterprises in tourism have clear standards in terms of achieving performance in the provision of services.	Ivars-Baidal, Vera-Rebollo, Perles-Ribes, Femenia-Serra & Celdrán-Bernabeu (2021); Mulec & Wise (2013); Gajić, Penić, Vujko & Petrović (2018); Dwyer & Kim (2003)	3.00	11.1	2.2	x	x	x	x	x	x	x	x
68. Large companies in tourism have clear standards in terms of achieving performance in the provision of services.	Ivars-Baidal, Vera-Rebollo, Perles-Ribes, Femenia-Serra & Celdrán-Bernabeu (2021); Mulec & Wise (2013); Gajić, Penić, Vujko & Petrović (2018); Dwyer & Kim (2003)	3.28	13.3	4.4	x	x	x	x	x	x	x	x
69. Tourism companies operate in accordance with ethical principles.	Dwyer & Kim (2003); Knežević Cvelbar, Dwyer, Koman & Mihalič (2016); Mulec & Wise (2013); Dwyer, Mellor, Livaic, Edwards & Kim (2004)	3.32	6.7	0	3.47	15	x	x	x	x	x	x

Indicators	References	Internal stakeholders			Local community			Tourists			Foreign tour operators	
		MV[1]	% II[2]	% IE[3]	MV	% II	% IE	MV	% II	% IE	MV	% II
70. There are favorable conditions for the development of entrepreneurship in tourism in Serbia.	Dias, González-Rodríguez &Patuleia (2021); Dias, Patulei, Silva, Estêvão & González-Rodríguez (2022); Zehrer & Hallmann (2015); Brandã, Joia & Canto Cavalheiro (2019); Blanco-Cerradelo, Gueimonde-Canto, Fraiz-Brea & Diéguez-Castrillón (2018)	2.97	2.2	2.2	3.60	0	0	x	x	x	x	x
71. There are adequate educational programs in Serbia.	Andrades & Dimanche (2019); Dragićević, Jovičić, Blešić, Stankov & Bošković (2012); Armenski, Gomezelj, Djurdjev, Ćurčić & Dragin (2012); Pansiri (2014)	3.00	4.4	4.4	3.31	20	0	x	x	x	x	x
72. There is a high level of awareness among tourism employees in Serbia about the importance of providing quality services (visitors, guests, tourists...)	Aquilino, Armenski & Wise (2019); Mulec & Wise (2013); Gajić, Penić, Vujko & Petrović (2018)	3.33	2.2	4.4	3.30	0	0	x	x	x	x	x
73. The legal/regulatory environment in Serbia is favorable for the development of tourism.	Natalia, Clara, Simon, Noelia & Barbara (2019); Flores-Romer, Pérez-Romero, Álvarez-García & del Río-Rama. (2021); Mulec & Wise (2013)	2.97	8.9	2.2	x	x	x	x	x	x	x	x
74. The investment environment in Serbia is conducive to the development of tourism.	Cillo, Rialti, Del Giudice & Usai (2021); Vieira, Hoffmann & Alberton (2018); Ndivo & Manyara (2018); Dragićević, Jovičić, Blešić, Stankov & Bošković (2012); Brandã, Joia & Canto Cavalheiro (2019)	3.36	6.7	2.2	x	x	x	x	x	x	x	x
75. There is a growing need for foreign direct investment in tourism.	Cillo, Rialti, Del Giudice & Usai (2021); Vieira, Hoffmann & Alberton (2018); Ndivo & Manyara (2018); Dragićević, Jovičić, Blešić, Stankov & Bošković (2012); Brandã, Joia &Canto Cavalheiro (2019)	3.76	2.2	2.2	4.15	0	0	x	x	x	x	x
76. There is a greater need for investments in Serbian tourism from domestic sources (domestic investments).	Cillo, Rialti, Del Giudice & Usai (2021); Vieira, Hoffmann & Alberton (2018); Ndivo & Manyara (2018); Dragićević, Jovičić, Blešić, Stankov & Bošković (2012); Brandã, Joia & Canto Cavalheiro (2019)	4.16	0	2.2	4.35	0	0	x	x	x	x	x
77. Political relations between Serbia and the main emitting markets are favorable.	Woyo & Slabbert (2021); Prideaux (2005); Mulec & Wise (2013)	3.59	4.4	2.2	x	x	x	x	x	x	3.67	0

Indicators	References	Internal stakeholders			Local community			Tourists			Foreign tour operators	
		MV[1]	% II[2]	% IE[3]	MV	% II	% IE	MV	% II	% IE	MV	% II
78. Political values, the general political situation and stability in Serbia are favorable for the development of tourism.	Pavić, Veljković & Bilić (2016); Lee, Choi & Breiter (2016); Armenski, Gomezelj, Djurdjev, Ćurčić & Dragin (2012); Vinyals-Mirabent (2019)	3.43	2.2	2.2	3.15	0	0	3.40	4.8	0	3.67	0
79. As a tourist destination, Serbia has skilled workers in tourism.	Andrades & Dimanche (2019); Armenski, Dwyer & Pavluković (2018); Hanafiah & Zulkifly (2019); Hallmann, Mueller & Peters (2015)	3.45	0	2.2	3.05	0	0	x	x	x	x	x
80. The salaries of employees in tourism in Serbia are at an appropriate level.	Roberts & Tribe (2008); Sosa, Aulet & Mundet (2021); Mendieta-Peñalver, Perles-Ribes, Ramon-Rodriguez & Such-Devesa (2018);	2.11	6.7	0	1.88	15	0	x	x	x	x	x
81. Tourism in Serbia brings benefits to the local community.	Balasingam & Bojei (2019); Blanco-Cerradelo, Gueimonde-Canto, Fraiz-Brea & Diéguez-Castrillón, (2018); Cucculelli & Goffi (2016)	3.69	0	0.00	3.90	0	0	x	x	x	x	x
82. The employment opportunities for the local population in tourism are high.	Mohamad, Jaafar & Ismail (2020); Cucculelli & Goffi (2016); Medina-Muñoz, D. R., Medina-Muñoz, R.D. & Chim-Miki (2013); Dávid & Tóth (2011); Blanco-Cerradelo, Gueimonde-Canto, Fraiz-Brea & Diéguez-Castrillón (2018)	3.41	2.2	0.00	3.42	0	5	x	x	x	x	x
83. The prices of tourist services offered at the destination (accommodation prices, transport prices and other elements of the offer of services at the destination) are favorable.	Mandić & Petrić (2021); Dwyer & Forsyth (2011); Campo-Martínez & Garau-Vadell (2010); Zehrer, Smeral & Hallmann (2017)	3.13	2.2	0	3.00	0	0	4.02	0	0	3.67	0
84. Tourist destinations in Serbia are adequately supplied with electricity.	Knežević Cvelbar, Dwyer, Koman & Mihalič (2016); Flores-Romer, Pérez-Romero, Álvarez-García & del Río-Rama (2021); Wang, Hsu & Swanson (2012); Tichaawa & Kimbu (2019); Bogale & Wondirad (2019)	3.82	0	0	4.21	5	0	4.32	4.8	0	x	x

Indicators	References	Internal stakeholders			Local community			Tourists			Foreign tour operators	
		MV[1]	% II[2]	% IE[3]	MV	% II	% IE	MV	% II	% IE	MV	% II
85. The supply of high-quality drinking water is provided at destinations in Serbia.	Farinha, Bienvenido-Huertas, Duarte Pinheir, Silva, Lança, José Oliveira & Batista, (2021); Flores-Romer, Pérez-Romero, Álvarez-García & del Río-Rama, (2021); Wang, Hsu & Swanson (2012); Tichaawa & Kimbu (2019); Bogale & Wondirad (2019)	3.74	2.2	0	4.05	0	0	4.08	4.8	0	x	x
86. There is a clear awareness in the international market about Serbia as a tourist destination.	Cucculelli & Goffi (2016); Petrović, Vujko, Gajić, Vuković, Radovanović, Jovanović & Vuković (2017); Pansiri (2014); Gomezelj & Mihalič (2008); Pavić, Veljković & Bilić (2016)	2.97	6.7	4.4	3.00	10	0	3.29	4.8	1.6	2.67	0
87. Serbia is an attractive tourist destination.	Zainuddin, Radzi & Zahari (2015); Prideaux (2005); Bahar & Kozak (2007); Armis & Kanegae (2020); Krešić & Prebežac (2011)	3.87	0	0.00	3.80	0	0	4.16	0	0	4.33	0
88. The image and perception of Serbia in the market are positive.	Del Chiappa (2012); Dragićević, Jovičić, Blešić, Stankov & Bošković (2012); Dwyer & Kim (2003); Hossain & Islam (2019); Kuhzady & Ghasemi (2019)	3.31	4.4	2.2	3.53	15	0	3.76	6.3	0	3.33	0
89. Information about Serbia as a tourist destination is easily available on the international market.	Pyo (2005); Liu, Ko & Chiang (2021); Medarić, Sulyok, Kardos & Gabruč (2021)	3.24	4.4	2.2	x	x	x	3.67	1.6	1.6	3.33	0
90. Tourist information is easily accessible to tourists during their stay in Serbia.	Milićević, Petrović, Kostić &Lakićević (2020); Vodeb & Rudež (2017); Albayrak, Caber, González-Rodríguez, & Aksu (2018); Wilde, Cox, Kelly & Harrison (2017); Lozano-Oyola, Blancas, González & Caballero (2019)	3.10	0	2.2	3.12	15	0	4.16	1.6	1.6	3.33	0
91. Booking a trip and booking products and services online is simple and reliable.	Dragićević, Jovičić, Blešić, Stankov & Bošković (2012); Tavitiyaman, Qu, Tsang & Lam (2021); Ghanem &Shaaban (2022); Hallmann, Mueller & Peters (2015)	3.59	2.2	2.2	3.71	15	0	4.27	1.6	0	3.33	0
92. The brand of Serbia as a tourist destination is recognizable in the international tourism market.	Dragićević, Jovičić, Blešić, Stankov & Bošković (2012); Shahabi, Sanayei Kazemi &Teimouri (2018); Bulatović, Stranjančević, Đurašević &Vlahović (2018); Petrović, Vujko, Gajić, Vuković, Radovanović, Jovanović & Vuković (2017); Wilde, Cox, Kelly & Harrison (2017)	3.08	4.4	2.2	3.18	15	0	3.67	3.2	1.6	3.00	0

Indicators	References	Internal stakeholders			Local community			Tourists			Foreign tour operators	
		MV[1]	% II[2]	% IE[3]	MV	% II	% IE	MV	% II	% IE	MV	% II
93. Experiences in Serbia as a tourist destination correspond to the needs and expectations of tourists.	Zainuddin, Radzi &Zahari (2015); Sarwar (2013); Pansiri (2014); Yoon & Uysal (2005); Baloglu, Pekcan, Chen &Santos (2004)	3.49	0	6.7	3.40	0	0	4.19	0	1.6	2.67	0
94. Tourists are ready to recommend Serbia as a destination to visit.	Han, Kiatkawsin, Koo & Kim (2020); Lee & Xue (2020); Zeng, Li & Huang (2021); Shahabi, Sanayei Kazemi & Teimouri (2018); Tavitiyaman, Qu, Tsang & Lam (2021)	3.69	4.4	4.4	3.61	10	0	4.69	0	0	4.00	0
95. Cultural resources in Serbia are well managed.	Lee and King (2009); Guizzardi, Stacchini & Costa (2022); Blanco-Cerradelo, Gueimonde-Canto, Fraiz-Brea & Diéguez-Castrillón (2018)	2.94	6.7	4.4	2.59	15	0	x	x	x	x	x
96. The natural environment in Serbia is well managed.	Cucculelli & Goffi (2016); Goffi & Cucculelli (2019); Panse, Fyall & Alvarez (2021); Pivčević, Petrić & Mandić (2020)	2.69	4.4	4.4	2.38	20	0	x	x	x	x	x
97. There is a lot of concern for the protection of the environment in Serbia.	Xu, Ao, Liu & Cai (2021); Zehrer, Smeral., & Hallmann (2017); Mihalič (2000); Blancas, Lozano-Oyola & González (2015); Cottrell, Vaske, Shen &Ritter (2007)	2.51	6.7	2.2	2.31	20	0	3.09	6.3	1.6	3.50	33.3
98. Companies in Serbian tourism effectively manage waste and wastewater.	Blancas, Lozano-Oyola & González (2015); Paunović, Dressler, Nikolić & Pantić (2020); Lozano-Oyola, Blancas, González & Caballero (2019); Potgieter, Tshipala & Coetzee (2019); Lozano-Oyola, Blancas, González & Caballero (2012)	2.38	8.9	4.4	x	x	x	x	x	x	x	x
99. The air in Serbia is polluted.	Lee & Xue (2020); Uysal & Sirgy (2019); Jangra, Kaushik & Saini (2021); Blancas, Lozano-Oyola & González (2015)	3.62	0	4.4	4.05	5	0	3.07	3.2	3.2	3.33	0
100. The noise in the destinations in Serbia is very pronounced.	Lee & Xue (2020); Blancas, Lozano-Oyola & González (2015); Garín-Muñoz & Moral (2017)	3.24	0	2.2	3.53	5	0	3.23	7.9	1.6	3.50	0
101. The waters in Serbia are polluted.	Lee & Xue (2020); Uysal & Sirgy (2019)	3.26	0	2.2	3.53	10	0	3.29	15.9	3.2	3.00	0

Furthermore, a panel discussion was organized during the CTTH 2022 conference (November 17-19, 2022 - Contemporary Trends in Tourism and Hospitality). On the first day of the conference, from 3:00 p.m. Until 17:00, a panel discussion “Grants and Projects in Tourism” was held, where 13 projects (6 domestic and 7 international) were presented. Among them, the results and model design of the TOURCOMSERBIA project were presented. The participants of the panel, which consisted of academics, domestic and foreign experts, tourism policy makers - representatives of the Provincial Secretariat for Economy and Tourism of Vojvodina, as well as representatives of the Tourist Organization of Vojvodina and local tourism organizations of projects, were followed by a constructive discussion that pointed to the validity of the TOURCOMSERBIA model in accordance with modern needs in the development and competitiveness of a tourist destination.

A detailed review of the literature on the model, a workshop with key stakeholders and pilot testing, as well as the model presented at the panel discussion, confirmed the validity of the TOURCOMSERBIA model. The design of the model was also presented at the SITCON 2022 Conference with a paper entitled: Developing a model for assessing the competitiveness of Serbia as a tourist destination – TOURCOMSERBIA.

After pilot testing and panel discussion, the final model was created, which was used in the second year of project implementation and applied in Serbia and the defined countries of the competitive set. The defined competitive set was selected based on information provided by key stakeholders during the workshop and pilot testing.

The process of developing a model for measuring the competitiveness of Serbia’s tourism, as well as its subsequent validation, has been presented at several international conferences and published in several scientific papers in international journals (Pavlović et al., 2022; Cimbaljević et al., 2023c; Kovačić et al., 2023; Pavluković et al., 2024a; Pavlović et al., 2023; Pavlović et al., 2023a; Radojević et al. 2024).

5 APPLICATION OF TOURCOMSERBIA MODELS IN SERBIA AND IN THE COUNTRIES OF THE COMPETING SET

5.1 Results of the implementation of the TOURCOMSERBIA model – internal stakeholders

After the development of the competitiveness model of Serbia as a tourist destination, the next phase followed – practical application, i.e. testing of the competitiveness model on different target groups – internal stakeholders in tourism (tourism industry and other key actors), local population, foreign tour operators and foreign tourists. The surveys were conducted from March 2023 to December 2023. During this period, the survey was conducted on the following sample (Table 12):

Table 12. Target groups and the sample for the implementation of the model of competitiveness of Serbia as a tourist destination

Target group	Sample
Internal stakeholders	207
Local Population	303
Foreign tour operators	58
Foreign tourists	406

In the following, the results of the research will be presented to internal stakeholders.

Research with internal stakeholders – testing the competitiveness model

The survey with internal stakeholders of Serbia was conducted from 01.01. to 31.03.2023. A total of 207 internal stakeholders from all parts of Serbia and various public, private, non-governmental organizations and academia participated in the research. The largest number of stakeholders is from Belgrade, Novi Sad, Zlatibor, Kopaonik, Vrnjačka Banja and Niš, but entities from the rest of Serbia are also represented in the sample. The research was carried out in combination – through an electronic survey (done in Google forms) which was sent via e-mail, to a defined mailing list of stakeholders in tourism in Serbia, but also in the field in direct meetings with stakeholders – on Zlatibor, Kopaonik, Novi Sad, Belgrade, Stara Planina, etc. Respondents were informed about the aim and purpose of the research, as well as the objectives of the project within which the research is being conducted. The types of organizations from which the respondents come are shown in Table 13.

Table 13. Type of organization from which internal stakeholders come

Type of organization	%
Hotels	23.7
Travel Agencies	15
Tourist Organizations	14.5
NGOs	1.9
Academy	24.3
Private company	7.2
Public entities	8.7
Cultural institutions	4.8

In terms of years of work experience, the minimum is 1 and the maximum is 46, i.e. the average work experience of respondents in tourism is 11.64 years with a standard deviation of 9.32.

Exploratory factor analysis

To identify the latent dimensions of Serbia's competitiveness as a tourist destination, an exploratory factor analysis (EFA) was conducted. Analysis of the athemum showed a high KMO = 0.915, and the statistically significant value of the Bartlett sphericity test was confirmed ($\chi^2 = 16625.83$, df = 5050, $p < 0.000$). The analysis of the correlations of the items revealed a significant number of correlations with values above 0.3, which led to the conclusion that the data are appropriate for EFA. To isolate the factors, the principal component method was used with Promaks rotation (due to the established correlations between the factors) and Kaiser normalization. As a result, and taking into account only factors whose eigenvalues were equal to or greater than one, five factors were singled out, which explain 49.55% of the variance. The five factors identified are: Natural and Cultural Heritage, Tourism Offer and Infrastructure, Marketing and Experience, Situational Frameworks of Tourism Development, and Pollution.

The results of the exploratory factor analysis are shown in Table 14.

Table 14. Results of Exploratory Factor Analysis – Structure of the Competitiveness Model

	Natural and Cultural Heritage	The quality of the tourist offer and infrastructure	Situational Frameworks for the Development of Tourism	Macrecreation and experience	Pollution
1. Serbia as a tourist destination has unique natural resources and beauty of the landscape	0.676				
2. Serbia as a tourist destination has unique cultural resources	0.741				
3. Serbia as a tourist destination has unique architectural features	0.715				
6. Serbia as a tourist destination has a rich tangible cultural heritage	0.673				
7. Serbia as a tourist destination has a rich intangible cultural heritage	0.675				
11. There is a quality offer of amusement and theme parks in Serbia		0.629			
12. There is a wide range of accommodation facilities in Serbia		0.545			
13. Tourism activities in Serbia are of high quality and diverse		0.502			
15. Serbia has frequent and high-quality events		0.489			
16. Products of Serbia as a tourist destination enable a longer stay of tourists		0.44			
17.Serbia has a rich and high-quality offer of ski and mountain tourism		0.536			
18. Serbia has a rich and high-quality offer of rural tourism (rural tourism, agritourism...)		0.445			
19. Serbia has a rich and high-quality offer of health, spa and wellness tourism		0.518			
20. Serbia has adequate capacities for business tourism		0.394			
21. Serbia has a rich and high-quality offer of content and activities for domestic tourism		0.384			
27. In Serbia, there is an adequate distribution of Wi-Fi, Internet and telecommunications infrastructure for tourists		0.543			
28. In Serbia, there are applications (internet and mobile) that support the tourist experience in the destination		0.499			
29. Application of state-of-the-art information technologies and e-commerce in tourism in Serbia is in line with the trends in the modern tourism market		0.48			
31. Locations and attractions of importance for tourism are accessible to tourists		0.57			
32. Local tourist and traffic signage meets the needs of tourism and tourists		0.609			
33. Road transport infrastructure in Serbia is of high quality		0.494			

	Natural and Cultural Heritage	The quality of the tourist offer and infrastructure	Situational Frameworks for the Development of Tourism	Macrecreation and experience	Pollution
34. Air transport infrastructure in Serbia is of good quality		0.507			
35. Bicycle and pedestrian paths in Serbia are of high quality and adequately maintained		0.552			
39. In Serbia, there are adequate signs in English, as well as menus in English in restaurants		0.483			
41. The level of hygiene and cleanliness in Serbia is high		0.465			
22. The offer of foreign tour operators for Serbia is rich and diverse			0.499		
24. The Tourist Organization of Serbia establishes adequate relations with tourism companies (travel agencies, tour operators, airlines, hotel chains, etc.)			0.488		
43. Tourism Enterprises in Serbia Have Access to Funds from the Tourism Development Program			0.673		
44. There are adequate tax breaks for the tourism industry in Serbia			0.694		
45. Subsidies from the public sector for tourism in Serbia are adequate and available to all stakeholders			0.69		
46. The public sector has clear training programs for tourism businesses			0.747		
47. The existing tourism policy, planning and development of tourism are in line with the vision of Serbia as a tourist destination			0.772		
48. The population of Serbia supports the development of tourism			0.509		
49. The level and scope of realized public-private partnerships in tourism in Serbia are at a satisfactory level			0.687		
50. Key actors in tourism in Serbia are involved in the decision-making process and long-term planning in tourism			0.708		
51. Local communities in Serbia are engaged in the production of food for tourism			0.599		
52. Tourism companies/destinations in Serbia have defined risk and crisis management strategies			0.707		
53. The Private Sector in Tourism in Serbia Recognizes the Importance of Sustainable Tourism Development			0.55		
54. The Public Sector in Serbia Recognizes the Importance of Sustainable Tourism Development			0.585		
55. Certified sustainability programs / green (eco) certification exist/ are applied in Serbia as a tourist destination			0.624		
56. Positioning Serbia as a tourist destination in the international market is effective			0.623		
61. There are clear standards of food production and preparation in Serbia			0.484		
62. Tourism companies monitor/examine the satisfaction of their visitors/service users			0.624		

	Natural and Cultural Heritage	The quality of the tourist offer and infrastructure	Situational Frameworks for the Development of Tourism	Macrecreation and experience	Pollution
63. Tourism Companies in Serbia Develop and Promote Innovative Tourism Products			0.581		
64. In Serbia as a tourist destination, there is a clearly established framework for quality management in tourism			0.748		
65. Tourist products and services in Serbia are accessible to persons with disabilities			0.522		
66. In Serbia, products, facilities and activities in tourism produce a quality tourist experience			0.467		
67. Micro, small and medium-sized enterprises in tourism have clear standards regarding the achievement of performance in the provision of services			0.542		
68. Large enterprises in tourism have clear standards regarding the achievement of performance in the provision of services			0.463		
69. Tourism Enterprises Operate in Accordance with Ethical Principles			0.509		
70. There are favorable conditions for the development of entrepreneurship in tourism in Serbia			0.602		
71. There are adequate education programs in tourism in Serbia			0.621		
72. There is a high level of awareness among employees in tourism in Serbia about the importance of delivering quality services (to visitors, guests, tourists...)			0.518		
73. The legal/regulatory environment in Serbia is favorable for the development of tourism			0.635		
74. The investment environment in Serbia is conducive to the development of tourism			0.558		
78. Political values, the overall political situation and stability in Serbia are favorable for the development of tourism.			0.465		
57. The National Tourism Organization of Serbia (TOS) clearly identifies Serbia's target markets as tourist destinations				0.635	
58. The effects of marketing activities in Serbia are regularly monitored by the TOS				0.655	
59. Social networks (Facebook, Instagram, Twitter) are effectively used to support the marketing activities of Serbia as a tourist destination.				0.512	
60. The value for money ratio in terms of tourist experience in Serbia is positive				0.562	
84. Tourist destinations in Serbia are adequately supplied with electricity				0.668	
85. Supply of quality drinking water is ensured in destinations in Serbia				0.663	
86. There is a clear awareness in the international market of Serbia as a tourist destination				0.467	
87. Serbia is an attractive tourist destination				0.583	

	Natural and Cultural Heritage	The quality of the tourist offer and infrastructure	Situational Frameworks for the Development of Tourism	Macrecreation and experience	Pollution
88. The image and perception of Serbia in the market are positive				0.402	
89. Information about Serbia as a tourist destination is easily available on the international market				0.575	
90. Tourist information is easily accessible to tourists during their stay in Serbia				0.602	
91. Booking of tourist services and online reservations of products and services are simple and reliable				0.576	
92. The brand of Serbia as a tourist destination is recognizable on the international tourism market				0.43	
93. Experiences and experiences in Serbia as a tourist destination correspond to the needs and expectations of tourists				0.677	
94. Tourists are ready to recommend Serbia as a destination to visit				0.579	
97. There is adequate care for environmental protection in Serbia					0.431
98. Serbian Tourism Companies Effectively Manage Waste and Wastewater					0.427
99. The air in Serbia is polluted					-0.716
101. The waters in Serbia are polluted					-0.741

Confirmatory factor analysis

Confirmatory factor analysis (CFA) is used to validate and confirm the factor structure obtained by exploratory factor analysis (EFA). The confirmatory analysis focuses on the relationship between latent factors and their manifest variables, rather than the other way around as in exploratory analysis. In addition, this technique allows the assessment of model fit, i.e. the fit of the model and the calculation of statistical parameters to estimate the goodness-of-fit of the model proposed by exploratory factor analysis, which is why confirmatory factor analysis is also called a measurement model in structural equation modeling (SEM).

Structural equation modeling (SEM) was used to test the hypothetical models set out in the research. AMOS for Windows operating system was used for SEM and confirmatory factor analysis. The Mardia index of multivariate kurtosis was above 3 for all models tested, indicating significant multivariate kurtosis. Therefore, it was justified to use robust methods and indices based on this method (Bentler, 2006). The fit or suitability of the model was assessed using the following indices (according to Majstorović, 2012): Sattora-Bentler χ^2 (S-B χ^2) – if it is insignificant then the model has a good fit but since it is sensitive to the number of subjects it is usually significant in a large number of cases, **Standardized Root Mean-Square Residual** (SRMR), **Root Mean-Square Error Of Approximation** (RMSEA) - SRMR and RMSEA should be less than.08 (Browne & Cudeck, 1993), **Comparative Fit Index** (CFI), **Normed Fit Index** (NFI), **Non-Normed Fit Index** (NNFI) - if CFI, NFI and NNFI are above.90, the model has a good fit (Hoyle, 1995). AMOS suggests and proposes changes to the model.

When the first model obtained by exploratory factor analysis was tested, satisfactory fit indices were not achieved. First of all, it was suggested that the Pollution factor should be eliminated because the factor loading was very low. In addition to this, for certain items it was suggested that they should be part of some other factor: 66. In Serbia, products, facilities and activities in tourism produce a quality tourist experience originally belonged to the factor **Situational factors of tourism**development but it has been suggested that it should belong to the **factor of macroting and experience**; 65. Tourist products and services in Serbia are accessible to persons with disabilities originally belonged to the factor **Situational factors of tourism develop-**

ment, and the model suggested that it should belong to the factor **Quality of tourist offer and infrastructure**. It was also suggested that the following items should be excluded from the model due to the very low factor loading: **items number 11, 12, 16, 17, 18, 19, 20, 27, 28, 29, 22, 24, 52, 56, 60, 64, 65, 66, 67, 68, 72, 73**. After these changes, adequate indices of the fita model were obtained. Also, due to the new structure, the original factor **Situational Factors of Tourism Development** was renamed to **Legal Frameworks and Sustainable Tourism Development**. The final model thus consists of four factors: **Natural and Cultural Heritage**, **Quality of Tourism Offer and Infrastructure**, **Legal Framework and Sustainable Development of Tourism**, and **Mapping and Experience**.

The final fit indices are shown in Table 15.

The final model is shown in Table 16, consisting of **the mentioned 4 factors** and a total of **47 indicators**.

Table 15. Fit indices of the tested model

Model	S–Bχ^2	df	χ^2/df	RMSEA	SRMR	CFI	NFI
1	1653,88	989	1,58	0,053 (0,048 – 0,058)	0,528	0,911	0,903

Table 16. Structure of the final model of competitiveness of a tourist destination (internal stakeholders)

Factors and Items	Factor loading	Mean value	St. Deviation
Natural and cultural resources (5 indicators), α =.810			
1. Serbia as a tourist destination has unique natural resources and beauty of the landscape (beauty of the natural environment and biodiversity/flora and fauna, untouched nature, national parks and reserves)	.70	4.44	.773
2. Serbia as a tourist destination has unique cultural resources	.80	4.40	.768
3. Serbia as a tourist destination has unique architectural characteristics (local architecture)	.71	3.83	1.049
6. Serbia as a tourist destination has a rich tangible cultural heritage (tangible cultural heritage (monuments, buildings, archaeological/historical sites/ parks, monasteries and other heritage objects, museums, etc.)	.64	4.47	.716
7. Serbia as a tourist destination has a rich intangible cultural heritage (unique traditional values, oral tradition, language, social practices, rituals, festive events, traditional crafts, etc.)	.56	4.47	.722
Quality of tourism offer and infrastructure (10 indicators), α =.898			
12. There is a wide range of accommodation facilities in Serbia	.56	3.25	1.030
13. Tourist activities in Serbia are of high quality and diverse (tourist activities that complement the experience - water activities, adventure activities, activities in nature / e.g. e.g. forest walks, hiking, outdoor activities, etc.)	.64	3.43	1.035
31. Locations and attractions of importance for tourism are accessible to tourists	.69	3.51	1.032
32. Local tourist and traffic signage meets the needs of tourism and tourists	.63	3.03	1.129
33. Road transport infrastructure in Serbia is of high quality	.68	2.87	1.226
34. Air transport infrastructure in Serbia is of good quality	.67	3.30	1.169
35. Bicycle and pedestrian paths in Serbia are of high quality and adequately maintained	.66	2.65	1.068
39. In Serbia, there are adequate signs in English, as well as menus in English in restaurants	.71	3.20	1.097
41. The level of hygiene and cleanliness in Serbia is high	.65	2.87	1.060
65. Tourist products and services in Serbia are accessible to persons with disabilities	.70	2.65	1.175

Factors and Items	Factor loading	Mean value	St. Deviation
Legal frameworks and sustainable tourism development (18 indicators), α =.947			
43. Tourism Enterprises in Serbia Have Access to Funds from the Tourism Development Program	.71	2.77	.994
44. There are adequate tax breaks for the tourism industry in Serbia	.67	3.10	1.030
45. Subsidies from the public sector for tourism in Serbia are adequate and available to all stakeholders	.69	2.83	1.0803
47. The existing tourism policy, planning and development of tourism are in line with the vision of Serbia as a tourist destination	.70	2.99	1.090
48. The population of Serbia supports the development of tourism	.71	3.72	1.003
49. The level and scope of realized public-private partnerships in tourism in Serbia are at a satisfactory level	.67	2.96	1.016
50. Key actors in tourism in Serbia are involved in the decision-making process and long-term planning in tourism	.68	2.90	1.110
51. Local communities in Serbia are engaged in the production of food for tourism	.68	3.21	1.041
53. The Private Sector in Tourism in Serbia Recognizes the Importance of Sustainable Tourism Development	.65	3.15	1.162
54. The Public Sector in Serbia Recognizes the Importance of Sustainable Tourism Development	.75	3.01	1.182
55. Certified sustainability programs / green (eco) certification exist/are applied in Serbia as a tourist destination	.75	2.92	1.067
62. Tourism companies monitor/examine the satisfaction of their visitors/ service users	.74	3.18	1.074
63. Tourism Companies in Serbia Develop and Promote Innovative Tourism Products	.70	3.18	1.081
69. Tourism Enterprises Operate in Accordance with Ethical Principles	.71	3.33	1.000
70. There are favorable conditions for the development of entrepreneurship in tourism in Serbia	.69	3.32	1.165
71. There are adequate education programs in tourism in Serbia	.73	3.13	1.128
74. The investment environment in Serbia is conducive to the development of tourism	.69	3.19	1.232
78. Political values, the overall political situation and stability in Serbia are favorable for the development of tourism.	.66	2.77	.994
Marketing and experience (14 indicators), α =.941			
66. In Serbia, products, facilities and activities in tourism produce a quality tourist experience	.72	3.54	.953
57. The National Tourism Organization of Serbia (TOS) clearly identifies Serbia's target markets as tourist destinations	.71	3.30	1.037
56. Positioning Serbia as a tourist destination in the international market is effective	.80	3.06	1.090
58. The effects of marketing activities in Serbia are regularly monitored by the TOS	.69	3.31	1.062
59. Social networks (Facebook, Instagram, Twitter) are effectively used to support the marketing activities of Serbia as a tourist destination.	.71	3.58	1.102
86. There is a clear awareness in the international market of Serbia as a tourist destination	.73	2.97	1.125

Factors and Items	Factor loading	Mean value	St. Deviation
87. Serbia is an attractive tourist destination	.60	3.85	1.052
88. The image and perception of Serbia in the market are positive	.76	3.28	1.106
89. Information about Serbia as a tourist destination is easily available on the international market	.75	3.37	1.089
90. Tourist information is easily accessible to tourists during their stay in Serbia	.79	3.44	1.099
91. Booking of tourist services and online reservations of products and services are simple and reliable	.67	3.66	1.033
92. The brand of Serbia as a tourist destination is recognizable on the international tourism market	.77	3.11	1.128
93. Experiences and experiences in Serbia as a tourist destination correspond to the needs and expectations of tourists	.68	3.57	.936
94. Tourists are ready to recommend Serbia as a destination to visit	.72	3.76	.900

Factor 1: Natural and cultural resources is a factor that includes the assessment of natural and cultural resources of Serbia, as well as the richness of tangible and intangible cultural heritage. This factor primarily refers to the natural and cultural potentials for the development of tourism in Serbia and the items of this model, in addition to internal stages, can easily be estimated by the local population, tourists and foreign tour operators.

Factor 2: Quality of tourist offer and infrastructure refers to how natural and cultural resources are shaped into tourist offer, what is the quality of that offer and activities, what is the supporting infrastructure, signage and accessibility of destinations and attractions. Internal stakeholders at the destination, as well as tourists who have visited a certain destination in Serbia, certainly have the most knowledge about this factor.

Factor 3: Legal frameworks and sustainable tourism development - refers to how stimulating the environment in Serbia is for the development of tourism, what are the legal regulations, political environment, benefits, subsidies, investment opportunities, etc. This factor also contains items related to sustainability, i.e. how much companies in tourism respect the principles of sustainability, how much they apply certified programs, support of the local community, development of tourism and the like. This factor is of particular importance for the development of a new model of competitiveness because it incorporates elements of sustainability that were not part of the previous models of competitiveness of the destination. This factor also makes the biggest difference between the competitiveness model that will be assessed by internal stakeholders and the model that will be assessed by tourists and tour operators, primarily due to items about which only internal stakeholders have knowledge and information.

Factor 4: Marketing and experience - refers to the perception of the brand, the image of Serbia as a tourist destination, brand awareness and the availability of information about Serbia both during the stay at the destination and for foreign potential visitors. This factor also includes the assessment of the quality of the experience and experience at the destination, the possibility of booking services and the readiness to recommend Serbia as a destination to others.

The mean values of the factors according to the estimates of internal stakeholders are shown in Table 17.

Natural and cultural resources are the best rated factor of competitiveness of Serbia as a tourist desti-

Table 17. Mean Values of Factors as Estimated by Internal Stakeholders

Factor	Medium rating	Std. Deviation
Factor 1: Natural and Cultural Resources	4.32	.614
Factor 2: Quality of tourism offer and infrastructure	3.08	.798
Factor 3: Legal frameworks and sustainable tourism development	3.12	.788
Factor 4: Marketing and Experience	3.41	.790

nation, which means that Serbia has rich cultural and natural resources and great potentials for tourism development. The lowest rated factor is **the quality of tourist offer and infrastructure**, especially the arrangement of pedestrian and bicycle paths, road infrastructure, the level of hygiene and cleanliness, the adaptability of products and services to persons with disabilities, as well as local needs. Only one item in this group exceeds 3.5, which indicates that the current situation in Serbia, when it comes to the quality of the tourist offer and infrastructure, is very bad. Immediately after that, the factor is **Legal Regulations and Sustainable Development of Tourism**, where items related to the general political situation, access to financing, subsidies, public-private partnerships, stakeholder involvement in decision-making in tourism, as well as the implementation of certified sustainability models are particularly poorly evaluated. **Marketing and experience** is a factor that is also rated below 3.5 Internal stakeholders rated the awareness of Serbia on the international market, the positioning of Serbia as a tourist destination and the brand of Serbia particularly low. The data obtained by the research of internal stakeholders pointed to the basic shortcomings and shortcomings that affect the competitiveness of Serbia as a tourist destination, and which should be systematically worked on in the coming period.

The results of a survey conducted among internal stakeholders in Serbia were published in the journal Vacation Marketing (Pavluković et al., 2024a).

5.2 Research with local people – testing the competitiveness model

The survey with the local population of Serbia was carried out from 01.06. to 15.12.2023. A total of 303 respondents from all parts of Serbia participated in the survey. Respondents assessed the items of the competitiveness model by rating the degree of their agreement with the above statements on a scale from 1 to 5 (1 – disagree at all, 5 – strongly agree). The largest number of stakeholders is from Belgrade, Novi Sad, Niš, Leskovac, Užice, Zlatibor, but entities from the rest of Serbia are also represented in the sample.

Also, 13.5% of the sample are respondents who are employed in tourism, 8.3% are those who are indirectly employed in tourism, while the majority (78.2%) are employed in tourism.

Exploratory Factor Analysis

In order to identify the latent dimensions of Serbia's competitiveness as a tourist destination, exploratory factor analysis (EFA) was conducted. The analysis showed a high KMO = 0.923, and the statistically significant value of Bartlett's sphericity test was confirmed ($\chi^2 = 9896.90$, df = 2485, $p < 0.000$). The analysis of item correlations revealed a significant number of correlation relationships with values above 0.3, which led to the conclusion that the data are appropriate for EFA. Not meeting this criteria, 11 items were removed from further analysis: 5. Tourism is developed in protected natural areas of Serbia, 58. Employment opportunities for the local population in tourism are high, 23. Serbia provides and provides quality health services to tourists, 24. There is an adequate distribution of Wi-Fi, internet and telecommunications infrastructure for tourists in Serbia, 35. Taxi and public transport services in Serbia are of high quality and reliable, 44. Tourism industry companies monitor/examine the satisfaction of their visitors/service users (Radojević and Stanišić, 2022), 40. Local population and tourism employees adequately use foreign languages in communication with tourists, 75. There is a greater need for foreign direct investments in tourism in Serbia, 76. There is a greater need to invest in tourism in Serbia from domestic sources (domestic investments).

To isolate the factors, the principal component method was used with Promaks rotation (due to the established correlations between the factors) and Kaiser normalization. As a result, and taking into account only the factors whose eigenvalues were equal to or greater than one, five factors were singled out, explaining 50.56% of the variance. The five factors identified are: Natural and Cultural Heritage, Quality of Tourism Offer and Infrastructure, Situational Framework of Tourism Development and Management, Pollution, Perception of the Destination and Experience. The results of the exploratory factor analysis are shown in Table 18.

Table 18. Exploratory Factor Analysis – Factor Structure of Serbia's Competitiveness Model as a Tourist Destination

		Natural and Cultural Heritage	The quality of the tourist offer and infrastructure	Situational Framework of Tourism Development and Management	Pollution	Perception of the destination and experience
1. Serbia as a tourist destination has unique natural resources and beauty of the landscape	C1	.706				
2. Serbia as a tourist destination has unique cultural resources	C2	.733				
3. Serbia as a tourist destination has unique architectural characteristics (local architecture)	C3	.722				
4. The climate in Serbia is pleasant (climatic conditions are suitable for tourism)	C4	.587				
6. Serbia as a tourist destination has a rich tangible cultural heritage	C6	.655				
7. Serbia as a tourist destination has a rich intangible cultural heritage	C7	.669				
8. Hotel accommodation capacities in Serbia are of high quality and diverse	C8		.531			
9. Tourist information centers are available and of high quality	C9		.436			
10. The offer of restaurants is of high quality (quality of food and service in restaurants)	C10		.533			
11. There is a quality offer of amusement and theme parks in Serbia	C11		.560			
12. In Serbia there is a wide selection of complementary accommodation capacities (family houses, camps, Couchsurfing, etc.)	C12		.636			
13. Tourism activities in Serbia are of high quality and diverse	C13		.594			
14. In Serbia there is a quality offer of nightlife and entertainment (bars, discos, clubs, rafts, casinos, etc.)	C14		.520			
15. Serbia has frequent and high-quality events (special events/festivals excluding business tourism events)	C15		.488			
16. Products of Serbia as a tourist destination enable a longer stay of tourists	C16		.435			
17.Serbia has a rich and high-quality offer of ski and mountain tourism	C17		.492			
18. Serbia has a rich and high-quality offer of rural tourism (rural tourism, agritourism...)	C18		.427			
19. Serbia has a rich and high-quality offer of health, spa and wellness tourism	C19		.472			
20. Serbia has adequate capacities for business tourism	C20		.462			
21. Serbia has a rich and high-quality offer of content and activities for domestic tourism (offer for trips of domestic tourists in the country)	C21		.411			
22. Local food and cuisine in Serbia are of high quality and authentic	C23		.412			

		Natural and Cultural Heritage	The quality of the tourist offer and infrastructure	Situational Framework of Tourism Development and Management	Pollution	Perception of the destination and experience
25. In Serbia, there are applications (internet and mobile) that support the tourist experience in the destination	C28		.443			
26. Application of state-of-the-art information technologies and e-commerce in tourism in Serbia is in line with the trends in the modern tourism market	C29		.436			
27. Serbia as a tourist destination is accessible (proximity of the destination in relation to the main markets, transport accessibility, etc.)	C30		.425			
28. Locations and attractions of importance for tourism are accessible to tourists	C31		.661			
29. Local tourist and traffic signage meets the needs of tourism and tourists	C32		.659			
30. Road transport infrastructure in Serbia is of high quality	C33		.548			
31. Air transport infrastructure in Serbia is of high quality	C34		.562			
32. Bicycle and pedestrian paths in Serbia are of high quality and adequately maintained	C35		.529			
36. In Serbia, there are adequate signs in English, as well as menus in English in restaurants	C39		.469			
38. The level of hygiene and cleanliness in Serbia is high	C41		.470			
39. The population of Serbia supports the development of tourism	C48			.534		
41. Positioning Serbia as a tourist destination in the international market is effective	C51			.651		
42. Social networks (Facebook, Instagram, Twitter) are effectively used to support the marketing activities of Serbia as a tourist destination.	C56			.568		
43. The value for money ratio in terms of tourist experience in Serbia is positive	C59			.485		
45. Tourism Enterprises in Serbia Develop and Promote Innovative Tourism Products	C62			.643		
46. Tourist products and services in Serbia are accessible to persons with disabilities	C63			.604		
47. In Serbia, products, facilities and activities in tourism produce a quality tourist experience	C65			.642		
48. Tourism Enterprises Operate in Accordance with Ethical Principles	C69			.593		
49. There are favorable conditions for the development of entrepreneurship in tourism in Serbia	C70			.517		
50. There are adequate education programs in tourism in Serbia	C71			.518		
53. There is a greater need for investment in tourism in Serbia from domestic sources (domestic investments)	C72			.560		

		Natural and Cultural Heritage	The quality of the tourist offer and infrastructure	Situational Framework of Tourism Development and Management	Pollution	Perception of the destination and experience
54. Political values, the overall political situation and stability in Serbia are favorable for the development of tourism.	C78			.505		
55. Serbia as a tourist destination has qualified workers in tourism	C79			.539		
56. Salaries of employees in tourism in Serbia are at an adequate level	C80			.606		
70. Cultural Property in Serbia Is Adequately Managed	C95			.669		
71. The natural environment in Serbia is adequately managed	C96			.690		
72. There is adequate care for environmental protection in Serbia	C97			.634		
73. The air in Serbia is polluted	C99				.786	
74. Noise in destinations in Serbia is very pronounced	C100				.692	
75. The waters in Serbia are polluted	C101				.780	
64. The image and perception of Serbia in the market are positive	C88					.560
67. The brand of Serbia as a tourist destination is recognizable on the international tourism market	C92					.530
34. The atmosphere in Serbia as a tourist destination is pleasant/relaxing	C36					.506
57. Tourism in Serbia Provides Benefits for the Local Community	C81					.500
59. Prices of tourist services in Serbia (accommodation, transport prices, and other elements of the offer of services in the destination) are favorable	C83					.473
60. Tourist destinations in Serbia are adequately supplied with electricity	C84					.661
61. Supply of quality drinking water is ensured in destinations in Serbia	C85					.640
62. There is a clear awareness in the international market of Serbia as a tourist destination	C86					.401
63. Serbia is an attractive tourist destination	C87					.517
65. Tourist information is easily accessible to tourists during their stay in Serbia	C90					.480
66. Booking tourist services and online reservations of products and services are simple and reliable	C91					.518
68. Experiences and experiences in Serbia as a tourist destination correspond to the needs and expectations of tourists	C93					.596
69. Tourists are ready to recommend Serbia as a destination to visit	C94					.539

Confirmatory factor analysis

Structural equation modeling (SEM) was used to test the factor structure obtained by exploratory factor analysis. For SEM and confirmatory factor analysis, AMOS for Windows operating system was used. The Mardia index of multivariate kurtosis was above 3 for all models tested, indicating significant multivariate kurtosis. Therefore, it was justified to use *robust* methods and indices based on this method (Bentler, 2006). The fit or suitability of the model was assessed using the following indices (according to Majstorović, 2012): **Sattora-Bentler χ²** (S-B χ²) – if it is insignificant then the model has a good fit but since it is sensitive to the number of subjects it is usually significant in a large number of cases, **Standardized Root Mean-Square Residual** (SRMR), **Root Mean-Square Error Of Approximation** (RMSEA) - SRMR and RMSEA should be less than.08 (Browne & Cudeck, 1993), **Comparative Fit Index** (CFI), **Normed Fit Index** (NFI), **Non-Normed Fit Index** (NNFI) - if CFI, NFI and NNFI are above.90, the model has a good fit (Hoyle, 1995). AMOS suggests and proposes changes to the model.

When the first model obtained by exploratory factor analysis was tested, satisfactory fit indices were not achieved. First of all, it was suggested that several factors should be excluded because they achieved loadings on several factors at the same time. These factors are: item 53. There is a greater need for investment in tourism in Serbia from domestic sources (domestic investments), 49. In Serbia, there are favorable conditions for the development of entrepreneurship in tourism, 46. Tourist products and services in Serbia are accessible to persons with disabilities, 56. The salaries of employees in tourism in Serbia are at an adequate level, 70. Cultural goods in Serbia are adequately managed, 71. The natural environment in Serbia is adequately managed. After these changes, the model was restarted, and although the fit indices have visibly improved, a satisfactory fit index has not yet been achieved. Modification indices have now suggested the exclusion of item 72. In Serbia there is adequate care for environmental protection and 4. The climate in Serbia is pleasant (climatic conditions are suitable for tourism) as well as 14. In Serbia, there is a quality offer of nightlife and entertainment (bars, discos, clubs, rafts, casinos, etc.), 43. The value for money ratio in terms of tourist experience in Serbia is positive and 45. Tourism companies in Serbia develop and promote innovative tourism products. The final modifications were related to the addition of correlations between individual items that belonged to the same factors, as well as the removal of items that saturated several factors at the same time - 47. In Serbia, products, contents and activities in tourism produce a quality tourist experience and 30. Road transport infrastructure in Serbia is of high quality. After these changes, a satisfactory fit model and the final structure of the competitiveness model by the local population were achieved. The final model consists of five factors: **Natural and Cultural Heritage**, **Quality of Tourism Offer and Infrastructure**, **Situational Framework of Tourism Development and Management**, **Mapping and Experience**, and **Pollution**.

The final fit indices are shown in Table 19.

The final model is shown in Table 20, consisting of the mentioned 5 factors and a total of 32 indicators.

Table 19. Fit indices of the tested model

Model	S–Bχ^2	df	χ^2/df	RMSEA	SRMR	CFI	NFI
1	914,49	468	1,95	0,056 (0,051 – 0,062)	0,549	0,921	0,911

Table 20. Structure of the final model of competitiveness of tourist destinations (local population)

Factors and Items	Factor loading	Mean	Std. Deviation
Natural and cultural resources (5 items), α =.853			
1. Serbia as a tourist destination has unique natural resources and beauty of the landscape	.876	4.40	0.836
2. Serbia as a tourist destination has unique cultural resources	.947	4.23	0.864
3. Serbia as a tourist destination has unique architectural characteristics (local architecture)	.950	3.77	0.963
6. Serbia as a tourist destination has a rich tangible cultural heritage	.895	4.35	0.859

Factors and Items	Factor loading	Mean	Std. Deviation
7. Serbia as a tourist destination has a rich intangible cultural heritage	.889	4.15	0.960
Quality of tourism offer and infrastructure (9 items), α =.897			
8. Hotel accommodation capacities in Serbia are of high quality and diverse	.806	3.56	1.077
10. The offer of restaurants is of high quality (quality of food and service in restaurants)	.982	4.09	0.893
11. There is a quality offer of amusement and theme parks in Serbia	.941	3.19	1.082
12. In Serbia there is a wide selection of complementary accommodation capacities (family houses, camps, Couchsurfing, etc.)	.918	3.56	1.014
13. Tourism activities in Serbia are of high quality and diverse	.902	3.71	0.974
28. Locations and attractions of importance for tourism are accessible to tourists	.889	3.76	0.982
29. Local tourist and traffic signage meets the needs of tourism and tourists	.802	3.26	1.113
31. Air transport infrastructure in Serbia is of high quality	.921	3.29	1.251
32. Bicycle and pedestrian paths in Serbia are of high quality and adequately maintained	.904	2.67	1.072
Situational framework of tourism development and management (5 items), α =.822			
39. The population of Serbia supports the development of tourism	.823	3.67	1.017
48. Tourism Enterprises Operate in Accordance with Ethical Principles	.921	3.49	1.009
50. There are adequate education programs in tourism in Serbia	.876	3.35	1.011
54. Political values, the overall political situation and stability in Serbia are favorable for the development of tourism.	.824	2.92	1.283
55. Serbia as a tourist destination has qualified workers in tourism	.923	3.41	1.041
Marketing and experience (10 items), α =.902			
64. The image and perception of Serbia in the market are positive	.923	3.45	1.037
67. The brand of Serbia as a tourist destination is recognizable on the international tourism market	.847	3.24	1.185
57. Tourism in Serbia Provides Benefits for the Local Community	.850	3.72	1.008
60. Tourist destinations in Serbia are adequately supplied with electricity	.939	3.96	0.984
61. Supply of quality drinking water is ensured in destinations in Serbia	.828	3.71	1.095
66. Booking tourist services and online reservations of products and services are simple and reliable	.888	3.71	1.003
68. Experiences and experiences in Serbia as a tourist destination correspond to the needs and expectations of tourists	.765	3.63	0.936
69. Tourists are ready to recommend Serbia as a destination to visit	.799	3.82	0.914
41. Positioning Serbia as a tourist destination in the international market is effective	.826	3.22	1.042
42. Social networks (Facebook, Instagram, Twitter) are effectively used to support the marketing activities of Serbia as a tourist destination.	.955	3.72	1.047
Pollution (3 items), α =.824			
73. The air in Serbia is polluted	.687	3.98	1.169
74. Noise in destinations in Serbia is very pronounced	.770	3.41	1.115
75. The waters in Serbia are polluted	.883	3.53	1.244

The first factor - Natural and cultural heritage - as in the previous model, contains items (5) relating to natural and cultural heritage and resources - natural values and characteristics as well as tangible and intangible cultural heritage.

The second factor - the quality of the tourist offer and infrastructure - includes 9 items related to the quality of infrastructure and accessibility, but also to the quality of accommodation services, restaurants, offer of activities, attractions, etc.

The third factor - Situational Framework of Tourism Development and Management - contains five items that refer to important situational factors for the development of tourism, such as the support of the local population, the political situation, ethical principles of business and education and training.

The fourth factor - Macrecreation and experience contains 10 items related to positioning, image, brand, promotion, as well as elements of experience in a tourist destination.

The fifth factor - Pollution is a factor that contains three items related to water and air pollution and pronounced noise at the destination. This is a factor that was not singled out in the research with internal stakeholders - key actors of the tourism economy, which means that in the assessment of the competitiveness of the destination, these items are of particular importance for the local population.

When it comes to the assessment of individual factors by the local population, the mean values are shown in Table 21.

The table shows that the best rated factor of Serbia's competitiveness by the local population is **Natural and Cultural Resources**. Within this factor, items related to rich tangible cultural heritage and rich natural resources are particularly highly rated. The item that Serbia possesses unique architectural resources is the lowest rated within this factor and the only item with an average value below 4.

The worst rated factor by the local population is the **Situational Framework of Tourism Development and Management**. Within this factor, the local population rated the lowest item related to political values and stability of the political situation, and the best rated item was that the local population supports the development of tourism. The factor **Quality of tourist offer and infrastructure** was also rated quite low. The lowest rated items are related to the existence of theme and amusement parks, the quality of air infrastructure and signaling, while the best rated item is related to the variety and quality of the restaurant offer. Within the Marketing **and Experience factor**, there is also a lot of room for improvement. The lowest rated items are recognizable brand and good positioning of Serbia on the international market, while the highest rated items refer to the readiness of tourists to recommend Serbia as a destination, the supply of electricity to destinations, as well as activities to promote Serbia through social networks. It also points to the concern of the local population for the quality of air (with the highest mean value) and water, as well as the pronounced noise at destinations.

The results of this survey conducted among the local population in Serbia were published in the journal Discover Sustainability (Kovačić et al., 2024).

Table 21. Mean values of the assessment of individual factors of competitiveness of Serbia by the local population

Factor	Mean	Std. Deviation
Factor 1: Natural and Cultural Resources	4.18	0.712
Factor 2: Quality of tourism offer and infrastructure	3.46	0.782
Factor 3: Situational framework of tourism development and management	3.37	0.824
Factor 4: Marketing and Experience	3.62	0.749
Factor 5: Pollution	3.64	1.012

5.3 Research with foreign tourists – testing the model of competitiveness

The research with tourists of Serbia was carried out from 01.06. to 25.12.2023. A total of 406 respondents - visitors from all parts of Serbia - participated in the research. The largest number of tourists was surveyed in the field, in the most visited destinations in Serbia - Novi Sad, Belgrade, Niš, Subotica, Zlatibor, Kopaonik, Tara, Vrnjačka Banja, Sokobanja and others, and to a lesser extent other destinations were represented, such as the cities of Leskovac, Zajecar, Bajina Basta, and destinations such as Banja Koviljaca, Zlatar, Stara Planina and the like. The tourists were surveyed by trained researchers in the field, and part of the questionnaire was collected with the help of employees in accommodation facilities at the destinations. Respondents assessed the items of the competitiveness model by rating the degree of their agreement with the above statements on a scale from 1 to 5 (1 – disagree at all, 5 – strongly agree).

All age categories are represented in the sample, and the age range is from 18 to 84 years, with an average age of 35.79 years and a standard deviation of 12,263 years. A slightly higher percentage of respondents are women (53.2%), while men make up 46.8% of the sample. The largest number of respondents has already been to Serbia (42.6% several times, 23.2% once), while 34.2% of respondents are in Serbia for the first time.

The surveyed tourists come from different countries, with the largest representation of tourists from Slovenia, Croatia, Bosnia and Herzegovina, Montenegro, Russia and Romania.

Exploratory Factor Analysis

To identify the latent dimensions of Serbia's competitiveness as a tourist destination, an exploratory factor analysis (EFA) was conducted. Analysis of the athemum showed a high KMO = 0.949, and the statistically significant value of the Bartlett sphericity test was confirmed ($\chi^2 = 10498.4$, df = 1953, $p < 0.000$). The analysis of the correlations of the items revealed a significant number of correlations with values above 0.3, which led to the conclusion that the data are appropriate for EFA. Items whose loading was less than 0.3 (5 items) were removed from further analysis: K5: Tourism is well developed in protected natural areas, K22: Visa regime for entering the country is favorable, K35: Taxi services and public transport in Serbia are of high quality and reliable, K38: The level of hygiene and cleanliness in Serbia is very high, Q14: In Serbia, there is a quality offer of nightlife and entertainment (bars, discos, clubs, rafts, casinos, etc.).

To extract the factors, the method of the main components with Promaks rotation (due to the established correlations between the factors) and Kaiser normalization was used. As a result, and taking into account only factors whose own values were equal to or greater than one, five factors were singled out, which explain 62.03% of the variance. The five factors identified are: **Natural and cultural heritage**, **Quality of tourist services**, **Marketing & Sustainability**, **Accessibility & Technology**, and **Pollution**.

The results of the exploratory factor analysis are shown in Table 22.

Table 22. Exploratory Factor Analysis – Factor Structure of Serbia's Competitiveness Model as a Tourist Destination

		Natural and Cultural Heritage; α=.876	The quality of tourism services; α=.955	Accessibility and technologies; α=.903	Pollution; α=.862	Marketing & Sustainability; α=.953
Serbia as a tourist destination has unique natural resources and beautiful landscapes	K1	.820				
As a tourist destination, Serbia has unique cultural resources	K2	.814				
Serbia as a tourist destination has unique architectural features	K3	.670				
The climate in Serbia is pleasant	K4	.741				
Serbia as a tourist destination has a rich tangible cultural heritage	K6	.783				

		Natural and Cultural Heritage; α=.876	The quality of tourism services; α=.955	Accessibility and technologies; α=.903	Pollution; α=.862	Marketing & Sustainability; α=.953
Serbia as a tourist destination has a rich intangible cultural heritage	K7	.736				
Hotel accommodation capacities in Serbia are of high quality and diverse	K8		.755			
Tourist information centers are available and of high quality	K9		.749			
The offer of restaurants is of high quality (quality of food and service in restaurants)	K10		.652			
There is a quality offer of amusement and theme parks in Serbia	K11		.818			
There is a wide range of complementary accommodation facilities in Serbia (family houses, camps, Couchsurfing, etc.).	K12		.761			
Tourist activities in Serbia are of high quality and diverse	K13		.815			
Serbia has frequent and high-quality events	K15		.738			
The products of Serbia as a tourist destination enable a longer stay of tourists	K16		.826			
Serbia has a rich and high-quality offer of ski and mountain tourism	K17		.752			
Serbia has a rich and high-quality offer of rural tourism (rural tourism, agritourism...)	K18		.741			
Serbia has a rich and high-quality offer of health, spa and wellness tourism	K19		.735			
The offer of foreign tour operators for visiting Serbia is rich and diverse	K20		.728			
The local food and cuisine in Serbia are of high quality and authentic	K21		.743			
Serbia provides quality health services to tourists	K23		.700			
The locals in Sri Lanka are friendly	K33		.673			
The atmosphere in Serbia as a tourist destination is pleasant/relaxing	K34		.788			
In Serbia, there are adequate signs in English as well as menus in English in restaurants	K36		.683			
Local residents and tourism employees use foreign languages in an adequate way in communication with tourists	K37		.616			
Tourist information about Serbia as a destination is easily accessible	K54		.726			
Tourist information is easily accessible to tourists during their stay in Serbia	K55		.772			
Booking tourist services and online reservations of products and services are simple and reliable	K56		.698			

		Natural and Cultural Heritage; α=.876	The quality of tourism services; α=.955	Accessibility and technologies; α=.903	Pollution; α=.862	Marketing & Sustainability; α=.953
In Serbia, Wi-Fi, internet and telecommunications infrastructure are very accessible to tourists	K24			.655		
In Serbia, there are applications (internet and mobile) that support the tourist experience in the destination	K25			.754		
The application of state-of-the-art information technologies and e-commerce in tourism in Serbia is in line with the trends in the modern tourism market	K26			.748		
Serbia as a tourist destination is accessible (proximity of the destination in relation to the main markets, transport accessibility, etc.)	K27			.697		
Locations and attractions of importance for tourism are accessible to tourists	K28			.601		
Local tourist and traffic signage meets the needs of tourism and tourists	K29			.676		
Road transport infrastructure in Serbia is of high quality	K30			.735		
The air transport infrastructure in Sri Lanka is of high quality	K31			.720		
Bicycle and pedestrian paths in Serbia are of high quality and adequately maintained	K32			.727		
The air in Sri Lanka is polluted	K61				.881	
Noise in destinations in Serbia is very pronounced	K62				.918	
Waters in Serbia are polluted	K63				.912	
Certified sustainability programs / green (eco) certificates exist/are implemented in Serbia as a tourist destination	K39					.742
Serbia's positioning as a tourist destination in the international market is effective	K40					.792
Social networks (Facebook, Instagram, Twitter) are effectively used to support the marketing activities of Serbia as a tourist destination.	K41					.796
The value for money ratio in terms of tourist experience in Serbia is positive	K42					.782
Tourism companies in Serbia monitor the satisfaction of their service users	K43					.805
Tourism companies in Serbia develop and promote innovative tourism products	K44					.797
Tourism products and services in Serbia are accessible to people with disabilities	K45					.702
In Serbia, products, facilities and activities in tourism produce a quality tourist experience	K46					.800
Political values, the overall political situation and stability in Serbia are favorable for the development of tourism.	K47					.708

		Natural and Cultural Heritage; α=.876	The quality of tourism services; α=.955	Accessibility and technologies; α=.903	Pollution; α=.862	Marketing & Sustainability; α=.953
Prices of tourist services in Serbia (accommodation, transport prices, and other elements of the offer of services in the destination) are favorable	K48					.757
Tourist destinations in Serbia are adequately supplied with electricity	K49					.689
A supply of high-quality drinking water is provided in destinations in Serbia	K50					.610
There is a clear awareness in the international market about Serbia as a tourist destination	K51					.637
Sri Lanka is an attractive tourist destination	K52					.658
The image and perception of Serbia in the market are positive	K53					.649
The brand of Serbia as a tourist destination is recognizable in the international tourism market	K57					.747
Experiences and experiences in Serbia as a tourist destination correspond to the needs and expectations of tourists	K58					.701
Tourists are ready to recommend Serbia as a destination to visit	K59					.767
There is a lot of concern for the environment in Sri Lanka	K60					.619

Confirmatory factor analysis

Structural equation modeling (SEM) was used to test the factor structure obtained by exploratory factor analysis. For SEM and confirmatory factor analysis, AMOS for Windows operating system was used. The Mardia index of multivariate kurtosis was above 3 for all models tested, indicating significant multivariate kurtosis. Therefore, it was justified to use *robust* methods and indices based on this method (Bentler, 2006). The fit or suitability of the model was assessed using the following indices (according to Majstorović, 2012): **Sattora-Bentler χ^2** (S-B χ^2) – if it is insignificant then the model has a good fit but since it is sensitive to the number of subjects it is usually significant in a large number of cases, **Standardized Root Mean-Square Residual** (SRMR), **Root Mean-Square Error Of Approximation** (RMSEA) - SRMR and RMSEA should be less than.08 (Browne & Cudeck, 1993), **Comparative Fit Index** (CFI), **Normed Fit Index** (NFI), **Non-Normed Fit Index** (NNFI) - if CFI, NFI and NNFI are above.90, the model has a good fit (Hoyle, 1995). AMOS suggests and proposes changes to the model.

When the first model obtained by exploratory factor analysis was tested, satisfactory fit indices were not achieved. First of all, it was suggested that several items should be excluded because they were saturating on several factors at the same time. These items are: 23. Serbia provides quality health services to tourists, 30. Road transport infrastructure in Serbia is of high quality, 34. The atmosphere in Serbia as a tourist destination is pleasant/relaxing, 54. Information about Serbia as a tourist destination is easily available on the international market. There are also correlations between the factors of the competition model. After these changes, the model was restarted, and although the fit indices have visibly improved, a satisfactory fit index has not yet been achieved. The modification indices now suggested the exclusion of items 10. Serbia has a quality restaurant offer (quality of food and service in restaurants), 17. Serbia has a rich and quality offer of ski and mountain tourism, 18. Serbia has a rich and quality offer of rural tourism (rural tourism, agritourism...), 19. Serbia has a rich and quality offer of health, spa and wellness tourism, 11. There is a quality offer of amusement and theme parks in Serbia, 33. The local population in Serbia is hospitable, 29. I am ready to recommend other people to visit Serbia. After these modifications, the fit indices were significantly improved, however, the modification indices suggested some significant changes: it was suggested that items 21: Domestic food and cuisine in Serbia are of high quality and authentic, 61. The air in Serbia is polluted and 63. Waters in Serbia are polluted instead of belonging to the Quality of tourist services factor, move into the Natural and cultural resources factor. Also, the final modifications were related to the removal of items that saturated several factors at the same time - 9. Tourist information centers are available and of high quality, 16. Tourist products in Serbia enable tourists to stay longer at the destination, 32. Bicycle and pedestrian paths in Serbia are of high quality and adequately maintained, 49. Tourist destinations in Serbia are adequately supplied with electricity, 50. Supply of high-quality drinking water is provided at destinations in Serbia, 62. Noise in destinations in Serbia is very pronounced, 61. Air in Serbia is polluted and 63. Water in Serbia is polluted.

After these changes, a satisfactory fit model and the final structure of the model of competitiveness by foreign tourists have been achieved. The final model consists of four factors: **1. Natural and cultural heritage**, **2. Quality of tourist service**s, **3. Accessibility and technology**, and **4. Marketing and sustainability**. What can be noted is that the final model does not contain the Pollution factor, since all its items are excluded from the model, as suggested by the modification index.

The final fit indices are shown in Table 23.

The final model is shown in Table 24, consisting of the mentioned 4 factors and a total of 38 indicators.

Table 23. Fit indices of the tested model

Model	S–Bχ^2	df	χ^2/df	RMSEA	SRMR	CFI	NFI
1	1214,68	713	1,70	0,042 (0,038 – 0,046)	0,456	0,946	0,935

Table 24. Structure of the final model of competitiveness of tourist destinations (foreign tourists)

Factors and Items	Factor loading	Mean value	Std. Deviation
Natural and cultural resources (7 items), α =.871			
1. Serbia as a tourist destination has unique natural resources and beauty of the landscape	.721	4.19	0.960
2. Serbia as a tourist destination has unique cultural resources	.761	4.23	0.902
3. Serbia as a tourist destination has unique architectural characteristics (local architecture)	.738	3.94	1.014
4. The climate in Serbia is pleasant	.591	4.15	0.903
6. Serbia as a tourist destination has a rich tangible cultural heritage (tangible cultural heritage	.750	4.22	0.864
7. Serbia as a tourist destination has a rich intangible cultural heritage	.727	4.25	0.882
21. Homemade food and cuisine in Serbia is of high quality and authentic	.698	4.41	0.900
Quality of tourist services (7 items), α =.831			
8. Hotel accommodation capacities in Serbia are of high quality and diverse	.666	3.92	1.012
12. In Serbia there is a wide selection of complementary accommodation capacities (family houses, camps, Couchsurfing, etc.)	.596	3.78	1.077
13. Tourism activities in Serbia are of high quality and diverse	.674	3.79	1.025
15. Serbia has frequent and high-quality events (special events/festivals excluding business tourism events)	.654	4.14	0.973
20. The offer of foreign tour operators for visiting Serbia is rich and diverse	.567	3.74	1.079
36. In Serbia, there are adequate boards in English as well as menus in English in restaurants	.637	3.80	1.129

Factors and Items	Factor loading	Mean value	Std. Deviation
37. Local population and employees in tourism adequately use foreign languages in communication with tourists	.662	3.96	1.091
Accessibility and technology (7 items) α =.878			
24. In Serbia, Wi-Fi, Internet and telecommunications infrastructure are very accessible to tourists	.656	3.98	1.078
25. In Serbia, there are applications (internet and mobile) that support the tourist experience in the destination	.649	3.86	1.105
26. The application of modern information technologies and e-business in tourism in Serbia is in line with the trends in the tourism market.	.683	3.79	1.080
27. Serbia as a tourist destination is accessible (proximity of the destination in relation to the main markets, transport accessibility, etc.)	.733	3.91	0.977
28. Locations and attractions of importance for tourism are available to tourists	.752	3.98	0.938
29. Local tourist and traffic signage meets the needs of tourists	.736	3.75	1.060
31. Air transport infrastructure in Serbia is of high quality	.700	3.68	1.120
Marketing and sustainability (16 items), α =.934			
39. Certified sustainability programs / green (eco) certificates exist/are implemented in Serbia as a tourist destination	.673	3.43	1.132
40. Positioning Serbia as a tourist destination in the international market is effective	.749	3.59	1.068
41. Social networks (Facebook, Instagram, Twitter) are effectively used to support the marketing activities of Serbia as a tourist destination	.691	3.78	1.094
43. Travel companies monitor/research the satisfaction of their visitors/service users	.689	3.77	1.023
44. Tourism Companies in Serbia Develop and Promote Innovative Tourism Products	.691	3.71	1.016
45. Tourist products and services in Serbia are accessible to persons with disabilities	.596	3.53	1.168
46. In Serbia, products, facilities and activities in tourism produce a quality tourist experience	.743	3.98	0.973
47. Political values, the overall political situation and stability in Serbia are conducive to the development of tourism.	.584	3.39	1.222
48. The prices of tourist services offered at the destination (accommodation, transport prices and other elements of the offer of services in the destination) are favorable.	.584	3.99	0.968
51. There is a clear awareness of Serbia as a tourist destination on the international market	.672	3.67	1.114
52. Serbia is an attractive tourist destination	.619	4.10	0.993
53. The image and perception of Serbia in the market are positive	.686	3.89	1.046
55. Tourist information is easily accessible to tourists during their stay in Serbia	.714	4.03	0.967
56. Booking travel services and online booking of products and services are easy and reliable	.661	4.17	0.950
57. The brand of Serbia as a tourist destination is recognizable in the international tourism market	.637	3.72	1.100
60. There is adequate care for environmental protection in Serbia	.611	3.44	1.187

The first factor - **Natural and cultural resources (contains 7 items)** - refers to the tangible and intangible cultural heritage, as well as the natural values of Serbia as a tourist destination. This factor has proven to be the most consistent because its structure has remained very similar after the application of the model to different target groups.

The second factor - **the quality of the tourist offer (contains 7 items)** - includes items related to the quality of accommodation facilities, the offer of events, activities at the destination, the entire offer of foreign tour operators as well as the availability of services in English.

The third factor - **Accessibility and technology (contains 7 items)** - contains items related to the accessibility of Serbia as a destination, but also the accessibility of individual attractions and sites. This factor also contains items related to the availability of modern technologies at the destination, as well as various applications that facilitate the tourist experience.

The fourth factor - **Marketing and sustainability (contains 7 items)** is the most comprehensive and contains items related to eco-certification, environmental care, quality of experience, positioning, image, brand, and availability of information about Serbia as a tourist destination. This factor is of particular importance for tourists because it also contains items related to the monitoring of their satisfaction by service providers as well as the provision of innovative products, quality experience at reasonable prices.

When it comes to the assessment of individual factors by tourists, the mean values are shown in Table 25.

As with the previous target groups with which the research was conducted, it was confirmed that **natural and cultural resources are** the most important factor in Serbia's competitiveness as a tourist destination. Local food and cuisine are the best rated factor, followed by the rich material cultural heritage of Serbia. **The quality of the tourist offer and Accessibility and technology** are factors with the same ratings. When it comes to the quality of the tourist offer, the best rated item is the variety and quality of events, followed by hotel accommodation capacities and the use of foreign languages by the local population and employees in tourism. Within the factors Accessibility and technology, the accessibility of attractions and the availability of the Internet and telecommunications infrastructure are especially highly rated. Of the last factor, **Marketing and Sustainability**, which is also the worst rated by tourists, tourists express the greatest concern for political stability and safety and concern for the environment, while they highly rated items related to the attractiveness of the destination, the availability of tourist information and the ease of booking services.

Table 25. Mean values of assessment of individual factors of competitiveness of Serbia by tourists

Factor	Mean	Std. Deviation
Factor 1: Natural and Cultural Resources	4.21	0.692
Factor 2: Quality of the tourist offer	3.90	0.755
Factor 3: Accessibility and technology	3.90	0.787
Factor 4: Marketing and Sustainability	3.82	0.770

5.4 Research with foreign tour operators – testing the competitiveness model

The survey with foreign tour operators was conducted in March 2023 during the Berlin Tourism Fair (ITB Berlin https://www.itb.com/en/trade-show-brands/). On that occasion, 58 foreign tour operators were surveyed, which have Serbia as a tourist destination in their offer.

The aim of the research, as with the previous target groups, was to test the model of competitiveness of Serbia as a tourist destination and to form a model by which the competitiveness of Serbia can be assessed by foreign tour operators that offer Serbia as a tourist destination on the market. Respondents assessed the items of the competitiveness model by rating the degree of their agreement with the above statements on a scale from 1 to 5 (1 – disagree at all, 5 – strongly agree).

The results of the study are shown in Table 26.

Table 26. Results of application of the model on a sample of foreign tour operators

	Mean value	Std. Deviation
Natural and Cultural Resources		
1. Serbia as a tourist destination has unique natural resources and beauty of nature and landscape	4.28	0.874
2. As a tourist destination, Serbia has unique cultural resources	4.21	0.833
3. Serbia as a tourist destination has unique architectural features	4.07	0.792
4. The climate in Serbia is pleasant (climatic conditions suitable for tourism)	4.12	0.774
5. Tourism is well developed in protected natural areas of Serbia	3.59	0.937
6. Serbia as a tourist destination has a rich tangible cultural heritage	4.12	0.860
7. Serbia as a tourist destination has a rich intangible cultural heritage	4.36	0.718
Quality of the tourist offer		
8. Serbia has diverse and high-quality hotel accommodation capacities	3.78	0.937
9. Tourist information centers are accessible and of high quality	3.59	0.992
10. Serbia has a quality restaurant offer (quality of food and service in restaurants)	4.03	0.936
11. There is a quality offer of amusement and theme parks in Serbia	3.52	0.800
12. In Serbia there is a wide range of complementary accommodation capacities (family houses, camps, couchsurfing, etc.)	3.78	0.796
13. Tourism activities in Serbia are of high quality and diverse	3.62	0.834
14. There is a quality offer of nightlife and entertainment in Serbia (bars, discos, clubs, rafts, casinos, etc.)	4.21	0.987
15. Serbia has frequent and high-quality events (special events/festivals excluding business tourism events)	3.97	0.898
16. Tourist products in Serbia enable tourists to stay longer at the destination	3.67	0.893
17. Serbia has a rich and high-quality offer of ski and mountain tourism	3.59	0.918
18. Serbia has a rich and high-quality offer of rural tourism (rural tourism, agritourism...)	3.83	0.920
19. Serbia has a rich and high-quality offer of health, spa and wellness tourism	3.62	0.895
20. Serbia has adequate capacities for business tourism	3.74	0.828
21. The offer of foreign tour operators for visiting Serbia is rich and diverse	3.67	0.906
22. Local food and cuisine in Serbia are of high quality and authentic	4.21	0.874
23. The Tourist Organization of Serbia establishes adequate relations with tourism companies (travel agencies, tour operators, airlines, hotel chains, etc.)	3.67	0.913
24. Visa policy to enter the country is favorable	3.78	1.027
25. Serbia Provides Quality Health Services to Tourists	3.47	0.842
26. In Serbia, Wi-Fi, Internet and telecommunications infrastructure are very accessible to tourists	3.74	0.890
27. In Serbia, there are applications (internet and mobile) that support the tourist experience in the destination	3.82	0.826
Quality of infrastructure and accessibility		
28. The application of modern information technologies and e-business in tourism in Serbia is in line with the trends in the tourism market.	3.67	0.866
29. Serbia as a tourist destination is accessible (proximity of the destination in relation to the main markets, transport accessibility, etc.)	3.83	0.920
30. Locations and attractions of importance for tourism are available to tourists	3.90	0.912

	Mean value	Std. Deviation
31. Local tourist and traffic signage meets the needs of tourists	3.91	0.904
32. Road transport infrastructure in Serbia is of high quality	3.41	1.009
33. Air transport infrastructure in Serbia is of high quality	3.81	0.982
34. Bicycle and pedestrian paths in Serbia are of high quality and adequately maintained	3.48	0.903
37. Taxi services and public transport services in Serbia are of high quality and reliable	3.47	1.087
Marketing & Experience at the Destination		
35. The local population in Serbia is hospitable	4.19	0.945
36. The atmosphere in Serbia as a tourist destination is pleasant/relaxing	4.05	0.847
38. In Serbia, there are adequate boards in English as well as menus in English in restaurants	3.76	0.942
39. Local population and employees in tourism adequately use foreign languages in communication with tourists	3.81	0.805
40. The level of hygiene and cleanliness in Serbia is high	3.46	0.867
43. Social networks (Facebook, Instagram, Twitter) are effectively used to support the marketing activities of Serbia as a tourist destination.	3.72	0.894
44. The value for money ratio in terms of tourist experience in Serbia is positive	3.83	0.798
45. Travel companies monitor/research the satisfaction of their visitors/service users	3.74	0.870
46. Tourism Companies in Serbia Develop and Promote Innovative Tourism Products	3.38	0.895
47. Tourist products and services in Serbia are accessible to persons with disabilities	3.21	1.056
48. In Serbia, products, facilities and activities in tourism produce a quality tourist experience	3.72	0.901
49. Political relations between Serbia and the main issuing markets are favorable	3.43	0.975
50. Political values, the overall political situation and stability in Serbia are conducive to the development of tourism.	3.45	1.079
51. The prices of tourist services offered at the destination (accommodation, transport prices and other elements of the offer of services in the destination) are favorable.	3.78	0.956
52. There is a clear awareness of the international market of Serbia as a tourist destination	3.34	0.983
53. Serbia is an attractive tourist destination	3.91	1.048
54. The image and perception of Serbia in the market are positive	3.55	1.157
55. Information about Serbia as a tourist destination is easily available on the international market	3.64	0.968
56. Tourist information is easily accessible to tourists during their stay in Serbia	3.71	0.879
57. Booking travel services and online booking of products and services are easy and reliable	3.74	0.849
58. The brand of Serbia as a tourist destination is recognizable in the international tourism market	3.38	0.933
59. Experiences in Serbia as a tourist destination meet the needs and expectations of tourists	3.57	0.993
60. Tourists are ready to recommend Serbia as a destination to visit	3.78	0.974
Pollution and ecology		
62. The air in Serbia is polluted	3.69	0.922

	Mean value	Std. Deviation
63. Noise in destinations in Serbia is very pronounced	3.47	0.908
64. The waters in Serbia are polluted	3.43	0.993
41. Certified sustainability programs / green (eco) certificates exist/are implemented in Serbia as a tourist destination	3.68	0.929
61. There is adequate care for environmental protection in Serbia	3.47	1.151

The research has shown that foreign tour operators gave the best ratings **to Natural and Cultural Resources**, mostly to intangible cultural heritage and unique natural resources. The lowest rating was given to the development of tourism in protected natural areas. When it comes to the factor **Quality of the tourist offer**, quality nightlife, local food and restaurant offer are the best rated items by foreign tour operators. The lowest rated items are the quality health services provided to tourists, the availability of theme and amusement parks, as well as the quality and availability of information centers. Within the factor **Quality of infrastructure and accessibility, the** lowest rated items are related to road infrastructure and taxi services, and the best rated items are those related to the availability of tourist sites and attractions for tourists, as well as the adequacy of tourist and transport infrastructure. Within the factor Marketing **and experience at the destination**, The most valued items are related to the hospitality of the local population, the pleasant atmosphere at the destination, and the attractiveness of Serbia as a tourist destination. The lowest rated items within this factor are brand recognition, clear awareness of the destination, innovative tourism products as well as accessibility of tourist sites to people with disabilities. The last factor relates to **Pollution and Ecology**, and indicates that foreign tour operators are most concerned about air pollution as well as the weak existence of sustainability program certificates.

The results of this research conducted among foreign tour operators were published in the Proceedings of the VI Congress of Geographers of Serbia (Pavluković et al., 2024).

The conclusion of the research points to important factors that affect the competitiveness of Serbia as a tourist destination, looking at the perspectives of internal stakeholders, local residents and foreign tour operators, as well as tourists themselves. Natural and cultural resources stand out as the most important factor, recognized as extremely rich and with great potential for tourism development. Items related to the rich tangible and intangible cultural heritage and unique natural resources are highly rated by all target groups, which can be considered the key advantages of Serbia as a tourist destination.

However, the quality of tourism offer and infrastructure, as well as the situational framework of tourism development, are areas that require significant improvement, with low scores, especially in segments such as infrastructure, hygiene, political stability and support of the local population.

Shortcomings in segments such as marketing, visitor experience and environmental sustainability are also evident, providing a clear picture of areas that need improvement to better position Serbia on the tourist map. The survey also shows that there are differences in perception between internal and external stakeholders, highlighting the need for coordinated efforts by all relevant stakeholders to improve the tourism industry.

The conclusion of the research emphasizes the importance of further development of tourism in Serbia, with a special focus on improving the quality of offer and infrastructure, sustainable management, strengthening marketing and promotion, as well as improving the situational framework of tourism development, taking into account the recommendations and assessments of various stakeholders to achieve sustainable and comprehensive growth of the tourism sector.

5.5 Implementation of the TOURCOMSERBIA model in the countries of the competitive set

After the validation of Serbia's competitiveness model by internal stakeholders and testing of the model in practice, questionnaires were prepared to assess Serbia's competitiveness by internal stakeholders in the main competitive countries – Hungary, Croatia and Slovenia. The competitive set was confirmed by a survey of Serbia's internal stakeholders, as well as a survey with foreign tourists, who mostly cited these three countries.

Research in competitive countries was conducted at the following intervals:

- **Croatia** – March-June, 2023, 127 respondents were collected.
- **Slovenia** – May – September, 2023, 102 respondents were collected.
- **Hungary** – September-December, 2023, 65 respondents were collected.

The sample of internal stakeholders consisted of representatives of the public and private sectors, as well as academia, who represent key tourism actors in these countries. The distribution of the questionnaire was done electronically, based on pre-prepared databases of contacts of key stakeholders in these countries. The questionnaires have been translated into Hungarian, Croatian and Slovenian. The respondents were offered items of the final model of Serbia's competitiveness as a tourist destination, and they were asked to assess on a scale from 1 - I do not agree at all, to 5 - I completely agree, how accurate these statements are, in the context of Serbia as a tourist destination.

The results of the study, where all three countries were compared, are shown in Tables 27 and 28.

Table 27 also shows that competitors differ in their perception of Serbia's competitiveness factors as a tourist destination. Stakeholders from Croatia generally perceive Serbia's competitiveness much better compared to Slovenia and Hungary (the results for Hungary show the lowest mean values). In Croatia, Serbia's competitive advantage is considered to be **Marketing and Experience the most**, while the lowest rated factor is **Legal Frameworks and Sustainable Tourism Development**. When it comes to Slovenia, all factors of competitiveness are significantly lower compared to **Croatia** and do not exceed 4. **Natural and cultural resources are rated the lowest**, while other factors are quite evenly evaluated, with a slightly higher score for **Legal frameworks and sustainable development of tourism**. The key stakeholders of tourism in Hungary rated the competitiveness of Serbia as a tourist destination the lowest. Like Croatia, Hungary rated the **Legal Framework and Sustainable Development of Tourism** the lowest. The highest rated factor is the **quality of the tourist offer and infrastructure**.

When it comes to individual items within the factors, within the **Natural and Cultural Resources**, Croatia scored the best for **unique natural resources and the beauty of the landscape**, while the lowest rated item was **intangible cultural heritage**. When it comes to Slovenia, **the unique natural resources and beauty of the landscape** are also the best rated item, while stakeholders in Slovenia rated the **architectural features of the destination** the lowest. Stakeholders in Hungary rated the material, **cultural heritage and architectural values the best, while the unique** natural resources and the beauty of the landscape **were the lowest**. There is a significant difference in the perception of the Natural and Cultural Resources of Serbia as a competitive advantage by Hungary compared to Slovenia and Croatia.

Table 27. Descriptive statistics of factors of the competitiveness model applied in Croatia, Slovenia and Hungary

Factors	Croatia		Slovenia		Hungary	
	Mean value	Std. Dev.	Mean value	Std. Dev.	Mean value	Std. Dev.
Natural and Cultural Resources	4.07	0.642	3.61	0.593	3.58	0.662
The quality of the tourist offer and infrastructure	4.14	0.556	3.90	0.458	3.79	0.504
Legal frameworks and sustainable tourism development	3.94	0.682	3.99	0.429	3.31	0.619
Marketing & Experience	4.24	0.644	3.97	0.506	3.74	0.528

Table 28. Descriptive statistics of the competitiveness model applied in Croatia, Slovenia and Hungary (mean of responses to model items and standard deviation)

Factors and Items	Croatia		Slovenia		Hungary	
	Mean value	St. Dev.	Mean value	St. Dev.	Mean value	St. Dev.
Natural and Cultural Recourses (5 indicators)						
Serbia as a tourist destination has unique natural resources and beautiful landscapes	4.29	.760	3.74	0.717	3.05	0.974
As a tourist destination, Serbia has unique cultural resources	4.06	.752	3.64	0.768	3.68	0.82
Serbia as a tourist destination has unique architectural characteristics (local architecture)	4.07	.782	3.36	0.755	3.79	0.826
Serbia as a tourist destination has a rich tangible cultural heritage	4.04	.814	3.67	0.825	3.79	0.792
Serbia as a tourist destination has a rich intangible cultural heritage	3.86	.843	3.67	0.916	3.61	0.817
Quality of tourism offer and infrastructure (10 indicators)						
There is a wide range of accommodation facilities in Sri Lanka	4.59	.659	3.72	0.937	4.11	0.68
Tourist activities in Serbia are of high quality and diverse	4.46	.746	3.69	0.944	3.95	0.858
Locations and attractions of importance for tourism are accessible to tourists	4.35	.780	3.86	0.784	3.81	0.8
Local tourist and traffic signage meets the needs of tourism and tourists	4.23	.753	3.94	0.794	3.73	0.793
Road transport infrastructure in Serbia is of high quality	4.15	.909	4.1	0.682	3.65	0.851
The air transport infrastructure in Sri Lanka is of high quality	3.80	.876	3.35	1.105	3.73	0.756
Bicycle and pedestrian paths in Serbia are of high quality and adequately maintained	3.95	.942	4.15	0.75	3.92	0.696
In Serbia, there are adequate signs in English as well as menus in English in restaurants	4.13	.794	3.89	0.795	3.47	0.804
The level of hygiene and cleanliness in Serbia is high	4.04	.763	4.25	0.667	3.73	0.787
Tourism products and services in Serbia are accessible to people with disabilities	3.82	.824	4.05	0.619	3.54	0.758
Legal frameworks and sustainable tourism development (18 indicators)						
Tourism companies in Serbia have access to funds from the tourism development program	4.23	.828	3.96	0.744	3.4	0.821
There are adequate tax breaks for the tourist economy in Serbia	3.69	.913	3.85	0.837	3.13	1.038
Subsidies from the public sector for tourism in Serbia are adequate and available to all stakeholders	3.84	.807	3.96	0.716	3.02	0.991

Factors and Items	Croatia		Slovenia		Hungary	
	Mean value	St. Dev.	Mean value	St. Dev.	Mean value	St. Dev.
The existing tourism policy, planning and development of tourism are in line with the vision of Serbia as a tourist destination	4.10	.880	4.01	0.682	3.47	1.03
The population of Serbia supports the development of tourism	4.04	.907	4.02	0.66	3.32	0.811
The level and scope of public-private partnerships in tourism in Serbia are at a satisfactory level	3.88	.898	3.95	0.695	3.09	0.867
Key stakeholders in Serbia's tourism are involved in the decision-making process and long-term planning in tourism	3.87	.858	3.92	0.699	3.07	0.92
Local communities in Serbia are engaged in the production of food for the needs of tourism	3.66	.976	3.97	0.682	2.98	0.842
The private sector in tourism in Serbia recognizes the importance of sustainable tourism development	3.91	.877	4.12	0.679	3.41	0.781
The public sector in Serbia recognizes the importance of sustainable tourism development	3.88	.914	4.17	0.719	3.36	0.873
In Serbia, as a tourist destination, there are/are implemented certified sustainability programs / green (eco) certification	3.97	.872	4.23	0.628	3.57	0.85
Tourism companies monitor/examine the satisfaction of their visitors/service users	3.94	.911	3.94	0.729	3.58	0.766
Tourism companies in Serbia develop and promote innovative tourism products	4.02	.856	3.98	0.832	3.61	0.781
Tourism companies operate in accordance with ethical principles	3.95	.853	4.02	0.675	3.09	0.752
There are favorable conditions for the development of entrepreneurship in tourism in Serbia	3.98	.867	3.87	0.67	3.39	0.899
There are adequate education programs in tourism in Serbia	4.16	.750	3.82	0.825	3.45	0.958
The investment environment in Serbia is conducive to the development of tourism	4.01	.884	3.92	0.713	3.26	0.877
Political values, the overall political situation and stability in Serbia are favorable for the development of tourism.	4.03	.890	4.15	0.681	3.19	0.982
Marketing and experience (14 indicators)						
In Serbia, products, facilities and activities in tourism produce a quality tourist experience	4.11	.805	3.95	0.776	3.68	0.753
The National Tourism Organization of Serbia (TOS) clearly identifies Serbia's target markets as tourist destinations	4.02	.882	3.96	0.688	3.6	0.897
Serbia's positioning as a tourist destination in the international market is effective	4.28	.863	4.01	0.751	3.63	0.786

Factors and Items	Croatia		Slovenia		Hungary	
	Mean value	St. Dev.	Mean value	St. Dev.	Mean value	St. Dev.
The effects of marketing activities in Serbia are regularly monitored by TOS	4.02	.862	4.01	0.711	3.65	0.834
Social networks (Facebook, Instagram, Twitter) are effectively used to support the marketing activities of Serbia as a tourist destination.	4.09	.886	3.91	0.759	3.56	0.836
There is a clear awareness in the international market about Serbia as a tourist destination	4.26	.850	4	0.689	3.95	0.756
Sri Lanka is an attractive tourist destination	4.41	.755	3.88	0.708	3.86	0.78
The image and perception of Serbia in the market are positive	4.43	.813	4.14	0.675	3.62	0.916
Information about Serbia as a tourist destination is easily available on the international market	4.31	.812	4.03	0.652	3.71	0.789
Tourist information is easily accessible to tourists during their stay in Serbia	4.28	.763	3.98	0.771	3.67	0.851
Booking tourist services and online reservations of products and services are simple and reliable	4.17	.817	3.93	0.748	3.69	0.765
The brand of Serbia as a tourist destination is recognizable in the international tourism market	4.48	.777	3.93	0.679	3.84	0.751
Experiences and experiences in Serbia as a tourist destination correspond to the needs and expectations of tourists	4.20	.817	3.97	0.826	3.69	0.759
Tourists are ready to recommend Serbia as a destination to visit	4.25	.867	3.87	0.84	3.82	0.695

Within the factor **Quality of Tourist Offer and Infrastructure**, stakeholders in **Croatia** rated the best accommodation **capacities, diversity and quality of tourist activities and accessibility of locations and attractions in tourism**. They rated the air **transport infrastructure and accessibility of tourist products and services to persons with disabilities** the lowest. Stakeholders in Slovenia, within this factor, rated the best **The level of hygiene and cleanliness** and **the quality of bicycle and pedestrian paths**, while the lowest rated the **air transport infrastructure** and **the variety and quality of tourist activities**. Stakeholders in Hungary rated the choiceof **accommodation capacitiesthe best**, and the lowest **the existence of labels in English, as well as menus in English in restaurants** (Radojevic et al. 2024) and the **accessibility of tourist products and services to people with disabilities**.

Within the **Legal Framework and Sustainable Tourism Development factor**, stakeholders in Croatia rated the item that t**ourism companies in Serbia have access to funds from tourism development programs, the alignment of tourism policy with the vision of Serbia as a tourist destination, and the existence of adequate tourism education programs**. They rated the lowest was the existence **of adequate tax incentives for the tourism industry and the engagement of the local community in the production of food for the needs of tourism**. Stakeholders in Slovenia, within this factor, are **political stability, the implementation of certified sustainability programs / green (eco) certification, recognition of the importance of sustainable development by the public and private sectors**. The lowest rated items were the existence **of favorable conditions for the development of entrepreneurship in tourism and education programs**. When it comes to stakeholders from Hungary, this factor is rated quite low. The best rated, but still with low middle values, are the **implementation of**

certified sustainability programs / green (eco) certification, monitoring and testing of service user satisfaction by companies and the promotion of innovative tourism products by companies. The lowest rated items are the **engagement of the local community in the production of food for the needs of tourism, public-private partnerships, and participation in decision-making in tourism**.

Within the last factor, **Marketing and Experience**, Croatia rated the **image and perception of Serbia as a tourist destination, the brand of Serbia, the attractiveness of the destination and the availability of information about Serbia on the international market**. The lowest ratings were given to **the identification of target markets by NTO, and the use of social networks for marketing**. When it comes to Slovenia, they gave the best assessment of **the image and perception of Serbia as a tourist destination, and the availability of information about Serbia on the international market**. They rated the **readiness of tourists to recommend Serbia as a tourist destination** the lowest. Stakeholders from Hungary rated the best awareness **of Serbia as a tourist destination on the international market and the attractiveness of the destination**, and **the lowest effective use of social networks for destination marketing**. The items of this factor were rated the lowest by stakeholders from Hungary.

5.6 Comparative analysis of the tourism competitiveness of Serbia and its key competitors

Today, in today's global tourism market, competition between destinations is becoming more and more intense. For this reason, it is important to understand and analyze the tourism competitiveness of each country to identify its advantages and disadvantages compared to other destinations. Based on the conducted research, we will present a comparative analysis of Serbia's tourism competitiveness compared to its key competitors - Croatia, Slovenia and Hungary. Through this analysis, an insight is provided into the strengths and weaknesses of each country, which could serve as a basis for improving the tourist offer in each of them. This analysis is crucial for the development of tourism sector strategies and more efficient tourism management in the region.

Competitiveness results according to defined factors for 4 observed countries (Serbia, Croatia, Slovenia, Hungary)

Table 29 shows the results of competitiveness according to the defined factors for the 4 observed countries. Stakeholders in tourism in Serbia gave the highest score to the first factor: **Natural and cultural resources**, while compared to Serbia, stakeholders from Slovenia rate this factor as the one in which they have the most problems achieving adequate competitive-

Table 29. Competitiveness results by defined factors for the 4 observed countries

Factor	Serbia		Croatia		Slovenia		Hungary	
	Mean value	Std. Deviation	Mean value	Std. Deviation	Mean value	Std. Deviation	Mean value	Std. Deviation
Factor 1: Natural and Cultural Resources	4.32	.614	4.07	0.642	3.61	0.593	3.58	0.662
Factor 2: Quality of tourism offer and infrastructure	3.08	.798	4.14	0.556	3.90	0.458	3.79	0.504
Factor 3: Legal frameworks and sustainable tourism development	3.12	.788	3.94	0.682	3.99	0.429	3.31	0.619
Factor 4: Marketing and Experience	3.41	.790	4.24	0.644	3.97	0.506	3.74	0.528

Source: Author's calculation

ness (3.61) compared to other factors. An even weaker assessment of the competitiveness of this factor was given by stakeholders from Hungary (3.58), although This result is closer to the conclusion that the level of competitiveness is higher compared to our country, while Croatian stakeholders rated this factor with a high level of competitiveness compared to Serbia (4.07), although this is not the highest score looking at other factors from the research.

The quality of tourism offer and infrastructure was assessed by stakeholders in tourism in Serbia as the weakest factor of competitiveness among the observed factors (3.08). However, while stakeholders from Croatia assess this factor with a high level of competitiveness compared to our country, Hungarian (3.79) and Slovenian (3.90) stakeholders are of the opinion that although there is a higher level of competitiveness compared to our country, it is not with such a difference as they assessed in Croatia. Also, it should be noted here that this factor in Hungary was assessed as the strongest compared to Serbia, which shows that there is no significant comparative difference in the observed factors between Hungary and Serbia.

The legal framework and sustainable development of tourism is seen as a factor in which the level of competitiveness of Slovenia is the highest compared to Serbia according to the opinion of stakeholders from that country (3.99). On the other hand, despite the opinion that there is a high level of competitiveness compared to the level of Serbia, stakeholders in tourism in Croatia rated this factor with the lowest score (3.94) compared to other factors. This can be interpreted as the attitude of local stakeholders that there is definitely a room for improvement in this country. Stakeholders in Hungary have a similar attitude, which also rated this factor with the lowest score compared to other factors, although in their opinion there is still a higher level of competitiveness compared to the level at which Serbia is. In the analysis of individual factors, it will be clearer which factors have the greatest impact on the creation of a higher level of competitiveness in the observed countries compared to Serbia. Stakeholders in tourism in Serbia have assessed this factor with a low average score, indicating that further efforts are needed to improve these aspects.

Finally, the fourth factor **Marketing and experience** is seen by stakeholders from Croatia as an aspect where they have an extremely high level of competitiveness compared to the level at which Serbia is. Bearing in mind the results that Croatian tourism has been recording for years and the fact that this economic activity is one of the most important generators of the country's GDP, it is clear that a great contribution to this is made by the activities that make up this factor of competitiveness. Stakeholders from Slovenia (3.97) and Hungary (3.74), although this result is not at the level of difference as is the case with Croatia. On the other hand, with an average score of 3.5, the critical attitudes of stakeholders in Serbian tourism on the built awareness of Serbia on the global market, the positioning of Serbia as a tourist destination and the promotion of the Serbian brand are shown.

Part of the results of the comparative analysis of the competitiveness of tourism between Serbia and Croatia was presented at the international conference THI 2024 in Opatija (Croatia) (Pavluković et al., 2024b).

Assessment of individual competitiveness factors for 4 observed countries (Serbia, Croatia, Slovenia, Hungary)

An insight into Table 30 provides a clearer overview of the assessments of individual factors of competitiveness for the observed countries in relation to Serbia. As already mentioned, the Natural and Cultural Resources factor is the best rated factor of Serbia's competitiveness as a tourist destination, which indicates that cultural and natural resources are recognized as a great potential for the development of tourism in Serbia. Looking at individual factors, the factors of possession of rich tangible and intangible cultural heritage were best estimated (4.47). Comparing these factors with the assessments of stakeholders from a competitive set of countries, we can see that all stakeholders have the opinion that they have a certain degree of greater competitiveness compared to Serbia, but not as dominantly as it is the case with other factors. For example, Croatian stakeholders believe that their country is the least competitive in terms of intangible cultural heritage (3.86), while stakeholders from Hungary (3.61) and Slovenia (3.67) gave scores below 4, confirming a relatively low level of competitiveness compared to Serbia based on this factor. Also, although the unique natural resources and beauty of the landscape have been rated highly by domestic stakeholders, the key actors in Croatian tourism see this as the greatest competitiveness of their country in relation to Serbia when it comes to this group of factors (4.29). For comparison, stakers from Hungary notice a low level of competitiveness compared to our country in this segment (3.05), while stakeholders from Slovenia rate this factor only slightly better (3.74), which is also the highest score in this group of factors.

Bearing in mind that natural and cultural heritage, as tourist attractions, significantly raise the overall attractiveness of destinations, regions and countries, the importance of a serious approach in the analysis of these factors is clear. It is these factors that are the basis of the competitive advantage of each observed country, so it is not surprising that the attitude of the stakeholders is not surprising. When it comes to Serbia, natural and cultural attractions are an increasingly important part of the tourist product, which thus gains in uniqueness and differentiation. Observing the global market and its influences, it can be seen that globalization has influenced the intensification of the role of natural and cultural heritage, as a source of local identity, thus emphasizing, in the foreground, the "national" as a means of strengthening the image in the increasingly competitive tourism market. In a study conducted by Dugulan et al. (2010), among the countries of Central and Eastern Europe, it is assumed that these resources are not the most important factor in increasing the competitive advantage of tourist destinations, but the success of the transformation of resources into tourist attractions, which makes comparative advantages competitive advantages. Therefore, these scientists argue that the basis of competitive advantage is knowledge, that is, the ability to make the right and responsible decisions regarding natural and cultural heritage.

Starting from the position that the level of development of a destination is defined by determinants such as the quality of the tourist offer, infrastructural development, legal frameworks and sustainable development of tourism, as well as marketing and experience, it is clear the importance of continuous monitoring of the state of each factor. The biggest difference in comparison of Serbia with three competing countries is shown by individual factors from the second group of indicators - **the quality of the tourist offer and infrastructure**. Among the observed individual factors, stakeholders from Croatia see the highest level of competitiveness compared to Serbia in a wide choice of accommodation capacities (4.59), quality and diversity of tourist activities (4.46) and accessibility of tourist sites (4.35). Bearing in mind that these three indicators are the best rated by stakeholders in the tourism industry of Serbia in the observed group of factors, with scores below 4, it is observed that there is a large gap between the level of development and the quality of these aspects in Croatia and Serbia. Also, stakeholders from Hungary assess the wide choice of accommodation capacities as a factor by which they have the highest level of competitiveness compared to Serbia in the observed group of factors (4.11). Hungary has chosen a mixed path for the entry of international capital and at the same time paved the way for the development of its own and internationally relevant expertise in the hotel and tourism industry. In the Republic of Hungary, the national hotel companies "Danubius" and "Hungest hotels" were formed directly under the leadership of the state. Today, these companies act as regional factors, controlling almost half of the hotel accommodation capacity in the Republic of Hungary. Thus, with the role of foreign companies, especially in Budapest, space has been opened for the rapid growth of the hotel industry and domestic entrepreneurship in the tourism industry in general. Along with the development of domestic management and revenue growth, the state gradually abandoned its initial role as the main shareholder, leaving the companies in entrepreneurial hands. On the one hand, such an approach satisfied the national interest in creating strong and internationally competitive domestic factors, while at the same time, on the other hand, it allowed access to foreign capital, especially in sectors that do not depend directly on "Danubius" and "Hungest Hotels", i.e. where it was necessary to realize large investments. What makes Hungary stand out are the springs of thermal and healing water, as well as excellent geothermal conditions, and a quality and diverse tourist offer in the field of balneology. Hungary has realized the importance of developing this form of tourism and has improved it to the level that Serbia should strive for. According to the RS Tourism Development Strategy, 2016-2025, the Republic of Serbia invested only USD 560 million in the period from 1989 to 2014, while Hungary invested USD 2.7 billion in that period. According to the same strategy, Hungary is a leader in terms of religious tourism as well as business tourism. On the other hand, the stakeholders' assessments regarding the competitiveness of Hungary and Serbia are quite modest. The impression is that Hungarian stakeholders, through criticality, influence them to be as good as possible in reality and to achieve the best possible business results. High quality, strict control requirements, GMO-free agriculture and expertise are the main competitive advantages of Hungarian stakeholders in the market.

Croatian stakeholders point out that their competitive advantage, in relation to Serbia, is the local tourist and traffic signage (4.23), and Slovenia, the level of hygiene and cleanliness (4.25). Tourist signage is a type of traffic sign, which is used to direct tourists to tourist destinations or certain tourist attractions. They represent a type of traffic sign and therefore have a clearly defined content, shape and color, as well as the manner and place of installation. Therefore, such signage must be informative, unambiguous and goal-oriented, that is, that it is useful to users so that they can reach the goal in the simplest way, and at the same time learn something about the tourist attraction they are heading to. As far as Serbia is concerned, stakeholders agree on the importance of tourist signage and that it is necessary to work on promotion, infrastructure construction, digitalization and additional incentives for improvement. Given the relatively low rating of stakeholders from Serbia (3.03) for competitiveness in the field of local traffic and tourist signage, the focus of work in the coming period should be on tourist signage, so that all tourist attractions are even better marked and so that tourists, especially foreigners, can find and visit them more easily. In parallel with tourist signage, it is necessary to establish Android applications, all to make it easier for tourists to find their way around the area, as well as to make it easier for stakeholders to network and cooperate.

When it comes to the sustainable development of tourism, there are also some discrepancies when it comes to the responses of stakeholders. Stakeholders from Serbia rated these parameters with very low scores, while stakeholders from Croatia and Slovenia consider these parameters to be their competitive advantages. Namely, Croatian stakeholders rated the access to funds from the tourism development program with an extremely high value (4.23), while stakeholders from Serbia gave one of the lowest scores for these parameters (2.77). Bearing in mind the importance of projects aimed at strengthening Serbia's comparative tourist advantages and transforming them into competitive advantages of Serbia, it should be emphasized that EU funds are very important and that the possibility of applying for them gives Serbia the necessary push-up effect for development. The EU is the largest donor in the Republic of Serbia, and since 2001, through several different funds, more than 3 billion grants have been provided to support various reforms. Cross-border cooperation programs under the IPA Instruments for Pre-Accession Assistance encourage cooperation between border territories (cross-border cooperation) in addressing issues of common interest, such as tourism. Given the border position of Serbia and Croatia, mutual cooperation with the aim of developing tourism in both countries is desirable and sustainable. A good example of the fact that funds can be transferred from one country to another is the development of the "Danube Cycling Route," which stretches in the direction of Croatia-Serbia and is directly related to the EU Strategy for the Danube Region (EUSDR). Therefore, stakeholders from both countries should rely more on each other in the future and apply for various funds announced by the EU through joint action. Back in 1973, the "Pro Natur" campaign was carried out in Hungary, which even then emphasized environmental protection and sustainability as the main foundations of tourism development. It is a deserted Hortobađ, in many ways similar to a typical Vojvodina level, whose main motifs are đeram, salaši (huts), čikoši (shepherds), traditional gastronomy, wine and tamburitza players. It was the first and largest (52,000 ha) National Park of Hungary, which has only expanded since then (82,000 ha). What we as a country could look up to, when it comes to desolate Hortobađ, is developed rural and farmhouse tourism. Hungary has improved the tourist offer of the deserted Hortobaß so much that in 1999 the United Nations declared Hortobağ National Park a natural biosphere reserve that serves to preserve both natural and social values (Moldova, O., 2005). A large number of events are held in Hortobadje throughout the year with the aim of promoting nature protection, preserving old crafts and nurturing traditions.

According to the scientist Petrovic et al. (2018), who explored the attitudes of the local population towards the development of tourism in Slovenia and Serbia, as well as Đukić et al. (2014), it can be concluded that the population of Croatia and Slovenia supports the development of tourism, and their positive attitudes stem from various forms of education and workshops to raise awareness of the importance of tourism development for the development of local communities, especially rural ones (Ignjatović et al., 2023). Due to the increase in awareness of the importance of tourism development, the population is ready to invest its resources in the development of tourism and help transform rural areas into tourist rural destinations (Vujko, Delić-Jović, 2021), while respecting all the principles of sustainability indicators (Panić et al. 2024; Nastić et al., 2024). Interested local population is one of the most important links in the process of transforming comparative into competitive advantages of destinations (Dwyer, Kim, 2003; Vujko et al., 2021). Bearing this in mind, the views of Croatia's stakeholders are also emphasized, according to which the competitive advantage of this country in relation to Serbia is the existence of adequate education programs (4.16). As far as some other parameters are concerned, the attitudes of stakeholders from Slovenia regarding the recognition of the importance of sustainable tourism development, both by the private sector (4.12) and by the public sector (4.17), are particularly emphasized. The development of tourism in accordance with all the principles of sustainability is imperative in the development of tourism and the attitude of stakeholders in terms of competitiveness is very important, when it comes to these parameters.

The parameters of the factors Marketing and experience were rated with the highest scores by stakeholders from Croatia. Stakeholders from Croatia believe that Croatia's biggest competitive advantage is that it is an attractive tourist destination (4.41). Research conducted by Radukić and colleagues (2019) and Konečný (2019), show that the reason for this is that Croatia stands out with a highly developed awareness of the importance of tourism and invests great efforts in its development. The image of destinations is essential for the development of tourism in them because potential tourists decide on certain destinations based on the entire tourist offer in them and the events that are organized in the destinations, thus influencing the richness of experiences and experiences. Bearing in mind the attitude of Croatian and Slovenian stakeholders in terms of marketing and tourist experience, it is clear that one of the basic tasks of the competitive strategy of tourist destinations is to provide all relevant information about the overall tourist offer of the destination, to promote loyalty, to build, maintain and improve the image of the tourist destination, by which the destination is presented on the tourist market, as well as to correct incorrect and incomplete information about the destination. It was the high scores of stakeholders from Croatia that pointed to the necessity of establishing contact between the tourist offer (stakeholders), the local population and decision-makers at all levels, with the aim of achieving the best possible competitive advantage and encouraging tourists to travel there.

Table 30. Assessment of individual factors of competitiveness for the 4 countries under review

Factors and Items	Serbia		Croatia		Slovenia		Hungary	
	Mean value	Std. Deviation	Mean value	Std. Deviation	Mean value	Std. Deviation	Mean value	Std. Deviation
Natural and Cultural Resources (5 indicators)								
Unique natural resources and the beauty of the landscape	4.44	.773	4.29	0.760	3.74	0.717	3.05	0.974
Unique Cultural Resources	4.40	.768	4.06	0.752	3.64	0.768	3.68	0.82
Unique architectural features (local architecture)	3.83	1.049	4.07	0.782	3.36	0.755	3.79	0.826
Rich Tangible Cultural Heritage	4.47	.716	4.04	0.814	3.67	0.825	3.79	0.792
Rich Intangible Cultural Heritage	4.47	.722	3.86	0.843	3.67	0.916	3.61	0.817
Quality of tourism and infrastructure (10 indicators)								
A wide range of accommodation facilities	3.25	1.030	4.59	0.659	3.72	0.937	4.11	0.68
Tourist activities are of high quality and diverse	3.43	1.035	4.46	0.746	3.69	0.944	3.95	0.858
Locations and attractions of importance for tourism are accessible to tourists	3.51	1.032	4.35	0.780	3.86	0.784	3.81	0.8
Local Tourist and Traffic Signage	3.03	1.129	4.23	0.753	3.94	0.794	3.73	0.793

Factors and Items	Serbia		Croatia		Slovenia		Hungary	
	Mean value	Std. Deviation	Mean value	Std. Deviation	Mean value	Std. Deviation	Mean value	Std. Deviation
Road Transport Infrastructure	2.87	1.226	4.15	0.909	4.10	0.682	3.65	0.851
Air Transport Infrastructure	3.30	1.169	3.80	0.876	3.35	1.105	3.73	0.756
Cycling and walking trails	2.65	1.068	3.95	0.942	4.15	0.75	3.92	0.696
Appropriate labels in English as well as menus in English in restaurants	3.20	1.097	4.13	0.794	3.89	0.795	3.47	0.804
The level of hygiene and cleanliness is high	2.87	1.060	4.04	0.763	4.25	0.667	3.73	0.787
Tourism products and services are accessible to people with disabilities	2.65	1.175	3.82	0.824	4.05	0.619	3.54	0.758
Legal frameworks and sustainable tourism development (18 indicators)								
Tourism companies have access to funds from the tourism development program	2.77	.994	4.23	0.828	3.96	0.744	3.4	0.821
There are adequate tax breaks for the tourist economy	3.10	1.030	3.69	0.913	3.85	0.837	3.13	1.038
Subsidies from the public sector for tourism are adequate and available to all stakeholders	2.83	1.0803	3.84	0.807	3.96	0.716	3.02	0.991
The existing tourism policy, planning and development of tourism are in line with the vision of the country as a tourist destination	2.99	1.090	4.10	0.880	4.01	0.682	3.47	1.03
The population supports the development of tourism	3.72	1.003	4.04	0.907	4.02	0.66	3.32	0.811
The level and scope of public-private partnerships in tourism are at a satisfactory level	2.96	1.016	3.88	0.898	3.95	0.695	3.09	0.867
Key actors in the country's tourism are involved in the decision-making process and long-term planning in tourism	2.90	1.110	3.87	0.858	3.92	0.699	3.07	0.92
Local communities are engaged in the production of food for the needs of tourism	3.21	1.041	3.66	0.976	3.97	0.682	2.98	0.842
The private sector in tourism recognizes the importance of sustainable tourism development	3.15	1.162	3.91	0.877	4.12	0.679	3.41	0.781

Factors and Items	Serbia		Croatia		Slovenia		Hungary	
	Mean value	Std. Deviation	Mean value	Std. Deviation	Mean value	Std. Deviation	Mean value	Std. Deviation
The public sector recognizes the importance of sustainable tourism development	3.01	1.182	3.88	0.914	4.17	0.719	3.36	0.873
There are/are certified sustainability programs / green (eco) certification	2.92	1.067	3.97	0.872	4.23	0.628	3.57	0.85
Tourism companies monitor/examine the satisfaction of their visitors/service users	3.18	1.074	3.94	0.911	3.94	0.729	3.58	0.766
Tourism companies develop and promote innovative tourism products	3.18	1.081	4.02	0.856	3.98	0.832	3.61	0.781
Tourism companies operate in accordance with ethical principles	3.33	1.000	3.95	0.853	4.02	0.675	3.09	0.752
Favorable conditions for the development of entrepreneurship in tourism	3.32	1.165	3.98	0.867	3.87	0.67	3.39	0.899
Adequate education programs in tourism	3.13	1.128	4.16	0.750	3.82	0.825	3.45	0.958
The investment environment is conducive to the development of tourism	3.19	1.232	4.01	0.884	3.92	0.713	3.26	0.877
Political values, the overall political situation and stability in the country are favorable for the development of tourism.	2.77	.994	4.03	0.890	4.15	0.681	3.19	0.982
Marketing & Experience (14 indicators)								
Products, facilities and activities in tourism produce a quality tourist experience	3.54	.953	4.11	0.805	3.95	0.776	3.68	0.753
The DMO clearly identifies the target markets	3.30	1.037	4.02	0.882	3.96	0.688	3.6	0.897
Positioning the country as a tourist destination in the international market is effective	3.06	1.090	4.28	0.863	4.01	0.751	3.63	0.786
The effects of marketing activities are regularly monitored by the national DMO	3.31	1.062	4.02	0.862	4.01	0.711	3.65	0.834
Social media is effectively used to support the marketing activities of the country as a tourist destination	3.58	1.102	4.09	0.886	3.91	0.759	3.56	0.836

Factors and Items	Serbia		Croatia		Slovenia		Hungary	
	Mean value	Std. Deviation	Mean value	Std. Deviation	Mean value	Std. Deviation	Mean value	Std. Deviation
There is a clear awareness in the international market of the country as a tourist destination	2.97	1.125	4.26	0.850	4	0.689	3.95	0.756
An attractive tourist destination	3.85	1.052	4.41	0.755	3.88	0.708	3.86	0.78
The image and perception of the country in the market are positive	3.28	1.106	4.43	0.813	4.14	0.675	3.62	0.916
Information about the tourist destination is easily available on the international market	3.37	1.089	4.31	0.812	4.03	0.652	3.71	0.789
Tourist information is easily accessible to tourists during their stay in the country	3.44	1.099	4.28	0.763	3.98	0.771	3.67	0.851
Booking tourist services and online reservations of products and services are simple and reliable	3.66	1.033	4.17	0.817	3.93	0.748	3.69	0.765
The brand of the country as a tourist destination is recognizable in the international tourism market	3.11	1.128	4.48	0.777	3.93	0.679	3.84	0.751
Experiences and experiences in the country correspond to the needs and expectations of tourists	3.57	.936	4.20	0.817	3.97	0.826	3.69	0.759
Tourists are ready to recommend the country as a destination to visit	3.76	.900	4.25	0.867	3.87	0.84	3.82	0.695

Source : Author's calculation

The analysis shows that natural and cultural resources received the highest marks in Serbia's tourism, while the quality of the tourist offer and infrastructure was assessed as the weakest factor of competitiveness. Croatian stakeholders in tourism rate marketing and experience as an aspect with high competitiveness compared to Serbia, while Slovenian and Hungarian stakeholders also gave high marks to this factor, but not by as much difference as Croatia. Legal frameworks and sustainable tourism development were rated as the highest factor of competitiveness in Slovenia compared to Serbia, while Croatian and Hungarian stakeholders rated this factor as the least competitive, indicating the need for improvement in these countries. These results provide insight into the key factors influencing the competitiveness of tourism among countries and indicate the need for further efforts to improve the competitiveness of Serbian tourism in relation to competing destinations.

6 GUIDELINES AND RECOMMENDATIONS FOR ACHIEVING SERBIA'S COMPETITIVE ADVANTAGE AS A TOURIST DESTINATION

Based on the results of work packages 3 and 4 (created the TOURCOMSERBIA model, and then tested in Serbia and the countries of the competitive set), in work package 5, conclusions were made on the competitiveness of Serbia as a tourist destination and guidelines and recommendations were created for continuous measurement of Serbia's competitiveness, improvement of Serbia's competitive position as a tourist destination and improvement of sustainable tourism. This document will be presented to decision-makers, representatives of the tourism industry, experts, academia and other stakeholders at a panel discussion in October 2024 in Belgrade, as well as at conferences and similar events attended by project team members, on the project website and social networks, as well as in national, regional and local media.

6.1 Recommendations

6.1.1 Infrastructure development

The modernization and expansion of transport networks within Serbia will undoubtedly improve accessibility and connectivity with major tourist destinations, both domestically and internationally.

A critical area for investment is **road infrastructure**. The expansion and modernization of highways, which are currently underway, will significantly improve access to Serbia from neighboring countries and improve connectivity with key European roads. In addition, the modernization of existing roads, especially in rural areas and around popular tourist destinations, will make it easier for visitors to reach their destinations, promoting travel to all corners of the country.

Ongoing investment in high-speed rail lines connecting major Serbian cities and international destinations will provide tourists with faster and more affordable travel options. The modernization of existing rail lines and stations will further enhance the overall travel experience, ensuring comfort and reliability for passengers. The expansion and improvement of regional rail connections will increase accessibility to smaller towns and tourist attractions, which will benefit both domestic and international visitors.

The construction of the high-speed railway from Belgrade to Subotica and Budapest (for speeds up to 200 km per hour) began in August 2017.

The first section from Belgrade to Novi Sad was completed and opened to traffic in March 2022. Immediately after that, works began on the second section from Novi Sad to Subotica. The section from Novi Sad to Vrbas was completed in May 2024 but has not yet been fully tested and put into operation. Works on the section from Vrbas through Bačka Topola to Subotica are well underway and it is planned that the entire section will be completed by September 2024. From September to December 2024, various tests are planned, and the opening of the railway from Belgrade through Novi Sad to Subotica is planned for December 2024. By that date, it was planned that the entire railway from Belgrade to Budapest would be opened to traffic, but due to delays in works on the section from Budapest to Kelebija, i.e. the border with Serbia, it is planned that the railway will be opened to traffic in 2025.

Next year, it is planned to overhaul the railway from Ruma through Sremska Mitrovica and Sid to the border with Croatia (for speeds up to 160 km per hour). The plan is also to overhaul and electrify the Pancevo-Vršac-State Border with Romania railway, as well as the Pancevo-Zrenjanin-Kikinda-State Border with Romania railway, with a branch from Banatski Miloševo through Senta to Subotica. This year, the long-awaited works on the construction of a new electrified railway Nis-Dimitrovgrad-State Border with Bulgaria began, which will be completed in three years, i.e. by the end of 2027. Works on the high-speed railway (up to 200 km per hour) from Belgrade to Nis are expected to begin this year. The works would last five years. A memorandum was also signed between Serbia and North Macedonia, in which it is emphasized that a project for the reconstruction of the Nis-Skopje railway should be done as soon as possible.

This year, the construction of a new electrified double-track railway from Zemunsko Polje to the Nikola Tesla Airport and the future National Stadium near Surčin is also expected to begin. The railway will be completed by 2027 when the opening of the international exhibition EXPO 2027 is planned. This railway will provide a direct railway line that will connect Belgrade Airport with the center of Belgrade.

Airports are the gateways for international tourism, and the expansion and modernization of the airports in Belgrade and Nis should host an increase in passenger traffic and provide improved services. Increasing the connectivity of flights to and from Serbia will improve connectivity with key international markets, which will make the country more accessible to tourists from all over the world. In addition, the improvement of land transport to and from the airport, including public transport options (*for example, the construction of a new suburban railway line, which will connect Belgrade Airport with both the city and the EXPO 2027 site*), simplifies travel for tourists, ensuring a smooth transition from arrival to their final destinations.

The development of integrated public transport systems within cities will make it easier for tourists to navigate and explore urban areas. The expansion of bus services and ***the introduction of modern ticketing systems*** with contactless payment options will enhance the convenience and overall travel experience for both local travelers and tourists. *For example, the construction of the Belgrade metro will be an important factor in increasing the competitiveness of this destination.* The implementation of smart ***traffic management systems*** could also play a vital role in reducing congestion and optimizing travel times, providing a smooth and more efficient experience for all road users. This is in line with the further promotion of community-driven navigation apps (e.g., Waze and Yandex) for tourism purposes.

By prioritizing infrastructure modernization, Serbia should unlock its full tourism potential, attract more visitors and boost economic growth through the tourism sector.

6.1.2 Promotion of sustainable tourism development

In order to attract eco-conscious tourists and preserve the natural and cultural heritage of Serbia, the following recommendations can be implemented:

Developing and implementing sustainable tourism standards - *Certification programs* More efforts should be made to establish a certification program for tourism businesses (hotels, tour operators, etc.) that adhere to sustainable practices such as energy efficiency, waste reduction, water consumption reduction, and more. For example, the Ministry of Tourism and Youth of the Republic of Serbia has joined as a member of the Global Sustainable Tourism Council (GSTC).

Hotel IN has received the international Green Key certificate, and the Courtyard by Marriott Hotel is in the process of certification, which shows the interest of the hotel industry in this topic, and at the same time these are good examples of commitment to environmental responsibility through the implementation of energy-efficient systems, the use of renewable energy sources, efficient waste management and the promotion of sustainable tourism.

Updating regulations and incentives. Implementing regulations that encourage sustainable practices and provide incentives such as tax breaks or grants for businesses that meet the criteria.

Promoting education and awareness of sustainable development. Launching campaigns that highlight Serbia's commitment to sustainable tourism and educating both tourists and locals about responsible travel practices should be a priority. Serbia should offer new training programs for tourism professionals to teach them the knowledge and skills needed to implement sustainable practices.

Conservation of natural areas and biodiversity. Strengthening the management and protection of national parks and other protected areas in order to preserve biodiversity and ecological balance is essential, given that Serbia's natural resources are a competitive advantage compared to, for example, Hungary.

Preservation of cultural heritage. Strategic investment in the restoration and preservation of historical sites, cultural landscapes and traditional crafts is crucial for the preservation of Serbia's rich cultural heritage. Investments to date have already proven effective in Serbia, and additional investments are needed, especially in the protection and promotion of intangible cultural heritage and cultural-thematic routes (currently 9 routes certified by the Council of Europe pass through Serbia). Encouraging cultural tourism that benefits local communities and promotes traditional practices and knowledge is important.

The existing Tourism Development Strategy in the Republic of Serbia until 2025 recognizes cultural heritage as one of the eleven tourist products of special importance, and in almost all priority destinations, cultural heritage stands out among the key values (attractions).

Supporting local communities. Serbia should promote community-based tourism initiatives that involve local groups in tourism planning and development, to ensure that they benefit and generate revenues from tourism. It should encourage tourists to buy local products and services to support the local economy and preserve traditional crafts.

Encouraging sustainable transport is closely related to the previous Recommendation on improving infrastructure. Serbia should improve public transport options to and from tourist destinations, reducing reliance on the use of private vehicles. It is recommended to promote cycling, walking and other environmentally friendly modes of transport over short distances.

Systematic monitoring and evaluation. Serbia should regularly collect data on the environmental and social impact of tourism activities in order to identify areas for improvement. It should continuously adapt its policies and practices based on data monitoring and stakeholder feedback.

6.1.3 Improving destination marketing

Serbia should strive to raise awareness of Serbia as a tourist destination, both domestically and internationally, and highlight its unique attractions and experiences.

Tourism marketing can be significantly enhanced by embracing new approaches. One such approach is to focus on personalized *storytelling*, which goes beyond generic advertising and instead emphasizes the individual experience. Partnering with micro-influencers who have a genuine connection to Serbia enables authentic narratives that resonate with niche markets. Encouraging tourists to share their own stories and photos on social media platforms further enhances This personalization, creating a sense of community and excitement about visiting Serbia. Also, the arrival of immersive technologies such as virtual and augmented reality can attract potential visitors to Serbia, giving them a better insight into the experiences that await them. Another innovative approach is marketing experience, which goes beyond traditional advertising to create memorable and interactive encounters with Serbian culture. Organizing presentations in major cities around the world, showing Serbian food, music and traditions, can cause interest in the destination. Cooperation with international brands or organizations can further raise the profile of Serbia, creating unique events or products that resonate with a global audience.

Data-driven marketing offers a powerful tool for reaching the right audience with the right message. By using data analytics, tourism organizations can identify potential tourists based on their interests and online behavior, tailoring advertisements and recommendations accordingly. Retargeting campaigns can effectively re-engage users who have previously shown interest in Serbia, which made them interested in taking the next step and booking a trip.

The use of technology is of key importance for Serbia. Developing user-friendly mobile apps that provide comprehensive information about attractions, transportation, events, and local businesses can significantly improve the visitor experience. The implementation of chatbots on websites and social media platforms enables instant interaction and personalized travel recommendations for restaurateurs according to the needs of modern tourists.

Bearing in mind the previously presented, as well as taking into account the technical needs of modern communication channels for the content and quality of photographs used (especially the qualitative needs in the context of transformations from landscape photography to communicating concrete experience), it is necessary to improve the existing and additionally raise the quality of the database of photographs and video materials at the level of national – regional – local tourist organization. To synchronize and improve marketing activities on the domestic and international markets, it is necessary to better coordinate activities at the mentioned level – TOS – RTO – LTO. Additional attention should be paid to the selection of priority editions of printed promotional materials in the direction of further improvement of content from factual to emotional, as well as in the direction of reducing physical printed material, bearing in mind the shortcomings, inflexibility and obsolescence that is achieved in a very short period of time (especially materials distributed at the largest fair events in the world). Intensification of cooperation with PR agencies (representative offices) in priority markets with clearly defined parameters for measuring the results of activities. To achieve a synergistic effect of promotional activities, it is necessary to improve cooperation with the tourism industry at the local and regional level.

6.1.4 Encouraging regional cooperation

The guidelines for the development of regional cooperation in tourism should include a number of steps in order to ensure an effective partnership between the two countries.

The first step is **to identify potential regional partners**. Serbia should establish open communication and regular meetings with neighboring destinations and tourism organizations to create a basis for cooperation.

A key next step is **to consider the establishment of a regional tourism alliance** to coordinate and implement cooperation. The primary purpose of this alliance would be to develop joint tourism products. This would be achieved by analyzing regional attractions and resources to create themed routes or packages spanning multiple destinations.

In addition, it is important **to establish common standards** for service delivery to ensure a consistent experience for tourists. Also, joint branding and marketing material should be created to promote regional offerings.

Facilitation of cooperation can be achieved through regular meetings and communication channels for all regional partners. This includes the exchange of best practices and knowledge in the field of destination management, as well as the identification of common candidates and projects for grant programs and financing of regional tourism projects. This practice also entails constantly looking for new ways to improve cooperation and improve the tourist offer in the region.

A good starting point for this can be the Open Balkans initiative, thanks to which the movement of people, goods and capital between Serbia, North Macedonia and Albania has been enabled. By removing barriers that hinder trade and free movement of people and enabling the use of electronic services within the regional initiative, conditions are created for intensifying cooperation in the field of tourism (creating a regional tourist offer, joint appearance in distant markets, solving the challenge of labor shortage, etc.). This can be a good way to involve other regional partners and countries in the immediate vicinity.

6.1.5 Development of public-private partnership (PPP)

PPP recommendations:

Serbia needs to identify common goals and objectives of the PPP. In particular, Serbia needs to clearly define the common objectives of the partnership, focusing on areas where both sectors can contribute and benefit, such as infrastructure development, marketing and promotion, or sustainable tourism initiatives.

The Impact of a Stimulating Legal and Regulatory Framework. Establish clear guidelines and regulations for PPP in the tourism sector, outlining the roles and responsibilities of each partner, risk sharing mechanisms and dispute resolution processes.

Promotion of a transparent and efficient procurement process. The tourism sector should ensure participation in a fair and competitive selection process of private partners, based on their expertise, experience and financial capacity.

Establishing a clear governance structure. More efforts should be made to create a joint governance body that includes representatives of both sectors to oversee the implementation and management of PPP projects, ensuring transparency and accountability.

Development opportunities for Destination Management Organizations (DMOs) and Destination Management Companies (DMCs). Serbia should find an effective way to successfully integrate the DMO and DMC.

6.1.6 Increasing the safety and security of tourists

Creating a safe environment for tourists is crucial to instill confidence in potential visitors and ensure a positive experience in Serbia. Recommendations to improve the safety and security of tourists:

Increase the presence and visibility of the police. Increasing patrols, especially in tourist centres, public transport hubs and at major events is important. Consideration should be given to setting up a dedicated tourist police unit to assist visitors and address their concerns.

Improving the system for responding to emergencies. It is necessary to provide a functional emergency line with multilingual operators who are available around the clock.

Implement measures to combat petty crime, such as pickpocketing and fraud, through increased patrols and awareness-raising campaigns. Concerns about organised crime and violence related to high-profile sporting events need to be addressed through targeted policing and preventive measures. Furthermore, the safety of women passengers should be ensured by providing information on safe transport options, Taxis for women only.

Monitoring and evaluation. Regularly collect data on crime rates and tourism experiences to identify trends and areas for improvement. Conduct surveys and collect feedback from tourists to assess their perception of safety and security in Serbia.

6.1.7 Tourism research and data analysis

To maximize the potential of Serbia's tourism industry, it is essential to prioritize comprehensive research and data analysis. This involves collecting a wide range of data, including feedback from tourism surveys, online reviews and social media posts, netnography, as well as industry data on occupancy rates and booking patterns.

By using advanced data analysis techniques, Serbia can gain valuable insights into its target market. This includes segmenting tourists based on their demographics, interests, and travel behavior, as well as tracking changes in visitor numbers, spending, and preferences over time. The analysis of the performance of competing destinations also helps to identify Serbia's strengths and weaknesses in the tourism market.

These insights can then be used to develop targeted strategies that address the specific needs and preferences of visitors. New tourism products and experiences can be designed to appeal to identified target markets, while marketing and promotional campaigns can be tailored to cater to different segments, highlighting unique points of sale and addressing specific concerns. In addition, pricing and distribution strategies can be optimized based on market demand and competitor analysis.

To ensure continuous **improvement, establishing key performance indicators (KPIs)** to measure the success of tourism initiatives and regularly reviewing data and strategies are crucial.

It is important to take care of data privacy. Ensuring compliance with data protection regulations when collecting and analysing personal information is of the utmost importance. In addition, priority must be given to the accuracy and reliability of the data source. Employing qualified analysts to interpret data and translate findings into practical recommendations is critical to making informed decisions that will drive the growth of Serbia's tourism sector.

6.2 Guidelines for the implementation of recommendations

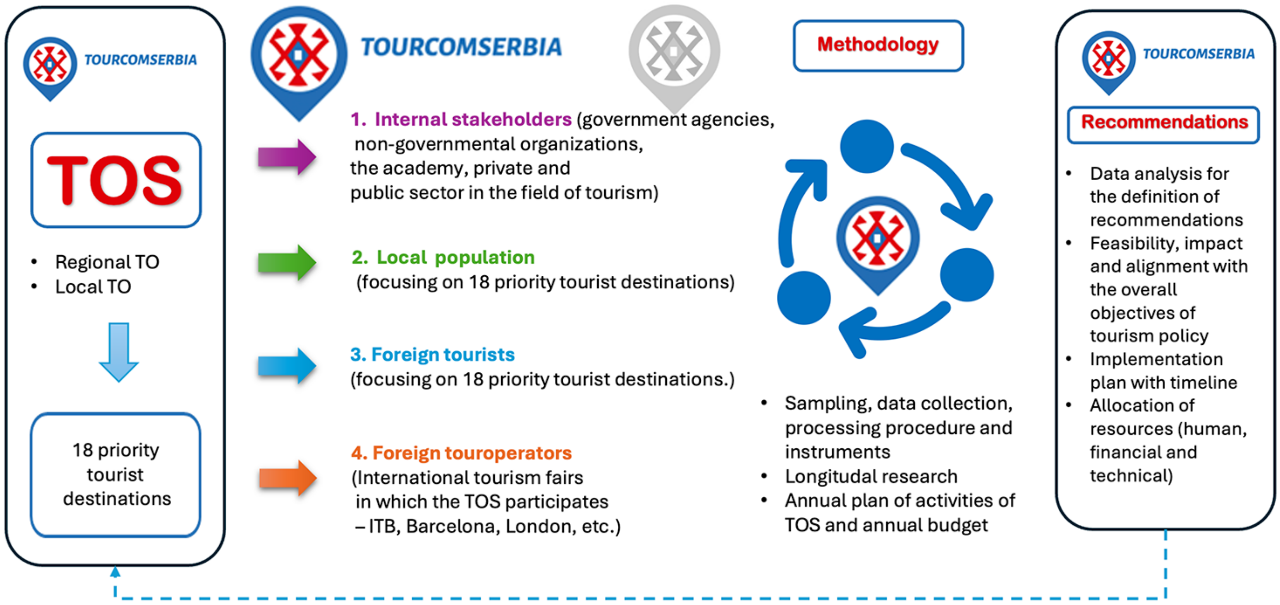
It is recommended that the implementation of the TOURCOMSERBIA model is carried out through the National Tourism Organization of Serbia – TOS. In cooperation with regional and local tourism organizations (it is recommended to focus on 18 priority tourist destinations defined by the Tourism Development Strategy of Serbia for the period 2015-2025).

It is recommended that the surveys be conducted once a year and that they cover all four defined target groups:

1. **Internal stakeholders** (government agencies, non-governmental organizations, academia, private and public sectors in the field of tourism).
2. **Local population** (it is recommended that the focus should be on 18 priority tourist destinations defined by the Tourism Development Strategy of Serbia for the period 2015-2025).
3. **Foreign tourists** (it is recommended that the focus should be on 18 priority tourist destinations defined by the Tourism Development Strategy of Serbia for the period 2015-2025).
4. **Foreign tour operators** (it is recommended that research be conducted at international tourism fairs in which TOS participates – ITB, Barcelona, London, etc.).

It is recommended that the methodology (causation, data collection and processing procedure as well as instruments) developed as a result of the TOURCOMSERBIA project be applied in the continuous research of Serbia's competitiveness as a tourist destination. It is also recommended that the survey of Serbia's competitiveness be included in the annual plan of activities of the TOS and the annual budget, in order to ensure the smooth implementation of the TOURCOMSERBIA model.

After conducting research, it is necessary to start analyzing the data on the basis of which recommendations for improving the competitiveness of Serbia as a tourist destination will be defined and priorities of recommendations based on their feasibility, impact and harmonization with the overall goals of tourism policy. Based on the results obtained, it is necessary to determine the implementation plan of the recommendations with a timeline with specific milestones for each recommendation to monitor progress and ensure timely implementation. The plan should also include the allocation of resources needed for each recommendation, including financial, human resources and technical support.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18 priority tourist destinations
TOURCOMSERBIA
1. Internal stakeholders (government agencies, non-governmental organizations, the academy, private and public sector in the field of tourism)
2. Local population (focusing on 18 priority tourist destinations)
3. Foreign tourists (focusing on 18 priority tourist destinations.)
4. Foreign touroperators (International tourism fairs in which the TOS participates – ITB, Barcelona, London, etc.)
Methodology
• Sampling, data collection, processing procedure and instruments
• Longitudal research
• Annual plan of activities of TOS and annual budget
TOURCOMSERBIA
Recommendations
• Data analysis for the definition of recommendations
• Feasibility, impact and alignment with the overall objectives of tourism policy
• Implementation plan with timeline
• Allocation of resources (human, financial and technical)

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