

THE ROLE OF TOUR OPERATORS IN URBAN AND RURAL TOURISM DEVELOPMENT OF SARAJEVO CANTON

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The paper is the product of a non-budget scientific research project ("The Role of Tour Operators in Urban and Rural Tourism Development of Sarajevo Canton," March-December, 2025) that was implemented in cooperation with five inbound tour operators located in Sarajevo (project leader: Prof. Dr. Lejla Žunić, Assoc. Prof. at the University of Sarajevo). This paper has never been published before.

Abstract: The paper investigates the functional role of inbound tour operators in the urban and rural tourism development of Sarajevo Canton by analyzing relevant parameters such as their business dynamics and collaboration with stakeholders, products, the typology of tourists and stays, and the promotion and sustainability of the offerings. A survey and interviews were conducted with five inbound tour operators situated in the most prominent zone (Old Town with Baščaršija). The findings indicated a strong impact of the inbound tour operators on tourism spatial development, as they are pivotal in fostering stakeholders' collaboration and in marketing and selling local authentic products to international tourists. Their endeavors contribute to creating unforgettable tourist experiences in Sarajevo, particularly concerning city and dark tours, ecotourism, and crafts. Tourist products are disseminated through WOM, international fairs, and online platforms, targeting markets in the EU, the USA, and Canada. This approach enhances international cooperation and promotes the destination's tourism. Inbound tour operators exhibit a positive business trend, although there are notable disparities in the level of collaboration with stakeholders and the focus of policies. Certain areas of action have been overlooked, such as strategies to position Sarajevo as a primary choice and final destination, identifying new potential markets, and adopting a more analytical approach to tourist typologies for more tailored tourism offerings. The paper highlights the current features and challenges of the destination's tourism development, providing practical solutions for inbound tour operators and recommendations for redesign.

Keywords: Sarajevo destination, inbound tourism, tour operators, stakeholders, tourism products, tourists, stay, target markets, promotion, tourism business.

1 Introduction

1.1 Theoretical background

Inbound tour operators and travel agencies play a vital role in the tourism development of a destination, as they focus on inbound tourism and „organize and sell travel packages within their own country for foreign tourists" (UNSD, 2025). The literature (Hossain et al., 2025; UNSD, 2025; Cambridge Dictionary, 2025; Zou, 2023; Science Direct, 2025; Žunić, 2022b; Žunić, 2023; Wormser & Steffen, 2010) stated that tour operators and agencies are intermediaries between tourism supply and demand, with the difference that tour operators create and market their own tourism products with elements of travel, accommodation and stay included, which are then sold by travel agencies, which are less often involved in the creation of their own products. Travel agencies are the fundamental "entities within the travel industry that assist customers with travel arrangements" (Wormser & Steffen, 2010), taking into account personal preferences and budget when booking, etc.

According to the Law on Tourism in the Sarajevo Canton (2025), a travel agency is a legal entity registered in the register of companies that organizes tourist and business trips and stays, mediates and provides all other services related to this, and sells its own tourism product, which it creates by combining various types of tourist services. The standard categorization includes 2 types: a) a travel agency - a travel organizer (tour operator), and b) a travel agency - an intermediary, with a set of defined services and activities. Agencies are also differentiated depending on their orientation to inbound or outbound tourism, or a combined type.

Since Bosnia and Herzegovina has been experiencing a tourism expansion over the last two decades, for example, "in 2019, the country had the third-highest tourism growth rate in the World" (Žunić et al., 2023), together with Sarajevo Canton - the leading tourism destination in the country (Žunić, 2024), thus, a "positive trend of growth of travel agencies in the country was observed, especially in the capital, primarily within the most important tourist zones: the Center with the Old Town and Ilidža near the Sarajevo International Airport" (Žunić: 2022b, 2023). Today, a large number of travel agencies operate in the Sarajevo Canton, although the fewest are those focused on inbound tourism. Since "the Old Town with Baščaršija - the most popular site in Sarajevo, has the highest tourism representation" (Žunić, 2018), agencies from that location were included in the research. Only agencies focused on inbound tourism (3) or with combined business - selling foreign and domestic packages (1), and a local tour operator (1) were sampled. The paper uses the term "inbound tour operator" for all five business entities, because these are agencies that are engaged in attracting foreign tourists and selling domestic or related tourist packages to foreign tourists in our country, i.e. in the Sarajevo Canton (inbound tourism).

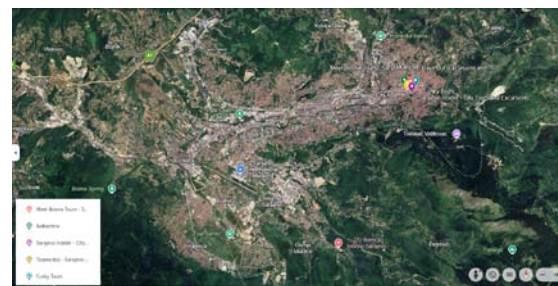


Fig.1. Location of inbound tour operators - Old Town Sarajevo - urban tourist zone
(Corresponding author)

"Inbound tourism comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip" (UN Tourism, 2025a), which is an important contributor to the spatial development of a destination. Numerous authors (Corne et al., 2024; Kochar, 2022; Arain et al., 2020; Enriquez-Perales et al., 2022; Madaleno et al., 2019; Tsaur & Chen, 2018; Cetin & Yarcin, 2017; Žunić: 2022b, 2023) emphasize the importance of inbound tourism for the sustainable social and economic development of a destination, because an increased number of foreign tourists in a country most stimulates the generation of tourism revenues, strengthens the local economy and improves living standards, increases diverse productivity and cooperation between stakeholders and tour operators, contributes to the development of cultural and international cooperation, and opens avenues for foreign direct investment, etc. Accordingly, the focus of the paper is on inbound tour operators, which operate in the most attractive part of the Sarajevo Canton, contributing to the specific beneficial features of its tourism development.



Fig.2. Baščaršija, Old Town Sarajevo: an oriental-Ottoman cultural landscape in the capital of Bosnia and Herzegovina as the most prominent tourist site
(Corresponding author)

1.2 Tourism-geographic ID of the Sarajevo Canton destination

Sarajevo (43°N, 18°E, 34T) represents the largest urban and tourist center of gravity in Bosnia and Herzegovina, which is impressed by the globally recognized features of the tourist image of this growing European destination:

- artistic and creative city, "Sarajevo UNESCO City of Film" (UNESCO, 2025), after the popular international event Sarajevo Film Festival visited by famous celebrities such as Meg Ryan (SFF-2024), among others;
- a centuries-old tradition of a European multicultural tourist destination, the "European Jerusalem" (in Census 2013, Bosniaks 83.8%, Croats 4.2%, Serbs 3.2%, others 8.8%);
- "the city with the longest siege in modern European history" (Žunić, 2023);
- the bridge of urban and natural tourism, as the city's mountain-valley topography and good connection with surroundings allow for rural and ecotourism to be included in the offerings of the canton (Žunić et al., 2024; Žunić, 2022);
- the urban destination with unique charm composed of the urban, provincial, and nature vibrations, providing a vacation that harmoniously integrates aspects of both urban and natural settings.

Altered exponential growth in tourism has been observed in the Sarajevo destination (Fig.3) over the past twenty years (2004-2024) as a result of COVID-19, following which the tourism sector has continued to document even more advantageous quantitative metrics regarding arrivals and overnight stays compared to the period prior to the global pandemic.

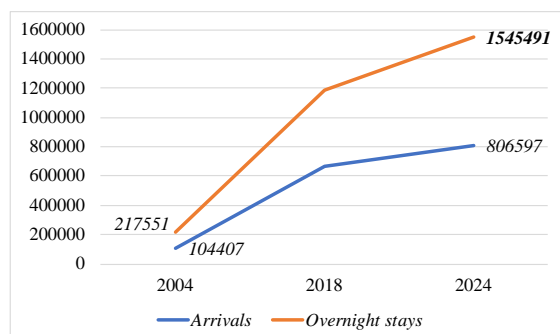


Fig.3. Increase in arrivals and overnight stays in the Sarajevo Canton destination 2004-2024.
(Own research)

The pattern of overnight stays by arrivals in Sarajevo Canton fluctuates over the course of the year (Fig.4), becoming more intricate during the summer months. Additionally, visitors from

Turkey consistently represent the largest group of overnight guests throughout the year, irrespective of seasonal variations.

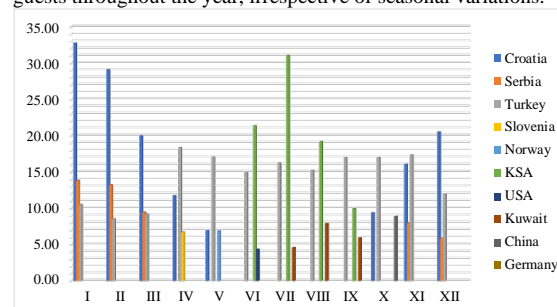


Fig.4. Leading arrivals in total overnight stays in Sarajevo Canton in 2024 - in percentages
(Own research)

The greatest diversity of overnight stays is during the warmer part of the year (April-October). Three countries are most represented in overnight stays in Canton Sarajevo during 2024: Turkey, the Kingdom of Saudi Arabia, and Croatia:

- Turkey holds the 1st place for 5 months of the year: spring and fall (IV-V and IX-XI);
- KSA holds the 1st place during the summer season (VI-VIII);
- Croatia holds the 1st place for 4 winter months (I-III and XII).

The leading overnight stays categorized by arrivals can be divided into various geographical and temporal segments, with the Turkey as consistent factor among all of them, who frequently rank among the top three nations regarding total overnight stays in Sarajevo Canton:

- I-III and XI-XII 2024: Croatia, Serbia, and Turkey;
- IV 2024: Turkey, Croatia, and Slovenia;
- V 2024: Turkey, Croatia, and Norway;
- VI 2024: KSA, Turkey, and USA;
- VII-IX 2024: KSA, Turkey, and Kuwait;
- X 2024: Turkey, Croatia, and China.

2 Research methodology

Fundamental-applied research investigates the contribution of tour operators to the development of urban and rural tourism in the Sarajevo Canton, aiming to identify and assess the current trends and challenges faced by this prominent destination in Bosnia and Herzegovina. A survey and interviews were conducted with representatives from five inbound tour operators situated in the most frequented tourist area (Old Town with Baščaršija), and a thematic map was created using the Google My Maps tool (an original project). Various parameters pertinent to understanding the spatial development of tourism in the destination were analyzed: statistics on arrivals and overnight stays, the collaboration of tour operators with stakeholders, the tourist offerings and products, the typology of tourists and their duration of stay, as well as the business, promotion, and competitiveness of the offerings. The results were processed using statistical methods accompanied by graphical representations (Excel). Potential limitations of the research include the reduced representativeness of the sample for the broader population, the subjectivity of the respondents, and the limited availability of statistical data. Consequently, the results were validated through triangulation methods, comparing findings obtained from fieldwork (explicit reports with observational insights in the destination) and document analysis. This paper highlights the strengths and weaknesses of Sarajevo's tourism influenced by inbound tour operators, providing practical recommendations for enhancing their role in fostering more sustainable tourism development in the destination.

3 Results and discussions

3.1 Collaboration of inbound tour operators and stakeholders

Inbound tour operators in Sarajevo work in partnership with a range of stakeholders from the public, private, and non-governmental sectors. They maintain the most robust collaboration with hotels, transportation companies, and other tour operators, as these entities offer essential services such as visitor accommodation, transportation, cultural experiences, and travel organization.

Tour operators maintain the most robust collaboration with essential tourism stakeholders (Fig.5): hotels, transport companies, and tour operators (100%), whereas their cooperation is least prevalent with airlines (20%) and foreign investors (40%).

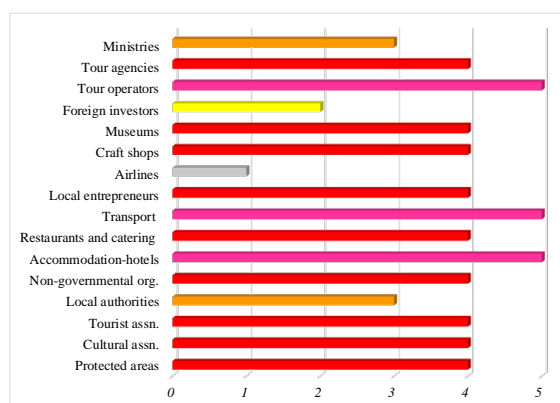


Fig.5. Collaboration between inbound tour operators in Sarajevo and various stakeholders
(Own research)

Hotels and accommodation facilities are of priority importance for inbound tour operators to satisfy the primary need of tourists for overnight stays. "The accommodation rating is high, hotels are the most represented category, and the highest concentration of accommodation units and luxury hotels is in the municipality of Stari Grad Sarajevo" (Žunić, 2018, 2022), which contributes to partnership relations between tour operators and hoteliers, while visitor reviews can improve business and image.

Cooperation between inbound tour operators and transport companies is important for the development and success of the tourism industry, due to the connection of tourism supply with demand and the organization of travel.

Inbound agencies and tour operators collaborate through team work, research, creation and sale of tourist products, which is the primary form of partnership for all five Sarajevo inbound tour operators, especially if they are declared as agencies, and therefore, in a hierarchical and operational sense, they are significantly dependent on the responsible tour operator.

Furthermore, collaboration between inbound tour operators and relevant categories for planning a more enriching stay at the destination (80%) is crucial, as it facilitates the development of creative tourism products associated with culture and nature, or integrated visits. For instance, the partnership between inbound tour operators and museums provides visitors with a cultural and educational experience, alongside generating revenue from visits, making museums indispensable sites when arranging trips and tours in Sarajevo. "Sarajevo museums are the most popular in Bosnia and Herzegovina, especially dark, national, and ethno-musicological-gastronomic, and play a key role in enhancing the cultural image of the tourist destination" (Žunić, 2024). Tour operators also have strong cooperation with protected area agencies, which indicates that they have well recognized the demands of modern visitors, because "green sites of Sarajevo are

generally popular among domestic and foreign tourists" (Žunić, 2018, 2023), and visits to eco-areas contribute to the preservation of biodiversity along with economic benefits.

The collaboration between inbound tour operators and relevant institutions (60%) is crucial, as tour operators conduct their business activities with governmental support, which is essential for implementing tourism policy in the canton. This collaboration facilitates the exchange of ideas and the development of joint projects aimed at enhancing tourism and upgrading the tourist offerings or infrastructure. Tour operators play a vital role in executing tourism activities within the destination, while state and cantonal ministries (such as the Ministry of Foreign Trade and Economic Relations in Bosnia and Herzegovina, the Federal Ministry of Environment and Tourism, and the Ministry of Economy of the Sarajevo Canton) along with local government units (including nine municipalities in the canton, such as Stari Grad) serve as the „brains“ or strategic planners for tourism development, maintaining its sustainable spatial growth.

Tour operators exhibit the least collaboration with airlines and foreign investors, as they typically concentrate on executing established programs or functioning within regional tourism initiatives, rather than launching their own development projects in tourism. Given that inbound agencies are generally small or medium-sized, they lack the necessary capacity to engage in intricate international projects, which demand specialized personnel, technological resources, and a well-known reputation from foreign investors and airlines.

The most advanced stakeholder collaboration (refer to Fig.6) is represented by Sarajevo Insider (100%), which includes partnerships with airlines; this is the sole inbound tour operator that has emphasized this form of business collaboration.

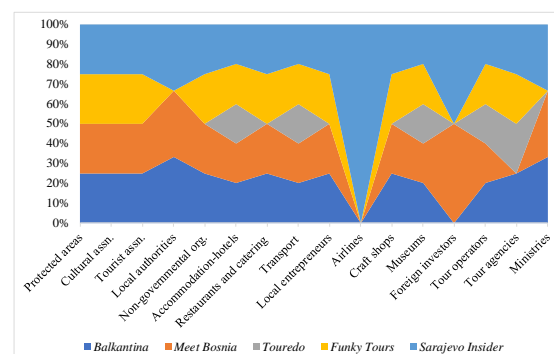


Fig.6. Mosaic of collaboration among individual tour operators and diverse stakeholders
(Own research)

Conversely, the least developed cooperation is observed with Touredo (31.3%), which concentrates on primary tourism entities and lacks collaboration with the majority of other stakeholders, such as authorities, protected areas, or local entrepreneurs. Additionally, a broader spectrum of cooperation is present with Balkantina and Meet Bosnia (88%), although they do not engage with airlines, foreign investors, or agencies.

3.2 Tourism offer and product diversity - thematic forms, tours and packages

In the literature (UN Tourism, 2025a,b; WTO, 2024; Schuh, Agapito, & Pinto, 2018; Žunić, 2018, 2022, 2023), the tourism offer, or tourism supply (*in a wider context of the term*), encompasses the material and spiritual heritage with the tourism infrastructure of the destination. It consists of various tourism products that are related to tourism activities in the destination, such as natural and cultural attractions and complementary services that are key to shaping the tourism experience. The tourism offer is influenced by numerous factors, including service providers- tour operators and travel agencies. Modern

destinations featuring a greater number of tour operators provide a superior and more competitive tourism offer.

Tourism products and the reasons for visiting are interrelated. The motivations behind tourist travel are varied; for instance, in the context of global inbound tourism, the primary motives include "recreation, leisure, and holidays (56%), followed by visiting friends and relatives, health, religion, etc. (29%), and work and training (11%)" (WTO, 2024). In contrast, in Sarajevo, the main attractions are its natural and cultural offerings, as well as its gastronomy (Žunić, 2018).

The destination of Sarajevo (Fig.7) showcases a variety of tourism forms, with urban, gastronomic, and cultural tourism being the most prominent, while rural tourism remains less developed. Additionally, transit tourism accounts for 40%, which is linked to the appealing location of inbound tour operators in Bašaršija (Fig.2), where visitors enjoy the famous Sarajevo ćevapi (a protected gastronomic brand) in the authentic Bosnian-oriental environment of Sarajevo. The following types of tourism are not represented: health, romantic, congress, event, spa, sports, entertainment, business, and VFR tourism.

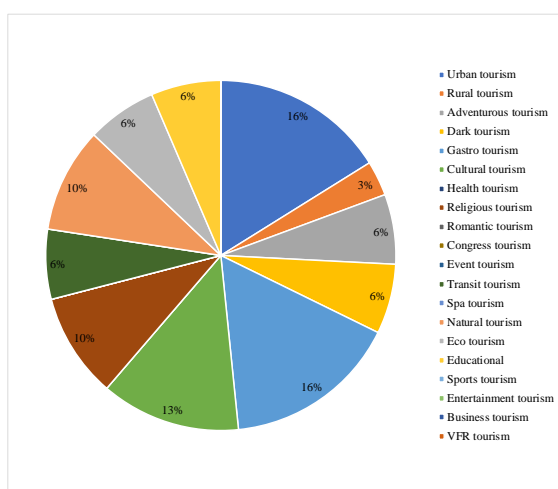


Fig.7. The composition of Sarajevo's tourism offerings – forms of tourism available in the destination
(Own research)

The dominant types of tourism (Fig.8) include urban and gastro tourism, followed by cultural tourism, as well as natural and religious tourism, which collectively represent 60% of Sarajevo's overall tourist offerings.

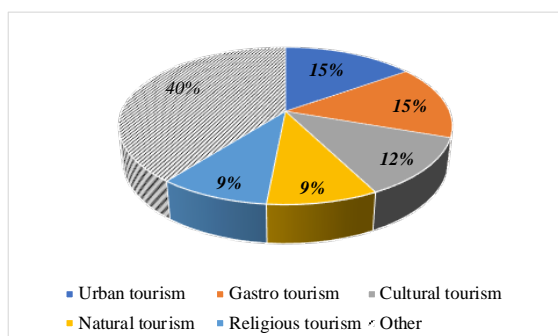


Fig.8. Prevailing forms of tourism among inbound tour operators
(Own research)

Among the top requested tourist products (Fig.9), the list comprises city and nature tours, with dark tours, crafts and workshops, and combined tours following closely behind. Nearly all tour operators have included city and nature tours in their offerings, with the exception of Touredo, specialized exclusively in city dark tourism.

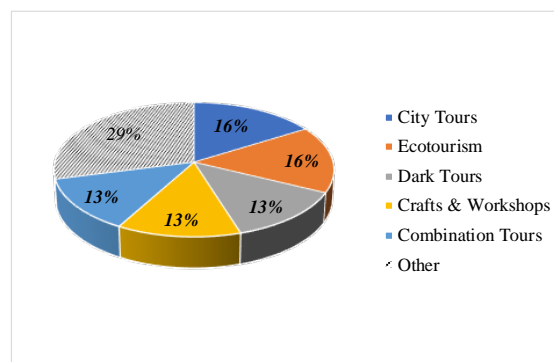


Fig.9. Top tourism products at inbound tour operators
(Own research)

Predominant tourism products in the destination (Fig.10) include city tours, dark tours, ecotours, and craft tours, which collectively account for 58% of the overall tourist offerings.

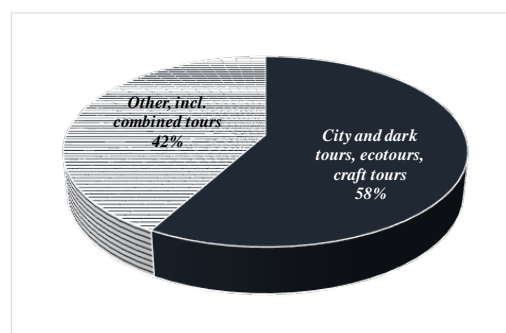


Fig.10. Predominant tourism products in Sarajevo tourism offer
(Own research)

Sarajevo is a "unique symbol of universal multiculturalism - a continuously open city" (UNESCO, 2025) and represents the multiethnic center of the Balkans and Europe with a sedimented polyvalent architecture composed of combined artistic styles of the East and the West, thus, it can meet various visitors' demands. The greatest tourism value holds the rich Ottoman and Austro-Hungarian heritage, along with the dynamic linear-radial spatial composition of the urban pluralistic center, which developed in a valley with seven hills. Urbanization is increasing as Sarajevo expands daily, evolving into an urban region that connects with its surrounding areas through infrastructural advancements. "Urban tourism is a type of tourist activity which takes place in an urban space where a broad and heterogeneous range of cultural, architectural, technological, social and natural experiences and products for leisure and business are offered" (UN Tourism, 2025a), thus, Sarajevo, with its popular city and nature tours stands for the representative urban tourism destination in the world. Furthermore, traditional gastronomy, featuring an authentic expression "tailored to suit everyone's taste" (Žunić & Nezirović, 2022), incorporates a blend of influences from the Orient, the Balkans, Central Europe, and the Mediterranean, making it an integral component of an unforgettable experience in Sarajevo. Consequently, gastro tours are often combined with city tours, among other offerings. Given the green surroundings and eco-sites (IUCN III-V) located not far from the city center, "Sarajevo serves as the bridge between natural and urban environments, enhancing its overall tourism image and demand" (Žunić, 2023), thus, excursions to natural areas are one of the top products in the canton.

City tours are structured excursions that provide tourists with the chance to discover and engage with local landmarks, culture, and nature. In addition to local tours, inbound tour operators arrange city tours across Bosnia and Herzegovina. More innovative local tourism offerings, which are included in city tours (such as those in Sarajevo), feature culinary workshops - cooking classes (with the number of registered participants increasing annually), a tour

of Bašaršija, the city market, and visits to traditional shops and restaurants - food and drink (for instance, Sarajevo Gourmet Food & City Tour or Eat, Pray, Love), a traditional Bosnian dinner hosted by a local family, and photography tours (such as A Concrete Utopia - Brutalist Architecture of Bosnia and Herzegovina for 7 days). Additionally, the Honeymoon visit principle can also be implemented outside the canton in other regions of Bosnia and Herzegovina through private arrangements.

Within Sarajevo, visits to natural areas are also offered, such as: Skakavac Waterfall - mountain bike tour, Safari - hills around Sarajevo, Trebević, Via Dinarica hiking trail, ski touring on Jahorina, Bjelašnica and Igman, tour of Bijambara and Vrelo Bosna, etc.

Religious tours are mainly related to Islamic and Jewish sites, and the more popular is the Ramadan tour (visiting Islamic sites, performing prayers there, and holding iftar with a complete experience for every tourist).

War tours (e.g. War Tour, Tour of the War Tunnel, Tour of the Siege of Sarajevo, Meet Gavriilo Princip, etc.) are also very popular due to the "wartime image of Sarajevo" (Žunić, 2018), and the most iconic sites with a particularly intriguing tourist experience are: Latinska ćuprija-Principov Most (Sarajevo assassination of Austro-Hungarian Prince Ferdinand as the reason for the First World War), and Tunnel of Hope (authentic attraction created under difficult wartime conditions under the runway of the International Airport of Sarajevo).

3.3 Tourist typology and sojourn/stay in the destination

Sarajevo exhibits a diverse composition of tourists based on arrivals (Fig.11), with the highest proportion coming from Australia and countries within the European Union, while there is a lesser representation from Korea and Japan. The following regions are not represented among inbound tour operators: GCC, Turkey, Malaysia, Indonesia, and Africa.

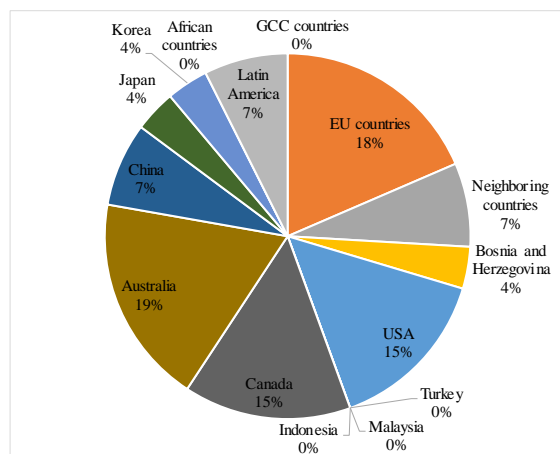


Fig.11. Tourists based on their arrivals at the Sarajevo destination – typical consumers of tourism products (Own research)

For instance, the GCC countries, which represent a clientele of significant importance due to their extended stays and substantial spending in the destination, reportedly do not utilize the services of local tour operators. Several reasons contribute to this trend: the presence of a grey economy, which encompasses the use of private or informal channels for organizing travel and accommodation, as well as private or unregistered lodging providers or car rentals that offer considerably lower prices; the independence and flexibility exhibited by these visitors, who primarily arrange their own accommodations and explore the destination independently, often relying on recommendations from friends—previous visitors to Sarajevo—or through acquaintances in the destination; the absence of a certified halal

tourism product among inbound tour operators; the lack of private tours featuring Arabic-speaking guides; and the unavailability of organized exclusive and luxury services tailored to meet the needs of this category of tourists. The significance of these factors is exemplified by the fact that GCC tourists are the most frequent guests at Sarajevo's halal-certified Malak Regency (lidža) hotel.

The majority of tourists arriving (as illustrated in Fig.12) in relation to the intermediary demand for tourist services in the receiving destination (Sarajevo) - including inbound tour operators, among others - originate from the EU, Australia, the USA, and Canada, accounting for 67% of the total clientele.

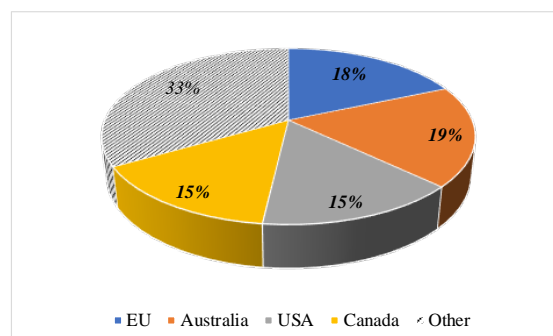


Fig.12. Predominant tourists by arrivals - consumers of Sarajevo inbound tour operator services (Own research)

All inbound tour operators cater to service users from the EU and Australia (see Fig.13). Sarajevo Insider boasts the most diverse clientele regarding arrivals, including visitors from Korea and Japan (exclusively). This diversity is enhanced by effective promotion and collaboration with stakeholders, including global tourism partners and local service providers. Additionally, the appealing location, the language skills of guides (English, German, Arabic), and a positive reputation in the tourism market contribute to this success.

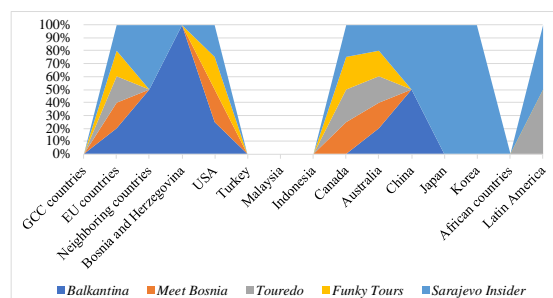


Fig.13. The composition of tourists based on arrivals at individual inbound tour operators (Own research)

Inbound tour operators in Sarajevo cater to various social categories of tourists (Fig.14), with family tourists being the most prevalent, followed by students, while pensioners are less represented. Business and scientific tourists are the least represented. All tour operators serve both organized groups and individual tourists.

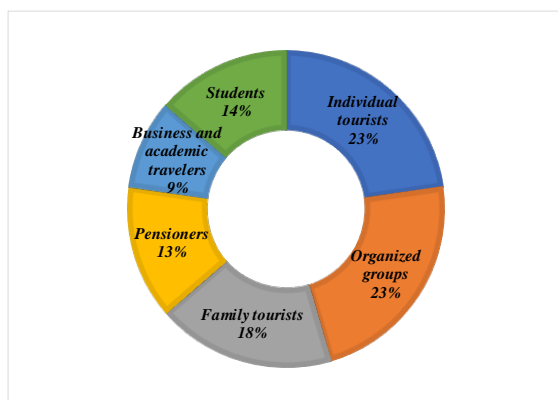


Fig.14. Categories of tourists according to arrivals - consumers of tourism products in Sarajevo
(Own research)

The most advanced form of differential cooperation exists between Meet Bosnia and Funky Tours (Fig.15), which includes the arrangement of personalized and private tours emphasizing local experiences – ranging from gastronomic tours to excursions to historical and cultural landmarks, in addition to appealing package offers for large groups of visitors such as corporate teams, educational institutions, or special interest groups. Similarly, tourism products designed for family tourists, students, and retirees are offered, featuring both entertainment and educational elements. In contrast, Balkantina, for instance, concentrates on individuals and groups rather than the social composition of service consumers.

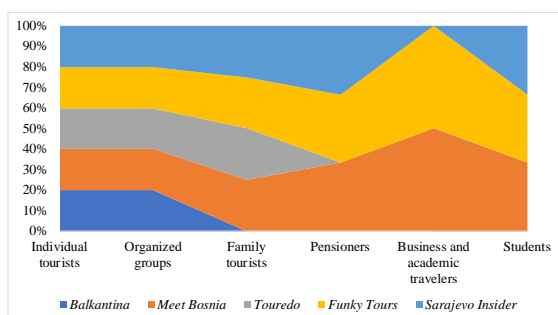


Fig.15. Mosaic of tourist categories - service consumers at individual inbound tour operators
(Own research)

Inbound tour operators report that the duration of stays in Sarajevo is generally brief, typically lasting up to 3 days or, in some cases, between 3 to 7 days (Fig.16). These visitors are frequently weekend or business tourists who tend to explore only sections of the Old Town or Baščaršija, whereas cultural tourists show a greater commitment to visiting museums, galleries, and similar attractions.

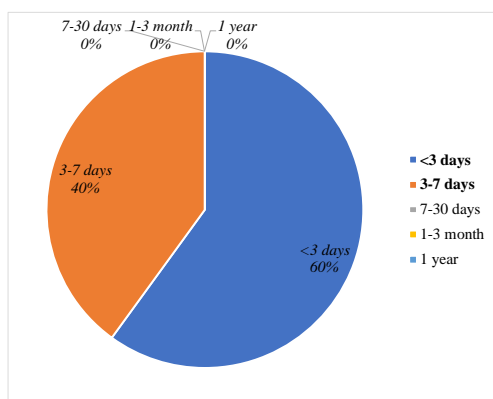


Fig.16. Duration of stay in Sarajevo destination
(Own research)

The brief or short duration of the stay reflects the static characteristics of the offerings provided by inbound tour operators, which likely depend on an outdated strategic document – the Tourist Product of the Sarajevo Canton (Chamber of Commerce, 2007). This document outlines the elements of an "optimal" three-day visit, with a focus on transit tourism. Furthermore, the limited collaboration between tour operators and governmental authorities leads to a deficiency in joint development initiatives within the tourism sector, which could facilitate enhancements in infrastructure and offerings (including a wider array of creative products that would captivate visitors with a more enriching and entertaining experience, thereby encouraging them to remain in the city).

Among the tour operators, in terms of stay, Meet Bosnia and Funky Tours are at the forefront (Fig.17). This is due to improved collaboration among stakeholders and a wider range of tourism services and products, which encompass the arrangement of both group and private tours across Bosnia and Herzegovina.

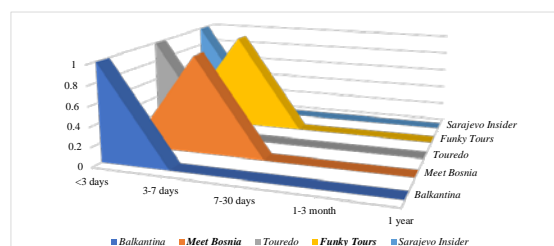


Fig.17. The composition of stay by length at specific inbound tour operators
(Own research)

In the composition of arrivals to the destination Sarajevo, based on the insights of inbound tour operators (see Fig.18), the majority of tourists originate from neighboring countries and the GCC, in addition to those from the USA and EU nations.

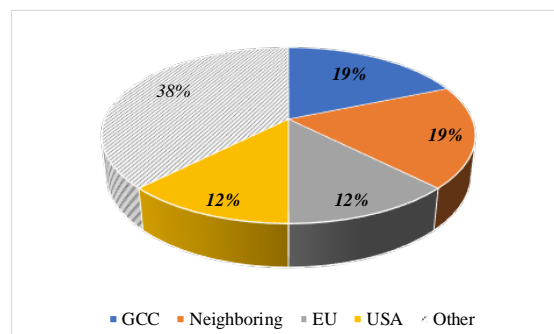


Fig.18. The composition of stay by arrivals to Sarajevo destination
(Own research)

Geographical proximity, cultural ties such as a shared or similar language, and business and trade relationships, including employment in the region or visiting family and friends, lead to an extended stay for tourists from neighboring nations/ countries (Croatia, Serbia, and Montenegro). They utilize agency services less frequently for activities like booking accommodations and city tours (therefore, they do not represent a target market for inbound tour operators), but they are more inclined to book trips to popular events or ski resorts. Tourists from the EU, such as Germany, Slovenia, Spain, Italy, Hungary, Switzerland, Sweden, the UK, etc., are drawn not only by cultural factors but also by significantly lower prices for accommodations, food, and activities compared to their home countries. Meanwhile, tourists from the GCC countries typically find Bosnia and Herzegovina appealing due to its lush landscapes and favorable climate, along with its distinctive European culture characterized by a strong Islamic heritage. Extended stays are also common among visitors from far-off countries like the USA, Canada, and

Australia, and inbound tour operators frequently collaborate with agencies and investors from these nations, making them their target markets. Additionally, the US Embassy in Sarajevo plays a crucial role in this context. These tourists show interest in exploring cultural and natural heritage or opting for various combined tours, among other activities.

The leading countries contributing to the composition of stays in Sarajevo (as illustrated in Fig.19) include the GCC, the USA, the EU, and neighboring nations, collectively representing 62% of the overall overnight stays.

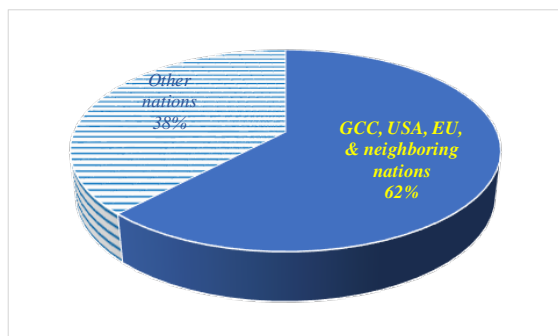


Fig.19. Top nations/ countries in a tourist stay in Sarajevo destination
(Own research)

The diverse characteristics of the stay composition among individual inbound tour operators (see Fig.20) are particularly highlighted in the case of Meet Bosnia, which exhibits the highest magnitude in the presented diagram due to its substantial number of clients from various countries, including the GCC, EU, USA, Turkey, Malaysia, China, and neighboring nations. In contrast, Touredo demonstrates the lowest magnitude, as it exclusively caters to tourists from the GCC, particularly in relation to the longest duration of stay at the destination.

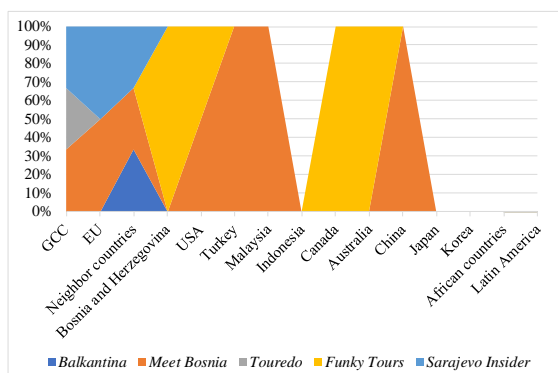


Fig.20. The composition of stays in Sarajevo at specific inbound tour operators
(Own research)

Notably, none of the five Sarajevo inbound tour operators have reported the presence of tourists from distant Asian countries such as Japan, Korea, or Indonesia, nor from regions in Latin America or Africa. For instance, there has been a noticeable decline in the number of arrivals and overnight stays from tourists originating from Indonesia, Japan, and Korea following the COVID-19 pandemic, as they tend to rarely utilize the services of local agencies, opting instead to plan their trips and accommodations independently. Additionally, an increasing number of young travelers are favoring individual trips organized through their native agencies. Furthermore, the visa requirements and higher costs compared to their home countries are seen as deterrents for visitors from Africa.

3.4 Business, promotion and sustainability of the tourism offer

In order to develop an effective business strategy, it is crucial to understand the dynamics of demand and supply in tourism, accounting for the complexity of tourism products, which are complex mixes of various services. Tourism demand is the requirement of various tourism products (goods and services, e.g. tour packages and guides, catering, or transport services) at a particular place or market in a given time period at a given price, and it depends upon various factors (geographical, socio-cultural, psychological, political, and international). "A tourism product is priced and sold through distribution channels" (UN Tourism, 2025b). Tour operators (wholesale) and travel agents (retail) are basic suppliers in tourism who sell tourism products, while other modes of supply include direct (online sale by parent organization), indirect (through affiliates), or personal (door to door) selling. IGNOU (2018) indicates that the greater presence of tour operators and travel agencies within specific markets provides better supply competitiveness.

All five inbound tour operators target the EU and the USA for the distribution and promotion of their products (Fig. 21 and 22), which constitutes 50% of their total promotional efforts, and when combined with Canada, this figure rises to 70%. Furthermore, they have a similar level of interest in Latin America, Japan, China, and Korea demand. However, their promotional efforts are less vigorous in the markets of Malaysia, Indonesia, and Australia, along with neighboring countries. The inbound tour operators exhibit no interest in promotion in the GCC and Mediterranean regions.

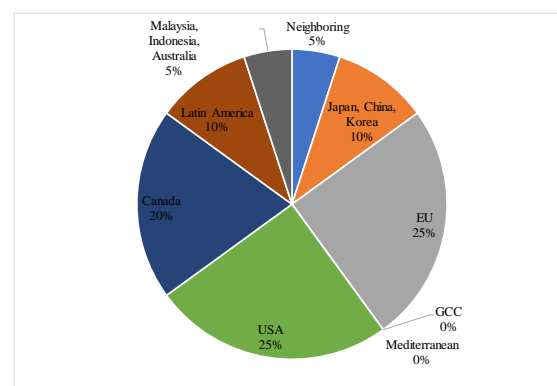


Fig.21. Target markets for the positioning of inbound tour operators' tourism offerings
(Own research)

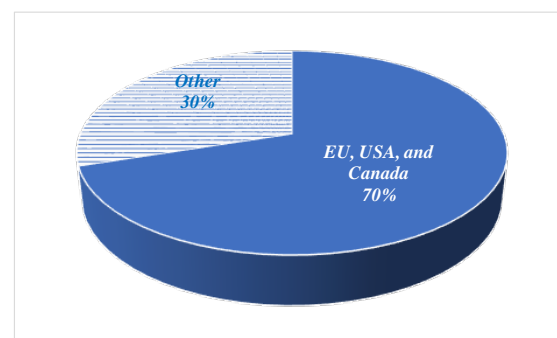


Fig.22. Top markets for promoting Sarajevo destination
(Own research)

The first-tier target markets (EU, USA, and Canada) represent the most developed geographical regions exhibiting considerable interest in Bosnia and Herzegovina, influenced by various geographical, political, and international factors. In the context of politics, culture, and economics, Bosnia and Herzegovina is actively pursuing integration with the European Union. The USA, for instance, plays a crucial role in the political landscape and peacekeeping efforts in

Bosnia and Herzegovina, particularly following the Dayton Peace Agreement (DPA) established in November 1995 ("the current Constitution of Bosnia and Herzegovina is the Annex 4 of the DPA", OSCE, 1995). American tourists visiting Bosnia and Herzegovina frequently express their admiration for its natural and cultural attractions; for example, Johanson (2014) highlighted it in the media (International Business Times) as an intriguing destination worthy of a visit. Furthermore, all three target regions are home to a significant part of the Bosnian-Herzegovinian diaspora, whose residents are repeat visitors to Bosnia and Herzegovina. Notably, individuals from the Serbian and Jewish communities tend to come from Western Europe and Canada, while those from the Bosniak and Croatian communities are more likely to originate from the USA or central and northern EU countries.

In the realm of business and marketing across various markets, Balkantina and Sarajevo Insider are the most prominent (Fig.23). Balkantina uniquely promotes in neighboring countries, whereas Touredo exclusively targets the Malaysian market. Notably, tour operators did not reference any promotional activities in the GCC and Mediterranean markets, attributing this to the lower demand for their services in those regions.

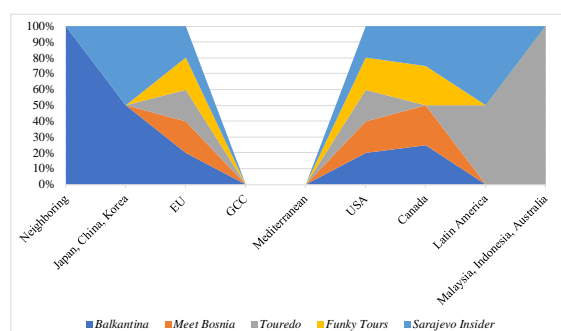


Fig.23. Targeted tourism markets for specific inbound tour operators
(Own research)

The most effective channels for distributing tourism products include recommendations, international fairs, and the internet (Fig.24). Recommendations serve as a powerful promotional tool within the tourism sector, where trust is paramount, and satisfied customers often become brand ambassadors, aiding in the product's popularization. International fairs facilitate direct interaction with potential clients and partners, while contemporary technologies and digital platforms, particularly social networks, allow for direct communication and the efficient dissemination of information, thereby enhancing the accessibility of tourism offerings to a broader audience. Private distribution channels are less prevalent and may include exclusive offers that agencies, for instance, do not provide online, whereas traditional media channels represent the smallest segment in the advertising efforts of inbound tour operators and their methods of reaching clients.

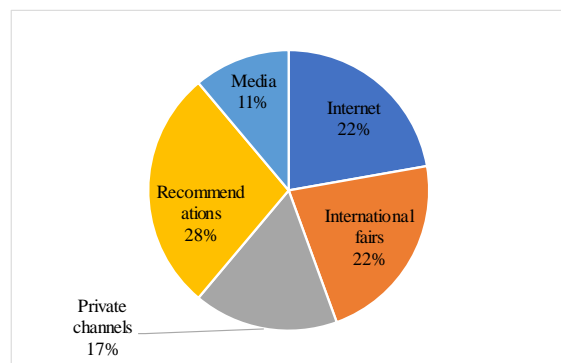


Fig.24. Sales and promotional distribution channels for tourism products
(Own research)

In the framework of offer promotion among individual inbound tour operators (Fig.25), only Balkantina employs all available forms of promotion, whereas Touredo, for instance, depends solely on internet channels and recommendations.

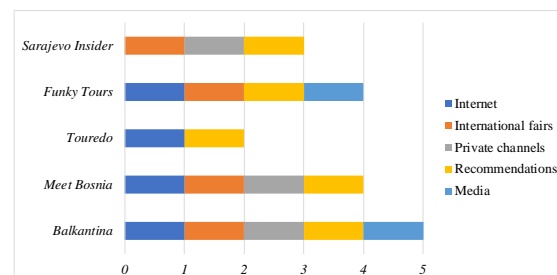


Fig.25. Distribution channels of tourism products for specific inbound tour operators
(Own research)

The main elements contributing to competitiveness and sustainability within the tourism market include the variety of offerings, particularly genuine tourist products, as well as their affordability and popularity, among other factors. In contrast, elements like seasonality, ISO standards, and eco-certification exert a relatively minor influence (Fig.26). This underscores the necessity to concentrate on creating distinctive experiences and a wide range of choices for travelers to enhance the appeal of the destination.

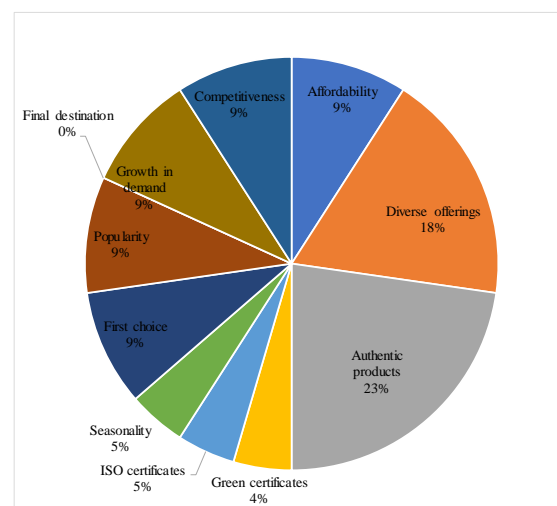


Fig.26. The competitiveness at the market- the sustainability of the tourism product
(Own research)

The competitiveness of the offerings provided by individual inbound tour operators (Fig.27) mainly encompasses authentic tourism products, yet it does not consider the Sarajevo Canton as the ultimate destination – the primary location for visitors' stays. Two out of five tour operators indicated that this destination is the preferred choice for visitors, which they view as an advantage (Meet Bosnia and Funky Tours). However, only one tour operator (Funky Tours) regards ISO and eco-certifications as significant for the sustainability of the tourism product.

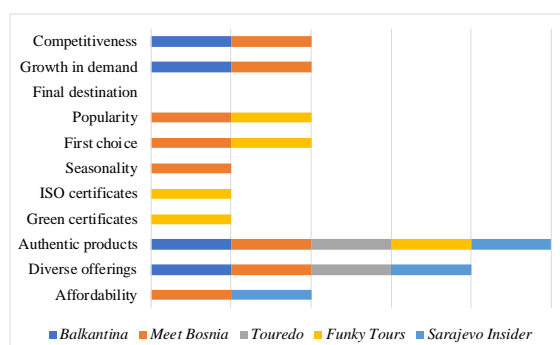


Fig.27. Competitiveness – sustainability of the offerings at specific inbound tour operators
(Own research)

Meet Bosnia is the most prominently featured in the composition of a competitive and sustainable tourism product (Fig.28), as it showcases the highest number of elements that enhance that segment, whereas Touredo is the least represented, concentrating on the variety of offerings and authentic tourism products.

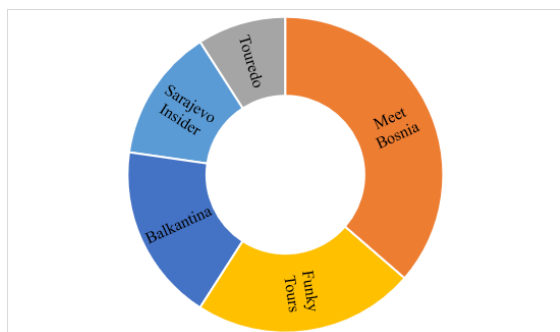


Fig.28. Participation of inbound tour operators in the sustainability of the tourism product
(Own research)

All five inbound tour operators are experiencing a favorable business trend (Fig.29) characterized by a rise in demand for tourist services, an expansion of offerings, and the emergence of new markets.

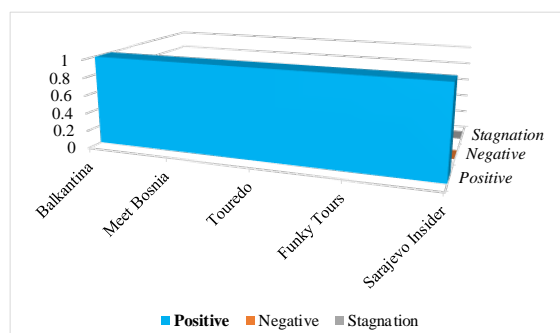


Fig.29. Business trend of inbound tour operators
(Own research)

This positive development can be attributed to effective marketing strategies, alongside the growth of tourism in Bosnia and Herzegovina, which has seen an increased influx of foreign tourists, an enhancement in the quality of offerings, and a growing popularity of the destination.

4 Conclusions

The significant contribution of inbound tour operators in Sarajevo to tourism, spatial, and social development has been recognized through their initiatives in creating, promoting, and selling a diverse range of authentic domestic and local tourism products to international visitors and foreign tourists. The most

prominent offerings include urban, gastro, and cultural tourism, along with religious and nature tourism. These tour operators enhance international and cultural collaboration by actively engaging in promotional events such as international fairs, primarily focusing on the tourist markets of the European Union, the USA, and Canada; consequently, a considerable number of clients utilizing their services originate from these regions. Moreover, tour operators play a vital role in strengthening cooperation with various stakeholders, primarily depending on established partnerships with traditional entities such as hotels and transport companies, while also collaborating with the cultural and natural heritage sectors. All five inbound tour operators are witnessing positive business trends, which not only bolster sustainable local economic development but also contribute to the national economy, as numerous tourism products are consumed in areas beyond the cantonal region, generating income and tourist activity in those locations.

Nevertheless, while tour operators in Sarajevo Canton play a crucial role in the development of both urban (dominant) and rural tourism (lesser), several challenges confronting this destination have been recognized. For instance, a minimum stay of less than three days is noted for the majority of inbound tour operators, whereas stays of three to seven days are less frequently observed. Moreover, the GCC was not recognized by tour operators as a target market for promotion or in the classification of tourists by arrivals, despite the fact that these travelers, along with those from the USA, the EU, and neighboring countries, tend to have the longest stays at the destination. According to official statistics from the Statistical Agency of Bosnia and Herzegovina (2025), the Institute for Informatics and Statistics of the Sarajevo Canton (2024), and the Economic Institute Sarajevo (2024), in conjunction with prior field research that included interviews with hotel managers and tourism officials (Žunić, 2018), our documented findings (Fig. 4) reveal that wealthy Arab tourists from GCC countries, such as the Kingdom of Saudi Arabia, enjoy the longest average stays in Sarajevo Canton, which can extend up to three months or even a year. This observation is equally relevant at the national level, as the longest stays in Bosnia and Herzegovina (exceeding three nights) are primarily linked to tourists from Kuwait, Qatar, and the United Arab Emirates, among others (according to data from the Agency for Statistics of Bosnia and Herzegovina, 2025). This situation highlights the necessity for the development of prioritized tourism policies at both the national and cantonal levels, along with the strategic business frameworks of inbound tour operators, to effectively plan promotional activities aimed at this specific geographic region, as well as to customize offerings to align with the unique preferences of this established clientele within the global tourism industry.

Given that travelers originating from Gulf Cooperation Council (GCC) nations do not engage the services of inbound tour operators in Sarajevo, it is imperative to enhance connectivity with the tourism market in that particular region of the world, while concurrently ensuring the provision of halal tourism offerings. The availability of certified services within tourist destinations holds significant importance for affluent clientele from Gulf nations: opulent hotels and dining establishments that adhere to halal business principles, tourist resorts staffed by individuals proficient in Arabic, as well as permissible tours encompassing natural or cultural attractions, which must include Islamic religious sites and cultural events specifically designed for visitors who practice the Muslim faith.

The issue of brief registered stays in Sarajevo is frequently associated with the grey economy, which necessitates intervention from the authorities through more efficient strategies such as surveillance of unregulated accommodation and transport providers. Additionally, it is important to enhance public awareness regarding their responsibilities, complemented by media coverage about the substantial penalties involved.

The brief visits noted by tour operators can also be associated with the focus on Sarajevo Canton as a transit point in promotional activities. The lack of strong collaboration with

airlines and foreign investors suggests a deficiency in commitment towards the advancement of inbound tourism, where Sarajevo Canton should ideally serve as a primary destination rather than merely a city-break destination. Likewise, the relatively neutral partnerships with ministries and municipalities reflect a stagnation in the exploration of geographical areas and a lack of progress in enhancing the tourist offerings, as new resources and tourist zones ought to be developed in consultation with government officials. It is crucial to strengthen the connections between inbound tour operators and these institutions for the purpose of regulation and support, as well as for collaborative innovative development initiatives in tourism. Notable landscapes, including theme parks, horticultural sites, and historical landmarks, along with nearby rural tourist attractions featuring rustic styles or natural areas equipped with eco-hotels, constitute appealing components of tourist infrastructure in regions intended for extended stays. Renowned international events, such as concerts by global icons like Madonna, or nightlife venues offering social activities like karaoke or bowling, also play a significant role in increasing attendance and prolonging stays in urban locations.

In the classification/ typology of tourists, the original geographical background of foreign visitors was overlooked, despite the fact that it is acknowledged within the industry that a significant portion of tourists from the USA, Canada, and the EU belong to the Bosnian diaspora. This aspect should be considered when developing thematic products related to diasporic tourism. Diasporic tourism plays a crucial role in revitalizing culture and reconnecting individuals with their roots, as well as promoting romantic tourism, which involves seeking partners from one's homeland. This necessitates the creation of innovative products, including special events, workshops, and matchmaking services. Furthermore, it is vital to recognize the connection between tourism and health, as many diaspora visitors opt for private healthcare services in their home country at more affordable rates (Žunić et al., 2024). Diasporic tourists can also be classified under the VFR category, as they are often motivated by visiting family or relatives in their place of origin. However, this type of tourism is often unacknowledged by inbound tour operators, highlighting the need to establish a comprehensive database that profiles visitors who utilize tourism services in the destination, along with their primary motivations or purposes for visiting.

Given that families are the primary consumers of inbound tour operator services, it is essential to tailor the offerings to meet their needs. Families with children tend to favor a greater number of attractions and events at their destination, which provides a solid foundation for organizing a longer and more engaging visit to the Sarajevo Canton.

Among the most prevalent tourist offerings as products in the Sarajevo Canton, rural tourism has not been emphasized by tour operators, despite the "favorable conditions for its clear integration into the tourism supply" ("Tourism Development Strategy of Canton Sarajevo until 2030- Draft", Economic Institute Sarajevo, 2024). The anticipated interest in this sector could notably come from family tourists (Žunić, Demir, & Ravlić, 2024). Nevertheless, while agencies primarily promote rural excursions through social media aimed at local residents, tour operators often lack a clear presentation of rural tourism options for international visitors (due to inadequate information). Consequently, they resort to arranging private tours at elevated prices, which hampers the potential for commercial growth in this area. For instance, a day trip to the village of Lukomir, including a scheduled tour and private transportation for 2-4 individuals, is priced at 300 EUR. This effectively "privatizes" the rural tourism offering in Sarajevo Canton, creating a notable obstacle to its accessibility and limiting its potential demand.

Similarly, specialized products associated with event and health tourism have been overlooked, making it essential to enhance the promotion and organization of international events, in addition to expanding capacities in the areas of sports, entertainment, and health.

Tour operators have failed to acknowledge the affordability of prices in the Sarajevo Canton as a crucial competitive factor. In comparison to their primary clientele, which includes individuals from the USA and the EU, this aspect should be prominently emphasized. These clients originate from a significantly more developed world with a higher standard of living, which is accompanied by considerably higher prices than those found in Bosnia and Herzegovina. Furthermore, many services in Sarajevo are more reasonably priced than those in the capital cities of neighboring nations.

The competitive limitations of the Sarajevo Canton's tourism offerings stem from its failure to be recognized as a primary destination, coupled with the absence of ISO and eco-certifications for the products available in the market.

Future strategies and objectives for the development of tourism in this destination should focus on adapting to the evolving demands of the tourism market. These demands necessitate that a destination provides a wide array of diverse attractions, which should include as "many protected natural and cultural sites as possible (IUCN, UNESCO), in addition to hotels and restaurants that possess well-known eco and halal certifications, as well as ethno-villages and open-air museums located in close proximity" (Žunić, Bidžan-Gekić, & Gekić, 2019; Žunić, Košić, & Pivac, 2023; Žunić, 2024; Žunić: 2022b, 2023). Furthermore, it is crucial to establish conditions and channels that attract foreign investors for innovative spatial research and infrastructure development. Additionally, designing action plans is crucial to enhance collaboration with airlines, enabling the Sarajevo Canton to connect more effectively with the global community and position itself as a primary choice or final destination. Inbound tour operators ought to invest more significantly in international relations and develop tourism business priorities and strategies in a more comprehensive manner, as they are instrumental in promoting local destinations to international markets. Collaborative efforts between inbound tour operators and airlines are vital for creating more competitive offerings, boosting passenger traffic, and generating revenue. Moreover, partnerships with foreign investors can supply the necessary capital for infrastructure development, enhance the destination's competitiveness, and attract a greater number of international visitors, thereby benefiting the national tourism sector.

One of the primary objectives of sustainable tourism in the Sarajevo Canton should be to enhance the network of inbound tour operators. The entities discussed are conditionally categorized as tour operators in this analysis, yet they are predominantly registered as agencies—often due to lower tax rates and less stringent inspection oversight—resulting in a significantly reduced responsibility and functional role in the tourism development of the destination. The findings reveal a substantial reliance of inbound agencies on tour operators, a more neutral relationship with authorities, diminished cooperation among stakeholders, a static supply, and a less dynamic research approach within the destination. At present, outbound agencies outnumber inbound ones, with domestic tour operators playing a minor role, which is unsustainable for the growth of receptive inbound tourism. Given that tour operators are essential in researching geographical areas to enhance tourist infrastructure and offerings, the canton should implement support measures and programs aimed at educating local tourism entrepreneurs, thereby creating more favorable conditions to foster the growth of inbound tour operators in the destination.

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