

# TOURISM OF THE REPUBLIC OF SERBIA: CHARACTERISTICS AND STRATEGIC GOALS OF DEVELOPMENT

GLIGORIJEVIĆ Živorad<sup>1</sup>, KOSTADINOVIĆ Ivana<sup>2</sup>

<sup>1</sup> Faculty of Economics University of Nis (SERBIA)

<sup>2</sup> Faculty of Economics University of Nis (SERBIA)

E-mails: zivorad.gligorijevic@eknfak.ni.ac.rs, ivana.kostadinovic@eknfak.ni.ac.rs

## ABSTRACT

*Tourism represents an activity which, as stated in numerous researches and official documents, is of exceptional importance for the development of the Republic of Serbia. However, during the second half of the 20<sup>th</sup> century, as well as during the first decade of the 21<sup>st</sup> century, tourism was not a priority direction of development and did not achieve significant results in development. With regards to numerous measures and activities undertaken since its inception, tourism became one of the priority activities and one of the key factors of sustainable growth and development in the middle of the second decade of the 21<sup>st</sup> century, until the onset of the COVID-19 pandemic. During the pandemic, tourism recorded significant losses, primarily in international tourist traffic. The aim of the work is to analyze the characteristics of development, based on theoretical knowledge and relevant data, and then to look at the strategic goals of the future development of tourism in the Republic of Serbia, which must be aligned with modern development trends and must be based on realistic assumptions of the country's competitive position on tourist market.*

**Keywords:** *tourism, characteristics of tourism development, strategic goals of tourism development, Republic of Serbia.*

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## INTRODUCTION

Judging by the number of participants in tourist trips, tourism has, in a relatively short period of time (during the second half of the 20<sup>th</sup> century), become the most massive socio-economic phenomenon on a global scale [10]. In fact, thanks to long-term positive development trends, tourism has become a key segment of the service economy, one of the most dynamic and propulsive economic activities and a great development opportunity for many countries [5]. The expansion that tourism experienced during the second half of the 20<sup>th</sup> century continued into the 21<sup>st</sup> century (excluding the period of the economic crisis of 2008 and the period of the Covid-19 pandemic). With this in mind, we can point out the fact that tourism, despite occasional crisis periods and events, is in constant progression and development [4]. The above fact is best confirmed by the data of the World Tourism Organization on the number of people who traveled abroad, that is, who participated in international tourist movements: in 1950, about 25 million, in 1970, 166 million, in 1990, 435 million, in 2010 over 935 million, and in 2019 close to one billion and 500 million [21; 22]. When the number of domestic tourists is added to this number, which is many times higher, it can be concluded that tourism, in modern conditions of development, represents the "leading world industry" and that its influence on the process of economic development is becoming more and more intense [3].

According to the data collected by the World Travel and Tourism Council for 2019, the participation of tourism in the world GDP was 10.3% (\$8.9 billion) and tourism provided 333 million jobs, that is one of 10 jobs worldwide [20]. This is why tourism, in many works, is labeled as an economic giant [18, 11]. "Tourism has, in fact, become a kind of socio-economic phenomenon, an integral part of the life of the largest part of the world's population, and the need for tourism has almost become part of the existential needs of man" [8]. That is why all forecasts say that the number of tourists will continue to increase. Thus, for example, according to the forecasts of the World Tourism Organization, in 2023, around one billion and 600 million people will participate in international tourist movements alone [21].

Tourism, therefore, can be understood as a huge driving force for the development of all, especially underdeveloped and developing countries, which means that it is a fundamental sector for the entire world economy, and above all, for certain parts of the world. "...there is no doubt that tourism, as part of the unfolding of global world processes, is becoming a de facto "world business" which in 2000 ... included around 673 million tourists. It is predicted that in 2050 there will be ... about 2 billion tourists ... and India, China, Indochina and Brazil will certainly be the biggest tourist destinations" [1].

Tourism has a special importance for the development of countries that are in the process of structural adjustment, as is the case with the Republic of Serbia [9]. This is due to the fact that tourism and the process of structural adjustment of the economy are in a symbiotic relationship: on the one hand, changes in tourism are conditioned by the strong scope of the economic, social and political transformation of a country, and on the other hand, the development of tourism contributes to the successful implementation of the process of structural adjustment transformations.

In accordance with the above, the subject of research in this paper are the characteristics of the current development of tourism in the territory of the Republic of Serbia. In this sense, with the aim of an objective and analytical approach to the subject of research, an analysis of the development of tourism in the Republic of Serbia during the second half of the 20<sup>th</sup> century and during the first two decades of the 21<sup>st</sup> century.

## CHARACTERISTICS OF THE DEVELOPMENT OF TOURISM

### IN THE REPUBLIC OF SERBIA

The development of tourism in the Republic of Serbia during the second half of the 20<sup>th</sup> century was largely determined by its overall socio-economic development. However, due to the characteristics it has as an economic activity, and especially due to the characteristics of tourist needs, tourism in the Republic of Serbia, in the mentioned period, did not develop at the same pace as the economy as a whole. In addition, the development of tourism in the Republic of Serbia was under the extremely high influence of the international environment, as well as under the influence of the development of tourism in Europe (especially in the last decade of the 20<sup>th</sup> century).

More intensive development of tourism in the Republic of Serbia began in 1965, when the number of tourists reached over 2.6 million, and the number of overnight stays over eight million. In the later period, tourism was the priority direction of overall economic development (from 1970 to 1985) and achieved constant growth (Table 1).

However, after 1985, there was a period of decline in tourist traffic, especially during the last decade of the 20<sup>th</sup> century, when total tourist traffic, measured by the number of overnight stays, decreased by 35.6% (domestic by 30.1%, and foreign by 71.6%). The decrease in the total number of arrivals, in the same period, amounted to 47.9% (domestic tourists by 37.8% and foreign tourists by 82.4%) [6].

**Table 1.** Tourist traffic in the Republic of Serbia during the second half of the 20<sup>th</sup> century (in thousands)

| Year | Number of tourists |         |          | Accomplished overnight stays |         |          |
|------|--------------------|---------|----------|------------------------------|---------|----------|
|      | domestic           | foreign | in total | domestic                     | foreign | in total |
| 1955 | 988                | 59.5    | 1.048    | 2.805                        | 175     | 2.980    |
| 1965 | 2.174              | 477     | 2.651    | 6.844                        | 1.303   | 8.147    |
| 1975 | 3.778              | 1.126   | 4.904    | 13.328                       | 3.631   | 16.958   |
| 1985 | 4.762              | 1.225   | 5.987    | 19.530                       | 4.881   | 24.411   |
| 1995 | 2.829              | 228     | 3.057    | 11.535                       | 805     | 12.340   |
| 2000 | 2.376              | 239     | 2.615    | 10.008                       | 865     | 10.873   |

*Source:* <https://www.stat.gov.rs/sr-latn/publikacije/?a=22&s=2202&d=2&r=>

At the beginning of the 21<sup>st</sup> century, the Republic of Serbia could, using the positive examples of countries that were also in the process of transformation, avoid certain mistakes and overcome numerous obstacles more quickly. It was necessary, among other things, to use the experiences of the mentioned countries, considering tourism as a very important means of economic growth and development of the country. However, during the first decade of the 21<sup>st</sup> century, tourist traffic in the Republic of Serbia recorded ups and downs in individual years (Table 2).

**Table 2.** Tourist traffic in the Republic of Serbia during the first decade of the 21<sup>st</sup> century (in thousands)

| Year | Number of tourists |         |          | Accomplished overnight stays |         |          |
|------|--------------------|---------|----------|------------------------------|---------|----------|
|      | domestic           | Foreign | in total | domestic                     | foreign | in total |
| 2001 | 1.887              | 242     | 2.129    | 6.603                        | 592     | 7.195    |
| 2002 | 1.898              | 312     | 2.210    | 6.469                        | 738     | 7.207    |
| 2003 | 1.658              | 339     | 1.998    | 5.892                        | 791     | 7.207    |
| 2004 | 1.580              | 392     | 1.972    | 5.791                        | 851     | 6.642    |
| 2005 | 1.536              | 453     | 1.989    | 5.507                        | 992     | 6.499    |
| 2006 | 1.537              | 469     | 2.007    | 5.577                        | 1.015   | 6.592    |
| 2007 | 1.611              | 696     | 2.307    | 5.853                        | 1.476   | 7.329    |
| 2008 | 1.620              | 646     | 2.266    | 5.935                        | 1.399   | 7.334    |
| 2009 | 1.376              | 645     | 2.021    | 5.307                        | 1.470   | 6.777    |
| 2010 | 1.318              | 683     | 2.001    | 4.961                        | 1.452   | 6.413    |

*Source:* <https://www.stat.gov.rs/sr-latn/publikacije/?a=22&s=2202&d=2&r=>

Tourism is an activity that, in this period, was of exceptional importance for the further overall economic development of the Republic of Serbia, that is, it is of special importance for the development of almost all economic activities and branches. In order to speed up the economic development of the Republic of Serbia, it was necessary to create the conditions for a greater tourism valorization of natural, geographical, cultural-historical and other benefits, i.e. conditions for development, which have not been sufficiently utilized [5]. Namely, in relation to all the aforementioned general trends of development as well as demand requirements, the Republic of Serbia had all the necessary conditions to, with adequate improvements of its tourist product and its maximum adaptation to the aforementioned tendencies, be involved in absorbing the effects arising from them. However, although there were favorable conditions for the development of tourism, the degree of valorization of tourist potentials and the achieved level of tourism development in the Republic of Serbia lagged behind in all indicators [14].

At the beginning of the second decade of the 21<sup>st</sup> century, prerequisites were created for the faster growth and development of tourism as an important activity for the economic development of the Republic

of Serbia, which improved its international activity, and thus improved its position on the international level. Namely, the Republic of Serbia improved regional cooperation, accelerated the process of joining the European Union and worked intensively on the construction of pan-European corridors [2].

The Republic of Serbia has also significantly improved regional and air traffic and created a favorable business environment for the growth and development of both new and existing small and medium-sized enterprises in the field of tourism. In addition, the legislative and institutional framework in the area of investments in tourism was improved, which created even better and more favorable conditions for investing in tourism even more intensively in the coming period. A favorable environment was also created for the development of other activities, with which tourism is in direct correlation, i.e., an extremely good starting point for the development of tourism in the Republic of Serbia was created [12].

Tourism of the Republic of Serbia showed the first signs of recovery in domestic demand in 2015, when an influx of foreign tourists from the European market was recorded, along with a standard high number of visits from countries in the region. The number of domestic tourist arrivals in 2015 compared to 2008 increased by 12%, and the number of overnight stays by 8%, so: *the total contribution of tourism to the GDP of the Republic of Serbia in 2015 was 6.4%; tourism directly contributed 2.2% of the GDP of the Republic of Serbia; tourism and hospitality included about 30,000 (direct) new employees, while about 157,000 new employees are in total in tourism and related activities with a large number of newly opened micro and small businesses in tourism and hospitality; "invisible export" represented 7.3% of the total export of the Republic of Serbia, i.e. almost 29% of the value of export of services; investments in tourism accounted for 4.1% of total investments in the Republic of Serbia* [19]. The trend of further growth, compared to 2015, continued in 2016, when the number of arrivals of domestic tourists increased by 14.2%, and the number of overnight stays by 15.2% (Table 3). "This positive trend was significantly influenced by the Government's decision to support the population with a weaker paying capacity with the voucher project..." [16].

**Table 3.** Tourist arrivals in the Republic of Serbia from 2011 to 2019

| Tourist arrivals (domestic and foreign) |           |       |           |       |           |       |
|---|-----------|-------|-----------|-------|-----------|-------|
| Year                                    | in total  | index | domestic  | index | foreign   | index |
| 2011                                    | 2.068.000 | 103   | 1.304.000 | 99    | 764.000   | 112   |
| 2012                                    | 2.079.000 | 100   | 1.270.000 | 97    | 810.000   | 106   |
| 2013                                    | 2.192.000 | 105   | 1.271.000 | 100   | 922.000   | 114   |
| 2014                                    | 2.192.000 | 100   | 1.160.000 | 92    | 1.029.000 | 112   |
| 2015                                    | 2.437.000 | 111   | 1.305.000 | 112   | 1.132.000 | 110   |
| 2016                                    | 2.754.000 | 137,7 | 1.472.000 | 111,6 | 1.282.000 | 187,7 |
| 2017                                    | 3.085.866 | 154,2 | 1.588.693 | 120,5 | 1.497.173 | 219,3 |
| 2018                                    | 3.430.522 | 171,5 | 1.720.008 | 130,5 | 1.710.514 | 250,6 |
| 2019                                    | 3.689.983 | 184,4 | 1.843.432 | 139,9 | 1.846.551 | 270,5 |

Source: Vlada Republike Srbije, Ministarstvo za trgovinu, turizam i telekomunikacije (2021). Statistički podaci o turističkom prometu u Republici Srbiji, Beograd, str. 1.

Tourist activity in the Republic of Serbia until 2019 recorded, we can safely say, a stable growth so that the number of tourist arrivals in 2019 amounted to about 3.7 million, which is an increase of 84.4% compared to 2010. In addition, the number of overnight stays by tourists at the end of 2019 was 10,073,299, which represents a growth of 57.1% compared to 2010.

According to data from the Ministry of Trade, Tourism and Telecommunications, 2019 was the most successful year for tourism in the Republic of Serbia, as for the first time the number of foreign tourists exceeded the number of domestic tourists by more than 10 million overnight stays. However, due to the situation caused by the corona virus (banning of flights, cancellation of accommodation reservations, closing of borders, as well as a drop-in overall tourist activity), the positive trend did not continue in 2020, but, on the contrary, there was a big drop [7].

By analyzing the official data of the Republic Institute for Statistics on tourist traffic in the Republic of Serbia in the first two months of 2021 compared to January and February 2019, it can be concluded that domestic tourism, thanks to spa and mountain destinations, which have become

very popular among domestic tourists, achieved a significantly smaller drop in the number of guests compared to international tourism [13].

According to the data of the Republic Institute of Statistics, the year 2022 is indeed significant for the recovery and further development of tourism in the Republic of Serbia (**Table 4**). In the period from the beginning of the year to June 2022, a total of 1,624,081 tourists stayed in the Republic of Serbia, which is 65% more compared to the period January-June 2021, of which there were 936,922 domestic tourists (36% more in compared to 2021) or 58% of the total number of tourists, and foreign 687,159 (+136%), or 42% of the total number of tourists.

**Table 4.** Tourist arrivals in the Republic of Serbia from 2020 to June 2022

| Tourist arrivals (domestic and foreign) |           |       |           |       |         |       |
|---|-----------|-------|-----------|-------|---------|-------|
| Year                                    | in total  | index | domestic  | Index | foreign | index |
| 2020                                    | 1.820.021 | 49,3  | 1.374.310 | 74,6  | 445.711 | 24,1  |
| 2021                                    | 2.591.293 | 142,4 | 1.720.054 | 125,1 | 871.239 | 195,5 |
| 2022 (January-June)                     | 1.624.081 | 62,7  | 936.922   | 54,5  | 687.159 | 78,9  |

Source: *Statistical Office of the Republic of Serbia*, <https://www.stat.gov.rs/en-us/oblasti/ugostiteljstvo-i-turizam/turizam/>

Regarding the number of overnight stays (**Table 5**), also, according to the data of the Republic Institute of Statistics, in the period January-June 2022, a total of 4,992,483 overnight stays were realized (which is 43% more compared to the same period in 2021), of which domestic tourists achieved 2,948,414 overnight stays (24% more compared to 2021), which accounts for 59% of the total number of overnight stays, and foreign tourists 2,044,069 (+85%) or 41% of the total number of overnight stays.

**Table 5.** Overnight stays by tourists in the Republic of Serbia from 2020 to June 2022

| Tourist overnight stays (domestic and foreign) |           |       |           |       |           |       |
|--|-----------|-------|-----------|-------|-----------|-------|
| Year   | in total  | index | domestic  | Index | foreign   | index |
| 2020   | 6.201.290 | 61,6  | 4.936.732 | 81,4  | 1.264.558 | 31,5  |
| 2021   | 8.162.430 | 131,6 | 5.732.833 | 116,1 | 2.429.597 | 192,1 |
| 2022 (January-June)                            | 4.992.483 | 61,2  | 2.948.414 | 51,4  | 2.044.069 | 84,1  |

Source: *Statistical Office of the Republic of Serbia*, <https://www.stat.gov.rs/en-us/oblasti/ugostiteljstvo-i-turizam/turizam/>

In the period January-June 2022, domestic tourists mostly stayed in Kopaonik (266,799 overnight stays, which is 20% more than in 2021), followed by the Serbian capital Belgrade, Vrnjačka spa, Sokobanja, and Zlatibor. Foreign tourists had the largest number of overnight stays in Belgrade (the capital of the Republic of Serbia) with 846,957 overnight stays, which is 132% more than in the same period of the previous year. Foreign tourists were extremely interested in Novi Sad, which won the title of European Capital of Culture in 2022, followed by Subotica, Kopaonik and Zlatibor. The largest number of tourists was from Russia (233,890 overnight stays), which is 133% more than in 2021, followed by tourists from Turkey, Montenegro, North Macedonia, Bosnia and Herzegovina. Foreign exchange inflow from tourism in the first six months of 2022 amounted to 969 million euros, which is an increase of 57.9% compared to the same period in 2021, and an increase of 72.4% compared to 2019 (562 million euros), which was the most successful for the Republic of Serbia, when it comes to tourism [7]. The above data indicate that the Republic of Serbia, during the first half of 2022, achieved enormous success and this is a sure indicator that the recovery of tourism is going in the right direction.

## STRATEGIC GOALS OF THE DEVELOPMENT OF TOURISM

### IN THE REPUBLIC OF SERBIA

Bearing in mind the trends in the international market, the process of joining the European Union, the current situation and its development potential in the field of tourism, the Government of the Republic of Serbia has determined the goals of tourism development until 2025. As a country whose tourist offer on the global tourist market has not yet crystallized, the Republic of Serbia should be guided by the basic goals of the future development of tourism, the realization of which will undoubtedly position it better among the competition. It (the Republic of Serbia) "... should encourage the development of a positive image on the world market, ensure the protection and sustainable use of nature and cultural heritage as a resource for the development of tourism, improve the quality of life of the population and ensure the protection of tourist consumers, in accordance with the experiences of developed European countries" [16].

In the previous period, in accordance with the development of mass tourism, goals that emphasized primarily the quantitative aspect dominated, that is, goals that, first of all, were aimed at attracting the largest number of both domestic and international tourists. In contrast to that period, in the modern conditions of tourism development, the emphasis is not on the quantitative, but on the qualitative aspect. However, this does not mean that the previous goals are deleted, but simply supplemented with new ones, which emphasize the need to preserve a healthy environment while meeting the increasingly diverse needs of tourists.

The future development of tourism in the Republic of Serbia should include a wide range of different goals, and accordingly, the development goals contained in the Tourism Development Strategy of the Republic of Serbia for the period from 2016 to 2025 would be the following: *growth the share of hotels and similar catering facilities for accommodation in total accommodation facilities at 50%; reaching the total occupancy of accommodation capacities of 30%; increase in tourist traffic by 2025 up to three times, that is, by at least 50%; increase in unit consumption of tourists (per night) by 50%; increasing the share of foreign overnight stays to 45% by 2020 and 55% by 2025; doubling the direct share of tourism in the GDP of the Republic of Serbia; an increase in the number of people directly employed in tourism by at least 50% and an increase in the number of people employed in tourism and complementary activities up to three times and an increase in direct investments* [16].

Depending on which goal is specifically in question, they can be achieved by applying different measures and incentives. It is the state that should play the main role in the achievement of most goals and, primarily, should work on securing the necessary investments for building and improving infrastructure, on providing more favorable loans, grants and a number of other benefits as help and support for the development of tourism. In recent years, in addition to the above, ecological goals and measures for their achievement, which are contained in various programs and policies and refer to the protection and rational use of tourist resources, have gained importance.

In the Tourism Development Strategy of the Republic of Serbia for the period from 2016 to 2025, a growth model from 2021 to 2025 was presented, which foresees an increase in accommodation capacity by 15,000 beds with the continuation of the trend of restructuring, increasing the quality of services and increasing the occupancy rate of already existing ones. capacity. The total number of overnight stays is expected to reach the level of 14.84 million in 2025, which means that an annual growth rate of 9.1% is expected. It is also expected that in 2025, foreign tourists will spend over eight million, and domestic tourists over 6.5 million overnight stays. This would mean that the average annual growth rate of overnight stays by foreign tourists would be 13.5%, and 4.8% by domestic tourists [16].

### CONCLUSION

The development of tourism in the Republic of Serbia during the second half of the 20<sup>th</sup> century was largely determined by its overall socio-economic development. However, due to its characteristics as an economic activity, and especially due to the characteristics of tourist needs, tourism in the Republic of Serbia did not develop at the same pace as the economy as a whole. In addition, the development of tourism in the Republic

of Serbia was under the extremely high influence of the international environment, as well as under the influence of the development of tourism in Europe (especially in the last decade of the 20<sup>th</sup> century).

During the first two decades of the 21<sup>st</sup> century, the faster development of tourism in the Republic of Serbia is evident. In particular, the continuous growth of international tourist arrivals is noted, which confirms that the Republic of Serbia is becoming an increasingly attractive tourist destination in Europe and the world. Tourism in the Republic of Serbia also has a very large potential that can, in the coming period, become a significant driving force for the overall development of the country.

The economic crisis of 2008 and the *COVID-19* pandemic left significant negative consequences on tourist traffic. In accordance with the above, the Republic of Serbia also recorded significant losses in tourist traffic, especially international, on the one hand, but there was an expansion of domestic tourist traffic, on the other hand, so many destinations became very popular and visited to a much greater extent by domestic tourists.

Tourism in the Republic of Serbia has a very large development potential that can, in the coming period, become a significant driving force for the overall development of the country. In this sense, the positioning of the Republic of Serbia as a tourist destination on the international tourism market is a very important and significant goal that requires: defining the mission and vision of the Republic of Serbia as a tourist destination, defining the goals of the future development of tourism (especially foreign), the application of modern concepts (marketing, management etc.) in the tourism industry and clearly defining the guidelines through which the vision and goals will be operationalized. It is also necessary to offer new, more modern tourist products for which there is great interest on the international market. These are mainly products related to business tourism, cultural tourism, eco tourism, health and recreational tourism.

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