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**TOURISM  
IN FUNCTION OF DEVELOPMENT  
OF THE REPUBLIC OF SERBIA**

Tourism product as a factor of competitiveness of  
the Serbian economy and experiences of other countries



**THEMATIC  
PROCEEDINGS**

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**UNIVERSITY OF KRAGUJEVAC  
FACULTY OF HOTEL MANAGEMENT  
AND TOURISM IN VRNJAČKA BANJA**



# TOURIST PRODUCTS IN THE FUNCTION OF IMPROVING COMPETITIVENESS OF SERBIA AS A TOURIST DESTINATION

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## Abstract

*Serbia disposes of natural, cultural and historical resources which represent the basis for the development of attractive tourism products. Nevertheless, Serbia as a tourist destination is not competitive on the international tourist market. Although the number of foreign tourists slightly increases year by year, the data of the World Economic Forum (WEF) show that Serbia is at the bottom of the scale in terms of competitiveness as a tourist destination in Europe. This paper aims to identify key tourism products of Serbia that can improve the competitiveness of Serbia as a tourist destination in the international market. In this paper the tourist traffic will be analyzed, as well as the position of Serbia as a tourist destination in Europe and worldwide. Special contribution of the paper is reflected in the proposal of measures for the future development of tourism in Serbia, with the aim of its better positioning in the international market.*

Key Words: *tourism products, competitiveness, Serbia, tourist destination, international market*

JEL classification: *Z32, L83*

## Introduction

As the most dynamic and heterogeneous phenomenon of modern society, tourism should be a long-term priority of economic development of each country as it represents one of the most remarkable economic and social phenomena of the XXI century. Tourism is one of the factors of growth of

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the world economy, the biggest export "industry", a significant factor in foreign exchange earnings and a source of added value of undeveloped areas (Hrabovski-Tomić & Milićević, 2012). According to the World Travel and Tourism Council the total contribution of the tourism industry in the global GDP in 2015 was 9.8%. Every 11 jobs in the world belong to the tourist activity (WTTC, Travel&Tourism Economic Impact 2016, World). The total number of international tourists in the world in 2015 amounted to 1,186 million (4.6% more than in 2014), while total revenue from international tourism increased by 4.4% and amounted to 1.260 billion USD (UNWTO Tourism Highlights, 2016 Edition). Such development of international tourism evolved in constant growth of tourism role in overall economic development of most countries over the world (Petrović & Milićević, 2015). Tourism significantly contributes to the economic, social and cultural development of many countries, especially the development of transition countries (Zdravković & Petrović, 2013). However, tourism market is characterized by an extreme glut. In tourism, continuous innovation of tourism offer is required because the development of the world economy, as well as the tourism development happens in a very turbulent environment (Krstić et al., 2015), and because tourists today increasingly strive for new tourism products, new destinations, new adventures and experiences. New experiences have become the main motive for a decision on tourism travel (Milićević & Petrović, 2016).

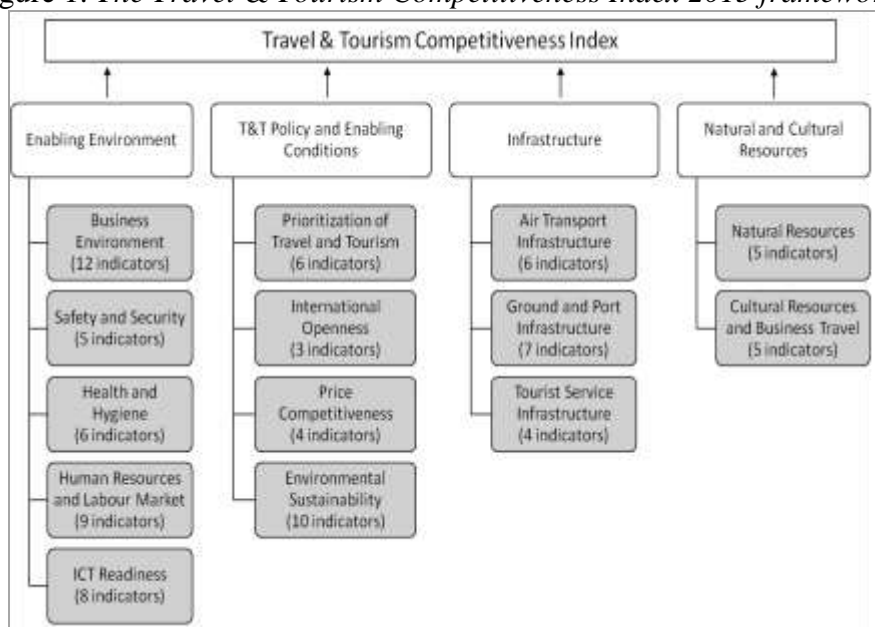
The concept of competitiveness at the country level was first introduced by Porter (1990), through the model of competitiveness of the national economy (Petrović et al., 2016). The competitiveness of countries as tourism destinations, especially transition countries, became vital for their survival and growth in the international market (Echtner & Ritchie, 2003). Kozak and Rimmington (1999) believe that destination competitiveness can be evaluated quantitatively and qualitatively; in quantitative terms, this refers to the number of tourists who visited the destination or tourism spending, while in qualitative terms, this includes those destination attributes which tourists enjoyed most (or least) during their stay at the destination, which they compare with the attributes and experience at other destinations they visited.

Serbia, as a country with rich cultural and historical heritage and preserved natural resources, has comparative advantages for tourism development. In addition to prehistoric archaeological sites, ancient heritage, numerous monuments and fortresses, Serbia also has medieval

churches and monasteries, some of which ranked in the UNESCO cultural heritage. It has mountains, rivers, lakes, mineral springs, national parks, etc. Although continental, it also has the connection with distant seas as well through the River Danube. It connects Western Europe and the Middle East, and therefore has geopolitical importance, and no wonder that for centuries it has been the target of invaders. Despite its many attractions, Serbian tourist products are not adequately developed nor commercialized in the international tourism market because the tourism as an industry has never had a strategic importance in the development policy of Serbia (Milovanović & Milićević, 2014).

### Analysis of competitiveness of Serbia as a tourist destination

Figure 1: *The Travel & Tourism Competitiveness Index 2015 framework*



Source: WEF, *The Travel & Tourism Competitiveness Report, 2015*, p. 4

For the purpose of determining and comparing the competitiveness of the countries as tourist destinations, the World Economic Forum (WEF) made the Travel & Tourism Competitiveness Index (TTCI) (Figure 1). The TTCI measures the set of factors and policies that enable the sustainable development of the Travel & Tourism (T&T) sector, which in turn, contributes to the development and competitiveness of a country. It comprises four subindexes (Enabling Environment; T&T Policy and Enabling Conditions; Infrastructure; Natural and Cultural Resources), 14

pillars, and 90 individual indicators, distributed among the different pillars (WEF, The Travel & Tourism Competitiveness Report 2015).

Table 1 shows the value of the index of competitiveness of Serbia as a tourist destination in the period from 2008 to 2015. Based on the data, we can conclude that the value of this index is the lowest in 2015 when Serbia was ranked 95th in the world and 35th in Europe. Serbia as a tourist destination has a particularly poor competitive position within Europe, where only Albania and Moldova have lower competitive position (WEF, The Travel & Tourism Competitiveness Report, 2015).

Table 1: *Tourism Competitiveness of Serbia – Global and European level*

	2015	2013	2011	2009	2008
Rank in world	95/141	89/140	82/139	88/133	78/130
Index (world)	3,34/7	3,78/7	3,85/7	3,71/7	3,76/7
Rank in Europe	35/37	40/42	38/42	38/42	37/42

Source: WEF, *The Travel & Tourism Competitiveness Report for 2015, 2013, 2011, 2009, and 2008*

Serbia has a particularly poor competitive position in the following indicators: Cultural Resources and Business Travel (1,61), Natural Resources (1,9) and Air Transport Infrastructure (2,13). Serbia is more competitive in the field of Health and Hygiene (6,04), Safety and Security (5,46), Price Competitiveness (4,56) and ICT Readiness (4,45).

When comparing tourist destinations, it is necessary to determine which destinations are the key competitors (Enright & Newton, 2004). Starting from the geographical position of Serbia and the simultaneous affiliation both to the Balkans and Central European cultural circle, while respecting the existing resource base of Serbia, there is no doubt that Bulgaria, Romania, Czech Republic, Slovakia and Hungary, are its main competitors in the tourism (Tourism Development Strategy of Serbia, the first phase report, 2005). Based on the reviews given in Table 2, it can be concluded that Serbia lags far behind its competitors and that by all indicators it is behind all the countries that make up the competitive set.

Table 2: *Tourism Competitiveness of Serbia in relation to its main competitors in 2015*

	Index (world)	Rank in world
Czech Republic	4,22	21
Hungary	4,14	41
Bulgaria	4,05	49
Slovak Republic	3,84	61
Romania	3,78	66
Serbia	3,34	95

Source: WEF, *The Travel & Tourism Competitiveness Report, 2015*

### **Analysis of tourist traffic of Serbia**

Most often, the success of the tourism industry is measured by quantitative indicators such as number of domestic and foreign tourists and the number of realized overnight stays. Despite its tourism resources, the tourism of Serbia is still underdeveloped. Serbia has not yet built an identity that makes it special and unique setting it apart from other destinations, making it special for tourists to choose it. In addition, Serbia in most of the world has a bad image, particularly in the major tourist generating areas. The images and information pertaining to Serbia in the last 25 years (the breakup of Yugoslavia, war environment, the bombing of Serbia in 1999, political instability, etc.) have a distinctly negative connotation, and are certainly not the motivational force that will bring a large number of foreign tourists to Serbia (Milovanović & Milićević, 2014).

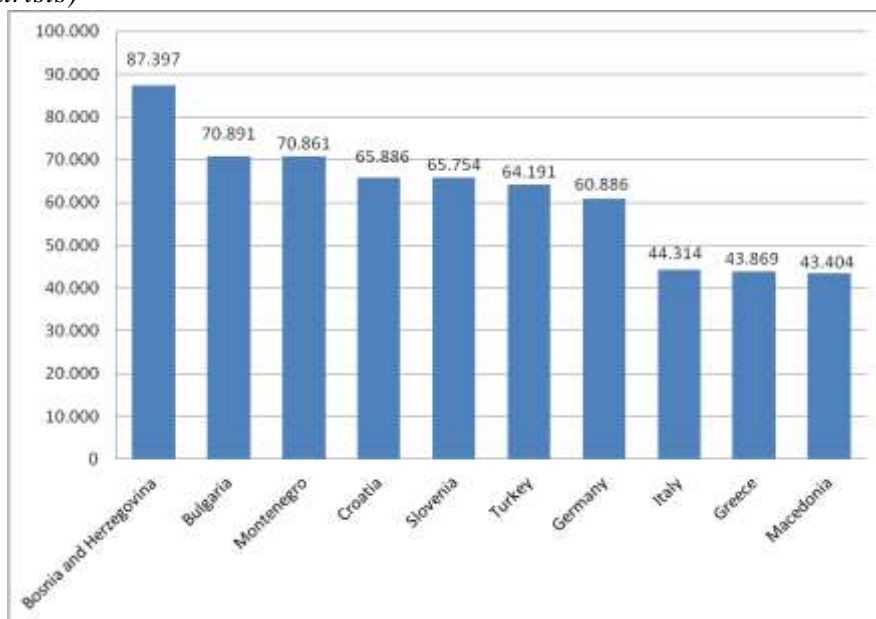
Table 3: *Tourist traffic in Serbia for the period 2011 - 2015*

Year	Tourists arrivals - Total	Tourists Arrivals - Domestic	Tourists Arrivals - Foreign	Tourists Nights - Total	Tourists Nights - Domestic	Tourists Nights - Foreign
2011.	2.068.610	1.304.443	764.167	6.644.738	5.001.684	1.643.054
2012.	2.079.643	1.269.676	809.967	6.484.702	4.688.485	1.796.217
2013.	2.192.435	1.270.667	921.768	6.567.460	4.579.067	1.988.393
2014.	2.192.268	1.163.536	1.028.732	6.086.275	3.925.221	2.161.054
2015.	2.437.165	1.304.944	1.132.221	6.651.852	4.242.172	2.409.680

Source: *Statistical Office of the Republic of Serbia, Statistical Yearbook – data for each years*

According to the data from Table 3, it can be concluded that although domestic tourists dominate in the total tourist traffic of Serbia, the number of foreign tourists every year recorded a slight growth. Foreign tourists made 46.5% of total tourists and 36% of the total number of overnight stays in 2015. Of the nearly 2.5 million tourists who visited Serbia in 2015, over 1.1 million are foreign tourists, in contrast to 2011, when there were around 760 thousand.

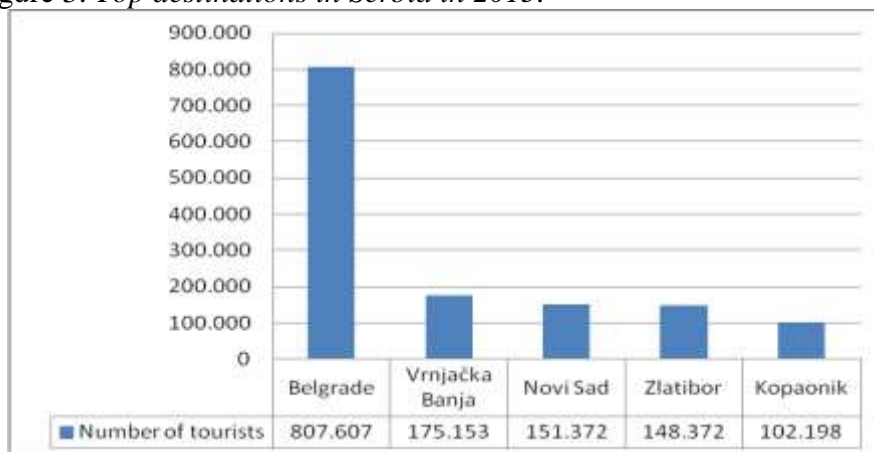
Figure 2: *The main emissive markets for Serbia in 2015 (number of tourists)*



Source: *Statistical Office of the Republic of Serbia, Statistical Yearbook 2016*

Regarding the structure of foreign tourists, as shown in Figure 2, visitors from the former republics of the former Yugoslavia, are a major generator of tourism demand in Serbia. Most foreign visitors in 2015 came from Bosnia and Herzegovina, Montenegro, Croatia and Slovenia. However, the significant share of tourists from Bulgaria, Turkey, Germany, Italy and Greece, which increases every year, should be noted as well.

Figure 3: *Top destinations in Serbia in 2015.*



Source: *Statistical Office of the Republic of Serbia, Statistical Yearbook 2016*

The most visited tourist destinations in Serbia are Belgrade, Vrnjačka Banja, Novi Sad, Zlatibor and Kopaonik. These are the destinations dominating for years by the number of domestic and foreign tourists.

### **Tourism products in the function of improvement of competitiveness of Serbia as a tourist destination**

Tourism products that could contribute to the development of tourism in Serbia, as well as to the improvement of its competitiveness in the international tourism market are (Tourism Development Strategy of the Republic of Serbia for the period 2016-2025): City Tourism; Manifestations/Events; Mountain tourism; Health tourism; Themed routes; Rural tourism; Nautical tourism; *MICE* tourism; Cultural heritage; Special interests; Transit tourism. The importance of these tourism products results from the growing volume of demand and the relatively high average consumption per day of stay. These are the products that can give the best effect with minimal effort, in shortest time. Below is the brief description of each of the listed products, and the measures that should be applied for the purpose of their development, and improvement of the competitiveness of Serbia.

**City Tourism** - the most visited tourist destination in Serbia is definitely Belgrade. The basis for positioning Belgrade on the international tourism market is based on the range of benefits it disposes of, namely: favorable

geographical position, a wealth of cultural and historical monuments, natural resources, tourist attractions, events, numerous various accommodation facilities, capacities for the development of *MICE* tourism, developed image of the city as fun and having a good time city. Besides Belgrade, city tourism is also developed in Novi Sad, which is the cultural center of Vojvodina. Fostering development of tourism in other cities in Serbia, would contribute to the development of these cities as tourist destinations and increase of traffic in them, as well as at the level of Serbia. The recognizability of other cities and promotion of their tourism offer would contribute to improving the competitiveness of Serbia as a tourist destination.

**MICE tourism** - Belgrade is the most developed destination of MICE tourism in Serbia. It has facilities that are necessary for the organization of large meetings, conventions and trade shows (Sava Centar, Kombank Arena, Belgrade Fair, EXPO XXI), as well as the hotels that provide quality services, including the hotels of international hotel chains (Radisson Blu, Crowne Plaza, Falkensteiner, Holiday Inn, Best Western, Marriott), which in its offer have conference facilities. The comparative advantage of Belgrade as a destination of MICE tourism is reflected in pricing competitiveness in relation to European congress centers, transport accessibility, as well as in the rich offer in the sphere of culture, gastronomy and entertainment. Other destinations in Serbia that have a developed MICE tourism are: Novi Sad, Subotica, Palić, Niš, Zlatibor, Kopaonik, Arandelovac and Vrnjačka Banja. They have potentials for organizing national and regional conferences. However, in these destinations it is necessary to work on improving the quality of existing accommodation and conference offerings, and the overall service quality.

**Health tourism** - Serbia has more than 1000 sources of cold and hot mineral water, as well as the wealth of natural mineral gases and curative mud. It has 50 spa and health resorts (Stanković, 2010). Basic comparative advantages of Serbian spa tourism are reflected in the rich natural medicinal resources, rich cultural and historical heritage, long balneological tradition, quality medical staff, skilled techniques of treatment, relatively low prices for accommodation and treatment, variety of events complementing the stay of visitors. On the other hand, inadequate transport and utility infrastructure, a large representation of outdated offer, inadequate health tourism products, lack of awareness of health tourism in line with current market trends, etc., are slowing down the positioning of medical tourism Serbia in the international market

(Milićević, 2013). The basic characteristics of spa tourism of Serbia is the dominance of domestic visitors, while foreign visitors account for only 16% of tourist traffic, which only confirms that Serbian spas are not competitive on the international market (Milićević & Petrović, 2016). The offer in spas should be supplemented with more sports and recreational, cultural, entertainment and *spa&wellness* contents. Guests at spas should not only be the patients, but also healthy guests who want to stay in the spa for rest and relaxation (Milićević, 2015). The most visited spa in Serbia is Vrnjačka Banja. However, its primary visitors are domestic tourists, which indicates that it is lagging behind the well-known spas in the region with its offer, and therefore is not competitive on the international market (Hrabovski-Tomić & Milićević, 2012).

**Mountain tourism** - Serbia has significant opportunities for the development of tourism in the mountains. The most visited winter mountain center of Serbia is Kopaonik, which has the most developed offer for winter sports, but also a varied summer sports and recreational offer. Stara Planina has great potential to become a major ski destination, but additional infrastructure and tourist offer is needed. Zlatibor offers a passive vacation, primarily intended for families with children, while for serious adventurers Tara offers a lot of possibilities, such as hiking or mountain biking, but it is certainly necessary to develop additional tourist offer in order to increase the number of tourists.

**Cultural tourism** - Serbia has a very rich collection of movable, immovable and intangible cultural heritage, which is a huge potential for the development of cultural tourism. Of the 200 monuments, which according to the national laws have the highest level of protection, ten of cultural monuments have been listed on *UNESCO's* World Heritage List: eight medieval Serbian monasteries and churches (Studenica, Petrova Crkva, Đurđevi Stupovi, Sopoćani, Gračanica, Bogordica Ljeviška, Pećka Patrijaršija, Visoki Dečani), the medieval town Ras and archaeological site *Felix Romuliana* in Gamzigrad near Zaječar (Ministry of Culture and Information of the Republic of Serbia, 2017). However, other cultural treasures of Serbia should be mentioned as well, such as: archaeological sites (Vinča, Lepenski Vir, etc.), medieval cities and fortifications (Kalemegdan, Petrovaradinska fortress, etc.), medieval monasteries (Žiča, Ljubostinja, Mileševa, etc.). Specialized tour operators can organize monastery tours, tours following the roads of Roman emperors, tours of *Transromanica* in Serbia, etc. However, many sites are poorly equipped

with infrastructure, they lack supporting facilities, basic information, signage, etc.

**Rural tourism** - Although solidly developed, especially in some parts of Vojvodina, Central and Western Serbia, rural tourism is still underdeveloped Serbian tourism product. The original nature, cultural and historical heritage, original architecture, authentic experience of life in the countryside (farm work, gatherings, local gastronomy), opportunities for active and passive vacation, would be the basis of an integrated rural tourism product of Serbia. However, it is important to create a positive climate and increase interest of the local people and businesses to be engaged in the development of this form of tourism. Accordingly, rural tourism can be a significant factor in the development of the villages of the municipality. The Kosjerić Municipality, which is rich in natural, cultural and historical wealth, but also manifestations, in which presenting the ethnographic values, traditional folk customs, costumes, folklore and cuisine, is increasingly becoming known for its rural tourism. Hospitable hosts of the villages began receiving guests in their homes two and a half decades ago (Milićević et al., 2015).

**Manifestation tourism** - In Serbia, numerous events are organized. They make tourist destinations especially attractive. Each event is a unique form of promotion of a destination in which it is organized. Especially interesting are the traditional events, through which the richness and diversity of folk creativity in Serbia is presented. The oldest tourist event in Serbia is "Karneval cveća" in Bela Crkva, which was first held in 1852. In Serbia there are two internationally renowned music festivals, *EXIT* in Novi Sad and *Dragačevski sabor trubača* (Dragačevo Trumpet Festival), which attract many foreign tourists. There are also very important cultural events with a decades-long duration: *FEST*, *BITEF*, *BELEF*, Ljubičevske konjičke igre, Župska berba, Vukov sabor, Mokranjčevi dani, etc. Gastronomic events organized throughout Serbia should certainly be noted (Roštiljijada, Kupusijada, Pasuljijada, Slaninijada, Pršutijada, etc.). Promotion and tourism propaganda of some important events in Serbia can contribute to increasing tourist traffic to destinations that are organizing these manifestations.

**Nautical tourism** - Although Serbia does not have a direct access to a sea, its rivers, lakes and canals, especially the Danube River, which connects Serbia with other countries and the Black Sea, are a great potential for development of nautical tourism (Štetić, 2003). The Danube

is the most popular river for cruises and numerous tour operators organize river cruisers docking in Belgrade and Novi Sad. Individual navigation on the rivers and canals of Serbia has not sufficiently been developed. The main disadvantages of the development of nautical tourism in Serbia mentioned include the lack of adequate infrastructure on the rivers (moorings, marinas, gas stations), insufficient accommodation facilities near the rivers to accommodate nautical tourists, the lack of specific information related to nautical tourism and incomplete image of the destination of nautical tourism.

**Ecotourism** - Serbia has 5 national parks, 17 nature parks, 20 areas with exceptional features, 68 nature reserves, 3 protected habitats, 310 nature monuments and 38 areas of cultural and historical significance (Institute for Nature Conservation of Serbia, 2017). This enormous potential is the basis for the development of ecotourism in Serbia, which has not been adequately developed yet. First of all, there is no quality infrastructure in national and natural parks, there is not enough educated staff for development of eco-tourism, and there is also a lack of interest of travel agencies for the tourism product. Bearing in mind the modern trends in the market, the primary task would refer to creating the Strategy for ecotourism development of Serbia, with the development of adequate standards (Kostić et al, 2016). The potential for development of ecotourism have a number of destinations in Vojvodina (the national park Fruška Gora, Deliblatska peščara, etc.), in Southeast Serbia (Đerdap National Park, Vlasina, Stara planina, etc.) and in Southwest Serbia (Nature Park Golija, Uvac River Canyon, National Parks Tara, Šarplanina, Kopaonik, etc.).

**Transit tourism** - Geo-traffic position of Serbia is very favorable for the development of transit tourism. Serbia is at the crossroads and represents a link between East and West. Of primary importance is the fact that passing through the territory of Serbia are two European corridors, i.e. naval corridor VII and land Corridor X (Štetić, 2003). Transit tourism is particularly pronounced in the summer months, when there is a greater frequency of traffic. The formation of an adequate tourism offer for this specific type of tourism, which includes a number of different types of services, is the question to which developed tourist countries attach great importance. Therefore, greater importance should be devoted to transit tourism in Serbia as well, in order to better valorize tourist facilities and achieve higher tourism earnings. This includes modernization of traffic arteries, development of modern rest areas, greater promotion, etc.

In addition to the aforementioned travel products, Serbia has the resources to offer a number of attractive products in the field of special interests: gastronomy, hunting, fishing, birdwatching, adventure tourism (mountain-biking, trekking, orienteering, etc.) and the like.

### **Measures for future positioning of Serbia in the international tourism market**

Based on the quantitative indicators, we can conclude that Serbia is lagging behind the other destinations in the region and that its tourism products are not competitive in the international tourism market. Serbia as a tourist destination could take a much better position in the international market, but it is necessary to adapt the tourist offer to the needs of modern tourists. In tourism, continuous innovation of tourist offer is necessary, because tourists today strive more and more for new tourism products, new destinations, new adventures and experiences.

In order to increase the competitiveness of Serbia in the international tourism market, some of the following measures can be applied:

- Establishing a regional Destination Management Organization, to deal with the coordination of development and improvement of tourism in the region. In this way, each region would more easily create a competitive tourist offer,
- Creating regional Tourism development strategies. This would gradually include less developed places from different regions into the international tourism market, through the development of specific forms of tourism,
- Creating and launching a modern and integrated tourist information system. The Internet is now a major tool of promotion and sales,
- A higher scope of promotional campaigns in the international tourism market,
- Modernization of existing accommodation facilities,
- Promotion of opportunities for investment in tourism development and the establishment of additional incentives for investors interested in the construction of new tourist facilities and content,
- Providing support to the preservation of existing cultural and natural attractions through the principles of sustainable development, i.e. through the development of eco-tourism,
- revitalization of urban cores and their inclusion in the tourist offer,

- Improvement of transport infrastructure and introduction of tourist signage and themed signs,
- Raising the quality of knowledge and skills in tourism, and other personnel who are indirectly involved in the development of tourism,
- Creating new attractions that can increase the coming of foreign tourists.

Successful and quality development of any destination in Serbia depends on organizing tourism both at the level of the whole country, as well as on the ability of mutual communication between the different interests of certain entities, which together contribute to the formation of the main tourist products Serbia.

### **Conclusion**

Despite the huge potential, Serbian tourist products are not competitive in the international tourism market. Based on the WEF report, according to the competitiveness in tourism Serbia is at 35th of 37 ranked countries in Europe. In recent years Serbia recorded a slight increase in foreign tourists, but in relation to tourism developed countries, it is certainly not enough. Tourism development could significantly contribute to economic development and the improvement of Serbia's image in the international community.

The main problems reflect in the fact that within the key tourist attractions, the initial offers were designed 20 years ago or earlier and due to the absence of Serbia in the international market remained non-modernized. The closed market has caused delays in the process of restructuring and privatization, and insufficient scales of investment, and consequently it did not come to the development of new and attractive tourism products.

The inherited tourism infrastructure was created primarily for the domestic tourism market, which is evident in the position of Serbia as a tourist destination in the region and throughout Europe. Frequent changes in tourism demand require great elasticity of tourist offer and constant improvement and therefore, quality management of tourism products and destinations as a whole is of great importance.

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