

ANALYSIS OF QUANTITATIVE INDICATORS OF MODERN TOURISM DEVELOPMENT IN THE REPUBLIC OF SERBIA

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Abstract: *The paper presents an analysis of quantitative indicators of modern tourism development in the Republic of Serbia. The subject of analysis is the ratio of the number of tourist arrivals and overnight stays in general, and the number of tourist arrivals and overnight stays by type of tourist sites for the period 2017-2018. The methods applied are the methods of theoretical content analysis, concretization, specialization and the normative method, then statistical, analytical-deductive methods and the method of quantitative data analysis. The research is based on statistical data of Statistical Office of the Republic of Serbia. Cumulative data of the arrivals and overnight stays indicate a progressive tendency in tourism development in Serbia. The number of arrivals and overnight stays in Serbia is related mostly to the main administrative centres. By comparing the data for both years, it is noticeable that the number of arrivals, as well as overnight stays in Serbia, was in 2018 higher than the number of arrivals and overnight stays in 2017, both in the total amount and in the individual monthly data.*

Keywords: *Tourism, Tourist Arrivals, Overnight Stays, Statistical Office of the Republic of Serbia.*

1. INTRODUCTION

Tourism can be defined as an activity which, in a particular way, connects urban environment and, provisionally speaking, non-urbanised areas which in turn have an abundance of different natural resources. Thus, tourism can be defined as “targeted, planned and motivated behaviour” (Geoffrey & Alister, 2006, p. 45), where equal contributions in the realization of a certain travel arrangement are made by both resources of the tourism product provider and tourism supply users, i.e. the motives, needs and expectations of the person who travels.

Although tourism is often linked to an activity that has reached its full intensity in recent decades, it must be emphasized that modalities of tourist movements existed well before the separation, development and spreading of modern forms of tourism as we know and practice it today. Namely, when organizing such movements, the goals were similar to the contemporary goals when organizing tourist trips - „research, trade, sports, cognitive, diplomatic, health, etc.” (Vujić, Cvijanović & Štetić, 2012, page 10). According to Njegovan (2016), “modern tourism as an economic (lucrative) activity, emerged and developed during the industrial revolution, within the framework of the capitalist socio-economic system. This system created the conditions for mass tourist movements (travels), and then, increase in their number became a sufficiently broad basis for numerous functions of tourism” (p. 14).

Modern tourism is in theory often considered as an activity which has a significant influence on the economic, social and functional structure of all, especially rural areas and as an essential factor of revitalisation and diversification of the rural economy (Ristić, Vujić & Leković, 2016, pp. 665-666).

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By encompassing various elements of space, tourism revitalises and valorises precisely the areas that are irrelevant or marginal for numerous other activities, thus contributing to their development. Accordingly, Jovičić (2000) points out that only tourism can valorise the sandy, pebbly and rocky coasts of the sea, lakes and rivers, lookouts, mountain slopes covered with snow, swamps, some elements of climate, caves and pits, relict and endemic specimens of plants and animals, sunset and picturesque landscapes, that is, necropolises, standing tombstones, archaeological sites, murals, etc.” (p. 17).

As an industry, tourism has, in recent decades, been slowly growing into a mass socio-economic phenomenon with numerous positive effects in the fields of finance, employment, technology, transport and communications, and thus in the second half of the 20th and at the beginning of the 21st century, tourism experienced a strong expansion, and consequently is constantly evolving every year.

Considering all the aforementioned advantages of tourism, especially emphasizing its close connection with a range of activities, such as transportation, culture, health, politics, etc., and understanding the importance that tourism has for modern society, it seems necessary to look at certain quantitative indicators of development of tourism in the Republic of Serbia and, accordingly, take into account and analyse the available parameters in this domain. In this context, it is particularly interesting to consider the ratio of the number of tourist arrivals and overnight stays in general, and the number of tourist arrivals and overnight stays by types of tourist sites for the selected three-year period, based on available official statistics.

The research of the number of arrivals and overnight stays in general, and the number of arrivals and overnight stays by types of tourist sites will cover a two-year period from 2017 to 2018. The paper will be methodologically based on theoretical analysis of relevant contemporary views in theory, normative analysis of legislative sources, and quantitative analysis of statistical indicators in the domain of the research subject.

2. LITERATURE REVIEW

Local economic development in an area is significantly defined among other things, by tourist activities (Rogerson & Rogerson, 2014; Karampela, Kizos and Spilanis, 2016, p. 161). In this context, Zhenhua (2003) states that in less developed regions, the local community can derive significant economic-social benefits from tourism (pp. 465-466), thus the development of this industry can be an important turning point for further development at the local level.

By studying various approaches in defining the notion of tourism, one can notice a great diversity in approaches, all depending on the author and the scientific discipline within which the concept of tourism is derived. Based on generality and content in the approach of conceptual definition, Marinoski et al. (2016) distinguish four groups of definitions of tourism: “nominalist, economic, statistical and universal” (p. 41).

Nominalist definitions have the broadest approach, defining tourism solely from the aspect of tourist movements, that is in a way that tourism represents “travel from the place of permanent residency to another place” (Jovičić, 1981; Marinoski et al. 2016, p. 41). This definition ignores the fact that tourism is essentially a broader category, that is, that tourism is not only and exclusively the movement of users of the tourism supply.

Economic character is, naturally, the essence of economic definitions of tourism, and thus an economic definition “explains the relations between tourism supply users and the activities which enable the meeting of tourist needs” (Marinoski et al., 2016, p. 44). As opposed to these, the statistical definitions of tourism are oriented to the statistical moments of monitoring the dynamics of tourist movements and other relevant elements, so that they are also very narrow in approach, and do not determine numerous significant elements on which tourism as an industry is based.

Finally, universal definitions provide a more comprehensive picture of tourism, and “enable the understanding of the complexity and heterogeneity of the tourism phenomenon” (Marinoski et al., 2016, p. 43). According to Jovičić (1981), in this sense, tourism can be defined as “a set of relationships and phenomena associated with movement and consumption outside the place of permanent residence, with the aim of meeting recreational and cultural needs.”

Tourism as an industry has proved particularly significant in the field of development of rural areas. Namely, according to Ćirić, Počuča & Raičević (2014), “on one side, tourism has great significance for the development of rural areas, and on the other side, the significance of tourism can be perceived in creating the market for agricultural products, since they are important inputs for hotels and restaurants” (p. 26). Thus, along with the fact that sustainable development of rural tourism must be economically justified, it also has to contribute to the preservation of the natural, social and cultural characteristics of the travel destination (Počuča, Matijašević-Obradović & Drašković, 2017, p. 1252).

In the field of tourism development, it is also important to mention the concept of sustainable development as a „contemporary development concept” (Matijašević-Obradović & Škorić, 2017, p. 283). As Šimkova (2007) points out, an important feature of modern society is precisely the focusing of primary attention on sustainable development (p. 236). The term sustainability can itself be described as the establishment and continuous progress of human well-being, while „not destroying the natural resource base that future generations will need to depend on” (Adinyira, Oteng-Seifah & Adjei-Kumi, 2007, p. 18). According to Ristić (2013), sustainable development is “a contemporary development concept that reconciles the social, economic and environmental interests of present and future generations” (p. 229), and the continuous development of modern aspects of tourism (primarily referring to rural tourism) can lead to a “new relationship between the environment, work and leisure, in terms of the sustainability of all, and especially rural areas” (Fagioli, Diotallevi & Ciani, 2014, p. 166). In the above context, Matijašević-Obradović & Kovačević (2016) state that sustainable development as an integral approach is the basis of all development policies of EU countries today, whose membership Serbia is striving for (p. 493).

There is a significant difference between „tourism as a phenomenon and a human desire to explore new localities and change“, which suggests the conclusion that the difference between travelling for the purpose of changing locality, entertainment and new insights and tourist travel is, in fact, in the organization itself“ (Gržetić, Favro & Saganić, 2007, p. 23).

Defining tourism in terms of organized travel, which satisfies the tourists’ needs for rest, entertainment and other, Article 3 of the Law on Tourism („Official Gazette of the Republic of Serbia“, no. 17/2019), defines certain relevant terms from this domain, which are important to mention here. Thus, „tourism activity is the provision of services of travel agencies, services

of tourism professions and the provision of other services” (Article 3, item 30 of the Law on Tourism), while a tourist agency is considered to be „a company, an entrepreneur, another legal entity engaged in the activity of tourism agency ”(Article 3, Item 27 of the Law on Tourism).

The law defines several other terms relevant to the context of the topic of this paper. Namely, a tourist destination refers to a „destination of tourist travel that enables the arrival and stay of passengers by being equipped to do so” (Article 3, item 3a of the Law on Tourism), while a tourism product means „a set of interdependent elements which is organized in practice as a separate value chain consisting of tangible goods and services, natural values and cultural goods, tourist attractions, tourism supra-structure and tourism infrastructure ”(Article 3, Item 39 of the Law on Tourism). It is also important to define the terms of tourist space, place and tourist travel.

According to the provisions of the Law on Tourism, a tourist area is „a unique and indivisible geographical and functional unit of natural and manmade resources and values of importance for tourism” (Article 3, item 40 of the Law on Tourism), a tourist place is an „organizational and functional unit with a formed tourist supply, natural values, cultural goods and other sights of importance for tourism, with communal, transport and tourist infrastructure, as well as with facilities and other amenities for the accommodation and stay of tourists ”(Article 3, item 41 of the Law on Tourism), while tourist travel is defined as „a combination of two or more tourist services (transport, accommodation and other tourist services), established or prepared by the tour operator on their own or at the request of the traveler, for a period exceeding 24 hours or shorter if it includes one night stay, or one or more overnight stays which include only the accommodation service for a specified period of time or duration sold at a single price ”(Article 3, Item 42 of the Law on Tourism).

Relevant defining moments for a further development of tourism in the Republic of Serbia, but also for an analysis of the current situation in this industry, are highlighted by the current Tourism Development Strategy of the Republic of Serbia, for the period 2016-2025 (The Ministry of Trade, Tourism and Telecommunications, 2016). Namely, bearing in mind that the needs, motives and aspirations of tourists in recent years have been perceived more realistically in the marketing field, and placed in the primary determinants of a concrete tourist offer, according to the provisions of the Tourism Development Strategy of the Republic of Serbia for the period 2016-2025 (hereinafter: the Strategy), three groups of new trends in the promotion and development of tourism are highlighted. Those are the following trends: 1.) new trends in promotion and booking methods, 2.) new types of accommodation, and 3.) contemporary motives for traveling in the world tourism market (The Ministry of Trade, Tourism and Telecommunications, 2016, p. 20).

According to Cvijanović et al., if the envisioned set of contemporary tourism development trends is not sufficiently respected, „that can lead to wrong decisions, and wrong decisions will deny the possibility of considering the impact of the demographic, economic, political and technological environment and directions of tourism development“ (Cvijanović, Vuković & Kljajić, 2011, p. 11).

According to the provisions of the Strategy, „new communication and promotional tools have been developed in the field of promotions and booking, based on e-marketing technology for communication with consumers, which strongly increase the efficiency of market activities“

(The Ministry of Trade, Tourism and Telecommunications, 2016, p. 20), while in the field of „accommodation, as opposed to large international hotel chains which also experience transformation adapted to the authenticity of the destination, small family accommodation facilities are being developed which enable the organization of stay and rest of tourists' own choosing, while meeting the growing needs of contemporary tourists for contact with nature and local culture and environment” (The Ministry of Trade, Tourism and Telecommunications, 2016, p. 21). In the domain of contemporary motives for going on tourist travels, decisive motives are certainly distinguished, such as intense vacations, gaining new experiences, learning about cultural heritage, organizing active fitness and sports trips, wellness vacations, getting acquainted with gastronomic specialties, etc. (The Ministry of Trade, Tourism and Telecommunications, 2016, pp. 22-23).

The true situation in the Republic of Serbia in the area of tourist arrivals to our country and the number of overnight stays for the selected period (2017-2018), will be considered and analysed in the research part of the paper. Therefore, the subject of further analysis will be the ratio of the number of tourist arrivals and overnight stays in general, and the number of tourist arrivals and overnight stays by types of tourist places for the selected two-year period, based on available official statistics.

3. MATERIALS AND METHODS

The subject of analysis in the paper, as stated above, is the ratio of the number of tourist arrivals and overnight stays in general, and the number of tourist arrivals and overnight stays by types of tourist places for the period 2017-2018.

In the theoretical part of the paper, the method of theoretical content analysis was primarily applied, with the basic methods of concretization and specialization, and the normative method in the domain of analysis of current legislative sources, while in the research part of the paper, statistical and analytical-deductive methods and the method of quantitative data analysis were applied. The survey is based on official statistics of the Statistical Office of the Republic of Serbia.

4. RESEARCH RESULTS

The research part of the paper included an analysis of the relevant data for 2017 and 2018. Considering that the research was done on the basis of data obtained from monthly statistical bulletins for the mentioned two-year period, the primary intention of the authors was to include the data from 2019 in the research as well. A preliminary observation of the available research material indicated that official statistical data were only available for the first half of 2019 (more precisely for the first seven months, ending with July of the current year), and therefore it was evident that partial information cannot provide a comprehensive picture on the number of arrivals and overnight stays of tourists, or the number of tourist arrivals and overnight stays by types of tourist places in this year. In order to reach accurate, statistically verified conclusions, the research accordingly covered the two previous years, for which there were transparent, monthly data presented for the whole, specifically observed annual period. And finally, the survey covered two years (not a larger number of years), given the abundance of data that must be presented and analysed in order to draw as accurate conclusions as possible and to obtain as adequate a picture as possible of the dynamics of tourist supply and demand in the Republic of Serbia, in the previous period.

However, in order to draw some parallels with the available 2019 data, a summary of the available 2019 data will be provided before the spreadsheet overview of the relevant research data for 2017 and 2018 is given. Namely, according to the official statistical data, “in July 2019, 391,387 tourist arrivals were recorded in the accommodation facilities in the Republic of Serbia, which is 5.6% more than in the same period in 2018. The number of arrivals of foreign tourists was increased by 5.2% compared to July of the previous year, while the number of arrivals of domestic tourists was increased by 6.1%” (The Statistical Office of the Republic of Serbia, 2019, p. 58).

In terms of the number of overnight stays, “in July 2019 tourists realized 1,149,996 overnight stays, of which 60.2% were realized by domestic and 39.8% by foreign tourists. The number of overnight stays is 5.3% higher than in July 2018. In July 2019, in the structure of overnight stays of foreign tourists, the most overnight stays were realized by tourists from Turkey (7.8%), China (6.7%) and Bosnia and Herzegovina (5.8%)” (The Statistical Office of the Republic of Serbia, 2019, p. 58).

Table 1. Number of arrivals and overnight stays of tourists
in the Republic of Serbia for the period 2017-2018

	Tourist arrivals (in thousands and percentages)				Tourist overnight stays (in thousands and percentages)			
	total		domestic		total		domestic	
2018	3,430.6 thous. 100%		1,720.1 thous. 100%		9,335.9 thous. 100 %		5,678.1 thous. 100%	
I	176.8	5.2	95.3	5.5	549.8	5.9	332.3	5.9
II	186.6	5.4	108.9	6.3	583.7	6.3	397.9	7
III	220.7	6.4	116.2	6.8	593.2	6.4	362.6	6.4
IV	283.4	8.3	155.1	9	714.8	7.7	448.7	7.9
V	371.8	10.8	208.3	12.1	923.5	9.9	586.9	10.3
VI	328.5	9.6	164.0	9.5	923.6	9.9	582.8	10.2
VII	370.5	10.8	165.4	9.6	1,092.0	11.7	657.5	11.6
VIII	421.2	12.3	194.1	11.3	1,266.2	13.6	769.8	13.6
IX	314.0	9.2	139.8	8.1	823.3	8.8	481.7	8.5
X	302.7	8.8	149.5	8.7	749.3	8	438.6	7.7
XI	220.1	6.4	110.0	6.4	546.8	5.9	310.2	5.5
XII	234.3	6.8	113.5	6.6	569.7	6.1	309.1	5.4
2017	3,085.8 thous. 100%		1,588.8 thous. 100%		8,325.2 thous. 100%		5,149.9 thous. 100%	
I	158.6	5.1	88.3	5.6	490.9	5.9	306.8	6
II	164.7	5.3	99.0	6.2	515.1	6.2	357.4	6.9
III	202.3	6.6	103.9	6.5	553.1	6.6	336.3	6.5
IV	264.9	8.6	146.6	9.2	642.1	7.7	396.4	7.7
V	325.9	10.6	189.3	11.9	797.5	9.6	518.6	10
VI	294.4	9.5	149.4	9.4	809.8	9.7	510.1	9.9
VII	331.6	10.7	153.4	9.7	988.1	11.9	611.8	11.9
VIII	366.8	11.9	176.0	11	1,081.7	13	684.1	13.3
IX	282.6	9.2	130.2	8.2	735.9	8.8	436.7	8.5
X	281.6	9.1	144.9	9.1	689.8	8.3	408.2	7.9
XI	190.9	6.2	97.4	6.1	482.6	5.8	280.8	5.5
XII	221.5	7.1	110.4	6.9	538.6	6.5	302.7	5.9

Source: Statistical Office of the Republic of Serbia, 2019, p. 59, Statistical Office of the Republic of Serbia, 2018, p. 59, Statistical Office of the Republic of Serbia, 2017, p. 59

Note: Percentage values are calculated by the paper’s authors.

By consulting the monthly statistical bulletins of the Statistical Office of the Republic of Serbia, the table 1. will provide an overview of the number of tourist arrivals and overnight stays in the Republic of Serbia, on a monthly basis, for the period 2017-2018. Along with the application of the statistical methodological approach and quantitative data analysis, the authors of the paper expressed the individual numerical data through percentage values.

By consulting the monthly statistical bulletins of the Statistical Office of the Republic of Serbia, the following table will provide an overview of the number of tourist arrivals in the Republic of Serbia, by types of tourist places. The data overview was also made on a monthly basis, for the same period - 2017-2018.

Table 2. Number of arrivals of tourists in the Republic of Serbia
by types of tourist places for the period 2017-2018

	Main administrative centres	Spa resorts	Mountain resorts	Other tourist places	Other places
2018	1,308.7 thous.	596.9 thous.	596.2 thous.	769.3 thous.	159.7 thous.
I	57.2	24.3	56.0	33.4	5.8
II	63.7	23.6	59.2	34.1	6.0
III	86.1	32.3	46.3	47.8	8.2
IV	106.9	46.0	50.4	68.2	11.9
V	133.5	60.4	62.9	100.2	14.8
VI	118.1	66.6	51.5	77.1	15.2
VII	141.1	83.3	49.1	78.5	18.6
VIII	143.4	103.1	57.2	83.3	34.3
IX	133.4	51.8	42.3	70.7	15.8
X	128.9	44.2	43.6	74.9	11.1
XI	97.8	28.3	35.0	49.8	9.2
XII	98.6	33.0	42.7	51.3	8.8
2017	1,172.9 thous.	519.1 thous.	556.2 thous.	705.8 thous.	131.7 thous.
I	51.6	19.8	54.4	27.7	5.1
II	56.5	18.9	53.8	30.6	4.9
III	83.9	28.0	42.0	41.0	7.3
IV	102.1	39.4	46.5	67.2	9.6
V	121.1	47.4	59.8	85.7	11.9
VI	109.0	56.7	47.7	69.5	11.5
VII	118.8	74.5	49.0	73.8	15.5
VIII	116.3	94.0	51.3	78.4	26.8
IX	119.2	48.8	35.1	66.4	13.1
X	119.1	39.7	42.7	70.3	9.8
XI	84.3	23.3	28.6	46.9	7.9
XII	91.0	28.6	45.3	48.3	8.3

Source: Statistical Office of the Republic of Serbia, 2019, p. 60, Statistical Office of the Republic of Serbia, 2018, p. 60, Statistical Office of the Republic of Serbia, 2017, p. 60

Finally, by consulting the monthly statistical bulletins of the Statistical Office of the Republic of Serbia, the third table will provide an overview of the number of tourist overnight stays in the Republic of Serbia, by types of tourist places. The data overview was also made on a monthly basis, for the period - 2017-2018.

Table 3. Number of overnight stays of tourists in the Republic of Serbia by types of tourist places for the period 2017-2018

	Main administrative centres	Spa resorts	Mountain resorts	Other tourist places	Other places
2018	2,707.7 thous.	2,542.5 thous.	2,172.8 thous.	1,539.3 thous.	373.7 thous.
I	128.8	90.1	249.4	67.8	13.7
II	137.4	87.6	271.1	73.9	13.6
III	184.0	115.9	181.9	93.2	18.2
IV	216.7	182.4	161.6	126.3	27.8
V	272.1	243.5	203.4	170.5	34.1
VI	248.4	286.7	198.6	155.4	34.5
VII	286.4	372.5	206.2	183.6	43.3
VIII	300.8	466.1	222.3	186.0	91.1
IX	259.1	276.1	114.3	140.7	33.1
X	263.9	198.2	120.1	142.5	24.6
XI	207.1	121.8	95.6	101.8	20.5
XII	203.0	101.6	148.3	97.6	19.2
2017	2,337.2 thous.	2,228 thous.	2,078.6 thous.	1,380.1 thous.	301.2 thous.
I	107.9	71.7	242.3	55.5	13.4
II	112.9	71.1	254.0	65.0	12.1
III	173.3	104.5	171.6	86.9	16.8
IV	205.1	148.0	151.5	117.1	20.4
V	235.4	194.6	195.6	145.0	26.9
VI	218.4	244.2	180.3	139.3	27.6
VII	233.7	347.9	205.0	166.5	35.0
VIII	223.1	411.2	206.9	175.2	65.3
IX	230.0	253.3	101.6	127.0	24.0
X	240.4	179.9	122.0	124.6	22.9
XI	174.7	111.3	86.8	91.6	18.2
XII	182.3	90.3	161.0	86.4	18.6

Source: Statistical Office of the Republic of Serbia, 2019, p. 60, Statistical Office of the Republic of Serbia, 2018, p. 60, Statistical Office of the Republic of Serbia, 2017, p. 60

5. DISCUSSION AND FUTURE RESEARCH DIRECTIONS

By consulting the monthly statistical bulletins of the Statistical Office of the Republic of Serbia, in the first table we have provided an overview of the number of tourist arrivals and overnight stays in the Republic of Serbia on a monthly basis, for 2017 and 2018.

The data for 2018 will be analysed first. It can be noted that the total number of tourist overnight stays on an annual basis in the Republic of Serbia (9,335.9 thousand, of which 5,678.1 thousand are domestic tourists) is significantly higher than the total number of tourist arrivals in the Republic of Serbia (3,430.6 thousand, of which 1,720.1 thousand are domestic tourists).

It can also be concluded that the share of domestic tourists as tourist supply end users in Serbia is higher when it comes to tourist overnight stays (in percentages, that share is 60.8%), than is the case with tourist arrivals in Serbia (in percentages, that share is 50.1%).

Regarding tourist arrivals in Serbia, the most pronounced dynamics of total arrivals in 2018 was in August (12.3%), while the most pronounced dynamics of domestic tourist arrivals in 2018 was in May (12.1%). When it comes to tourist overnight stays in Serbia, the most pronounced dynamics of overnight stays (total overnight stays and overnight stays by domestic tourists) in 2018 was in August (13.6%).

In the same year, the lowest dynamics of total arrivals (5.2%) and arrivals of domestic tourists (5.3%) was in January. Also, the lowest dynamics of total tourist overnight stays was recorded in January and November (5.9%), while the lowest dynamics of domestic tourist overnight stays was recorded in December (5.4%).

This is followed by an analysis of the data provided for 2017. It can be noted that the total number of tourist overnight stays on an annual basis in the Republic of Serbia (8,325.2 thous., of which 5,149.9 thousand domestic tourists) is significantly higher than the total number of tourist arrivals in the Republic of Serbia (3,085.8 thousand, of which 1,588.8 thousand are domestic tourists). Also, it can be concluded that the share of domestic tourists as tourism supply end users in Serbia is higher when it comes to tourist overnight stays (in percentages, that share is 61.9%) than in the case of tourist arrivals in Serbia (in percentages, that share is 51.5%).

In terms of tourist arrivals in Serbia, the most pronounced dynamics of total arrivals in 2017 was in August (11.9%), while the most pronounced dynamics of arrivals of domestic tourists in 2017 was in May (11.9%). When it comes to tourist overnight stays in Serbia, the most pronounced dynamics of overnight stays (total overnight stays and overnight stays by domestic tourists) in 2017 was in August (13% with regard to tourist arrivals and 13.3% relating to tourist overnight stays).

In the same year, the lowest dynamics of total arrivals (5.1%) and arrivals of domestic tourists (5.6%) was in January. Also, the lowest dynamics of total tourist overnight stays was recorded in November (5.8%), while the lowest dynamics of domestic tourist overnight stays was also recorded in November (5.5%).

If the data for both years are compared, it will be noticed that the number of users of the Republic of Serbia tourist supply is higher in 2018 (tourist arrivals: 12.3% total users and 12.1% domestic users; tourist overnight stays: 13.6% for both total users and domestic users) than in 2017 (tourist arrivals: 11.9% each for total users and domestic users; tourist overnight stays: 13% for total users and 13.3% for domestic users). The data indicate a progressive tendency in tourism development and tourist supply in the Republic of Serbia, given the situation regarding the number of tourist arrivals and overnight stays in the Republic of Serbia, on a monthly basis, for 2017 and 2018.

By consulting the monthly statistical bulletins of the Statistical Office of the Republic of Serbia, the second table presents the data on the number of tourist arrivals in the Republic of Serbia, by types of tourist places. The data presentation was done on a monthly basis, for 2017 and for 2018.

The data for 2018 will be analysed first. It can be observed that the number of tourist arrivals to Serbia is mostly related to the main administrative centres (a total of 1,308.7 thous. arrivals in 2018). This is followed by spa resorts (with 596.9 thous. arrivals) and mountain resorts (with 596.2 thous. arrivals). In total, other tourist spots attracted 769.3 thous. tourists.

By observing the dynamics of tourist arrivals on a monthly basis, according to types of tourist places, it is noticed that the main administrative centres were the most visited in August, with 143.4 thous. arrivals, then that spa resorts were also the most visited in August, with 103.1 thous. arrivals, and finally, that the mountain resorts were the most visited in May, with 62.9 thous. tourist arrivals. Comparing the monthly dynamics of tourist arrivals, it can be concluded that the main administrative centres were the most visited during the whole year (therefore, in each individual month of the year). Other tourist places taken collectively were also the most visited in May, with 100.2 thous. of arrivals.

In contrast to the data on the most visited tourist destinations in individual months during 2018, it is also necessary to present the data for the periods when the tourist destinations were visited the least. Thus, the main administrative centres were the least visited in January (57.2 thous. arrivals). Spa resorts were the least visited in February (with 23.6 thous. arrivals), while mountain resorts were the least visited in November (with 35.0 thous. arrivals). Other tourist spots taken collectively were the least visited in January (33.4 thous. arrivals).

This is followed by a data analysis for 2017. It can also be noted that in 2017 the number of tourist arrivals in Serbia is mostly related to the main administrative centres (a total of 1,172.9 thous. arrivals). This is followed by mountain resorts (with 556,2 thous. arrivals) and spa resorts (with 519,1 thous. arrivals). In total, other tourist places attracted 705.8 thous. tourists.

By observing the dynamics of tourist arrivals on a monthly basis, according to the types of tourist places, it can be noted that the main administrative centres were the most visited in May, with 121,1 thous. arrivals, then, that the spa resorts were the most visited in August, with 94,0 thou. Arrivals, and finally, that the mountain resorts were the most visited in May, with 59,8 thous. of tourist arrivals. By comparing the monthly dynamics of tourist arrivals, it can be concluded that the main administrative centres were also the most visited during the whole year (that is, each individual month of the year). Other tourist places, taken collectively, were also the most visited in May, with 85,7 thous. of arrivals.

By comparing the data for both years, it is observed that the number of arrivals to the Republic of Serbia in 2018. is higher than the number of arrivals in 2017., both in the total sum and in the individual monthly, numerically expressed, data.

In contrast to the data on the most visited tourist places in individual months during 2017, it is also necessary to present the data on the periods when the tourist places were visited the least. Thus, in 2017, the main administrative centres were the least visited in January (51.6 thous. arrivals). The spa resorts were the least visited in February (with 18.9 thous. arrivals), while the mountain resorts were the least visited in November (with 28.6 thous. arrivals). Taken collectively, other tourist destinations were the least visited in January (27.7 thous. arrivals).

Finally, by consulting the monthly statistical bulletins of the Statistical Office of the Republic of Serbia, in the third table we have presented the data on the number of tourist arrivals in the Republic of Serbia, by types of tourist places. The data presentation was done on a monthly basis, for 2017 and for 2018.

We shall first analyse the data for 2018. By analysing the data presented in the tables, it is evident that the greatest number of tourist overnight stays in Serbia is recorded in the main administrative

centres (2,707.7 thousand nights in total in 2018). They are followed by spa resorts (with 2,542.5 thousand nights) and mountain places (with 2,172.8 thousand nights). In sum, the remaining tourist places, with regard to overnight stay capacities in Serbia attracted 1,539.3 thousand tourists.

On examining the dynamics of tourist overnight stays on a monthly basis, by tourism place types, it is evident that the main administrative centres were the most visited in August, with 300.8 thousand overnight stays, then that the spa resorts were also the most visited in August, with 466.1 thousand overnight stays, and finally that mountain resorts were the most visited in February, with 271.1 thousand tourist overnight stays.

By comparing the monthly dynamics of tourist overnight stays in the main administrative centres, spas and mountain resorts, we can conclude that the main administrative centres prevail in terms of overnight visits (March, April, May, October, November and December are the months in which the main administrative centres record the highest numbers of overnight stays), to be followed by spa places (June, July, August, and September are the months in which the number of nights is the highest for spas), and finally by mountain resorts (with the highest number of tourist overnight stays recorded in January and February 2018). The other tourism destinations recorded in sum the greatest number of tourist overnight stays in the month of August, amounting to 186 thousand stays.

As opposed to the data on the most visited tourism places by months during 2018, we should also present the data on the periods when tourism places were visited the least in terms of tourist overnight stays. Thus, the main administrative centres recorded in 2018 the lowest number of overnight stays in the month of January (128.8 thousand stays). The spas had the fewest overnight stays in February (with 87.6 thousand stays), while the mountain places recorded the least stays in November (with 95.6 thousand nights). The remaining tourism places taken collectively recorded the lowest number of overnight stays in January (67.8 thousand stays).

The above is followed by an analysis of the data for 2017. The data from 2017 indicate that the number of tourist overnight stays in Serbia is the highest in the main administrative centres (2,337.2 thousand stays). They are followed by spas (with 2,228 thousand nights) and mountain resorts (with 2,078.6 thousand overnight stays). Taken collectively, the remaining tourism places as a separate category attracted, in terms of overnight stays, 1,380.1 thousand tourists.

On examining the dynamics of tourist overnight stays on a monthly basis, by tourism place types, it is evident that the main administrative centres were the most visited in October, with 240,4 thousand nights, then that the spa resorts were the most visited in August, with 411.2 thousand nights, and finally that mountain resorts were the most visited in February, with 254,0 thousand tourist overnight stays.

By comparing the monthly dynamics of tourist overnight stays in the main administrative centres, spas and mountain resorts, we can conclude that the main administrative centres prevail in terms of overnight visits (March, April, May, October, November and December are the months in which the main administrative centres record the highest numbers of overnight stays), to be followed by spa places (June, July, August, and September are the months in which the number of nights is the highest for spas), and finally by mountain resorts (with the highest number of tourist overnight stays recorded in January and February 2017). The other tourism destinations recorded in sum the greatest number of tourist overnight stays in the month of August, amounting to 175.2 thousand stays.

By comparing the data for both years, it is noted that the number of arrivals to the Republic of Serbia in 2018 is higher than the number of arrivals in 2017, both in the total sum and in the individual monthly, numerically expressed, data.

As opposed to the data on the most visited tourism places by months during 2017, we should also present the data on the periods when tourism places were visited the least in terms of tourist overnight stays. Thus, the main administrative centres recorded in 2017 the lowest number of nights in the month of January (107.9 thousand nights). The spas had the fewest overnight stays in February (with 71.1 thousand stays), while the mountain places recorded the least stays in November (with 86.8 thousand nights). The remaining tourism places in sum recorded the lowest number of overnight stays in January (55.5 thousand stays).

What we can conclude from the presented data in the research part of the paper is that the sector of tourism is recording a positive development trend, which is expressed in the paper primarily through the ratio of the number of tourist arrivals and overnight stays in general, and the number of arrivals and overnight stays by tourism place types for the period 2017-2018. This approach indicates that by a continuous development of this sector the Republic of Serbia may develop tourism to the level of a key economic structural element of the country, and indirectly the whole region. What could be done in practice, and analysed in more detail in further research, is the strengthening of the Republic of Serbia competitiveness both in foreign and the domestic markets, with all the authorities, in particular the local ones, playing a more active role, and the strengthening and improvement of marketing activities in the field of promotion and commercialisation of tourism products, as well as its capacities in the realisation of innovative approaches in the promotion and marketing of tourism supply in general.

5. CONCLUSION

The importance and the characteristics of tourism as an industry branch have been addressed in more detail in the theoretical part of the paper.

The qualification and analysis of tourism turnover by tourism destinations is very important for any destination, country, or region. With a view to presenting the situation in the Republic of Serbia in more detail, the research part of the paper includes an analysis of the number of arrivals and overnight stays of tourists in general, and the number of arrivals and overnight stays of tourists by tourism resort types for the years 2017 and 2018.

Before the conclusion we should emphasise one more significant modern tendency in the current strategic and practical approach to tourism development. This tendency in the planning of the key elements of modern tourism development is the consideration of tourist needs, motives and affinities as the primary starting point. As stated at the beginning of the paper, on one side there exist tourists as consumers of tourism services, and on the other there is tourism trade. Tourists possess funds whereby they pay for tourism services, while supply is the factor that should provide the satisfaction of various tourist needs.

The subject of analysis of the research part of the paper is the number of arrivals and overnight stays of tourists in general, and the number of arrivals and overnight stays of tourists by tourism resort types for the period 2017-2018. The obtained results (which have been analysed in detail

in the part of the paper including a discussion and recommendations for further research) will also be briefly outlined here.

Namely, it is noticeable that the total number of tourist overnight stays on an annual basis in the Republic of Serbia considerably exceeds the total number of tourist arrivals in the Republic of Serbia. In addition, we can conclude that the share of local tourists as tourist supply end users in Serbia is larger relating to tourist overnight stays than is the case with tourist arrivals in Serbia. If we compare the data for both analysed years, it is evident that the number of users of tourism supply in the Republic of Serbia is larger for 2018 than for 2017. Thus, the data point to an increasing tendency in the development of tourism and tourism supply in the Republic of Serbia.

It is noticeable that the number of tourist arrivals in Serbia is mostly linked to the main administrative centres. They are followed by spas and mountain sites. Comparing the data for both years, it is noticeable that the number of arrivals in the Republic of Serbia in 2018 exceeded the number of arrivals in 2017, both in total, and in the individual monthly numerical data.

By analysing the data shown in the tables, we can see that the number of tourist overnight stays in Serbia is also for the most part linked to the main administrative centres. As in the case of analysing the dynamics of tourist arrivals in Serbia, spas and mountain sites follow behind. By comparing the data for both years, we can notice that the number of tourist overnight stays in the Republic of Serbia in 2018 exceeds the number of overnight stays in 2017, both in total, and in the individual monthly numerical data.

Following an analysis of the research results, and in the context of the paper subject and recommendations for further research in this area, we should also mention the strategic goals of tourism development for the following period, considering that tourism has a great impact as “an asset for economic growth and development, the creation of new added value and new employment” (The Ministry of Trade, Tourism and Telecommunications, 2016, p. 37). Thus, the goals of tourism development to 2025 can be defined as follows: “1) growth in the share of hotels and similar hospitality facilities for accommodation in the total number of accommodation facilities up to 50%; 2) reaching the total booking of accommodation capacities (accommodation units) of 30%; 3) raising the tourism turnover to 2025 up to three times, or by 50% at least; 4) increasing tourist unit consumption (per overnight stay) by 50%; 5) increasing the share of foreign overnight stays to 45% to 2020, and 55% to 2025; 6) doubly increasing direct tourism participation in the Republic of Serbia gross domestic product; 7) increasing the number of employees working directly in tourism by no less than 50% and increasing the number of employees in tourism and complementary activities by up to three times; 8) increasing direct investments (The Ministry of Trade, Tourism and Telecommunications, 2016, p. 38).

In addition, the Strategy (2016) aims, besides the aforesaid, to achieve the following goals: “1) setting up an efficient tourism development management system along with strengthening public-private partnerships; 2) improving and harmonising the methodology and procedures of statistical data collection and processing with international standards and practice; 3) establishing the Tourism Register on legal foundations; 4) reducing grey economy in tourism” (p. 38).

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