

# Serbia

## Tourism in the economy and outlook for recovery

Tourism is an important source of employment in Serbia. In 2019, tourism provided 4.2% of total employment or 85 092 direct jobs. This remained steady at 4.3% of employment in 2021, with the number of jobs increasing to 99 216 jobs.

In 2021, international arrivals increased 95.5% compared to 2020 and hit 871 000, however, this remained 52.8% below pre-pandemic levels. The top source markets in 2021 were Bosnia and Herzegovina (11.8%), Montenegro (6.7%), Türkiye (5.6%), and Croatia (4.5%).

Domestic tourism has performed stronger. After domestic tourists declined 25.4% in 2020 to 1.4 million, they returned to 1.7 million tourists in 2021, just 6.7% below 2019 levels. Domestic nights in hotels remained just 12% lower than in 2019 at 4.3 million nights.

Serbia is expecting a return of inbound tourism to pre-pandemic levels by 2025.

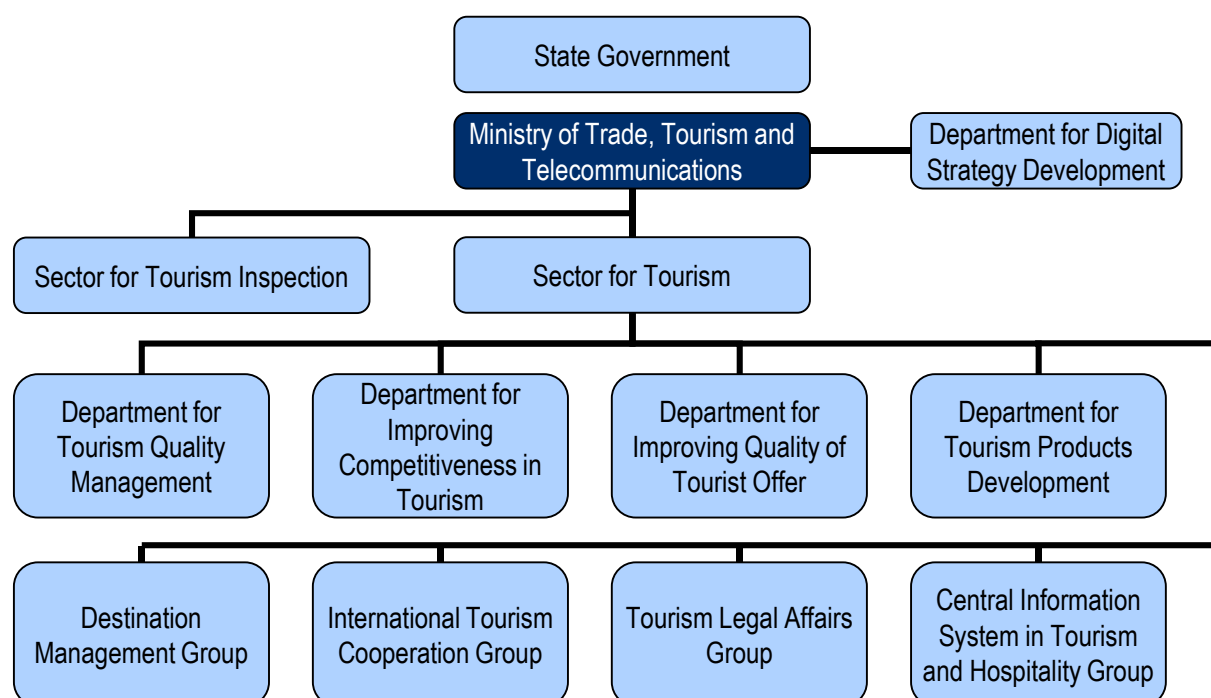
## Tourism governance and funding

The Ministry of Trade, Tourism, and Telecommunications is responsible for tourism affairs, dealing with all aspects of tourism strategy, policy, promotion, and development. The Ministry provides direct and indirect support to regional and local authorities, including incentive programmes for tourism development projects (such as infrastructure, promotion, education, and training) and supporting local government and regional development agencies with jointly funded projects.

The Ministry co-operates closely with other ministries, particularly the Ministry of Culture and Information (on international bilateral co-operation and the development of cultural routes), the Ministry of Agriculture, Forestry and Water Management (on the development of rural tourism and the support instruments in the field of rural development), the Ministry of Environment (on tourist zoning) and the Ministry of Health (on medical tourism development, safe travel protocols and measures against COVID-19). The Ministry works closely with the private sector and is active in regional initiatives and international organisations on related programmes and projects.

The total budget for tourism in Serbia is RSD 8 billion. The share of tourism in the total 2021 national budget is 0.36% - more than double the share of the 2020 budget.

## Serbia: Organisational chart of tourism bodies



Source: OECD, adapted from Ministry of Trade, Tourism and Telecommunications, 2022.

## Tourism policies and programmes

During the pandemic, Serbia put the following support measures in place through a specific programme for the tourism and hospitality sectors, with funding of RSD 5.4 billion:

- Payment of the minimum wage to employees in the fields of hospitality and tourism.
- Subsidies to support the work of tourist guides, tour escorts and the hotel sector.
- Support for night bars and nightclubs as well as travel agencies and tour operators.

Serbia has a Tourism Development Strategy for the period 2016-25. The Strategy is implemented through a mixture of strategic master plans, a Strategic Marketing Plan, a Product Development Programme, and spatial and urban plans. The Tourism Development Strategy also establishes a competitive arena for the business sector in Serbian tourism. The National Tourism Development Strategy is being revised due to the changed situation in the market in the post-COVID-19 era.

Beyond the National Development strategy, Serbia is implementing the following strategies and programmes for tourism:

- A programme for allocating and using subsidies, transfers, and grants for tourism development projects.
- Legislation on approving and using credit funds to encourage a high-quality tourist offer.
- Legislation on allocating funds to encourage the improvement of domestic tourism.
- Continued support for the tourism and hospitality sectors as the COVID-19 pandemic evolves.

A Central Information System (CIS/e-tourist) was recently introduced as a unique and centralised information system that combines data on all accommodation providers and facilities (see box below). The

digitalisation of the tourism offer in Serbia was recently started and is expected to be completed in May 2023.

Lessons from the pandemic include the importance of developing tourism in smaller rural areas, not only in large cities. During the pandemic, domestic tourists spent their summer holidays in rural areas engaging in outdoor activities, leading to an increase in tourism-related businesses to accommodate the new visitors, provide food services and rent private rooms, houses, and apartments for people working from home. This had positive impacts, including increased employment of women in rural areas, encouraged entrepreneurship, and boosted tourism employment (e.g. local guides, national park rangers, and food suppliers). It also revealed the necessity to involve residents in creating the local tourist offer where possible. This creates an attractive and competitive tourism offer for different market segments.

Serbia has co-ordinated existing regulations, legal frameworks, standards, and protocols to ensure that they reflect the sector's changing needs and facilitate recovery and post-COVID-19 growth. Pandemic support focused on two areas: developing the safe travel protocol (using the World Travel and Tourism Council's Safe Travels standard) and creating a new support package for the tourism sector. This support was delivered through wage subsidies, business subsidies, domestic vouchers, and business grants.

The ministry provided support measures, including the development of a voucher programme for catering services for domestic tourists; programmes for tour operators to welcome organised inbound tourism groups; improvement of the investment climate through a system of incentives (both for domestic and overseas investors) to support investments in tourism development in co-ordination with local governments.

Serbia also finances projects for promotion, education, and training to support the improvement of tourism facilities, with co-financing of up to 100% for capital projects and 50% for promotion.

### Development of a Central Information System for Tourism in Serbia

Serbia has introduced the Central Information System (CIS/e-Tourist), a database that generates the number of tourist arrivals and overnight stays according to accommodation capacities and destinations in Serbia. Through this portal, all accommodation providers are registered when categorising their facilities.

The digitisation of Serbia's tourism offer is in progress and will partly be connected to the e-Tourist platform. Serbia recognises the need to implement the green and digital agendas, including, in co-operation with the Western Balkans, the implementation of e-government, e-procurement, and e-health, the introduction of more affordable, roaming-free mobile charge rates for Western Balkan countries, and increased cybersecurity, trust, and digitalisation across the sector. Through joint projects, Serbia aims for positive employment rates, entrepreneurship growth, and innovative solutions to respond to future challenges.


## Statistical Profile

### Serbia: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	1 589	1 720	1 843	1 374	1 720
Overnight visitors (tourists)	1 589	1 720	1 843	1 374	1 720
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	5 150	5 678	6 063	4 937	5 733
Hotels and similar establishments	4 384	4 624	4 916	3 572	4 327
Other collective establishments	31	48	35	18	21
Private accommodation	735	1 006	1 112	1 347	1 385
<b>Inbound tourism</b>					
Total international arrivals	1 497	1 711	1 847	446	871
Overnight visitors (tourists)	1 497	1 711	1 847	446	871
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Bosnia and Herzegovina	108	121	136	51	103
Montenegro	79	82	90	26	59
Türkiye	100	97	108	25	49
Croatia	83	94	104	27	39
China (People's Republic of)	52	102	145	18	16
Nights in all types of accommodation	3 175	3 658	4 010	1 265	2 430
Hotels and similar establishments	2 992	3 416	3 761	1 201	2 290
Other collective establishments	20	24	20	1	9
Private accommodation	163	218	229	63	131
<b>Outbound tourism</b>					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b>					
<b>Inbound tourism</b>					
Total international receipts	1 706	1 941	2 001	1 421	..
International travel receipts	1 345	1 547	1 604	1 245	..
International passenger transport receipts	361	394	396	177	..
<b>Outbound tourism</b>					
Total international expenditure	1 549	1 837	1 999	1 178	..
International travel expenditure	1 381	1 643	1 806	1 115	..
International passenger transport expenditure	168	194	194	64	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/4olbg8>


## Serbia: Enterprises and employment in tourism

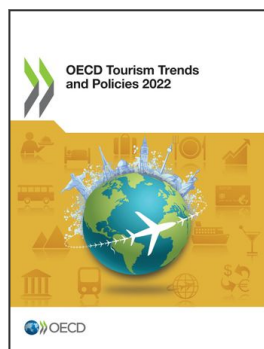
	Number of establishments <sup>1</sup>	Number of persons employed				
	2021	2017	2018	2019	2020	2021
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>31 249</b>	<b>74 981</b>	<b>81 411</b>	<b>85 092</b>	<b>87 767</b>	<b>99 216 p</b>
Accommodation services for visitors	2 525	14 194	15 374	16 348	17 151	17 478 p
Hotels and similar establishments	1 269	10 088	11 133	11 743	12 216	12 240 p
Food and beverage serving industry	27 548 e	56 176	61 348	63 961	66 159	69 498 p
Passenger transport	..	..	..	..	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	1 176	4 611	4 689	4 783	4 457	3 489 p
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>

.. Not available; e Estimated value; p Provisional data

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/9u74vr>



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