

# Serbia

## Tourism in the economy

In 2017, tourism's direct contribution to GDP was 0.9%, and this was expected to increase by 2.3% in 2018 to a total of RSD 104.8 billion. The total contribution of the tourism industry to the Serbian economy, including the effects from investment, supply chain and induced income impacts, amounted to RSD 294.6 billion in 2017, or 6.7% of GDP, and was expected to have grown by 2.7% to RSD 302.5 billion in 2018.

The tourism industry directly generated 32 000 jobs in the Republic of Serbia in 2017, representing 1.8% of the country's total employment. The industry attracted capital investment of RSD 33.8 billion, 4.1% of total national investment. This is expected to rise by 2% over the next ten years to RSD 43.5 billion by 2028.

The total number of tourist arrivals in 2018 was 3.4 million, an increase of 11.2% from 2017. International arrivals accounted for 49.9% of total arrivals, and showed a 14.2% increase on 2017. Domestic arrivals increased by 8.3% in 2018 compared to 2017.

The key source markets for international arrivals in 2018 were Bosnia and Herzegovina (15.4% market share), Montenegro (12.3%), and China (10.5%), followed closely by Croatia and Turkey. All of the five top markets showed growth in volume of arrivals between 2017 and 2018, particularly China which showed an increase of 89%.

## Tourism governance and funding

The Ministry of Trade, Tourism and Telecommunications is the national government authority overseeing tourism in Serbia. The Ministry has jurisdiction over the National Tourism Organisation of Serbia (NTOS), which is the national agency for promoting tourism in the country and abroad. The NTOS also undertakes tourism market research and collects relevant tourism information. Founded as a government organisation in 1994, the aim of the NTOS is to affirm the value and potential of the country's tourist industry. Its activities focus on positioning Serbian tourism in both domestic and international markets, and evaluating the comparative advantages of tourism in Serbia, such as geographical location and historical, cultural and natural identity.

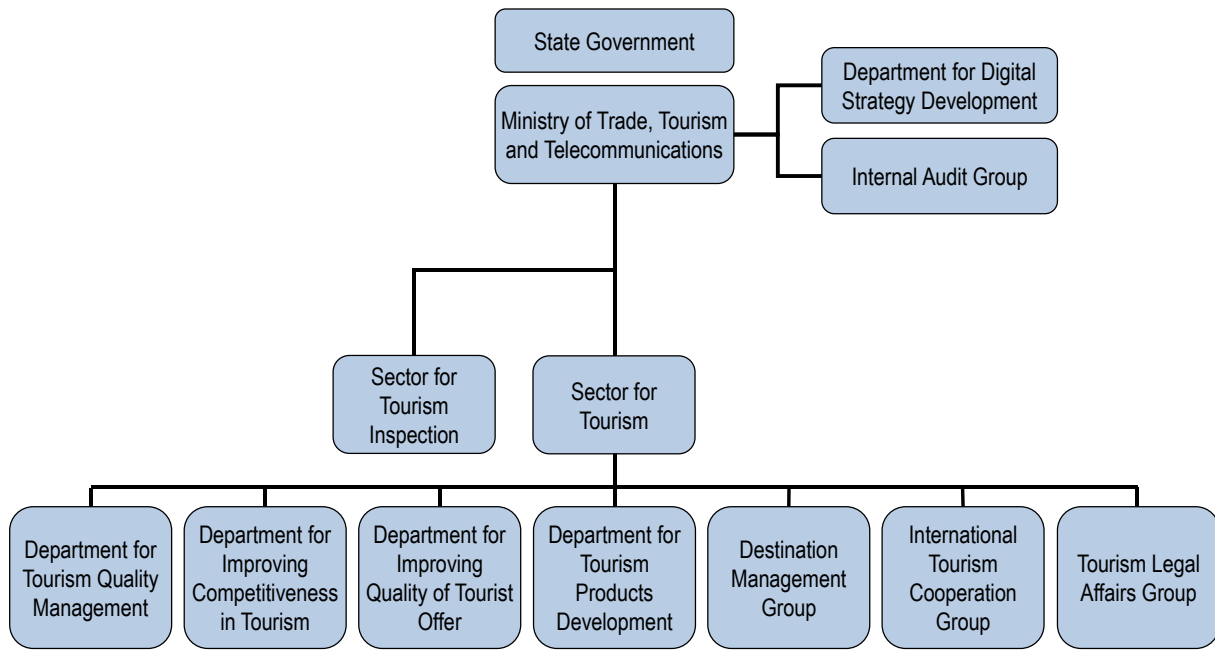
Three Regional Tourism Organisations have been established, as well as 116 Local Tourism Organisations, owned and operated by Serbia's local and regional governments and supported by the private sector. The regional and local tourism organisations act in accordance with the National Tourism Strategy and the plans and programmes of the NTOS. The Serbian Convention Bureau was established in 2007 as a part of the National Tourism Organisation of Serbia in order to develop MICE tourism.

Professional tourism associations have also been established including the:

- Serbian Spas and Resorts Association (consisting of municipalities, institutes, and special hospitals)

- Associations of Tourist Agencies
- Business Association of Hotels and Catering Operations
- International Centre for Tourism and Hospitality Development.

### Serbia: Organisational chart of tourism bodies



Source: OECD, adapted from Ministry of Trade, Tourism and Telecommunications, 2020

### Tourism policies and programmes

The Tourism Development Strategy of the Republic of Serbia runs from 2016 to 2025. The development goals of the Strategy include increasing the number of hotels and similar facilities by 50%, and increasing overall accommodation occupancy by 30%. The Strategy also aims to increase tourist arrivals, overnight stays, and expenditure, and to double the tourism industry's direct contribution to GDP. Furthermore, it aims to increase direct employment in tourism by at least 50%.

The Tourism Development Strategy sets the following goals:

- Increase tourist arrivals by at least by 50% by 2025,
- Increase expenditure of tourists (per night) by 50%,
- Increase the share of inbound tourists overnights to 45% by 2020, and to 55% by 2025,
- Increase the direct share of tourism to Serbia's GDP by 100%,
- Increase the amount of direct employment in the tourism industry by at least 50%, and triple employment in tourism and complementary activities,
- Grow direct investment.

The legislation provides the framework for a modern and efficient organisation and development of tourism and its related industries. However, the tourism sector has not yet been developed and there is a lack of capacity in tourism management and national marketing. Additionally, there has been some indecision in

relation to the necessary public investment, which has slowed down the development of products and their commercialisation.

The key challenges for sustainable tourism development in the Republic of Serbia include:

- Reducing seasonality,
- Improving the quality of tourism jobs,
- Maintaining and enhancing local community prosperity and quality of life – for example by encouraging the purchase of local goods and services, the promotion of local culinary heritage, history and culture, handicrafts and folk art, small museums and vineyards,
- Conserving and increasing the value of natural and cultural heritage,
- Enriching the tourist offer with products and services that will make tourism in Serbia more recognisable and attractive.

Measures to address the key challenges for sustainable tourism development include increasing levels of environmental consciousness, growing the interest in heritage and culture, strengthening local economic activity, as well as supporting the development of visitor activities that enable visitors to meet local residents and engage in cultural tourism activities and events.

The Ministry of Trade, Tourism and Telecommunications provides support for tourism development through a programme of incentives and loans. The Ministry finances projects focused on promotion, education, training and improving and developing the tourism supply chain, as well as projects which support the improvement of tourism infrastructure and facilities. Financing of up to 100% is available for infrastructure projects and up to 50% for other projects. The aim of the financing programme is to support and encourage the development of the domestic offer and to attract foreign demand. The incentives and loans are open to non-governmental organisations, local tourism organisations and small enterprises. Since 2015, two new policy instruments have been introduced – vouchers supporting domestic demand, and subsidies for inbound tour operators in Serbia.

With a growing number of tourist arrivals and overnights, Serbia recognises that in order to be competitive and maintain visitor satisfaction, a full understanding of the motivations of tourists is required. Future tourism policy is therefore oriented towards understanding the experiences of visitors, taking into account new trends in promotion and booking, new accommodation types, and travel motivations in the global tourism market. This will be facilitated by incentive measures, which include financial resources for:

- Tourism product development strategies and programmes,
- Promotional activities for tourist destinations,
- Educational programmes relating to the tourism workforce,
- Development of projects for the protection of nature, environment and cultural heritage,
- Improvement of ecological standards, energy efficiency, use of renewable energy sources,
- Digitalisation and other innovative solutions,
- Improvement of access and transport connections for inbound markets,
- Encouraging the construction of tourism infrastructure, including sports, recreational and other supporting facilities.

## Statistical Profile

## Serbia: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	1 164	1 305	1 472	1 589	1 720
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	3 925	4 242	4 795	5 150	5 678
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	1 029	1 132	1 281	1 497	1 711
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Bosnia and Herzegovina	164	192	223	235	263
Montenegro	137	171	196	198	210
China	31	33	43	95	179
Croatia	117	121	142	153	177
Turkey	82	115	142	163	175
Nights in all types of accommodation	2 161	2 410	2 739	3 175	3 658
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<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	1 352	1 321	1 461	1 705	1 921
International travel receipts	1 142	1 047	1 150	1 344	1 547
International passenger transport receipts	210	274	310	361	374
<b>Outbound tourism</b>					
Total international expenditure	1 359	1 253	1 351	1 548	1 837
International travel expenditure	1 178	1 102	1 202	1 380	1 643
International passenger transport expenditure	181	152	149	168	194

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078889>

## Serbia: Enterprises and employment in tourism

	Number of establishments <sup>1</sup>	Number of persons employed				
	2017	2014	2015	2016	2017	2018
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>4 155</b>	<b>26 577</b>	<b>28 449</b>	<b>30 642</b>	<b>32 044</b>	..
Accommodation services for visitors	813	8 647	8 670	8 900	9 048	..
Hotels and similar establishments	..	..	..	..	..	..
Food and beverage serving industry	2 471	14 274	15 802	17 408	18 599	..
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	871	3 656	3 977	4 334	4 397	..
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. Not available

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078908>



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