

DOMAĆA KONFERENCIJA SA MEĐUNARODNIM UČEŠĆEM

# IZAZOVI I PERSPEKTIVE MARKETINGA

## ZBORNİK RADOVA

ZLATIBOR, 5-7. NOVEMBAR, 2021. GODINE

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SRPSKO UDRUŽENJE ZA MARKETING

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*Od svog osnivanja, 2007. godine, Srpsko udruženje za marketing (SeMA) je nastavilo tradiciju Jugoslovenskog udruženja za marketing (JUMA) i Društva za marketing Srbije u pogledu organizovanja opštih i specijalizovanih naučnih i stručnih skupova u različitim formatima, kao što su naučne konferencije, simpozijumi i savetovanja, od nacionalnog i međunarodnog značaja, okrugli stolovi, tribine, seminari i dr. Jedan od osnovnih ciljeva Srpskog udruženje za marketing je afirmacija savremenih teorijskih koncepata, metoda, tehnika i alata marketinga u funkciji unapređenja poslovne prakse domaćih preduzeća, organizacija i institucija koje posluju na tržištu Republike Srbije, a ujedno i unapređenje nastave iz različitih disciplina marketinga na univerzitetima, fakultetima i drugim visokoškolskim ustanovama.*

*U proteklom periodu Srpsko udruženje za marketing je samostalno ili u saradnji sa drugim asocijacijama, organizacijama i institucijama organizovalo brojne naučno-stručne skupove koji su bili posvećeni dubljem sagledavanju pojedinih pitanja i problema koji su u godinama organizovanja privlačila pažnju naučnika i stručnjaka iz oblasti marketinga.*

*Počev od 2017. godine Srpsko udruženje za marketing svake druge godine uspešno organizuje naučno-stručnu konferenciju pod nazivom **Izazovi savremenog marketinga**. Od 5. do 7. novembra 2021. godine na Zlatiboru je organizovana treća po redu domaća naučna konferencija, sa međunarodnim učešćem, koja je bila posvećena savremenim izazovima marketinga. Poseban doprinos u organizacionom smislu dala je i Privredna komora Srbije.*

*U radu konferencije učestvovao je veliki broj istraživača iz naučnih instituta, sa univerziteta, fakulteta i drugih visokoškolskih ustanova kao i određeni broj stručnjaka iz marketinških agencija i preduzeća iz Srbije i šireg regiona, koji su svoje radove predstavili uživo ili u onlajn formatu. Ukupno 87 autora i koautora iz naučnih, univerzitetskih i drugih istraživačkih centara iz Srbije, Bosne i Hercegovine, Hrvatske i Nemačke napisalo je preko 50 radova u vidu apstrakta, od kojih je 39 pozitivno recenzirano i objavljeno u Knjizi apstrakta, koja je zainteresovanim čitaocima dostupna u fizičkoj i elektronskoj formi. Vredne priloge na ovoj naučnoj konferenciji pripremili su autori iz marketinških agencija, privredne komore i velikih proizvodno-poslovnih sistema koji su doprineli da se ostvari toliko neophodan spoj teorije i prakse, da se sagledaju dometi i ograničenja pojedinih teorijskih marketinških koncepata u praksi, te da se podstaknu empirijska istraživanja u posebnim područjima primene marketinga.*

*Kao što je navedeno, od ukupnog broja prispelih apstrakata radova, redakcioni odbor je prihvatio da se njih 39 objavi u Knjizi apstrakta, ali je od ukupnog broja napisanih radova svega 26 radova dobilo pozitivnu recenziju i prihvaćeno za objavljivanje u ovom zborniku radova. Ti radovi su razvrstani u sledeće tematske celine:*

- *Strategijski marketing i društveno odgovorno ponašanje organizacija*
- *Istraživanje marketinga i ponašanje potrošača*
- *Brend menadžment*
- *Marketinške komunikacije i digitalni marketing*
- *Marketing u obrazovanju*
- *Marketing u turizmu i hotelijerstvu*
- *Marketing u trgovini i logistici*
- *Marketing finansijskih usluga*
- *Ekologija i marketing*

*Kao što se može videti iz naziva samih radova i tematskih područja kojima radovi pripadaju, napisani referati pokrivaju gotovo sve važnije oblasti marketinga. U najvećem broju radova se ukazuje na aktuelne probleme ili prezentuju rezultati primene odgovarajućih postavki, metoda, principa i tehnika marketinga u istraživanju konkretnih marketinških problema. Određeni broj radova, koje su recenzenti ocenili visokim ocenama i koji su dobili pozitivne ocene od recenzenata časopisa Marketing, biće objavljeni u tom časopisu čiji je izdavač takođe Srpsko udruženje za marketing.*

*Uvereni smo da će radovi koje ovaj zbornik sadrži biti od koristi kako naučnicima i istraživačima koji se teorijski bave proučavanjem marketinga, tako i svima onima koji se bave primenom teorijskih postavki, principa, metoda, tehnika i alata marketinga u poslovnoj praksi.*

*U Beogradu,  
25.02.2022.*

*profesor emeritus dr Hasan Hanić  
prof. dr Saša Veljković*



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Komunikacijski potencijal indirektnog oglašavanja u pozicioniranju ekološki orijentisanih brendova

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## Analiza uticaja pandemije COVID-19 na turističku tražnju u Republici Srbiji – izazovi i prilike

### Analysis of the Impact of the COVID-19 Pandemic on Tourism Demand in the Republic of Serbia – Challenges and Opportunities

Milena Lazić<sup>53</sup>, Aleksandra Bradić-Martinović<sup>54</sup>

**Apstrakt:** Kriza izazvana pandemijom virusa korona predstavlja događaj bez presedana čijim su negativnim efektima u većem ili manjem obimu izloženi svi sektori privrede. Kao najviše pogođeni izdvojili su se sektori čije su poslovne performanse determinisane interpersonalnom interakcijom („licem u lice“), odnosno delatnosti direktno izložene vladinim restrikcijama. Ekstenzivne mere socijalnog distanciranja i ograničavanje kretanja stanovništva imali su devastirajući uticaj na sektor turizma, za koji se procenjuje da na globalnom nivou predstavlja jedan od najugroženijih, vitalnih sektora. Aktualna epidemiološka situacija iz korena je transformisala dosadašnje modele ponašanja ponude i tražnje za turističkim uslugama. Posledično, u fokusu kriznih marketinških strategija usmerenih na oporavak sektora nalazi se promocija turizma u nacionalnim okvirima, prioritet se daje bezbednosti i sigurnosti, dok se ton marketinških poruka prilagođava novonastalim prilikama uz naglašenije izražavanje solidarnosti i empatije. Visoko učešće turističkog sektora u ukupnoj novostvorenoj vrednosti, kao i višemilionski gubitak radnih mesta u sektoru turizma na globalnom nivou ukazuju na kontinuiranu potrebu za iznalaženjem novih rešenja i kreiranjem strategija sektorskog oporavka, a samu problematiku stavlja u žižu naučne i stručne javnosti kako na lokalnom, tako i na regionalnom i globalnom nivou. Uzimajući u obzir aktuelnost i značaj izučavane problematike, predmet rada predstavlja analiza turističke tražnje u Republici Srbiji u periodu 2019 M1 – 2021 M8. Rad ima za cilj da, kroz analizu turističke tražnje u Republici Srbiji tokom pandemije COVID-19, utvrdi koje bi inovacije u poslovanju i promociji mogle da utiču na njen oporavak. Rezultati istraživanja očekivano upućuju na promenu strukture tražnje u korist domaćih turista i, posledično, rast tražnje za planinskim i banjskim sadržajima. Pored toga, istraživanjem se identifikuje potreba i potencijal za uvođenje inovacija u domicilnom turističkom sektoru, uz istovremeno jačanje digitalnih kompetencija zaposlenih i posetilaca. Na kraju, u radu se potvrđuje zaključak da pandemija Covid-19 predstavlja prekretnicu u razvoju sektora turizma, uz otvaranje mogućnosti redefinisivanja prioriteta i uvažavanje principa održivog razvoja kroz ekološku i socio-ekonomsku dimenziju.

**Ključne reči:** *tražnja, sektor turizma, COVID-19, Republika Srbija*

**JEL klasifikacija:** M310, Z320, Z330

**Abstract.** The COVID-19 influenced crisis represents an unprecedented event to which all sectors of the economy are exposed to a greater or lesser extent. The sectors most affected were those whose business performance was determined by interpersonal interactions (face-to-face) and those directly exposed to government restrictions. Extensive measures of social distancing and travel restrictions have had a devastating impact on the tourism industry, which is estimated to be one of the most vulnerable, vital sectors globally. The ongoing epidemiological situation has radically transformed the existing patterns of supply and demand for tourist services. Consequently, the focus of crisis marketing strategies aimed at recovering the sector is the promotion of tourism in the national context, priority is given to safety and security, while the tone of marketing messages is adapted to the “new normal” with more emphasis on solidarity and empathy. The high share of the tourism sector in global GDP and multimillion loss of jobs in the tourism industry worldwide indicate the continuing demand for new solutions and sectoral recovery strategies, both on local and regional and global levels. Considering the actuality and relevance of the studied issues, the subject of this paper is the analysis of tourism demand in the Republic of Serbia in the period of 2019 M1 - 2021 M8. The paper aims to provide a deeper

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insight into the fundamental transformational impacts and changes in the structure of demand for tourist services in the Republic of Serbia caused by the outbreak and declaration of a global pandemic. As expected, the research results indicate a change in the structure of demand in favor of domestic tourists and, consequently, an increase in demand for mountain and spa facilities. In addition, the research identifies the need and potential for the introduction of innovations in the Serbian tourism sector while at the same time strengthening the digital competencies of employees and visitors. Finally, the paper confirms that the COVID-19 pandemic represents a turning point in the development of the tourism industry, opening the possibility of redefining priorities and respecting the principles of sustainable development through the environmental and socio-economic dimensions.

**Keywords:** *Demand, Tourism Sector, COVID-19, Republic of Serbia*

**JEL Classification:** M310, Z320, Z330

## 1. Introduction

The COVID-19 influenced crisis represents an unprecedented and unforeseen event to which all sectors of the economy are exposed to a greater or lesser extent. The sectors most affected are contact-intensive services (Lazić et al., 2021), as well as those directly exposed to government restrictions. Break on mobility through extensive measures of social distancing, quarantining, and travel restrictions have had devastating impact on tourism and travel, which was estimated to be one of the most vulnerable, vital sectors globally. Prior to the coronavirus outbreak, the sector accounted for 10.4% of the overall global GDP, which in absolute terms translated to US\$2.9 trillion with US\$848 billion capital investments (WTTC, 2021). Furthermore, the sector was considered to be “a valuable partner in governments’ employment schemes” given the information that prior to crisis on average one in four newly created jobs was created in tourism and travel (WTTC, 2021). Nevertheless, the year 2020 is proclaimed to be “the worst year in the history of tourism” (UNWTO, 2021a) when the overall number of international tourist arrivals on the global scale shrank by 74% compared to the previous year (y/y) (UNWTO, 2021a).

The high share of tourism in global GDP and multimillion job-loss of the industry due to the ongoing pandemic indicate the continuing demand for new solutions and sectoral recovery strategies, both on local and global levels. The ongoing epidemiological situation has radically transformed the existing patterns of tourism supply and demand. Consequently, in focus of the post-pandemic tourism recovery programs and crisis marketing strategies has been promotion of domestic tourism, priority is given to safety and security, while the tone of marketing messages has been adapted to the “new normal” with solidarity and empathy much more pronounced.

Moreover, the COVID-19 pandemic has given the nature “a healing time” (Moreno-Luna et al., 2021) and tourism the chance to re-build on a more “resilient, inclusive, carbon neutral, and resource efficient” principles (UNWTO, 2021b). Given that 21<sup>st</sup> century has considered to be the century of continuous environmental contamination (Đukić et al., 2016), work towards a responsible recovery of the industry should be based on the following five priorities (UNWTO, 2021b): (1) reduction of the crisis’ socio-economic impacts especially on vulnerable population groups; (2) competitiveness boost and establishment of sector’s resilience; (3) implementation of innovations and advanced ICTs solutions; (4) further promotion of sustainable and environmentally-friendly industry’s growth; and (5) sector’s transformation towards achieving sustainable development goals (SDGs).

Given the context, the subject of this paper is the analysis of tourism demand in the Republic of Serbia during the period of 2019 M1 - 2021 M8. The paper aims to provide a deeper insight into the fundamental transformational impacts and changes in the structure of demand for tourist services in the Republic of Serbia caused by the outbreak and declaration of a global pandemic. As expected, the research results indicate a change in the structure of demand in favor of domestic tourists and, consequently, an increase in demand for mountain and spa facilities. In addition, the research identifies the need and potential for the introduction of innovations in the Serbian tourism sector while at the same time strengthening the digital competencies of employees and visitors. Finally, the paper confirms that

the COVID-19 pandemic represents a turning point in the development of the tourism industry, opening the possibility of redefining priorities and respecting the principles of sustainable development through the environmental and socio-economic dimensions.

The remainder of the paper is organized as follows. After introductory remarks, Section 2 presents main innovation which have characterized tourism and hospitality industry in general during the last decade. Section 3 reports stylized facts of Serbian tourism industry while Section 4 performs descriptive analysis of the COVID-19 crisis' impact on tourism demand in the Republic of Serbia. Finally, Section 5 concludes the paper.

## **2. Innovation in tourism and hospitality industry as the COVID-19 crisis response**

The concept of “sustainable tourism” has been at the center stage of sector’s decision makers, destination marketing organizations, and academic scholars for decades now (Tyan et al., 2021). It can be defined as “tourism that takes full responsibility of its current and future economic, environmental, and social impacts, addressing the needs of the industry, environment, tourists, and host communities” (Tyan et al., 2021, p. 20). In other words, the concept of sustainable tourism is based on three main cornerstones of sustainability – economic, environmental, and social. In order to preserve the sustainability of the sector for future generations, the emphasis has been put to the implementation of advanced digital solutions that can adequately respond to economic, environmental, and social challenges (Herrera-Cano & Herrera-Cano, 2016; Imon, 2017), on one hand, and its more meaningful context, on the other.

Prior to the coronavirus outbreak, Information and Communication Technologies (ICTs) have already revolutionized the pace of change and existing business models of tourism and hospitality (Calvaresi et al., 2021). Advanced digital solutions, modern technology, and artificial intelligence have radically transformed the industry, by reengineering the entire ecosystem (Buhalis & Moldavska, 2021). The loss of human touch, which was considered to be the main drawback of the automation and implementation of advanced technological solutions into the business processes (Tussyadiah, 2020), is now regarded as the part of a solution in the process of mitigation the COVID-19 crisis' negative effects (Frey, 2020).

Advanced digital solutions, modern technology, and artificial intelligence are integral parts of the so-called ‘new normal’ hospitality (Leung, 2019). For example, 78% of hospitality companies consider that voice-activated devices will soon become mainstream for room lights and temperature controls (Oracle, 2020). Artificial intelligence is influencing both, the industry, and tourist behavior (Tuo et al., 2021). Furthermore, it is projected soon to become “a human special companion” (Buhalis & Moldavska, 2021) which has especially been pronounced during extraordinary circumstances induced by the ongoing and lingering health crisis. It should be noted that this process also requires appropriate digital skills (Bradić-Martinović & Banović, 2017).

Implementation of advanced ICTs solutions through new improved tourist products and services has the potential to transform the customer experience and boost sector’s productivity. One of the latest technological boosts was the implementation of mobile applications (Hashim et al., 2019; Bradić-Martinović & Miletić, 2017). By providing the mobile access to services such as hotel’s and airline tickets’ reservations, as well as local destinations’ recommendations, decision makers can boost tourists’ interest and consequently generate considerable revenues (Snow et al., 2016). Furthermore, the usage of sophisticated chatbots is estimated to have the potential to transform the industry even further. The chatbot is a computer program capable to imitate natural language-based conversation (Calvaresi et al., 2021). Consequently, the implementation of sophisticated chatbots directly influences time efficiency and customer satisfaction given that they provide instant customer support 24/7 (Buhalis & Yen, 2020).

Along with the implementation of mobile application, voice-recognition technologies, and chatbots some authors (Tyan et al., 2021) find blockchain technology as another integral part of sustainable tourism and hospitality industry. Due to its characteristics, blockchain technology has the potential and

possibility to radically transform the whole industries and overall business processes (Treiblmaier, 2019). Implementation of blockchain technology into the business can help integrate sales, operational activities, financial services, and administrative tasks while at the same time is capable to deal with the key stakeholders (Tyan et al., 2021).

Finally, before the coronavirus outbreak tourism industry was dominated by its “sun-and-beach” component. Nevertheless, the identified fragility and vulnerability of the industry has put stress on sector’s protection and resilience (Prayag, 2020), with health safety and hygiene measures as its main cornerstones. Domestic tourism has been put into the focus of immediate tourism-recovery strategies (Arbulu et al., 2021; Calderon et al., 2021) considering that the distance of travel became risk factor in itself (Zenker & Kock, 2020). Marketing communication and promotional campaigns were designed to reflect on empathy and solidarity in order to create an emotional attachment with potential customers (Hang et al., 2020). Moreover, sector is turning to more meaningful solutions and creation of mindful tourist products. Mindfulness as “a practice of bringing a certain quality of attention to moment-by-moment experiences” (Stankov et al., 2020) has become valuable asset in dealing with everyday problems of modern lifestyle which became even more emphasized during the COVID-19 pandemic.

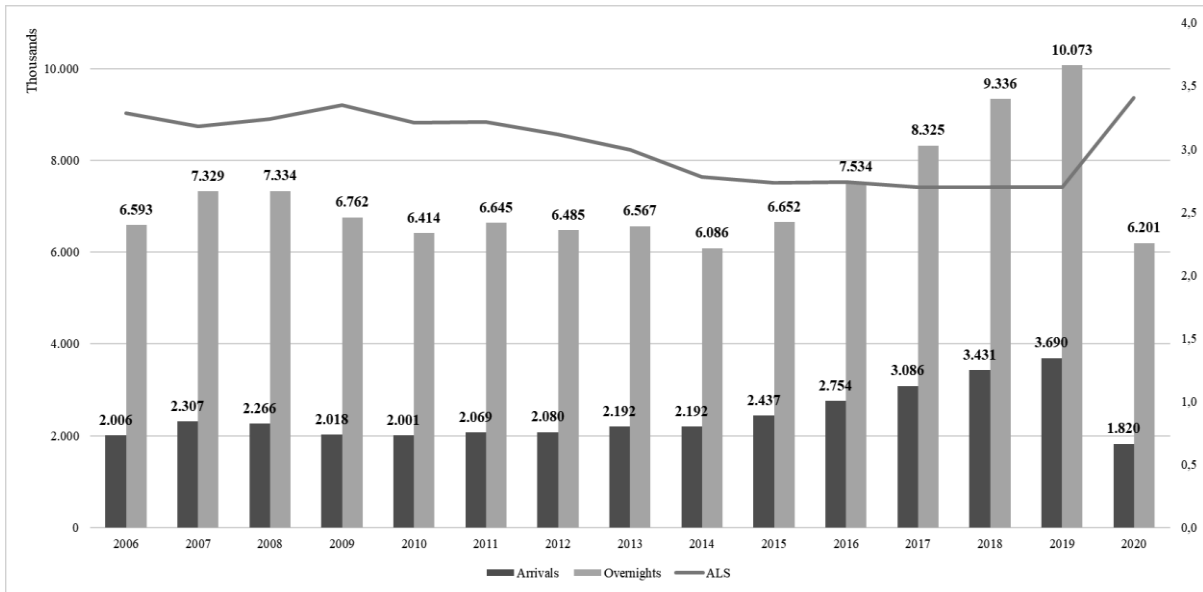
### **3. Tourism in Serbia – stylized facts**

Evolution of the conception of tourism development in Serbia dated back to 1965, but the actual rise was linked to 1970-1985. Since 1985, and especially in the 1990s, tourism demand in Serbia declined due to the unprecedented inflation, economic recession, and political instability, including the NATO bombing in 1999. The period was marked by a lack of capital investment in tourism infrastructure, insufficient housing capacity, modest quality of tourist services, and unqualified workforce engaged in the industry. Nevertheless, the beginning of the 21st century was a turning point for tourism in Serbia, since when the industry has on average witnessed positive growth (Perić, et al., 2018). With that regard, three phases can be distinguished. The first phase lasted until 2008 and was characterized by slightly increased tourist traffic. During the second phase (2009-2014), Serbian tourism industry evidenced a decline and stagnation. The third phase covers the period after 2015, and prior to the COVID-19 pandemic outbreak, when the sector recorded strong growth.

In the last fifteen years (Figure 1), the number of tourist arrivals in Serbia has risen at an average annual rate of 4.4%, while the number of overnight stays recorded growth at a rate of 3.1%. The highest numbers of tourist arrivals and overnight stays were recorded in 2019 when just under 3.7 million guests (with 10 million overnight stays) visited Serbian tourist destinations. Due to the outbreak of the contagious coronavirus, the sector recorded sharp decline in 2020 when the number of tourist arrivals fell by 50.7%, and overnight stays by 38.4% compared to 2019 (y/y). During the first eight months of 2021 the industry has recovered. In August 2021, at the pick of the tourist season, the number of tourist arrivals was higher by 32.6%, and overnight stays by 23.3% compared to the same month last year.

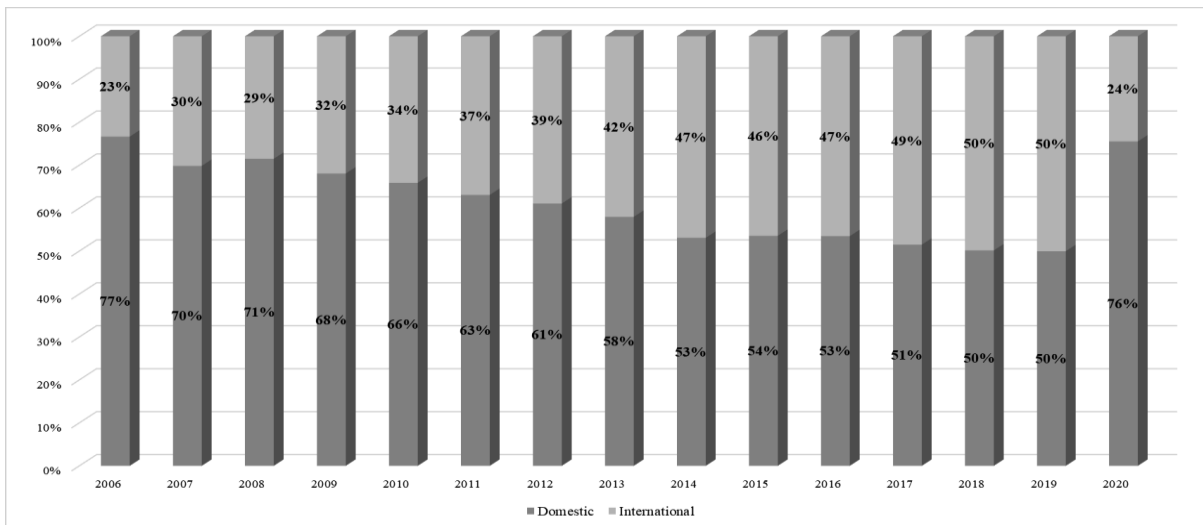
The structure of tourist demand has changed over the observed period, as presented in Figure 2. In 2006, domestic guests generated 77% of the overall tourist arrivals, while in period of 2017-2019 the distribution of guests by the country of origin was uniform. In 2020, the percentage of domestic guests rose significantly, which has proven to be a good mechanism for substituting the lack of foreign guests’ demand. The recovery of tourism demand recorded in August 2021 has led to a 359.7% increase in overnight stays of foreign tourists (y/y).

Figure 1 Tourist arrivals and overnights in Serbia, 2006-2020 (in thousands)



Source: Statistical Office of the Republic of Serbia

Figure 2 Structure of tourism arrivals in Serbia, 2006-2020



Source: Statistical Office of the Republic of Serbia

Following the available official resources, Serbian tourism has dominantly been developed within three groups of destinations - cities, spas, and mountain areas. Belgrade and Novi Sad are the main urban tourist destinations, with other major cities (Niš, Kruševac, Sombor) also attractive to tourists. Spas are considered to be essential for the future tourism development in Serbia. Vrnjacka Banja and Sokobanja traditionally attract many domestic guests, and lately, other spas have joined them (e.g., Banja Vrdnik at the foot of the Serbian national park Fruška gora). Spa tourism is a huge resource for the development of health tourism, which would be competitive in regional frameworks (Mišić & Bradić-Martinović, 2020). Mountain destinations are starting to attract guests throughout the whole year, with Stara Planina, Zlatibor and Kopaonik as the most attractive among them.

*Table 1 Participation of city, spa, and mountain overall overnight stays in Serbia, 2015-2020*

Year	Total	Cities	Spas	Mountains
2015	5.647.376	37,7%	32,8%	29,4%
2016	6.508.194	38,3%	32,0%	29,6%
2017	7.173.633	40,0%	31,1%	29,0%
2018	7.984.195	40,9%	31,8%	27,2%
2019	8.564.303	40,6%	32,5%	26,9%
2020	5.244.978	25,0%	41,7%	33,3%

*Source:* Authors calculation based on Statistical Office of the Republic of Serbia data

The structure of tourism overnights in major Serbian destinations – cities, spas, and mountains is presented in Table 1. It can be concluded that in 2015 distribution of tourism overnights was mostly uniform with slightly higher participation of city tourism. By 2019, the share of mountain tourism was slowly decreasing, while the share of spa tourism was stable and ranged around one-third of the total number of overnight stays in the observed period.

*Table 2 Structure of domestic and international overnight stays in Serbian cities, spas, and mountain destinations, 2015-2020*

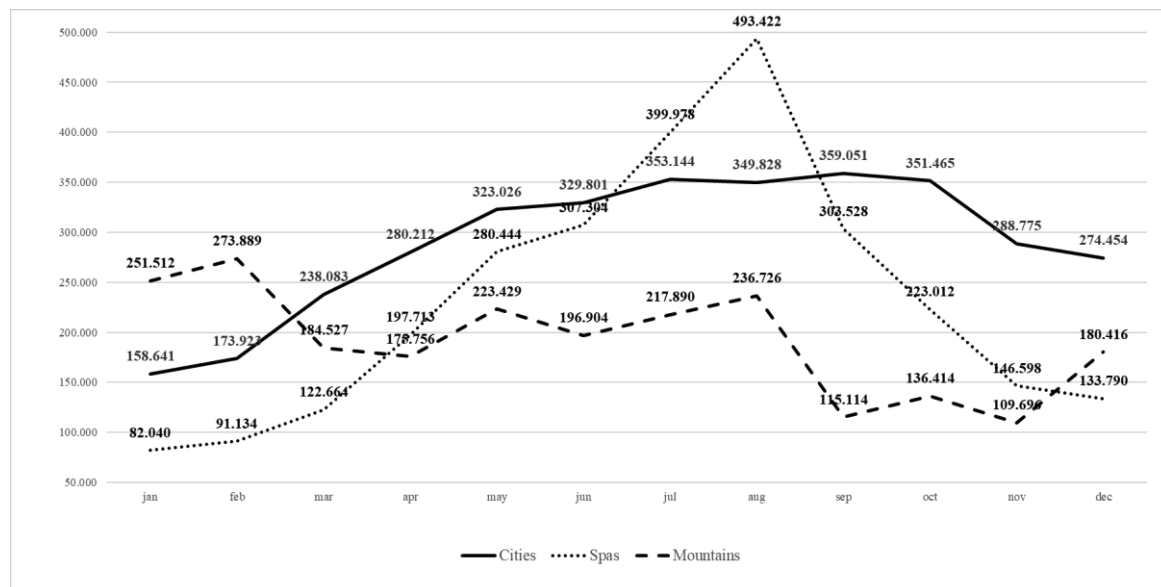
Year	Cities			Spas			Mountains		
	Total	Dom.	Int.	Total	Dom.	Int.	Total	Dom.	Int.
2015	2.131.307	28%	72%	1.854.582	88%	12%	1.661.487	85%	15%
2016	2.494.617	28%	72%	2.085.044	88%	12%	1.928.533	85%	15%
2017	2.866.998	26%	74%	2.227.945	88%	12%	2.078.690	85%	15%
2018	3.268.898	25%	75%	2.542.391	88%	12%	2.172.906	84%	16%
2019	3.480.403	25%	75%	2.781.627	87%	13%	2.302.273	83%	17%
2020	1.313.204	44%	56%	2.184.602	95%	5%	1.747.172	88%	12%

*Source:* Authors calculation based on Statistical Office of the Republic of Serbia data

Considering the structure of Serbian tourism demand by the country of origin (domestic vs international guests) presented in Table 2, two trends can be identified. City tourism is dominantly reliant on foreign guests, and their share in the overall tourism demand rose from 72% in 2015 to as much as 75% in 2019. On the other hand, with an average share of 88% domestic guests are dominant visitors of Serbian spas. A similar situation can be noticed in the segment of mountain tourism, where the share of domestic guests is considerably larger compared to the international ones.

Brief analysis of tourism demand seasonality for the identified three groups of destinations in Serbia (Figure 3) shows that in 2019 this characteristic was mainly pronounced in spas, where the peak tourist season was recorded in August, and increased tourism demand in the period of April - September. In 2019, cities also recorded increased tourist traffic in the period of April - October, while tourism demand for mountain destinations in Serbia seems to be relatively evenly distributed during the year with a slightly prominent period between December and February, during the ski season, and in August during the summer holiday season.

Figure 3 Seasonality of tourism demand in Serbian city, spa, and mountain destinations (2019)



Source: Authors calculation based on Statistical Office of the Republic of Serbia data

#### 4. Impact of the COVID-19 crisis on tourism demand in Serbia

Due to the situation influenced by the outburst of the COVID-19 pandemic, in 2020 Serbia recorded a decrease in the number of overnight tourists of 38% (y/y) which is less compared to the world (-73%) and European (-68%) averages. This percentage is also lower in comparison to decline registered by some of the countries in the region (e.g., Montenegro – 79.8%, Bosnia and Herzegovina – 63%, and North Macedonia – 48%). One of the main reasons for the sustainability of tourism demand in Serbia during the ongoing pandemic was the identified domestic propensity to spend on tourist trips – a significant feature of the Serbian population.

Table 3 Domestic and international tourism demand structure in Serbian cities, spas and mountain destinations (2019, 2020 and 1-8/2021)

M/Y	Cities			Spas			Mountains		
	Dom. (%)	Int. (%)	Total	Dom. (%)	Int. (%)	Total	Dom. (%)	Int. (%)	Total
1/2019	28%	72%	158.641	84%	16%	82.040	70%	30%	251.512
1/2020	28%	72%	197.659	78%	22%	108.026	70%	30%	309.879
1/2021	44%	56%	96.205	92%	8%	66.314	90%	10%	239.007
2/2019	29%	71%	173.923	89%	11%	91.134	86%	14%	273.889
2/2020	31%	69%	202.510	86%	14%	125.697	85%	15%	323.300
2/2021	50%	50%	109.620	92%	8%	88.423	89%	11%	216.488
3/2019	26%	74%	238.083	85%	15%	122.664	88%	12%	184.527
3/2020	41%	59%	104.826	85%	15%	81.265	85%	15%	121.541
3/2021	44%	56%	113.575	90%	10%	99.926	89%	11%	127.834
4/2019	28%	72%	280.212	88%	12%	197.713	90%	10%	175.756
4/2020	61%	39%	18.291	85%	15%	4.590	46%	54%	3.124
4/2021	43%	57%	124.603	91%	9%	132.632	87%	13%	61.283
5/2019	27%	73%	323.026	89%	11%	280.444	90%	10%	223.429
5/2020	72%	28%	37.376	98%	2%	73.458	86%	14%	25.097
5/2021	38%	62%	148.988	92%	8%	221.777	89%	11%	110.984
6/2019	23%	77%	329.801	89%	11%	307.304	87%	13%	196.904
6/2020	58%	42%	81.028	97%	3%	244.424	97%	3%	152.747
6/2021	33%	67%	203.130	92%	8%	296.100	90%	10%	143.125
7/2019	22%	78%	353.144	86%	14%	399.978	82%	18%	217.890
7/2020	54%	46%	78.377	94%	6%	156.904	97%	3%	172.622
7/2021	25%	75%	299.644	91%	9%	398.652	87%	13%	277.803
8/2019	23%	77%	349.828	87%	13%	493.422	82%	18%	236.726
8/2020	56%	44%	98.137	98%	2%	500.047	97%	3%	282.576
8/2021	27%	73%	292.537	90%	10%	532.717	85%	15%	273.025
9/2019	24%	76%	359.051	90%	10%	303.528	78%	22%	115.114

9/2020	52%	48%	120.514	97%	3%	343.300	95%	5%	136.713
10/2019	25%	75%	351.465	89%	11%	223.012	84%	16%	136.414
10/2020	45%	55%	158.334	96%	4%	199.346	89%	11%	87.477
11/2019	28%	72%	288.775	86%	14%	146.598	86%	14%	109.696
11/2020	46%	54%	115.142	95%	5%	102.378	88%	12%	62.059
12/2019	27%	73%	274.454	80%	20%	133.790	78%	22%	180.416
12/2020	47%	53%	101.010	92%	8%	45.697	90%	10%	70.037
Total									
2019	25%	75%	3.480.403	87%	13%	2.781.627	83%	17%	2.302.273
2020	44%	56%	1.313.204	95%	5%	1.985.132	88%	12%	1.747.172
1-8/2021	34%	66%	1.388.302	91%	9%	1.836.541	88%	12%	1.449.549

*Source:* Statistical Office of the Republic of Serbia

According to official statistics (Table 3) spa destinations were the least affected by the crisis' negative effects. In 2019, spa destinations in Serbia recorded turnover with 87% share of domestic guests, and this share rose to 95% in 2020. A similar situation has been reported in case of mountain destinations, where the share of domestic guests increased from 83% in 2019 to 88% in 2020. Nevertheless, the overall tourism demand for these types of destinations decreased by 28.6% (spas) and 24.1% (mountains). On the other hand, cities in Serbia were the most affected by the crisis' negative effects and, consequently, evidenced drop in overall turnover of 62.3% which was well above the sector's average. The main reason was extremely low foreign component considering that Belgrade and Novi Sad are the cities mostly attractive to business guests, as well as established venues for music (e.g., EXIT festival) and other cultural events, and touring. With that regard, in the first two months of 2020, city tourism experienced positive growth rates. Nevertheless, dramatic decline was recorded after formal declaration of the COVID-19 pandemic at the end of March 2020. In April 2020, the number of overnight stays in cities fell by 93% compared to the same month last year. Unlike 2019, when the share of foreign tourists in cities accounted for 75%, in 2020 this percentage fell to 56%.

In the second COVID-19 year, 2021, tourist traffic in all three types of destinations has recorded recovery. In the first eight months of 2021, urban tourism demand increased by 70%, while spa and mountain destinations recorded growth of 42%, and 4%, respectively.

Based on the analysis conducted, it can be concluded that in the case of Serbian mountain and spa destinations, domestic demand was able to considerably substitute the decline of foreign arrivals. This was especially pronounced in the case of mountain destinations, which recorded solid results despite the imposed government restrictions. Compared to mountain destinations, the situation in spas is a little more challenging given the fact that numerous guests in spa destinations were elderly citizens of Serbia who hesitated to move outside the areas in which they live. Nevertheless, the most severely affected was Serbian urban tourism, which has shown a low degree of resilience in the face of limited international visits.

## 5. Conclusion

Authors consider that the COVID-19 pandemic has brought to light some of the important challenges of Serbian tourism industry – pronounced seasonality of all three types of destinations, as well as limited resilience and insufficient attractiveness of urban tourism especially in times of increased risk and uncertainty. In order to overcome identified challenges, destinations in Serbia are urged to develop more up to date tourist products and services by further exploiting the usage of advanced digital solutions, modern technology, and artificial intelligence as integral parts of sustainable tourism development in the years to come. Voice-recognition tools and mobile applications should be the first in line when considering sector's modernization in the short run, which should be followed by strengthening the digital competencies of employees and visitors.

Furthermore, in times of increased risk perception decision makers should focus on domestic and nearby markets to obtain sector's gradual recovery and improve structure of guests which could have positive effects on mitigating sector's resistance to similar shocks in the future. Findings from the existing literature (Volgger et al., 2021) indicate positive correlation between retentive advertising, discounting and flexible cancellation policies, on one hand, and booking intentions, on the other. Consequently,

marketing messages should be designed to reflect the empathy and solidarity, as well as to evoke “restorative experience”. Brand image and slogans for domestic destinations are considered to be critical components of converting “floating” domestic tourists into the guests (Hussain et al., 2021). The goal is to establish emotional attachment to potential tourist and revive the necessity to travel for the sake of physical and mental wellbeing.

Finally, it can be concluded that the ongoing pandemic represents the opportunity for the industry to re-start and re-build on more mindfulness principles in order to achieve its sustainable development in the years to come.

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