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# A DECADE OF TOURISM CHANGES IN THE REPUBLIC OF SRPSKA

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#### **SUMMARY**

This research will present the changes in arrivals and overnight stays of the tourists to the Republic of Srpska in the observed period from 2013 to 2022. This is a continuation of the research, which was conducted in 2020. Data for tourist arrivals and overnight stays, according to NACE, were also presented in the same observed period. The paper explains the changes in the oscillations of visits and overnight stays in relation to the crisis years for tourism in the Republic of Srpska (2014 and 2020), but also the recovery in the years after. According to the research results, the authors again gave recommendations, based on the UNWTO Forecast (2022) which states that international tourism is on track to return to pre-pandemic levels, with twice as many people traveling during the first quarter of 2023 as during the same period in 2022.

KEYWORDS: tourism changes, Republic of Srpska, UNWTO

## DECENIJA TURISTIČKIH PROMJENA U REPUBLICI SRPSKOJ

#### SAŽETAK

Ovim istraživanjem biće predstavljene promjene u turističkim dolascima i noćenjima u Republici Srpskoj u posmatranom periodu od 2013. do 2022. godine. Ovo je nastavak istraživanja koje je sprovedeno u 2021. godini. Podaci o dolascima i noćenjima turista, prema NACE-u, takođe su predstavljeni u istom posmatranom periodu. U radu se objašnjavaju promjene u oscilacijama dolazaka i noćenja u odnosu na godine, koje su bile krizne za turizam u Republici Srpskoj (2014. i 2020.), ali i oporavak u godinama nakon toga. Prema datim rezultatima istraživanja, autori su ponovo dali preporuke, koje se zasnivaju na prognozi UNWTO (2022) koja navodi da je međunarodni turizam na putu da se vrati na nivo prije pandemije, sa dvostruko više ljudi koji su putovali tokom prvog kvartala 2023, u odnosu na isti period 2022. godine.

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### INTRODUCTION

The Republic of Srpska, placed in the heart of the Balkans, has been endowed with natural beauty, cultural heritage, and historical significance. As a region rich in diversities, it offers a tapestry of experiences that range from picturesque landscapes and vibrant cities to authentic traditions and warm hospitality. Tourism is an important sector for many regions, including the Republic of Srpska. Changes in tourism can be influenced by various factors, including economic trends, political stability, infrastructure development, cultural promotion, and global events (e.g. consequences of the COVID-19 pandemic). Over the past decade, the Republic of Srpska has witnessed a dynamic shift in its tourism landscape, characterized by various advancements, challenges, and emerging trends. Successful tourism development involves careful planning, collaboration and a focus on sustainability. Develop a clear and comprehensive tourism development strategy that outlines objectives, target markets, infrastructure needs and sustainability initiatives. Thorough market research should be conducted to understand the needs, preferences and behavior of tourists target. This helps tailor experiences and services to their interests. Also, it is necessary to start crisis (risk) management, to develop contingency plans that can deal with potential risks, such as natural disasters, health emergencies or political instability that could affect tourism. Analyzing all of the above, the authors reviewed the history of tourism development in the Republic of Srpska over a period of 10 years, analyzing the number of arrivals and overnight stays, both domestic and foreign tourists, according to the classification of economic activities (NACE). The Classification of Economic Activities is harmonized with NACE Rev.2 Statistical classification of economic activities in the European Community (Hotels and similar accommodation; holiday and other short-stay accommodation; camping grounds, recreational vehicle parks and trailer parks; human health activities). Also, the authors analyzed the crisis years in the observed period, as well as the time of recovery after the COVID-19 pandemic.

### THEORETICAL BACKGROUND

According Barykin et al. (2021), growth in tourism would automatically mean more possibilities for all, as there would be more wealth creation, job creation, environmental awareness and avenues for recreation. All these are possible if the industry is ready to improve and take full advantage to leverage digital transformation by making digital excellence a goal through the excellent digital presence and digital hygiene. The pandemic has accelerated the adoption of technology in the travel industry. The system of contactless payments, virtual tours and health monitoring applications has grown. Konstantinova (2019) states that challenges and opportunities for digitalization in tourism are aimed at creating new key initiatives: digital competences and skills, changing thinking, creativity and innovation, creating new relationships between consumers and producers, implementing new good practices, new value chains, facilitating personalization of tourists' experiences, securing funding, contributing to new destination configurations, improving infrastructure, political support, etc.

Also, sustainable tourism is considered a lot in the new literature. This kind of tourism also presents vast challenges such as being difficult to define and measure, being more expensive than traditional forms of tourism (in part), and potentially having negative impacts on local communities. Another major challenge is the lack of incentives for industry players, which makes it hard for stakeholders to embrace sustainable tourism methods and practices (Fuchs, 2023; Garg & Pandey, 2021; Jeong et al., 2023; Torkington et al., 2020).

Before the analysis and interpretation of the obtained results, it is necessary to analyze the facts that led to the increase in the number of arrivals, both foreign and domestic tourists from 2013 to 2022. It's important to note that the tourism industry can be influenced by a multitude of factors, and changes can occur rapidly due to various global and local developments. There is little doubt that foreign and domestic tourism have been major 'victims' of the global crisis caused by the health pandemic (Milovanović & Dervida, 2021). Many of the consequences of the COVID-19 pandemic on tourism and our individual mobilities have been enacted by governments, frequently backed up by emergency legislation (Baum & Hai, 2020). According to Tourism statistics - nights spent at tourist accommodation establishments (2020), comparing January to September 2020 with the same 9 months period in 2019, the number of nights spent in EU tourist accommodation dropped from 2.4 billion in 2019 to 1.2 billion in 2020 (-49%). Lachhab et al. (2022) point out that tourism research related to crisis management and resilience is very important, with a special emphasis on research related to small tourism businesses.

From the aspect of cities and countries, the brand represents a kind of their designation: in the perception of individuals about a city or country, an attempt is made to generate a certain set of expectations, thoughts, knowledge, feelings and associations. Branded cities and countries are easier to attract tourists, but also residents, and thus make a step towards their own sustainable development (Mirosavljevic & Milovanovic, 2019; Foster & Cadogan, 2000; Jojic, 2018; Kilduff & Tabales, 2017).

The loyalty of both domestic and foreign tourists who visited certain destinations in the Republic of Srpska before the pandemic has been proven here. According Peric, Milovanovic and Vranesevic (2019), loyalty is a variable category in itself, and customer expectations should not be considered a permanent and stable category. Expectations are variable before the purchase process, during that process and during the use of products or services due to various influences (changes in market circumstances, competition efforts, etc.) Creating emotional connections with customers through storytelling, brand values, and memorable experiences can result in stronger brand loyalty. When customers feel emotionally connected to a brand, they are more likely to remain loyal. The Tourist Organization of Banja Luka states that this city has been the first tourist destination in the Republic of Srpska for the past two decades, and last year it recorded a record tourist traffic with more than 146.000 overnight stays.

There is also "price like loyalty" in the context of health tourism in the Republic of Srpska, compared to countries in the region, because the prices in spas and health resorts are much cheaper than in the region. This is specific situation where patients or medical travelers exhibit loyalty primarily based on the cost of medical treatments or procedures. This means that patients choose a specific destination or medical provider because they consistently offer lower prices compared to other options. Othervise, Kim, Chiang and Tang (2017), point out that wellness tourism is a rapidly growing sector of the current thriving tourism industry and that impact of tourists' motivation on engagement, which consequently leads to loyalty.

However, it is important to point out that loyalty was not the same among domestic and foreign tourists. While the number of arrivals of domestic tourists in 2021 and 2019 almost equalized, the number of arrivals of foreign tourists only reached the number of their arrivals (from 2019) in 2022, and the number of overnight stays by foreign tourists in 2022 (489035) did not even equal the number of overnight stays in 2019 (506040).

All of the above had a significant impact on the recovery of both the overall economy and tourism from 2021 until now.

## **RESEARCH AND METHODOLOGY**

As already stated, this work is a continuation of the research, which was completed two years ago. Accordingly, the same methods of data collection and evaluation were used. In order to capture the economic power comprising all activities in the tourism field, Eurostat, the Statistical Office of the European Communities, issued a statistical document for all economic activities in the European states, called NACE (Jurigova, 2015). The data, used by the authors of this paper, were taken from a multitude of reports, which are presented in the announcement "Monthly Report on Tourists and Nights" (TU-11), which is submitted to the Statistical Office of the Republic of Srpska provided by hotel and restaurant enterprises and other enterprises, business entities and organisations that provide services of guests accommodation (Milovanović & Dervida, 2021). The data will be presented showing the growth of arrivals and overnight stays in total, as well as the number of arrivals and overnight stays of domestic and foreign tourists in the Republic of Srpska (RS), interpreting the first observed period of 10 years (2013 to 2022).

	,	Tourist arrivals	8	Tourist overnight stays			
year	domestic foreign		total	domestic	foreign	total	
2013	143510	112767	256277	396293	273936	670229	
2014	141898	118262	260160	323002	275666	598668	
2015	158571	136210	294781	366761	320183	686944	
2016	166063	157845	323908	379136	361465	740601	
2017	168293	176366	344659	390647	403896	794543	
2018	179674	202128	381802	456367	470572	926939	
2019	181401	218869	400270	466815	506040	972855	
2020	123966	66305	190271	335624	195823	531447	
2021	175763	119275	295038	478830	269445	748275	
2022	217634	222147	439781	547534	489035	1036569	

Table 1. Tourist arrivals to the Republic of Srpska (2013-2022)

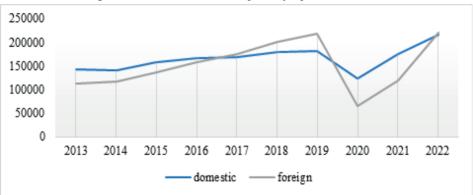


Figure 1: Tourist arrivals to the Republic of Srpska (2013-2022)

Source: The authors, according to the research

Considering Table 1. there were total 439781 tourist arrivals in 2022. in the RS, which is an increase of 71,60% compared to the number of tourist arrivals realised in 2013. Due to the catastrophic floods, which hit the RS in 2014, it is noticeable that the number of domestic tourists was lower than in 2013, and that the tendency of arrival/visit of domestic tourists in the accommodation facilities of the RS was disturbed. Also, due to the known situation with the COVID-19 virus pandemic, the number of tourist arrivals in 2020 had a decrease of -52.46% compared 2019 (Figure 1). The number of tourist overnight stays realised in 2022 was 54,66% higher compared to 2013. Also, due to the catastrophic floods in 2014, it is noticeable that the number of domestic tourists was lower than in 2013. Due 2020, the number of total tourist overnight stays had a decrease of -45,37% compared to 2019, and number of foreign tourists nights had a decrease of -61,30% (Figure 2).

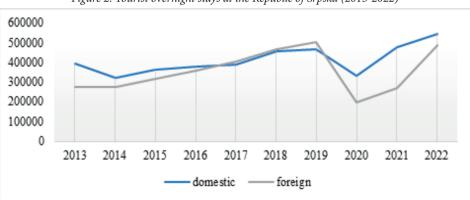


Figure 2: Tourist overnight stays at the Republic of Srpska (2013-2022)

Source: The authors, according to the research

In the observed period of 10 years, tourists in the RS primarily visited "hotels and similar accommodation", followed by "human health activities", "camping grounds, recreational vehicle parks and trailer parks" and "holiday and other short-stay accommodation" (Figure 3). There is a noticeable increase in interest in "camping grounds, recreational vehicle parks and trailer parks", during last years. Table 2 shows that the number of *domestic tourists* who visited the RS in 2022 and it was 51,65% higher, compared to 2013. In the observed period of 10 years, first of all they visited "hotels and similar accommodation", and than "human health activities", "holiday and other short-stay accommodation" and "camping grounds, recreational vehicle parks and trailer parks" (Figure 4). The number of domestic tourist arrivals in 2020 had a decrease of -31,66% compared to 2019, due to known restrictions related to the COVID-19 pandemic. However, what is significant is that the recovery followed quickly, so that two years later, a 75,56% increase in the number of domestic tourists was recorded. The number of foreign tourists in 2022 was 97% higer than 2013. Compared to domestic tourists, foreign tourists visited the most "hotels and similar accommodation", "camping grounds, recreational vehicle parks and trailer parks", "holiday and other shortstay accommodation" and "human health activities" (Figure 5). The number of foreign tourist arrivals in 2020 had a decrease of -69,70% compared to 2019. Important is that foreign tourists returned already one year after the pandemic, and a growth of 79,89% was recorded, Two years later (2022) that number was higher than it was in the year before the pandemic (2019).

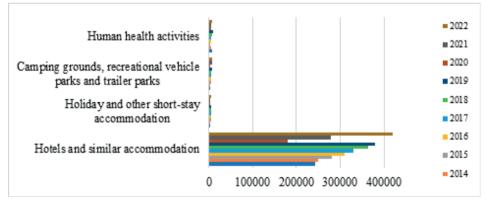
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year	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
DOMESTIC TOURISTS	143510	141898	158571	166063	168293	179674	181401	123966	175763	217634
Hotels and simi- lar accommoda- tion	134097	135912	151117	158491	160581	168572	169963	117542	166567	208409
Holiday and other short-stay accom- modation	1832	2057	3152	2566	3483	3347	2714	1745	1837	2276
Camping grounds, recre- ational vehicle parks and trailer parks	937	465	1263	1462	455	975	1131	879	1579	764
Human health ac- tivities	6644	3464	3039	3544	3774	6780	7593	3800	5780	6185
FOREIGN TOURISTS	112767	118262	136210	157845	176366	202128	218867	66305	119275	222147
Hotels and simi- lar accommoda- tion	109039	114289	130895	151662	169107	195553	209153	63043	112654	212821

Table 2. Tourist arrivals according to the Classification of Economic Activities (NACE4) (2013-2022).

<sup>4</sup> NACE is the acronym used to designate the various statistical classifications of economic activities developed since 1970 in the European Union (EU). NACE provides the framework for collecting and presenting a large range of statistical data according to economic activity in the fields of economic statistics (e.g. production, employment, national accounts) and in other statistical domains. Statistics produced on the basis of NACE are comparable at European and, in general, at world level. The use of NACE is mandatory within the European statistical system.

Holiday and other short-stay accom- modation	1402	1312	1803	1798	2053	2233	2579	641	1384	2015
Camping grounds, recre- ational vehicle parks and trailer parks	1890	2123	2884	3486	4191	3121	5725	2346	4993	6621
Human health ac- tivities	436	538	628	899	1015	1221	1410	275	244	690
TOTAL	256277	260160	294781	323908	344659	381802	400268	190271	295038	439781
Hotels and simi- lar accommoda- tion	243136	250201	282012	310153	329688	364125	379116	180585	279221	421230
Holiday and other short-stay accom- modation	3234	3369	4955	4364	5536	5580	5293	2386	3221	4291
Camping grounds, recre- ational vehicle parks and trailer parks	2827	2588	4147	4948	4646	4096	6856	3225	6572	7385
Human health ac- tivities	7080	4002	3667	4443	4789	8001	9003	4075	6024	6875

Figure 3: Total tourist arrivals according to the NACE (2013-2022).



Source: The authors, according to the research

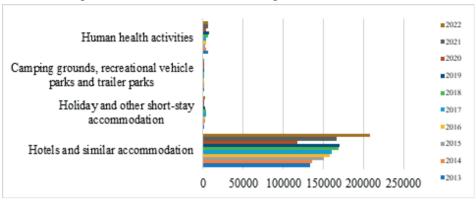
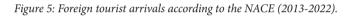
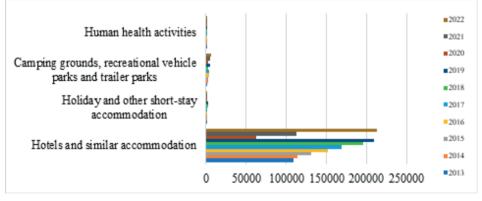


Figure 4: Domestic tourist arrivals according to the NACE (2013-2022).

Source: The authors, according to the research





Source: The authors, according to the research

Number of total tourist nights increase in total 54,66% during this period (Table 3). There was a significant increase in overnight stays (nights) by foreign tourists of 78,52%, and the number of overnight stays by domestic tourists increased by 38,16% (Figure 6).

YEAR	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
DOMESTIC TOURISTS	396295	323002	366761	379136	390647	456367	466815	335624	478830	547534
Hotels and similar accommodation	310248	283392	327626	337639	344301	376682	381529	288970	400690	468924
Holiday and other short-stay accom- modation	3756	4189	6395	4011	5026	5792	4383	2675	3331	4213
Camping grounds, recreational ve- hicle parks and trailer parks	1100	512	1370	1571	515	1163	1306	1076	1849	1580
Human health ac- tivities	81191	34909	31370	35915	40805	72730	79597	42903	72960	72817
FOREIGN TOURISTS	273936	275666	320183	361465	403896	470572	506040	195823	269445	489035
Hotels and similar accommodation	261113	263799	306134	343252	384288	448866	479309	187481	257614	468017
Holiday and other short-stay accom- modation	6285	4136	5092	5587	5496	6257	7238	1988	3683	5518
Camping grounds, recreational ve- hicle parks and trailer parks	2343	2783	3379	4402	4901	4228	6729	2950	6192	9573
Human health ac- tivities	4195	4948	5578	8224	9211	11221	12764	3404	1956	5927
TOTAL	670231	598668	686944	740601	794543	926939	972855	531447	748275	1036569
Hotels and similar accommodation	571361	547191	633760	680891	728589	825548	860838	476451	658304	936941
Holiday and other short-stay accom- modation	10041	8325	11487	9598	10522	12049	11621	4663	7014	9731
Camping grounds, recreational ve- hicle parks and trailer parks	3443	3295	4749	5973	5416	5391	8035	4026	8041	11153
Human health ac- tivities	85386	39857	36948	44139	50016	83951	92361	46307	74916	78744

 Table 3. Tourist nights (overnight) stays according to the Classification of Economic Activities (NACE5) (2013-2022).

<sup>5</sup> NACE is the acronym used to designate the various statistical classifications of economic activities developed since 1970 in the European Union (EU). NACE provides the framework for collecting and presenting a large range of statistical data according to economic activity in the fields of economic statistics (e.g. production, employment, national accounts) and in other statistical domains. Statistics produced on the basis of NACE are comparable at European and, in general, at world level. The use of NACE is mandatory within the European statistical system.

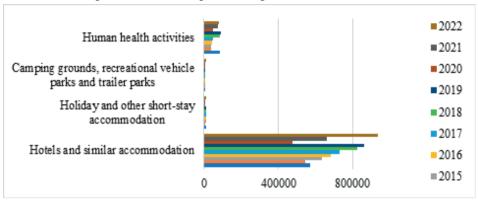
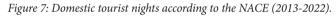
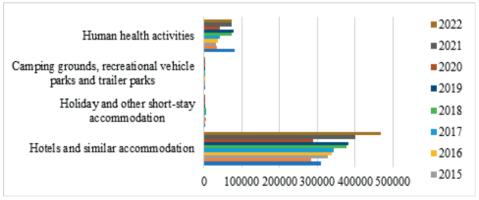


Figure 6: Total tourist nights according to the NACE (2013-2022).

Source: The authors, according to the research

Domestic tourists, who spent the night in some of the tourist facilities in the RS in 2022 was 38,1% higher, compared to 2013. In the observed period, first of all they spent nights at "Hotels and similar accommodation", and than "Human health activities", "Holiday and other short-stay accommodation" and "Camping grounds, recreational vehicle parks and trailer parks". There are no significant oscillations in this trend. The number of domestic tourist night in 2020 had a decrease of -28,10% compared to 2019 (Figure 7).





Source: The authors, according to the research

The number of foreign tourists in 2022 was 78,52% higer than 2013. They also spent nights most in "Hotels and similar accommodation", "Human health activities", "Holiday and other short-stay accommodation" and "Camping grounds, recreational vehicle parks and trailer parks (Figure 8). It is interesting that in 2014 the number of total night decreased by -10,68% compared to 2013, and also the number of nights of domestic tourists decreased by -18,49%. The number of overnight stays of foreign guests has slightly increased compared to 2013.

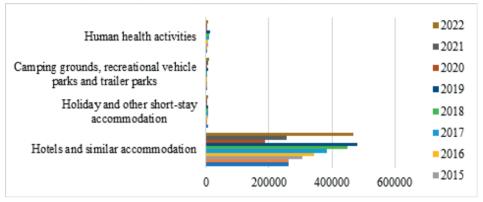


Figure 8: Foreign tourist nights stays according to the NACE (2013-2022).

Source: The authors, according to the research

#### CONCLUSION AND IMPLICATIONS

The paper analyzed data on the number of arrivals and overnight stays of domestic and foreign tourists, and new trends and changes in the preferences of tourists were noted. Republic of Srpska has a rich cultural and historical heritage. Efforts to preserve and promote this heritage through events, museums, festivals, and guided tours can attract tourists interested in exploring the local culture and history. Investments in infrastructure, such as transportation networks, accommodations, and attractions, can significantly impact tourism. Improved roads, airports, and public transportation can make it easier for tourists to access different regions within the RS. Also, the RS has unique natural landscapes, such as national parks, lakes, and mountains, promoting eco-tourism and outdoor activities like hiking, camping, and water sports. All of these could be a strategy to attract nature enthusiasts. Utilizing digital platforms and social media for marketing and promotion can help reach a wider audience and attract tourists who are looking for unique and off-the-beatenpath destinations. As global trends shift towards sustainable and responsible tourism, the RS could focus on promoting environmentally friendly practices, supporting local communities, and ensuring that tourism growth is balanced and doesn't negatively impact the local environment or culture. Hosting cultural events, music festivals, and other entertainment activities can draw in a diverse range of tourists and boost the local economy. Developing unique and immersive experiences, such as culinary tours, handicraft workshops, and immersive cultural exchanges, can set the Republic of Srpska apart from other destinations. Also, the COVID-19 pandemic has highlighted the need for flexible strategies in the tourism industry. The ability to adapt to crises and implement safety measures will be crucial for attracting tourists in the future. it is necessary to continue holding cultural events, music festivals and other entertainment activities, not only in the larger cities of the Republic of Srpska, but also in those that have potential, but not financial and infrastructural opportunities. Such manifestations, which would be promoted, could attract a diverse range of tourists and stimulate the local economy.

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