Tourism and COVID-19: Case of the Balkan Region*

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Abstract: The crisis caused by the Covid-19 virus has had a significant impact on the tourism industry and brought numerous changes in travel patterns. Uncertainty, travel risks, restrictions, strict measures and limitations in terms of physical contact and mobility affected a re-evaluation of the existing travel plans. The paper investigates travel plans among travelers in three Balkan countries (Serbia, Bosnia and Herzegovina, and Montenegro). Understanding tourists’ preferences and future intentions are the essential basis for creating a tourist offer, keeping tourists at the national and regional level, and mitigating the harmful effects of the crisis. These could contribute to the faster regional recovery of the tourism industry on the one hand and higher levels of tourist satisfaction on the other.

1. INTRODUCTION

Since monitoring tourist movements up to the crisis caused by the Covid-19 virus, tourism has recorded constant growth. Several crises - the financial crisis, health crises (SARS, MERS, Ebola), and terrorism - have impacted reducing the number of international tourist arrivals, most often in the regional context. After the crisis, experience has shown that a complete recovery of tourism and a renewed growth of tourist movements took place very quickly.

The crisis caused by COVID-19 is significantly different from most of the previous ones. Its global impact, affecting all countries and continents, has affected the reshaping of collective consciousness and changes in typical patterns of social behavior, tourist behavior, mobility, consumption patterns and leisure (Molloy et al. 2021; Miao et al.2021).

To better understand the effects of the crisis and investigate the consequences of the pandemic on future trends in tourism, it is necessary to perform a comprehensive analysis of tourists’ intentions, choices, and behavior. It is crucial to examine general habits and tourist flows in pre-crisis and post-crisis times. The paper aims to provide insight into the characteristics of the tourist market in the three analyzed Balkan countries: Serbia, Bosnia and Herzegovina and Montenegro, and gain insight into the respondents’ travel plans and intentions after and during the crisis.

The obtained results can serve as a basis for creating a tourist offer at the national and regional level, to retain tourists and faster regional recovery of the tourism industry on the one hand, but also a higher level of tourist satisfaction on the other hand.

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2. TOURISM AND COVID-19

For the 10th consecutive year, international tourism arrivals grew in 2019, reaching 1.5 billion, while exports generated by international tourism reached USD 1.7 trillion. UNWTO reported that the sub-region of Southern and Mediterranean Europe also recorded a 5% growth in tourist arrivals in 2019. For the Republic of Serbia, the increase was 7.4%, Montenegro 21.4%, Croatia 4.2% and Bosnia and Herzegovina 13.7% (UNWTO, 2020).

The proclamation of the Covid-19 pandemic and the introduction of stringent travel and mobility restrictions all over the world effectively halted international travel. The tourism and hospitality industry was among the hardest-hit sectors, with a 74% drop in tourist arrivals and a loss of 1.3 trillion USD. In 2021 international tourist arrivals increased by 4% compared to 2020, but are still 72% below 2019 levels (UNWTO, 2022). Figure 1 compares data according to international tourist arrivals in 2021 with 2020 and 2019 by the world and regions.

![Figure 1. International tourist arrivals by regions in 2021. Source: UNWTO World Tourism Barometer, 2022.](image)

The harmful effects of the pandemic have been mitigated by the actions of the governments of many countries in the world. The tourism industry benefits from general economic stimulus and support measures, but also tourism-specific measures to eliminate the adverse effects of the crisis on tourism.

The reports of the World Travel and Tourism Council (2022) for the analyzed countries indicate the following data:
- In 2019, tourism’s direct contribution to Serbia’s GDP was 5.9%, and it dropped 54% in 2020, having a decline of 57.5% in terms of international spending and 50.3% in domestic spending. For tourists from Serbia, Montenegro was one of the five destinations with the largest number of outbound departures in 2019 and 2020. The key source markets in 2020 for international arrivals were Bosnia and Herzegovina, followed by Montenegro.
- Tourism in Montenegro contributed 30.9% to the GDP in 2019 and declined by 75% in 2020 (81.6% in foreign consumption and 42.7% in domestic consumption). In 2019 and 2020, Serbia and Bosnia and Herzegovina were the countries with the highest number of tourist arrivals in Montenegro. In 2019 and 2020, Serbia was one of the three most important destinations for travelers from Montenegro.
- The total contribution of tourism to Bosnia and Herzegovina’s GDP in 2019 was 9.8%. The decline in 2020 in GDP was 66.1%, while international visitor spending declined by 76.1% and domestic visitor spending fell by 55%. Serbia was among the top three countries from which the largest number of tourists comes and the top five destinations for Outbound Departures in 2020.

Although the data on tourist arrivals obtained from the official statistical offices for all three observed countries indicate a huge decline in foreign tourist arrivals (Serbia -75.9%, BiH-86.7%, Montenegro, -86%), domestic tourism showed better results (Serbia -25.5%, BiH-30.8%, Montenegro -31.2%).

Uncertainty, travel risks and restrictions, and strict measures and limitations in terms of physical contact and mobility caused new trends in travel behavior.

UNWTO and available literature, indicate trends that could be summarized:
- Closer destinations - Travel to closer destinations in the form of shorter stays or excursions has become more popular. People also opt for staycations - vacations at home, i.e. spending vacation time in the place of permanent residence. The crisis has only intensified the desire to travel, and the uncertainty and complexity of travel organization have affected the planning of several short weekend trips within the homeland. Such journeys provide a higher level of safety and less risk (Ioannides & Gyimóthy, 2020).
- Outdoor adventure – Tourists are more interested in outdoor activities, walking tours, cyclotourism (de Haas et al., 2020), ecotourism, green and other environmentally oriented forms of tourism. Protected natural areas, such as national parks, rural areas and exciting landscapes are becoming attractive destinations. According to Mackenzie and Goodnow (2020), micro-adventures in the local area will become more interesting.
- Travel flexibility - One of the main concerns of tourists is the flexibility in travel organization and cancellation and refund policy in case of inability to travel. With the constant changes in entry and exit requirements, Covid certificates, and other issues, the possibility of last-minute booking is becoming increasingly important (Uğur & Akbıyık, 2020).
- Safety and Hygiene - Safety and cleanliness are the key issues in vacation planning (Del Chiappa et al., 2021) and the accommodation booking process. Hygiene and sanitation measures and their adequate promotion are how the accommodation industry adapts to new circumstances (Roelofsen & Minca, 2021).
- Longer stay - More flexible work policy and remote work introduced a new trend - workation, which combines work and vacation and allows people to have a vacation without taking a break from work. Hotel chains (Marriott, Hilton and Hyatt) offered unique programs to respond to this trend (e.g., WorkSpaces by Hilton). On the other hand, due to the popularity of private accommodation, where overnight stays are usually cheaper than in hotels, and the risk that frequent change of destination bears, guests prefer to stay longer in one place/object.
- Traveling with family and friends - Tourists would rather travel with family and friends than in groups with strangers. Instead of group trips, tour operators will turn to personalized tailored-made tours that include smaller groups of people who know each other.
- Demographic change - Travel recovery is more robust among the younger segments, while the tourists of the third age are the most affected. Research has shown that older people will have lower travel needs, especially if they have health problems (Peluso & Pichierri, 2021)
- Solo travel - The market of individual travelers continuously grows despite the limitations, where Wen et al. (2020) state that the pandemic affects the expansion of independent travel, where luxury, health, wellness, and slow and smart tourism take precedence.
- Responsible travel - Travelers pay more attention to sustainability, authenticity, positive impact and respect for the locals. Stankov et al. (2020) point out that the experiences during the pandemic will create a new category of tourists - mindful tourists (Tauber & Bausch, 2022).

The tourism sector beats with uncertainty for two years. The recovery remains slow (growth of 4% in 2021 compared with 2020) (UNWTO, 2022) and uneven across world regions due to varying mobility restrictions, vaccination rates, and traveler confidence. Also, the highly contagious Omicron variant disrupted the recovery and made traveling more complicated for organization and realization.

3. METHODOLOGY

A total of 787 respondents from three countries participated in the survey: Serbia (42.7%), Bosnia and Herzegovina (20.9%) and Montenegro (7.3%).

The questionnaire consisted of two parts. The first part of the questionnaire included questions related to the socio-demographic characteristics of the respondents and questions related to the most common motives for traveling and travel companions. The second part of the questionnaire consisted of questions related to planned trips during/after the crisis, travel period, length of stay, choice of destination, travel duration and travel organization.

The questionnaire was distributed in April 2020 at the beginning of the Covid-19 pandemic and during the lockdown, i.e. an entire global movement restriction period. The questionnaire was distributed online, and the participation in the research was conceived voluntarily.

The sample consisted of 67.5% women and 32.5% men. The average age of respondents was 32. The highest percentage of respondents had a university degree (46.6%), while the rest had completed high school (30.7%) or master’s studies (22.6%). Most of the respondents are employed (66.3%), followed by students (21.6%) and unemployed respondents (12.1%). Regarding respondents’ incomes, the largest percentage of respondents said they have an average income (compared to the residence country’s standard) (40.4%), and 30.1% of respondents stated that they have incomes below the average. In comparison, 20.7% of respondents do not have incomes and 8.8% think they have below-average incomes.

Regarding travel frequency, the respondents stated that in the period of one year before the pandemic, they traveled on average four times within their country and four times abroad. The dominant motive for travel for 75.7% of respondents is relaxation, rest and fun, followed by visits to friends and relatives (17.9%) and work (6.4%). The largest number of respondents (39.3%) stated that they travel most often with family, followed by 30.5% with a partner, 23.1% with friends, while the least number of respondents travel alone (5.3%) or organized in a group 1.4%.

4. RESEARCH RESULTS

The results of the field research provided insight into the travel plans of respondents from three Balkan, ex-Yugoslav countries. The largest percentage of respondents plan to travel from 1 to 6 months after the crisis ends (46.8%), which indicates their willingness to opt for tourist travel in a relatively short time. The intensive desire to travel is present among respondents from all three countries, especially Montenegro.
Despite the limiting circumstances, the majority of respondents intend to travel abroad for the first time after the restrictions (46.6%). Observing the data by country, it can be noticed that the respondents from Montenegro have a greater intention to travel abroad compared to the respondents from Serbia and Bosnia and Herzegovina.

It is a fact that a large number of respondents plan to realize their travels abroad in the period immediately after the stabilization of the epidemic and direct them primarily to coastal and mountain destinations. This indicates the general perception of these destinations as “healthy” and “less risky”, but also the general habits of respondents to spend their holidays in these destinations.
realization of shorter trips immediately after the crisis, lasting 3-4 nights (20.8%). Such trips will most likely take place in the immediate vicinity and national frameworks, after which they will gradually expand to regional and possibly further destinations.

**Table 5. Respondents’ answers regarding the organization of the trip**

<table>
<thead>
<tr>
<th>Country</th>
<th>I plan for my first trip after the crisis to be organized:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Independently</td>
<td>By travel agency</td>
</tr>
<tr>
<td>Serbia</td>
<td>83.8%</td>
<td>16.2%</td>
</tr>
<tr>
<td>B&amp;H</td>
<td>90.5%</td>
<td>9.5%</td>
</tr>
<tr>
<td>Montenegro</td>
<td>91.4%</td>
<td>8.6%</td>
</tr>
<tr>
<td>Total</td>
<td><strong>86.5%</strong></td>
<td><strong>13.5%</strong></td>
</tr>
</tbody>
</table>

*Source: Own research*

When it comes to travel organization, the largest percentage of respondents in all three analyzed countries want to organize their first trip after/during the crisis independently (86.5%).

5. **CONCLUSION**

The Covid-19 pandemic has left behind two extremely difficult years for tourism. According to the UNWTO, most experts do not expect the recovery of international tourism to the pre-Covid level before 2024. Travel restrictions, slow virus control and economic difficulties are the main obstacles to the recovery of international tourism. A key aspect of future travel is to create a unified and coordinated approach to travel and to fully harmonize rules and regulations, to avoid all the inconsistencies and challenges that have accompanied international travel. Experience with the pandemic will permanently affect values and change aspects of people’s lives, which will result in changes in tourism behavior and patterns tourism. Despite the numerous negative aspects that the pandemic will bring, changes in tourist behavior are inevitable. One of the key changes that stand out may result in a shift towards more spatially, environmentally and socially responsible behavior. (Telišman-Košuta, 2020) and sustainable tourism. Although the pandemic has affected changes in tourism behavior and the re-evaluation of existing travel plans, the results indicate that respondents from three Balkan countries have a clear desire to travel independently, primarily abroad, primarily to coastal and mountain destinations for seven days or more. The further development of tourism in Europe and Balkan countries will depend on the ability of the governments to limit the new epidemics, harmonize the rules regarding Covid-19 and create adequate and safe conditions for tourist travel. Although domestic tourism in 2020 showed greater resilience to the crisis, Hall et al. state that the focus on domestic tourism will disappear as soon as travel restrictions are lifted. Therefore, in addition to domestic tourism, countries in the region should consider options for attracting as many tourists from the surrounding countries as possible to speed up the recovery of the tourism economy. They should base their offer on creating a safe environment, greater flexibility in booking accommodation, better outdoor activities, offering tourists a highly individualized service and a pleasant stay, an authentic and unforgettable experience.
REFERENCES


