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## Analysis of tourist traffic and accommodation capacities through the prism of the tourism development Strategy of the Republic of Serbia 2016-2025

Dorđe Alavuk<sup>a\*</sup>, Dragana Tomašević<sup>a</sup>, Dragana Gašević<sup>a</sup>


<sup>a</sup> Novi Sad School of Business, Serbia

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### Abstract

*Tourism is one of the most promising activities, which has achieved significant results recently in the Republic of Serbia. Proper interpretation of these results, in most cases, implies focusing on a series of interdisciplinary studies and strategies, which make it possible to adequately assess the development of tourist activities in certain areas. The Tourism Development Strategy of the Republic of Serbia for the period 2016–2025, within its business visions and goals, has identified tourist destinations and products that need to be developed. The paper analyzes important segments of the Strategy, with special reference to the comparative view of the projection of tourist traffic growth and accommodation capacities for the periods 2016–2020 and 2021–2025, in order to assess the accuracy of the data, i.e., potential deviations. Also, based on the number of tourists and the structure of accommodation capacities, the real state of tourism and hotel activities was presented through the prism of the Tourism Development Strategy of the Republic of Serbia.*

**Keywords:** tourism, touristic traffic, accommodation capacities

### 1. Introduction

Tourism, as one of the key impicators of the growth of the world's economies, is exposed to constant turbulence in the market, which manifests itself through various development trends. Changes in the quality of life of people, as well as general social awareness, affect the increased demand for tourist products on a daily basis, which has led to the fact that the development of certain countries is assessed through the development level of tourism activity. Seeing it as one of the main "export industries", whose benefits are reflected in huge foreign exchange inflows and an increase in the standard of living of the domicile population, tourism is increasingly being incorporated into the strategic plans of local and national governments (Hrabovski et al., 2012). In this way, tourism, through the multiplier effect, is a driving force that contributes to the economic development of both individual regional parts and the country as a whole.

Tourism, as a complex system, is a set of specially defined activities and actions that arise from leaving the place of permanent residence of travelers. Although until the end of the last century it was believed that the benefits of tourism were exclusively economic in nature, today this scientific discipline is studied from several different cultural and social aspects. That is why a large number of theorists in the field of tourism agree that each trip is a unique experience, since it differs in nature, scope and character (Krasojević et al., 2014). Also, it was pointed out that in addition to the huge cash flow that is realized during the realization of the trip, special attention is paid to modern forms of tourism, which contribute to the development of accompanying activities and the quality of life of the domicile population. These, as well as the previously listed reasons, are just some of the leading ones that have contributed to the creation of access to tourism in the Republic of Serbia through various forms of laws, strategies, principles, standards, etc. (Ilić et al., 2017).

Until the end of the 20th century, the main goals in the development of tourism were related to economic results, such as the amount of foreign exchange inflow, the amount of tourist spending, the number of visitors and overnight stays, investments in tourist facilities and the like, i.e., the emphasis was on making a profit while simultaneously exploiting tourist potentials (Ubavić, 2016). It has been shown that new forms of tourism and related activities, as important carriers of tourist success on which both tourism companies and local communities make money, can initiate the development of tourism in Serbia (Dedejić, 2015).

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\*Corresponding author

E-mail address: [djordjealavuk@yahoo.com](mailto:djordjealavuk@yahoo.com)

The subject of this paper are the basic postulates of the Tourism Development Strategy of the Republic of Serbia 2016 – 2025, with a special focus and analysis of its key segments. As one of the most promising activities in our country, tourism should record positive business results from year to year, followed by growth trends. However, based on the previous Tourism Development Strategy, 2006 – 2015, it can be seen that Serbia's tourism potential is not sufficiently valorized. Moreover, with a closer analysis of the same, a number of shortcomings are noticed during its implementation. Soon after the adoption of the Strategy, the global financial crisis followed, the consequences of which were evident in our market, and which manifested themselves in the reduced volume of investments, and thus the limitation of space for more dynamic commercialization of tourism.

The aim of this paper is to compare the projected growth trends presented within the previous and current Development Strategy of the Republic of Serbia, in order to identify all the shortcomings, as well as the advantages of the mentioned Strategies, during their implementation. Numerically speaking, an evident decline was present in all spheres, starting from a reduced level of investment in tourism by as much as 54.5%, through a decreasing number of overnight stays of 22%, to a decrease in the number of employees in this activity by 5% (Garača et al., 2013). This attitude towards the development of tourism in the territory of the Republic of Serbia was sufficient to create such a business climate within which this activity was not perceived as a prosperous industry and as such, remains without the adoption of a concrete development policy, which certainly prevented the adequate positioning of potential tourist products and their promotion and recognition both in the domestic market, as well as in the foreign market (Alavuk, 2023).

In addition to the Introduction and Conclusion, the paper consists of three basic parts. Namely, in the Introduction, the subject and goal of the work are defined, with more detailed determinants and reasons for the research. The further course of work includes a comparative overview of the projected growth trends within the previous and existing Tourism Development Strategy of the Republic of Serbia, with special emphasis on accommodation capacities and tourist traffic. The second part of the paper is presented through the analysis of tourist traffic, with special attention paid to the time period during the Covid pandemic, the consequences of which have been reflected in many ways on the development of tourism in the Republic of Serbia. Within the third part, numerical capacities of accommodation units are presented, according to the types of accommodation facilities.

## 2. Comparative overview of projected growth trends within the tourism development strategy of the Republic of Serbia 2016-2025

As stated in the introductory part of the paper, a special segment of exceptional importance within the mentioned Tourism Development Strategy of the Republic of Serbia refers to the so-called projected growth model, which is analyzed in the same manner for two periods, 2016 – 2020 and 2021 – 2025. A comparative overview of the mentioned model points to the importance of continuous monitoring of previously set goals, as well as the realization of them on the basis of standardized parameters and methodologies, which are an indispensable part of the sphere of strategic tourism planning.

**Table 1.** Projection of growth of accommodation capacities and tourist traffic (2016 – 2020) in the Republic of Serbia

Type of accommodation	2016			2020		
	Accommodation Beds	Overnight stays	Occupancy in %	Accommodation Beds	Overnight stays	Occupancy in %
Hotels	45.261	3.583.244	21.75	50.261	4.942.501	30.00
Camps	10.249	37.861	1.01	20.498	373.064	10.00
Private accommodation	21.896	530.512	6.66	21.896	1.594.029	20.00
Lodging	10.527	473.899	12.37	10.527	574.774	15.00
Spas and climatic spas	6.203	881.610	39.05	6.203	1.354.735	60.00
All resorts	5.274	395.319	20.59	5.274	575.921	30.00
Other	3.533	183.830	14.29	3.533	192.902	15.00
Total	102.943	6.086.275	16.53	118.192	9.607.926	25.71

Source: Author's calculation based on Statistical Yearbook of the Republic of Serbia 2015

Based on the data from Table 1, the number of total overnight stays that was predicted in 2020 amounted to 9.6 million, which, if achieved, would represent a 7.6% growth rate on an annual basis. However, bearing in mind that the number of overnight stays of tourists in 2020 was only 6,201,290 (Table 3), a significant deviation of as much as 36% is observed. Given the significant deviations within the category of total overnight stays, it was expected that this trend would be reflected in the category of overnight stays realized by foreign tourists. Namely, only 20.4% of the total number of overnight stays were realized by foreign tourists, which is a significant deviation from the 45% originally planned.

According to publicly available data, presented within the Strategy, the second phase of projected growth is characterized by significantly smaller deviations compared to the previous model. Namely, based on the data from Table 2, the expected number of realized overnight stays in 2021 was 9,607,926, which is a deviation of 15%, given that the total number of realized overnight stays was 8,162,430 (Table 3).

**Table 2.** Projection of growth of accommodation capacities and tourist traffic (2021–2025) in the Republic of Serbia

Type of accommodation	2021			2025		
	Accommodation Beds	Overnight stays	Occupancy in %	Accommodation Beds	Overnight stays	Occupancy in %
Hotels	50.261	4.942.501	30.00	52.761	6.721.751	35.00
Camps	20.498	373.064	10.00	25.998	1.892.654	20.00
Private accommodation	21.896	1.594.029	20.00	28.896	2.629.536	25.00
Lodging	10.527	574.774	15.00	10.527	957.957	25.00
Spas and climatic spas	6.203	1.354.735	60.00	6.203	1.580.524	70.00
All resorts	5.274	575.921	30.00	5.274	671.908	35.00
Other	3.533	192.902	15.00	3.533	385.804	30.00
Total	118.192	9.607.926	25.71	133.192	14.840.134	34.29

Source: Author's calculation based on projection of growth of accommodation capacities and tourist traffic

The culmination of the optimistic forecast is noticeable in the projection for 2025, bearing in mind that 14,840,134 overnight stays are planned for the final year of the current Tourism Development Strategy of the Republic of Serbia, with an incredible share of 55% of foreign tourists. However, based on the data of the Statistical Office of the Republic of Serbia, in 2024, 12,662,151 (Table 3) overnight stays were realized, or 85% of the predicted, with the participation of foreign tourists in the realization of the same 48%.

### 3. Analysis of tourist traffic

Tourist traffic in the Republic of Serbia, shown in Table 3, is mainly characterized by an upward trend in the total number of visitors. It is necessary to point out that the observed period 2016 – 2024 was, among other things, permeated by the coronavirus epidemic, which, as in many other activities, including tourism, contributed to significant difficulties in functioning, reflecting a drastic decline in both domestic and foreign arrivals.

**Table 3.** Tourist traffic in the Republic of Serbia for the period 2016–2024

Year	The total number of tourists	Number of domestic tourists	Number of foreign tourists	Total number of overnight stays	Number of overnight stays domestic	Number of nights foreign
2016	2.753.591	1.472.165	1.281.426	7.533.739	4.794.741	2.738.998
2017	3.085.866	1.588.693	1.497.173	8.325.144	5.150.017	3.175.127
2018	3.430.522	1.720.008	1.710.514	9.336.103	5.678.235	3.657.868
2019	3.689.983	1.843.432	1.846.551	10.073.299	6.062.921	4.010.378
2020	1.820.021	1.374.310	445.711	6.201.290	4.936.732	1.264.558
2021	2.591.293	1.720.054	871.239	8.162.430	5.732.833	2.429.597
2022	3.869.235	2.096.472	1.772.763	12.245.613	7.306.219	4.939.394
2023	4.192.797	2,058,492	2.134.305	12.440.935	6.858.331	5.582.604
2024	4.432.751	2.048.016	2.384.735	12.662.151	6.564.402	6.097.749

Source: Author's calculation based on Statistical Yearbooks of the Republic of Serbia 2016 – 2024

Bearing in mind the difficulties reflected through various procedures and testing at border crossings, such a decreasing trend in the number of foreign tourists was expected. Facing significantly lower revenues from tourism, one of the interventions of the competent ministry was reflected in the placement of a significantly larger number of tourist vouchers, which enabled domestic tourists to visit numerous mountain and spa centers (Alavuk, 2023).

The first optimistic results after a drastic decline in the number of tourists were achieved in 2021, within which the number of total arrivals, compared to the previous year, increased by as much as 42%, while the number of total overnight stays was higher by as much as 32%, which was considered an extraordinary result. The growth trend was noticeable among both domestic and foreign tourists, which were also clear indicators that tourism in the Republic of Serbia is recovering. The achieved growth trends have initiated a more intensive placement of the number of tourist vouchers in the coming year, with the aim of an even greater share of domestic tourists in the total number of arrivals and overnight stays.

Looking at the period from 2016 to 2024, and according to the data of the competent ministry, it can be stated that the average stay of domestic and foreign tourists was more or less equal, except for 2020, when the average length of stay for both categories of visitors reached the highest values (Table 4).

Table 4. Average length of stay of tourists in the Republic of Serbia for the period 2016 – 2024

Year	Average length of stay of tourists (days)		
	Total	Domestic	Foreign
2016	2.73	3.25	2.13
2017	2.69	3.24	2.12
2018	2.72	3.30	2.14
2019	2.73	3.28	2.17
2020	3.41	3.60	2.84
2021	3.15	3.34	2.79
2022	3.16	3.48	2.79
2023	2.97	3.33	2.62
2024	2.86	3.20	2.56

Source: Author's calculation based on Statistical Yearbooks of the Republic of Serbia 2016 – 2024

The reasons should certainly be sought in the more complex conditions of travel, which were reflected in a large number of administrative and health steps in the form of preventing the spread of the coronavirus. Such complex procedures contributed to the fact that domestic and foreign tourists stayed at the desired destinations for a slightly longer period of time than was the case before and after the epidemiological situation. Also, it is observed that the values of the average length of stay of domestic tourists are higher than that of foreign tourists, which are clear indicators that in the first group of tourists, trips are realized in the form of "long weekends", while in foreign tourists the business aspect of travel is noticeable.

Table 5 shows tourist traffic by type of tourist places in the Republic of Serbia for 2024, where it can be clearly seen that the absolute dominance is held by the city of Belgrade with 1,536,132 tourist arrivals and 3,712,038 overnight stays. In second place is the mountain Zlatibor, which in the previous year 2024, was visited by 423,285 tourists, who made an impressive 1,221,605 overnight stays.

Table 5. Tourist arrivals and overnight stays by types of tourist places in the Republic of Serbia in 2024

Tourist Places	Arrivals			Overnight stays		
	Total	Domestic	Foreign	Total	Domestic	Foreign
City centers						
1. Beograd	1.536.132	195.947	1.340.185	3.712.038	518.215	3.193.823
2. Novi Sad	239.031	81.639	157.392	580.673	152.629	428.044
3. Niš	156.520	63.985	92.535	346.240	170.051	176.189
Spa Centers						
1. Vrnjačka Banja	187.861	152.549	35.312	626.198	516.219	109.979
2. Sokobanja	115.274	102.783	12.491	493.094	459.767	33.327
3. Banja Vrdnik	103.154	67.298	35.856	228.740	151.537	77.203
Mountain centers						
1. Zlatibor	423.285	276.705	146.580	1.221.605	881.071	340.534
2. Kopaonik	162.925	122.875	40.050	636.042	482.075	153.967
3. Fruška gora	108.338	70.922	37.416	225.088	145.392	82.696
4. Tara	67.300	60.934	6.336	242.267	224.141	18.126

Source: Author's calculation based on Tourist Traffic - December, 2024

Based on publicly available data for the period January – April 2025, the number of visitors is 1,152,285, who realized 3,435,176 overnight stays on the territory of our country. Although the results in the category of arrivals and overnight stays are about 5% worse compared to the same from the previous year, it is necessary to point out that the number of foreign tourists and overnight stays is higher compared to domestic tourists. (Tourist traffic – quarter, 2025).

#### 4. Presentation of the current state of accommodation capacities

Based on Table 6, which presents data on the number and structure of categorized accommodation facilities, and for the period 2021-2025, an increase in the number of hotels, i.e., the number of rooms and beds within this type of accommodation facilities, can be observed. The increase in the same categories is also visible in apartment-type hotels, while the number of garni hotels decreased in the observed period. On the other hand, if we look at the total number of rooms and beds for 2025, the downward trend is noticeable in garni hotel facilities.

Table 6. Overview of the number and structure of categorized hotel-type accommodation facilities in the Republic of Serbia for the period 2021 – 2025 (cross-section 01.4.2025)

Type of accommodation facility	Number of objects			Number of rooms			Number of beds		
	2021	2023	2025	2021	2023	2025	2021	2023	2025
Hotel	270	276	280	17.150	17.212	18.406	25.942	25.448	26.774
Garni Hotel	157	150	140	3.643	3.528	3.238	5.337	5.018	4.484
Apart hotel	5	4	4	280	316	316	506	581	617
Total	432	430	424	21.073	21.056	21.960	31.785	31.047	31.875
Motel	7	8	5	197	213	168	327	306	258
Guesthouse	3	2	1	52	42	6	124	111	13
Tourist resort	6	6	5	285	285	255	506	488	441
Total	448	446	435	21.607	21.596	22.389	32.742	31.952	32.587

Source: Author's calculation based on data from the Statistical Office of the Republic of Serbia

Table 7 shows the data of objects by type and category. Based on these data, it can be noted that in the territory of the Republic of Serbia, hotels with four (48%) and three stars (31%) dominate, while the smallest number of hotels categorized with one star is only 1.8%.

Table 7. Overview of the number of accommodation capacities by type and category of facilities in 2025 in the Republic of Serbia

Facilities	1*	2*	3*	4*	5*	Total
Hotel	5	37	87	134	17	280
Garni Hotel	6	27	50	56	1	140
Apart hotel	1	2	-	1	-	4
Motel	4	-	1	-	-	5
Guesthouse	1	-	-	-	-	1
Tourist resort	-	-	2	3	-	5

Source: Author's calculation based on data from the Statistical Office of the Republic of Serbia.

Table 8 presents data related to the number of rooms, category and capacity of hotels in the Republic of Serbia for the period 2021–2025. The growing trend is noticeable in four-star hotels, whose number has increased from 115 to as many as 134, which is directly reflected in the increase in the number of rooms and beds.

Table 8. Number of hotel facilities and their capacity by category in the Republic of Serbia (2021 – 2025)

Object type	Number of objects			Number of rooms			Number of beds		
	2021	2023	2025	2021	2023	2025	2021	2023	2025
<b>Hotels</b>									
1*	7	6	5	28	182	187	342	295	291
2*	43	39	37	2.261	1.755	1.719	3.877	2.879	2.668
3*	92	96	87	4.493	4.816	4.649	7.014	7.318	7.151
4*	115	121	134	8.607	8.853	9.984	12.541	12.895	14.154
5*	13	14	17	1.581	1.606	1.867	2.168	2.061	2.510
<b>Garni Hotels</b>									
1*	10	9	6	138	131	105	219	206	162
2*	32	31	27	535	522	441	819	777	628
3*	59	54	50	1.324	1.216	971	1.968	1.797	1.449
4*	55	55	56	1.628	1.641	1.703	2.310	2.217	2.224
5*	1	1	1	18	18	18	21	21	21

Source: Author's calculation based on data from the Statistical Office of the Republic of Serbia

Although in 2025 there was a slight decrease in the number of hotels of the highest category, such data certainly indicate the successful implementation of the Tourism Development Strategy of the Republic of Serbia (2016-2025), given that according to it, Serbia's successful positioning on the global tourism market is conditioned by an increase in high-category hotel capacities.

## 5. Conclusion

Tourism, perceived for years as the most significant phenomenon in domestic and international tourist movements, represents a development opportunity for many developing countries, including Serbia. A review of the previous Development Strategy of the Republic of Serbia 2006 – 2015 highlighted several shortcomings and missed business opportunities, resulting in poor positioning of the country both regionally and globally in the tourism market. For many years, tourism in Serbia has not been given adequate attention, and at the same time, it has been quite isolated in relation to global tourist flows. However, encouraging statements can be identified within the framework of the current Strategy, according to which the Government has committed itself to a series of steps that should significantly improve not only the quality of the tourism policy created, but also implemented. Also, it was finally realized that a more favorable

environment for the development of tourism in Serbia implies the integration of tourism into wider political, economic and social spheres, with emphasized financial incentive support from the state.

A comparative analysis of the projected growth trends within the Tourism Development Strategy of the Republic of Serbia 2016–2025 showed significant deviations, especially for the first observed time period, 2016–2020. Multiple discrepancies predicted in relation to real indicators are not only a consequence of difficult business conditions during the coronavirus epidemic, but also of inadequate strategic decisions at all levels of management. The second observed time period records minor deviations compared to the first, with one of the main causes manifested through a significantly smaller number of tourist vouchers placed. Based on the analysis of categorized accommodation facilities for 2025, an upward trend has been established in the hotel category, not only in terms of the number and capacity of rooms and beds, i.e. the downward trend is present in all other categories, which is contrary to the development goals of the defined tourism policy.

Although the current Strategy clearly identifies and lists the criteria that are considered necessary for tourism development, such as trained and professional management with clearly defined strategic planning in the business of business entities in the field of tourism, then a purposeful marketing concept and adequate monitoring of the implementation of everything implemented, we can only be silent observers of the success of the implementation of the mentioned Strategy during the last months of its implementation.

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