

THE IMPACT OF THE COVID-19 PANDEMIC ON TOURISM TRENDS IN BOSNIA AND HERZEGOVINA

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Abstract

Due to its favorable geographical location, natural resources, attractive cultural and historical heritage, internationally recognized events, gastronomy, and status as a still relatively undiscovered destination for the leading emitting tourist markets, Bosnia and Herzegovina has the prerequisites for the successful development of tourism. Therefore, in the first decades of the 21st century, a continuous increase in domestic and foreign tourists was recorded in this country. However, the COVID-19 pandemic had a significant impact on tourism trends in the world and in Bosnia and Herzegovina. The pandemic crisis decreased the number of foreign tourists and tourism remittances. Given the potential of the tourism industry, this study aims to determine how the COVID-19 pandemic has altered trends and spatial patterns of tourism in Bosnia and Herzegovina. The spatiotemporal analysis revealed that this pandemic considerably lowered the size of the tourism industry in this country and affected spatial patterns of tourism flows, but by 2021 and 2022, the industry had already begun to recover. The results of the study provide new insights into tourism trends and the effects of the COVID-19 pandemic on the tourism industry and can serve for future tourism research and development in Bosnia and Herzegovina.

Key words: *tourism, trend, impact, COVID-19 pandemic, Bosnia and Herzegovina.*

JEL Classification: *010, Z32*

I. INTRODUCTION

In the last few decades, the world has been faced with significant economic, social, and political changes, which are mainly caused by globalization. Many of these changes had a positive impact on tourism, especially its international aspects (Kadušić et al., 2018; Hall and Page, 2014). This has been confirmed by the data on the number of international tourists, whose number, in the period 1990-2019, increased from 435 million to 1,460 million. This growth was accompanied by an increase in inbounds from international tourism, which in 2019 reached a value of around 1,466 billion USD (UNWTO, 2021a). However, the COVID-19 pandemic had a significant impact on tourism trends in 2020 and 2021. Travel restrictions implemented in different parts of the world due to the COVID-19 pandemic have caused a significant decrease in the number of international tourists and a decrease in tourism remittances (Popša, 2021; Jafari et al., 2021; Butnaru et al., 2020; Gössling et al., 2020). In 2020, at the international level, a 72.0%

decrease in the number of tourists was recorded due to restrictions on the movement of the world's population (from 1,460 million to 409 million), a 63.4% decrease in contributions from tourism (in 2019, the share of tourism in global GDP was 10.4%; in 2020, it was 5.5%), and a decrease in the number of employment in tourism by 62 million or by 18.5%, i.e., from 334 to 272 million employees in the tourism sector (UNWTO, 2021b; WTTC, 2021).

The COVID-19 pandemic caused a decline in the tourism sector, and it is estimated that this economic activity will not return to the pre-pandemic level before 2023 (Popša, 2021). Therefore, numerous studies were conducted to discuss the consequences of the pandemic and the development and recovery of the tourism sector in pandemic conditions (Zhang et al., 2021; Hall et al., 2020). Wachyuni and Kusumaningrum (2020), for example, investigated the effect of the COVID-19 pandemic on future tourist behavior; Tenie et al. (2021), changes in tourism trends due to COVID-19 in Romania and Lebanon; Helble and Fink (2020), the impact of the pandemic on the Asian tourism industry; Hanafiah et al. (2021), the implications of the pandemic on the Malaysian tourism industry; Toubes et al.

(2021), changes in consumption patterns and tourism promotion after COVID-19 in Spain; Nan (2020), the impact of the pandemic on the hospitality and tourism industries in China, etc.

The intensification of international tourism trends and the crisis caused by the COVID-19 pandemic prompted a more comprehensive analysis of tourism in the world as well as in Bosnia and Herzegovina. Bosnia and Herzegovina is a country with significant potential for the development of tourism. Its geographic position, attractive tourism resources and proximity to the European Union enabled more intensive development of tourism in the first decades of the 21st century. Before the pandemic Bosnia and Herzegovina recorded growth in both domestic and foreign tourists. In 2019, 1,641,000 tourist arrivals and 3,371,000 overnight stays were recorded (BHAS, 2021). This growth is a consequence of the increase in foreign tourists, who accounted for 73% of total tourist arrivals in 2019. The COVID-19 pandemic had a significant impact on tourism trends in 2020 and 2021 around the world, and therefore also in Bosnia and Herzegovina. Restrictions on travel and movement have influenced a significant decrease in the number of international tourists and tourism remittances in this country. In 2020, the arrival of only 196,878 foreign tourists was recorded (a decrease in the number of tourists by 83.6% in comparison to 2019).

Since the outbreak of the COVID-19 pandemic, several studies have been conducted on the implications of this crisis for the tourism industry in Bosnia and Herzegovina. Aljić and Pađen Đurić (2022) researched the effects of the COVID-19 pandemic on tourist flows using Tuzla Canton in Bosnia and Herzegovina and Sisak-Moslavina County in Croatia as case studies. Peštek et al. (2021) elaborated on the effects of the pandemic on the tourism industry in Sarajevo Canton. The effects of the COVID-19 pandemic on the tourism sector in Bosnia and Herzegovina are discussed in studies of pandemic effects on tourism in Western Balkan and Southeastern European countries. Caporale et al. (2022) researched the implications of the COVID-19 pandemic in southeastern European countries (Albania, Bosnia, Bulgaria, Croatia, Montenegro, North Macedonia, Serbia, and Slovenia). Lazić and Bradić-Martinović (2022) conducted an analysis of tourism demand in selected Western Balkan countries, including Bosnia and Herzegovina, during the COVID-19 pandemic. Nientied and Shutina (2020) examined the effects of the COVID-19 pandemic on the tourism industry and post-pandemic tourism in Western Balkan countries.

The primary assumption of this research is that the outbreak of the COVID-19 pandemic has negatively influenced tourism trends and the competitiveness of Bosnia and Herzegovina in the global tourism market. Therefore, the main goals of this study are to research contemporary trends of tourism in

Bosnia and Herzegovina before and after the pandemic (2019-2022), to analyze the spatial patterns of tourism trends in Bosnia and Herzegovina in order to determine which regions of this country faced the most negative trends, and to provide a geovisualization of tourism trends and spatial distribution of tourists by tourism regions in Bosnia and Herzegovina.

II. METHODOLOGY

The development of tourism is influenced by global economic, social, and political processes. In this regard, the aforementioned processes had an impact on the growth of tourism in Bosnia and Herzegovina. However, the COVID-19 pandemic has altered the tourism industry, causing new obstacles and creating new opportunities. Although the recovery of tourism has slowed, changes in tourist travel habits provide an opportunity for tourism to rebound while upholding the principles of sustainable development (Kupi and Szemerédi, 2021). Numerous studies have been published in the past three years that study how the pandemic influenced tourist flows and behavior patterns. Zenker and Kock (2020) critically discuss the methodology of tourism research after the outbreak of the COVID-19 pandemic and suggest which issues of tourism need to be researched more intensively in the future. According to the authors, these are the complexity of the situation; changes in destination image; changes in tourism behavior; changes in resident behavior; changes in the tourism industry; and long-term and indirect effects.

Tourism turned out to be extremely sensitive to the pandemic crisis because the measures of isolation and suppression of the spread of the virus made it impossible for the population to travel and meet their tourist needs. Although tourism in Bosnia and Herzegovina has a seasonal character, this activity contributes to the country's balance of payments (Mrkalić Ateljević and Subotić, 2022). Therefore, it is necessary to determine the effects of the pandemic on tourism through interdisciplinary research and to define strategies for the recovery and development of this sector in Bosnia and Herzegovina.

In order to fulfil the objectives set in this study, that is, to determine the effect of the COVID-19 pandemic on tourism trends, data were collected on basic tourism indicators by municipalities, cantons, and regions of Bosnia and Herzegovina from the Institute for Statistics of FB&H (FZS), the Republic of Srpska Institute of Statistics (RZSRS), and the Agency for Statistics of Bosnia and Herzegovina (BHAS). To conduct an analysis of current tourism trends in this country and confirm changes caused by the COVID-19 pandemic, data on the number of domestic and foreign tourists, the origin of foreign tourists, the length of stay of tourists (overnight stays), employment in tourism,

and tourism revenues in the period 2019-2022 were obtained.

In order to analyze the spatial distribution of tourists in Bosnia and Herzegovina, an analysis of the previous literature on the regionalization of tourism in this country was carried out. The analysis of the spatial distribution of tourists in Bosnia and Herzegovina was carried out in order to determine which regions and areas have the highest tourist activity and which regions were most severely affected by the COVID-19 pandemic. The regionalization of tourism in Bosnia and Herzegovina is largely determined by the administrative division. Mirić et al. (2016) distinguished seventeen regions, ten of which are in the Federation of Bosnia and Herzegovina, six in the Republic of Srpska, and Brčko District as a separate region. Within the FB&H, each canton represents a separate tourist region: Una-Sana, Posavina, Tuzla, Zenica-Doboj, Bosnian-Podrinje, Central Bosnia, Herzegovina-Neretva, West Herzegovina, Sarajevo and Livno region. In the FB&H, these regions have legal jurisdiction over tourism. There are no administrative regions in the Republic of Srpska, but the spatial plan of this entity has identified the following tourist regions: Banja Luka, Doboj, Zvornik-Bijeljina, East Sarajevo, Foča and the Trebinje region. Brčko District, as a separate administrative-territorial unit in Bosnia and Herzegovina, stands out as a separate, seventeenth tourist region.

Analysis of tourism trends in Bosnia and Herzegovina was performed in QGIS 3.28.1. GIS technology offers great opportunities for the analysis of tourism processes. It is a system that provides capturing, storing, checking, manipulating, analyzing, and displaying data (Jovanović and Njeguš, 2008). GIS can be a powerful tool for spatiotemporal analysis of tourism trends, offering a better understanding of tourism flows. A better understanding of tourist behavior can lead to better management of infrastructure and activities, environmental protection, and the spread of benefits such as economic gains (Farsari and Prastacos, 2004). Thus, in this study, a tourism spatiotemporal analysis was carried out to determine which regions and areas of Bosnia and Herzegovina are the most attractive for visitors and which regions were affected by the COVID-19 pandemic the most. Therefore, the results of the research are geovisualized in the form of thematic maps

that illustrate tourism trends and the spatial distribution of tourists in Bosnia and Herzegovina.

III. RESULTS AND DISCUSSION

Since tourism is a rapidly growing economic branch that contributes to gross product growth, employment growth, and investment growth, i.e., overall economic development but also overall social development, many authors highlight the importance and role of tourism in Bosnia and Herzegovina (Mrkaić Ateljević and Subotić, 2022; Mrkaić Ateljević and Popović, 2020; Stanić and Vujić, 2016, etc.). According to Bidžan and Gekić (2015), cultural and historical heritage, natural resources and proximity of the main tourist centers in Europe contributed to the popularity of Bosnia and Herzegovina as a tourist destination on the international tourist market. However, although Bosnia and Herzegovina recorded the second-highest growth rate in the Western Balkans in terms of the number of international arrivals at the beginning of the 21st century, it still accounted for only 3.3% of the total number of international arrivals in the region. Although there has been significant growth in tourism in the country in recent years, the sector faces a number of challenges and limitations not only in the general business environment but also in the environment specific to this sector, which prevents its greater competitiveness on the international market (GIZ, 2021).

Tourism in Bosnia and Herzegovina is one of the most promising sectors of the economy, which, in the years before the emergence of COVID-19, i.e., until 2019, recorded significant growth and development, and already in 2021 showed a certain recovery from the pandemic. Therefore, the strategic goal of Bosnia and Herzegovina is to attract foreign tourists, and tourism is expected to be one of the main drivers of the country's economic development by the end of this decade (FMOIT, 2022).

Prior to the COVID-19 epidemic, there was a notable increase in the number of domestic and international tourists in Bosnia and Herzegovina. Thus, in the period from 2001 to 2019, the number of tourists increased from 332,000 to 1,641,000, and Bosnia and Herzegovina reached its pre-war tourism level of 1.48 million tourists (in 1990) (Tab. 1).

Table 1. Number of tourists in Bosnia and Herzegovina in the period 1990-2022

| Year | Domestic tourists in 000 | | | Foreign tourists in 000 | | |
|------|--------------------------|----------------|--------------|-------------------------|----------------|--------------|
| | Arrivals | Overnight stay | Average stay | Arrivals | Overnight stay | Average stay |
| 1990 | 1,157 | 3,018 | 3.0 | 321 | 776 | 2.2 |
| 2001 | 194 | 470 | 2.4 | 138 | 328 | 2.4 |
| 2002 | 214 | 503 | 2.4 | 161 | 400 | 2.5 |
| 2003 | 220 | 505 | 2.3 | 167 | 409 | 2.5 |
| 2004 | 223 | 533 | 2.4 | 194 | 466 | 2.4 |
| 2005 | 217 | 533 | 2.5 | 217 | 485 | 2.2 |
| 2006 | 243 | 583 | 2.4 | 256 | 594 | 2.3 |
| 2007 | 277 | 642 | 2.3 | 306 | 695 | 2.3 |
| 2008 | 289 | 678 | 2.3 | 322 | 719 | 2.2 |
| 2009 | 262 | 597 | 2.3 | 311 | 671 | 2.2 |
| 2010 | 291 | 644 | 2.2 | 365 | 773 | 2.1 |
| 2011 | 294 | 668 | 2.3 | 392 | 836 | 2.1 |
| 2012 | 309 | 714 | 2.3 | 439 | 931 | 2.1 |
| 2013 | 316 | 714 | 2.3 | 529 | 1,109 | 2.1 |
| 2014 | 310 | 623 | 2.0 | 537 | 1,088 | 2.0 |
| 2015 | 351 | 718 | 2.0 | 678 | 1,426 | 2.1 |
| 2016 | 372 | 735 | 2.0 | 777 | 1,641 | 2.1 |
| 2017 | 384 | 764 | 2.0 | 923 | 1,914 | 2.1 |
| 2018 | 412 | 875 | 2.1 | 1,053 | 2,165 | 2.1 |
| 2019 | 443 | 954 | 2.2 | 1,198 | 2,420 | 2.0 |
| 2020 | 304 | 752 | 2.5 | 197 | 489 | 2.5 |
| 2021 | 463 | 1,043 | 2.2 | 497 | 1,188 | 2.4 |
| 2022 | 557 | 1,208 | 2,2 | 907 | 1,986 | 2.2 |

Source: BHAS, 2022a

Since 2001, Bosnia and Herzegovina has recorded an increase in domestic and foreign tourists. The number of domestic tourists in the period 2001-2019 increased from 194 to 443 thousand, while the number of overnight stays increased from 470 to 954 thousand. In the same period, the number of foreign tourists increased from 138 thousand to 1.2 million, and the number of overnight stays increased from 328 thousand to 2.42 million. The average length of stay of guests in Bosnia and Herzegovina was relatively short,

and in the analyzed period, the average stay of domestic and foreign tourists lasted only 2.3 nights (Tab. 1). Although the number of foreign arrivals to Bosnia and Herzegovina grew until 2019, its share within the countries of Southeast Europe was relatively small. Bosnia and Herzegovina, compared to the countries of the region, has the lowest number of international arrivals because it attracts slightly more than a million foreign tourists. Tab. 2 shows foreign tourist arrivals by country of origin.

Table 2. Arrivals and overnight stays of foreign tourists in B&H in the period 2010-2022

| Country of origin | Arrivals of foreign tourists | | | | |
|-------------------|------------------------------|-----------|---------|---------|---------|
| | 2010 | 2019 | 2020 | 2021 | 2022 |
| Total | 365,454 | 1,198,219 | 196,878 | 497,474 | 907,526 |
| Croatia | 56,100 | 138,354 | 44,204 | 57,217 | 128,778 |
| China | 770 | 103,000 | 4,910 | 1,945 | 5,217 |
| Serbia | 56,370 | 102,339 | 54,870 | 90,880 | 141,919 |
| Turkey | 24,024 | 71,059 | 7,833 | 22,335 | 62,392 |
| Slovenia | 40,246 | 67,977 | 9,677 | 23,339 | 61,943 |
| Saudi Arabia | 464 | 65,854 | 1,970 | 36,026 | 33,552 |
| Germany | 17,281 | 56,813 | 6,080 | 25,302 | 47,034 |
| Italy | 23,749 | 47,881 | 3,567 | 9,004 | 22,049 |
| South Korea | 0 | 41,317 | 1,541 | 155 | 2,848 |
| Poland | 17,888 | 37,520 | 1,097 | 8,143 | 22,305 |
| USA | 8,239 | 33,762 | 4,505 | 13,929 | 29,247 |
| UAE | 0 | 31,961 | 10,452 | 49,063 | 33,610 |
| Austria | 14,344 | 28,133 | 4,426 | 16,750 | 29,232 |

Continuation of the table on the next page

| Country of origin | Overnight stay of foreign tourists | | | | |
|-------------------|------------------------------------|-----------|---------|-----------|-----------|
| | 2010 | 2019 | 2020 | 2021 | 2022 |
| Total | 772,754 | 2,420,519 | 489,224 | 1,187,774 | 1,986,679 |
| Croatia | 104,863 | 315,179 | 119,313 | 128,511 | 282,696 |
| Serbia | 113,840 | 203,566 | 136,263 | 189,430 | 287,695 |
| Saudi Arabia | 1,144 | 158,049 | 5,946 | 92,774 | 80,834 |
| Slovenia | 64,959 | 128,793 | 23,166 | 45,810 | 120,027 |
| China | 1255 | 122,282 | 8,029 | 6,609 | 11,329 |
| Germany | 36,925 | 121,561 | 14,979 | 63,217 | 104,438 |
| Italy | 49,113 | 118,829 | 8,767 | 20,829 | 47,047 |
| Turkey | 45,349 | 112,138 | 17,639 | 46,598 | 99,101 |
| UAE | 0 | 94,069 | 27,637 | 148,574 | 102,174 |
| Poland | 54,989 | 88,550 | 2,923 | 16,047 | 51,571 |
| USA | 22,381 | 71,953 | 9,124 | 29,696 | 66,303 |
| France | 28,476 | 55,496 | 3,687 | 23,687 | 48,359 |
| Austria | 25,229 | 53,313 | 9,251 | 34,527 | 59,166 |

Source: BHAS, 2022a

The European tourism market is the most important for Bosnia and Herzegovina's tourism. In 2019, European tourists accounted for 65% of all tourist arrivals and 68% of the total number of overnight stays. The tourism market of Asia is the second most important and was responsible for 29% of international tourist arrivals and 26% of overnight stays in 2019. In the total number of tourist arrivals in 2019 (1,641,000), the share of domestic tourists was 20.7% and foreign tourists were 73.0%. The most numerous guests were from Croatia (11.5%), China (8.6%), Serbia (8.5%),

and Turkey (5.9%) followed by guests from Slovenia (5.7%), Saudi Arabia (5.5%), Germany (4.7%), Italy (4.0%), South Korea (3.4%), Poland (3.1%), the USA (2.8%), and Austria (2.3%). These countries accounted for about 66.0% of the total number of foreign tourists in Bosnia and Herzegovina (Fig. 1). When it comes to the average stay of foreign tourists in Bosnia and Herzegovina in 2019, guests from the United Arab Emirates (2.9 nights), Saudi Arabia (2.4 nights), Croatia (2.3 nights), and Germany (2.1 nights) stayed the longest.

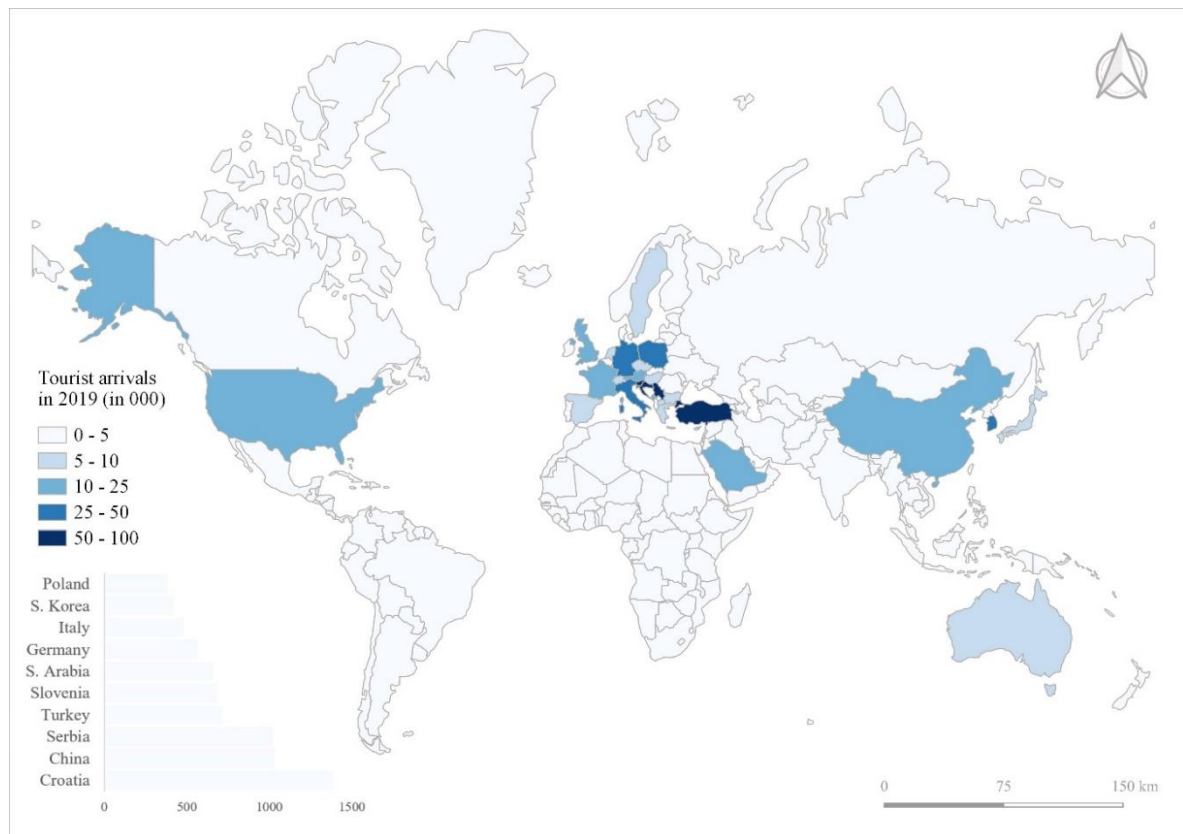


Figure 1. Origin of foreign tourists in Bosnia and Herzegovina in 2019

Source: Author's elaboration based on data from BHAS (2022a)

Travel and movement restrictions imposed in numerous countries around the world as a result of the COVID-19 pandemic had a significant impact on tourist movements in 2020 and 2021 around the world, including Bosnia and Herzegovina. Restrictions on travel and movement have influenced a significant decrease in the number of international tourists and a drop in tourism remittances in this country. In 2020, the arrival of 196,878 foreign tourists was recorded, and this year the number of tourists decreased by 1,001,341 or by 83.6%. In the same year, a decrease in the number of domestic tourists was recorded at 138,944 tourists, or 31.4% (Tabs. 1 and 2).

In 2021, there was a slight recovery in tourism, which was the result of the reopening of many destinations for international travel. However, despite a

relative improvement international tourism remained below 2019 levels (UNWTO, 2022).

In Bosnia and Herzegovina, a certain recovery of the tourism sector was recorded in 2021, and this year, 497,474 visits and 1,187,774 overnight stays by foreign tourists were achieved. In 2022, there were 1,464,216 visits which is a 52.5% increase, compared to 2021. There have also been changes in the structure of the foreign tourist market. In the total number of foreign tourist arrivals in 2021, the most numerous were guests from neighboring European countries (Serbia 18.3%, Croatia, 11.5%, and Slovenia, 4.7%) and Asian Arab countries (UAE 9.9% and Saudi Arabia 7.2%), while the share of tourists from East Asian countries (China 0.4% and South Korea 0.03%) decreased significantly (Fig. 2).

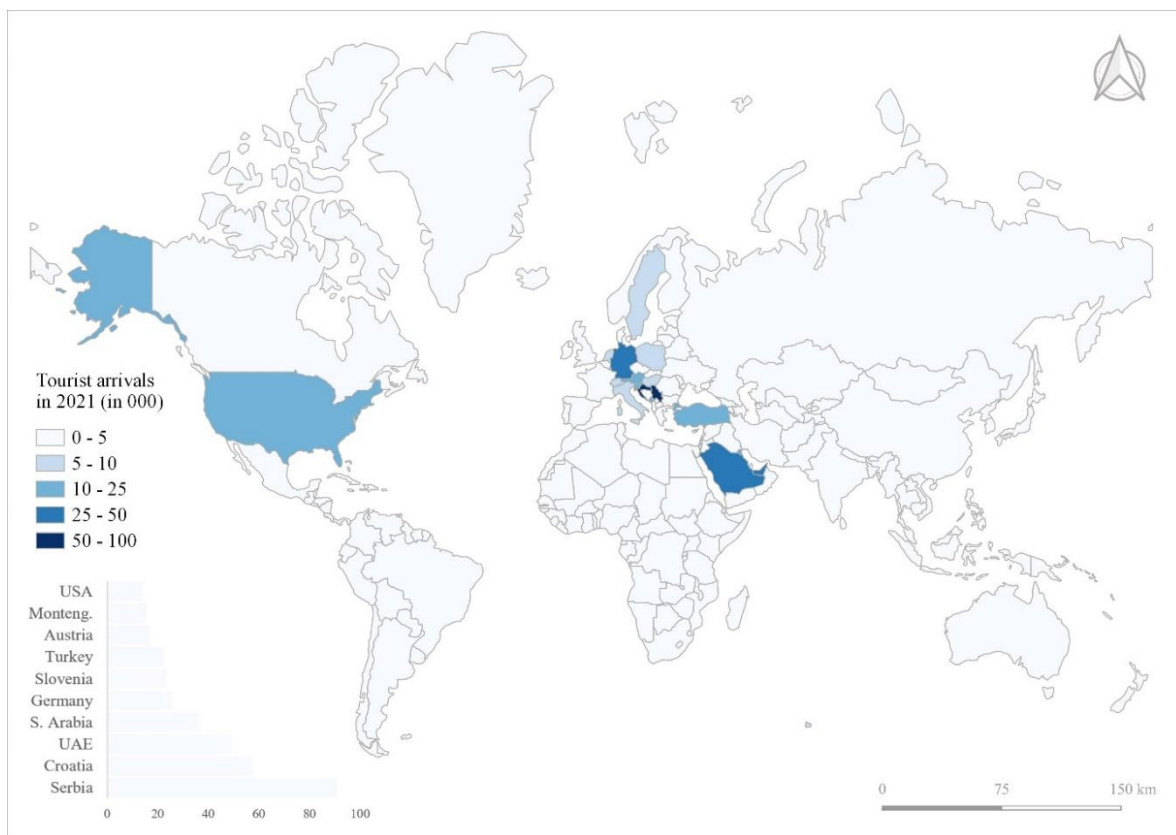


Figure 2. Origin of foreign tourists in Bosnia and Herzegovina in 2021

Source: Author's elaboration based on data from BHAS (2022a)

Of the total number of foreign tourists who visited Bosnia and Herzegovina in 2019, 80.0% visited the Federation of Bosnia and Herzegovina, 18.3% visited the Republic of Srpska, and about 0.7% visited the Brčko District. In 2019, the Federation of Bosnia and Herzegovina recorded 1,227,000 visits, of which 79.1% were foreign tourists and 20.9% were domestic tourists. That year, 2,380,000 overnight stays were recorded, of which 79.9% were overnight stays by foreign tourists and 20.1% by domestic tourists. In the Federation of Bosnia and Herzegovina, Sarajevo and the Herzegovina-Neretva region led the way in terms of

tourist arrivals (Figs. 3 and 4). The most visited tourist destinations were Sarajevo, Neum, and Mostar. Sarajevo is the most attractive tourist destination with 54.4% of tourists, followed by Neum with 10.8%, Mostar with 8.9%, and other tourist destinations with 25.9% (FZS, 2022).

In 2019, the Republic of Srpska had 400,268 visitors, of whom 218,867 were foreign tourists who spent 506,040 nights in this entity (52.0% of the total number of tourist overnight stays). The Banja Luka region was the most visited area of the Republic of Srpska (Figs. 3 and 4). When it comes to arrivals by

type of place, about 11.8% of tourists visited mountain areas, 13.3% spa places, and 74.9% other tourist destinations and places in the Republic of Srpska (RZRS, 2022). Brčko District, which consists of the

urban settlement of Brčko and rural settlements of the pre-war municipality of Brčko, was visited by 0.7% of the total number of foreign tourists in Bosnia and Herzegovina in 2019 (BHAS, 2022a).

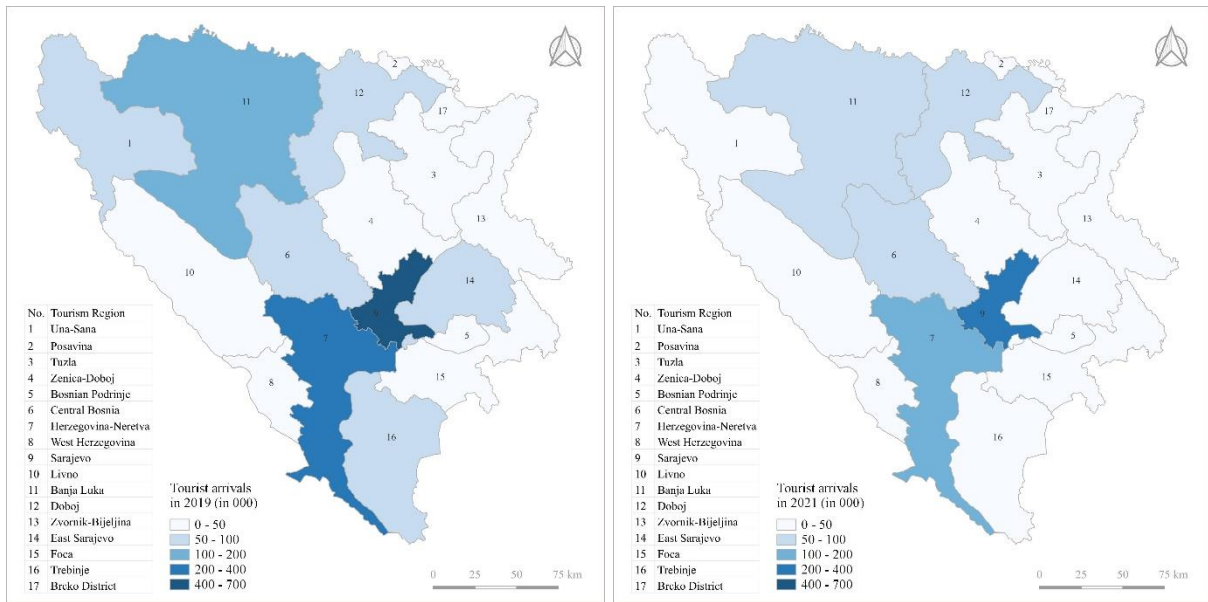


Figure 3. Foreign and domestic tourist arrivals in Bosnia and Herzegovina in 2019 and 2021

Source: Author's elaboration based on data from BHAS, FZS, RZSRS (2022)

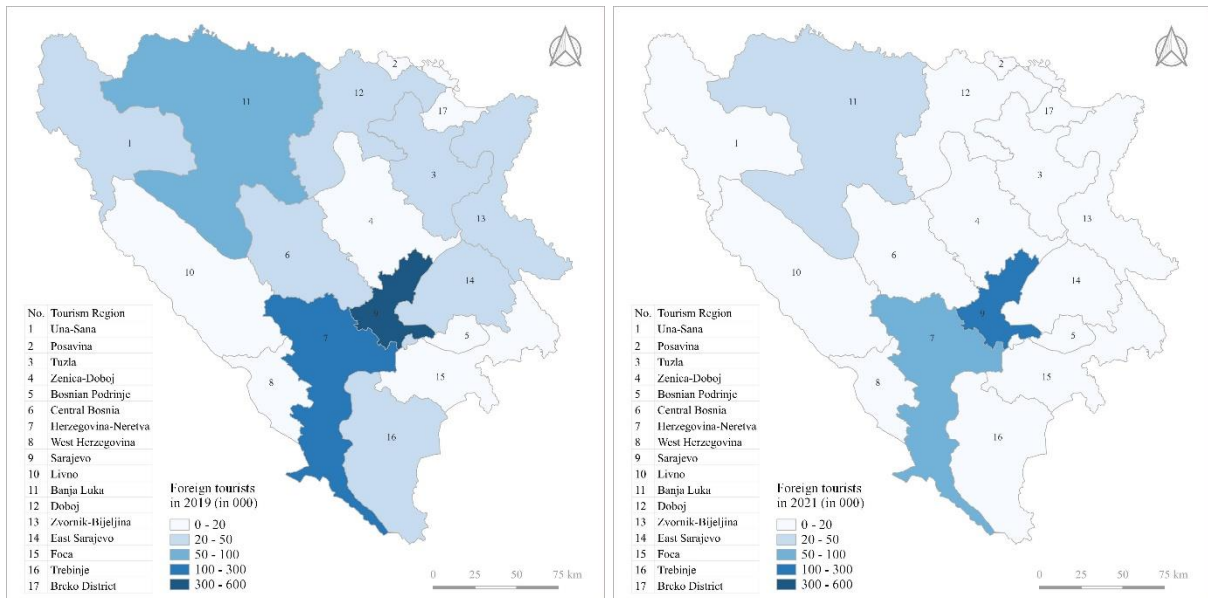


Figure 4. Foreign tourist arrivals in Bosnia and Herzegovina in 2019 and 2021

Source: Author's elaboration based on data from BHAS, FZS, RZSRS (2022)

Due to the COVID-19 pandemic in 2020, a decrease in the number of tourists was recorded in all tourist regions of Bosnia and Herzegovina, and the largest decrease was recorded in Central Bosnia, Bosnian Podrinje, Doboj, Zvornik-Bijeljina, and Foča region. Of the total number of foreign tourists who visited Bosnia and Herzegovina in 2021, 75.0% visited the Federation of Bosnia and Herzegovina, 24.1% visited the Republic of Srpska, and about 0.9% visited

the Brčko District. In 2021, the Federation of Bosnia and Herzegovina visited 655,687 tourists, of whom 57.0% were foreign tourists and 43.0% were domestic tourists. The most visited were Sarajevo region (67.0% of foreign tourists in FB&H and 43.0% of foreign tourists in B&H) and the Herzegovina-Neretva region (13.6% of foreign tourists in FB&H and 10.2% of foreign tourists in B&H) (Figs. 3 and 4). In the same year, the Republic of Srpska had 296,338 tourists, of

whom 40.6% were foreign and 59.4% were domestic. The Banja Luka region is still the most visited tourist region in the Republic of Srpska (36.6% of foreign tourists in the RS and 8.8% of foreign tourists in B&H) (Figs. 3 and 4).

In 2019, 3.37 million overnight stays were

realized in Bosnia and Herzegovina, of which 71.7% were overnight stays by foreign tourists. The average stay of tourists in Bosnia and Herzegovina was relatively short (2.5 days). In 2019, foreign tourists stayed the longest in Neum (2.2 days on average) and the shortest in Mostar (1.3 days) (Figs. 5 and 6).

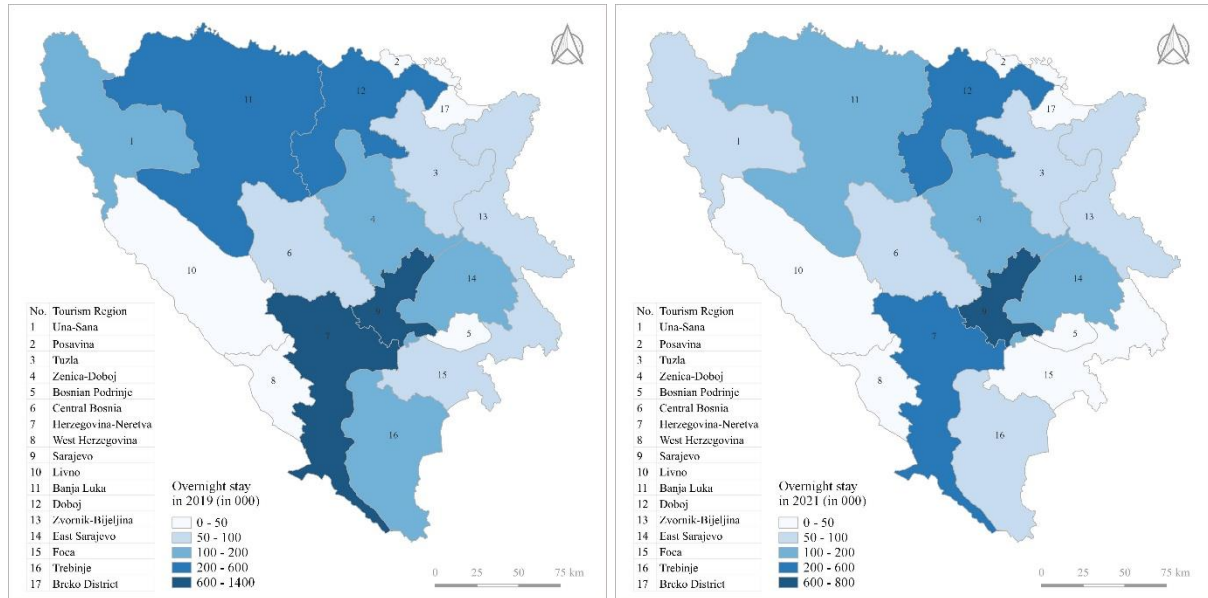


Figure 5. Overnight stays of foreign and domestic tourists in Bosnia and Herzegovina in 2019 and 2021

Source: Author's elaboration based on data from BHAS, FZS, RZSRS (2022)

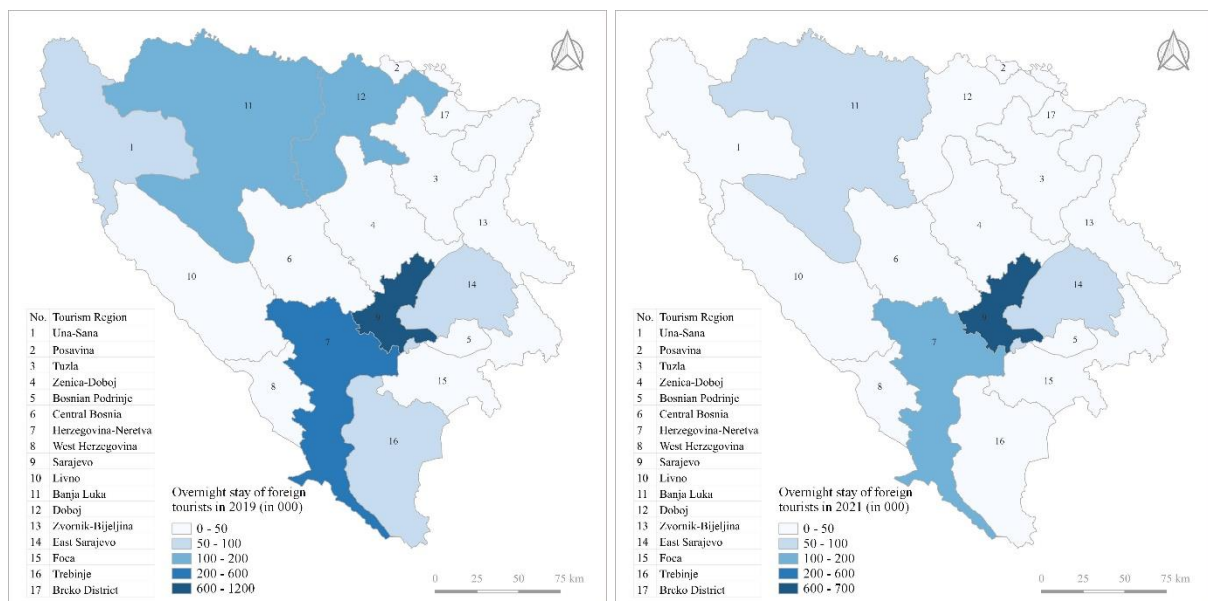


Figure 6. Overnight stays of foreign tourists in Bosnia and Herzegovina in 2019 and 2021

Source: Author's elaboration based on data from BHAS, FZS, RZSRS (2022)

Based on Figs. 5 and 6, it is evident that there have been changes due to the COVID-19 pandemic in terms of the number of tourist overnight stays. In 2021, compared to 2019, there was a decrease in the number of overnight stays by tourists in Bosnia and Herzegovina, from 3.37 to 2.23 million, of which 53.2% were overnight stays by foreign tourists. The

average stay of tourists in Bosnia and Herzegovina is still relatively short, at 2.2 days.

In 2022 there were 3,194,681 overnight stays, which is a 43.2% increase compared to 2021. There has been a 15.8% increase in domestic tourist overnight stays and a 67.3% increase in international tourist overnight stays compared to 2021. In the total number

of overnight stays, the share of domestic tourists is 37.8%, while the share of foreign tourists is 62.2%. Countries with the highest percentage of overnight stays among international visitors were Serbia (14.5%), Croatia (14.2%), Slovenia (6.1%), Germany (5.3%), the United Arab Emirates (5.1%), Turkey (5.0%), and Saudi Arabia (4.1%), accounting for 54.3% of all overnight stays. Regarding the length of stay of foreign tourists in our country, the first place is Kuwait, with an average stay of 3.8 nights, followed by Ireland with 3.4

nights, France with 3.1 nights, and the United Arab Emirates with 3.0 nights (BHAS, 2022a).

The COVID-19 pandemic also affected the income generated from tourism and employment in the tourism sector in Bosnia and Herzegovina. According to the data of the Agency for Statistics of Bosnia and Herzegovina, the gross added value of activities and the gross social product in the sectors of providing accommodation and preparing and serving food amounted to about 735.7 million KM in 2019 (Tab. 3).

Table 3. Generation of Income Accounts in the Accommodation and Food Service Activities in Bosnia and Herzegovina, 2016-2021

| Year | Gross value added | Compensation of employees | Net other taxes on production | Gross operating surplus/mixed income | Consumption of fixed capital | Net operating surplus/mixed income |
|------|-------------------|---------------------------|-------------------------------|--------------------------------------|------------------------------|------------------------------------|
| | | | | | | |
| 2016 | 585,863 | 320,616 | 3,978 | 261,268 | 109,709 | 151,560 |
| 2017 | 658,173 | 349,187 | 5,409 | 303,578 | 119,225 | 184,353 |
| 2018 | 687,750 | 363,616 | 5,603 | 318,530 | 124,500 | 194,030 |
| 2019 | 735,691 | 387,782 | 5,781 | 342,127 | 133,101 | 209,026 |
| 2020 | 507,050 | 317,177 | -29,017 | 218,889 | 118,206 | 100,683 |
| 2021 | 645,662 | 358,155 | 2,781 | 284,726 | 129,457 | 155,270 |

Source: BHAS, 2022b

The gross domestic product of Bosnia and Herzegovina in 2019 was about 35 billion BAM, which means that the sector of providing accommodation and preparing and serving food accounted for about 2.1% of the country's total gross domestic product. In 2020, as a result of the COVID-19 pandemic, the gross added value of activities and the gross social product in the sectors of providing accommodation and preparing and serving food decreased compared to 2019 and amounted to about 507 million BAM, while the gross domestic product of Bosnia and Herzegovina amounted to about 34 billion BAM. Thus, the share of the accommodation and food preparation and serving sector in the total GDP of Bosnia and Herzegovina in 2020 was about 1.5%. However, already in 2021 and 2022, the recovery of the tourism sector was recorded (Tab. 3).

Official statistical data on the number of arrivals and overnight stays represent formally recorded indicators of the tourism sector, because there is also an informal part that, if included, significantly changes its overall analysis. Research shows that the actual number of foreign tourist arrivals on an annual basis is much higher than official statistics show, which reduces the overall impact and importance of tourism in Bosnia and Herzegovina (Kadušić et al., 2018). According to the report of the World Travel and Tourism Council (2021), there was a decline in the tourism sector of about 50% in Bosnia and Herzegovina. Thus, in 2019, the tourism sector contributed about 9.7% to the total gross domestic product of the country; in 2020, it

contributed about 5.0% (a drop of 50.1% compared to 2019); and in 2021, it contributed 6.6% (a 21.7% increase compared to 2020). According to the same source, there were approximately 87.9 thousand employees in tourism in 2019, 63.5 thousand in 2020 (a drop of 27.7% compared to 2019), and 71.2 thousand employees in 2021 (recorded growth of 12% compared to 2020).

According to the Tourism Competitiveness Index, in 2019, Bosnia and Herzegovina was ranked 105 out of 140 countries in the world with an average score of 3.3 (WEF, 2022). Although the tourism industry has potential in Bosnia and Herzegovina, numerous shortcomings slow down the development of this activity. According to the Center of Excellence for Evaluation and Policy Research (2022), the main obstacles to tourism in Bosnia and Herzegovina are the political structure of the country, a weak business environment, the lack of a consistent strategic approach to tourism development at the state level, the inconsistent implementation and evaluation of tourism policies and strategies, the lack of accurate and relevant data for the development and implementation of sector policies, the lack of a coordinated and strategic approach to marketing Bosnia and Herzegovina as a tourist destination, and a lack of awareness of the importance and possibilities of the tourism industry in the country. Despite the aforementioned disadvantages, tourism can significantly contribute to economic and social development, elevating the standard of living and quality of life for the people of Bosnia and

Herzegovina. The tourism industry has the potential to be one of the most important economic sectors in Bosnia and Herzegovina, contributing significantly to the country's gross domestic product through job creation and exports.

IV. CONCLUSION

Tourism as an important economic and social phenomenon affects many different socioeconomic areas of a global society. However, the COVID-19 pandemic had a substantial effect on world travel patterns in 2020 and 2021. Travel restrictions due to the COVID-19 pandemic significantly reduced the number of foreign visitors and tourism remittances in the world. Global tourism trends and the COVID-19 pandemic issue prompted an expanded study of tourism in the world and also in Bosnia and Herzegovina.

This country has a lot of potential for the growth of the tourism industry. Until 2019, Bosnia and Herzegovina recorded an increase in both domestic and international visitors. 3,371,000 overnight stays and 1,641,000 visitor arrivals were recorded in 2019. This growth was recorded due to the increase in foreign visitors (73% of all tourist arrivals in 2019). The COVID-19 pandemic significantly affected travel patterns in 2020 and 2021, not just in Bosnia and Herzegovina. Travel and mobility restrictions have caused a decrease in the number of foreign visitors and the share of the tourism sector in the economy of Bosnia and Herzegovina.

In 2020, 196,878 international tourists visited Bosnia and Herzegovina (a decrease of 83.6% in comparison to 2019). All of Bosnia and Herzegovina's tourism regions experienced a decline in visitors as a result of the COVID-19 pandemic in 2020. The highest decrease in tourists was recorded in the Central Bosnia,

Bosnian Podrinje, Dobož, Zvornik-Bijeljina, and Foča regions. Out of the total number of tourists in Bosnia and Herzegovina in 2021, the Federation of Bosnia and Herzegovina received 75.0% of the international visitors, the Republic of Srpska 24.1%, and the Brčko District 0.9%. 655,687 tourists, of whom 57.0% were foreign tourists, visited the Federation of Bosnia and Herzegovina in 2021. In FB&H, Sarajevo and the Herzegovina-Neretva region were the most visited. In the same year, the Republic of Srpska recorded 296,338 visitors, of whom 40.6% were foreign tourists. The Banja Luka region continued to receive the most tourists in the Republic of Srpska. 1,464,216 tourists visited Bosnia and Herzegovina in 2022, which is a 52.5% increase, and 3,194,681 overnight stays, which is a 43.2% increase, compared to 2021. The structure of the foreign tourist market in Bosnia and Herzegovina has also changed. In 2021 and 2022, guests from neighboring European countries (Serbia, Croatia, and Slovenia) and Asian Arab countries (UAE and Saudi Arabia) were the most numerous, while the proportion of tourists from East Asian countries (China and South Korea) declined significantly.

In 2019, tourism produced about 2.1% of the total GDP in Bosnia and Herzegovina. As a consequence of the COVID-19 pandemic GDP in the tourism sector decreased to about 1.5% in 2020. However, the tourism industry has already started to recover in 2021 and 2022, and this sector is expected to grow further in the future. Although there are numerous factors that limit tourism development, the biggest of which is a lack of understanding of the value and potential of the tourism sector in Bosnia and Herzegovina, tourism can significantly contribute to economic and social development, improving the living standard and quality of life for the population of Bosnia and Herzegovina.

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