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## REFLECTION OF THE PANDEMIC ON TOURIST FLOWS CASE OF BOSNIA AND HERZEGOVINA, CROATIA

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### Abstract

*The Covid-19 pandemic is undoubtedly a global crisis, which has had a negative impact on all economic activities. Tourism, as an extremely sensitive branch, is unquestionably the most affected sector. The Republic of Croatia, as well as Bosnia and Herzegovina, has continuously had an increase in tourist traffic in the number of tourist arrivals and overnight stays until the moment of the pandemic crisis. The aim of this paper is to consider the consequences on tourist flows on the example of Bosnia and Herzegovina – Tuzla County and the Republic of Croatia – Sisak-Moslavina County. The results of the research, conducted through a questionnaire, will detect the problems in the pandemic crisis faced by economic operators in tourism, and we will try to find answers on how to overcome this health crisis with the least possible consequences for tourism, improve the efficiency of tourist boards, as initial affirmers and promoters of tourism.*

**Key Words:** *tourism, crisis, Bosnia and Herzegovina, Croatia, tourist boards*

**JEL classification:** *Z30, Z32*

### Introduction

The Covid-19 pandemic is one of the crises that has left unforeseeable consequences on the world economy. Tourism is particularly vulnerable to

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negative impacts, and given the fact that this crisis is a global phenomenon, one gets the impression that the tourism industry is under constant threat. According to UNWTO figures, in the first 10 months of 2020, world tourism recorded 72 percent fewer international arrivals, with a global loss of \$935 billion in export earnings (2020). This situation also affected the tourist flows of Bosnia and Herzegovina and the Republic of Croatia. In this paper, based on secondary research, the authors wanted to look at the state of tourism, i.e. tourist traffic, in both countries, but also in two experimental counties: Tuzla Canton and Sisak-Moslavina County and establish the consequences of this crisis.

Empirical research is focused on economic entities in the field of tourism and hospitality, based on which they wanted to understand the vulnerability of these activities during the pandemic crisis, as well as the expectations of economic entities in terms of measures to overcome the crisis.

The subject of this paper is the state of tourism in Bosnia and Herzegovina - Tuzla County and the Republic of Croatia - Sisak-Moslavina County, within whose micro destinations: Tuzla County and Sisak-Moslavina County analyzes the state of tourism through tourism and tourist movements during the pandemic but one also wants to know the role of Tourist Boards in crisis situations.

The hypothetical assumption is that governments are the main bearers of the program of measures in overcoming the pandemic crisis. The aim of this paper is to establish the role and importance of the state in overcoming the crisis, as well as the importance of tourist boards, on how to promote and affirm tourism in furry situations.

### **Research Overview**

The fact that tourism is the most endangered industry affected by the pandemic (Pangesta, 2021) is also shown by the data on the decline in international travel with a loss of about 1.3 trillion USD of export revenue, as well as the fact that 100 to 120 million jobs in tourism are endangered, mostly small and medium-sized enterprises. In such crises (Gautam & Hens, 2020), it is extremely important to observe and analyze the social, economic and environmental aspects of the crisis, and its impact on sustainable development. Governments should play an extremely important role and have the greatest responsibility in crisis situations. As Pierre (2020) points out, governance must have exceptional coordination

between the state and all social systems in which the state plays a key role in mediating the processes of formal and informal public and private interactions. Tourism is an extremely complex branch, and therefore tourism management should be based on transparency and participation of all stakeholders with the consensus of the best strategic vision orientation of sustainability, responsibility, equality of rule of law ((Buteau-Duitschaever et al., 2010; Presenza et. al.2013), but also representativeness, mutual trust and harmony of tourism actors. Prerequisite for tourism development (Arnaut & Fehrić, 2011: 19) is a stable political environment, favorable economic trends, security, health, infrastructure and environmental protection. For the development of tourism (Vukonić & Keča, 2001, p. 123-134) it is necessary to have a certain degree of socio-economic development of the country in which tourism is developing. Bosnia and Herzegovina is a state with two entities in the Federation of Bosnia and Herzegovina, Republika Srpska and Brčko District, and the competence in the field of tourism is entrusted to the entities. In the Federation of Bosnia and Herzegovina the competence is divided between the Federation and ten cantons, so policies and development plans are adopted in accordance with the Constitution of Bosnia and Herzegovina. The local community is an integral part of the heritage site and its natural vitality can contribute to the vitality of the area and the creation of an atmosphere that will favor the development of tourism, especially in such challenging times (Lekić, et al., 2021). Numerous primary studies point to the aftermath of the Covid-19 pandemic:

- A survey (Draganić et al., 2020) conducted on a sample of 233 respondents, 79.4% of respondents expects a reduction in business activities between 61% and 100% during the pandemic period.
- In their study (UNDP, 2020), they state that smaller companies in certain sectors are more exposed to the consequences of the pandemic and will find it harder to recover.
- According to research on a sample of 1,300 respondents (Bećirović et al., 2020), 91.2% of them said they did not agree that the economic aid measures adopted by the Bosnia and Herzegovina governments were correct, while 80.2% of respondents disagreed (“completely disagree” or “disagrees”) that the government of Bosnia and Herzegovina is coping well with the COVID-19 pandemic.

Tourist boards develop an awareness of the importance of developing a tourist destination on the principles of sustainable tourism development (Hartl, 2002, p. 188). One of the tasks of tourist boards (Bornhorst, Ritchie,

Sheehan 2009) is to work on benefits for the local population through promotion and destination development in terms of quality management and attracting tourists. An extremely important task of tourist boards is to identify and predict trends, communicate among all entities in tourism, as well as to make available all relevant information. Tourist boards are considered marketing agencies with the task of promoting the destination and attracting visitors, and their (Ashwort & Goodall 1990, p. 211) management role is essential in the development of the destination. A good partnership between tourist boards and stakeholders in tourism contributes to the affirmation of tourism, but such a relationship also contributes to faster overcoming of the negative effects caused by the crisis (Marušić & Prebežec 2004) important in the development of tourism in the country.

## **Methodology and research results**

### **Methodology**

The authors applied secondary and primary research, with the aim of understanding the problems and goals of the paper. The secondary research is based on the relevant literature of previous research by domestic and foreign authors, statistical data of official institutions, relevant strategic documents and Internet sources. Secondary data were processed by desk technique using the method of analysis as well as synthesis and description. In the secondary research, the following paper provides an overview of relevant statistical indicators of tourist activity at the state level, as well as the observed research areas of counties in order to assess the negative effects caused by the Covid-19 pandemic.

In the period March–December 2021, a survey was conducted in Bosnia and Herzegovina – Tuzla County and in the Republic of Croatia – Sisak-Moslavina County. The sample was represented by catering and hotel employees, and the size of the samples is based on the number of economic operators in the hotel and catering industry, so the sample of 244 respondents for TC and 104 respondents for SMC can be considered as representative. The analysis of the performed research was done in the statistical program for data processing to SPSS, which was processed and interpreted by the author. The collected data were entered into a statistical data processing program, analyzed by applicable methods, which helped to come up with answers that would meet the objectives of the research and give a clearer picture of the impact of the pandemic on tourism. Data were processed by using descriptive statistics, graphical representations, and within descriptive

statistics the following parameters are calculated: minimum and maximum value, mean value using arithmetic mean, standard deviation as an absolute measure of variability, coefficient of variation as a relative measure of variability. The T-test was used in order to determine the existence of a significant statistical difference between two independent samples, where in this case the existence of differences in attitudes between respondents from Tuzla County – Bosnia and Herzegovina and respondents from Sisak-Moslavina County – Croatia will be tested.

## **Research results**

### ***State of tourist flows in Bosnia and Herzegovina and the Republic of Croatia and research areas of Tuzla and Sisak–Moslavina counties - secondary research***

The concentration of tourist activity (Curić et al., 2013) is noticeable in all developed tourist destinations, whether it is done within the geographical characteristics of one or a small number of regions. Bosnia and Herzegovina, as well as the Republic of Croatia, is rich in natural, cultural and historical values, which for both countries represent the resource backbone of tourism development, but are conditioned (Aljić et al., 2021a) by the actions of the state and local population. Tourism of Bosnia and Herzegovina and the Federation of Bosnia and Herzegovina (Aljić, 2015, p. 152) due to numerous comparative advantages in relation to other activities, can be a reliable and efficient market niche for entering the international market.

According to the data (WEF, 2019), the share of tourism revenues in GDP for Bosnia and Herzegovina was 2.8%, while for the Republic of Croatia it was 10.9%, which is 7.1% higher tourism share than in the GDP of the Republic of Croatia in relation to the tourism share in the GDP of Bosnia and Herzegovina. According to the same source, the number of arrivals of foreign tourists in Bosnia and Herzegovina was 922.4, while for the Republic of Croatia it was 15,592.9; the interesting fact is that the average income per arrival is higher for Bosnia and Herzegovina and amounted to USD 895.7 compared to USD 700.6 in Croatia. In 2019, the share of the number of employees in tourism in the total number of employees in Bosnia and Herzegovina was 5.2%, while in the Republic of Croatia it was 6.83%. The decrease in the number of employees in the tourism industry in Bosnia and Herzegovina in 2020 amounted to 9.1%, while the decrease in the number of employees in the Republic of Croatia amounted to 13.7.

Table 1: *Employees in catering and hotel industry (I) in Bosnia and Herzegovina and the Republic of Croatia*

Year	Employed in Bosnia and Herzegovina		Index 20/19	Employed in Croatia	
	Total	I <sup>3</sup>		Total	I <sup>4</sup>
2018	804,497	40,455	90.92	1,426,933	110,754
2019	823,455	42,734		1,683,718	115,018
2020	812,592	38,857		1,694,693	99,239

Source: *For Bosnia and Herzegovina data: Agency for Statistics of Bosnia and Herzegovina (2018, 2019, 2020) (a) Press release. Demographic and social statistics For Croatian data: CBS, Statistical Information 2019 and 2021*

In the observed period from 2017 to 2019 (see Table 2), the total number of tourist arrivals in Bosnia and Herzegovina increased by an average of 12.03% per year, and the number of overnight stays increased by an average of 12.26% per year. The pandemic period in 2020 led to a decrease in tourist arrivals by 69.65%, of which 83.64% in foreign arrivals, and 31.81% in domestic arrivals. In the same period there was a decrease in the number of overnight stays by 63.37%, of 79.86% refers to overnight stays by foreign guests and 21.55% by domestic guests.

Table 2: *Tourist activity of Bosnia and Herzegovina*

Year	Arrivals			Overnight stays		
	Domestic	Foreign	Total	Domestic	Foreign	Total
<b>2017</b>	384,33	923,22	1,307,550	763,81	128,01	2,677,641
<b>2018</b>	412,51	1,052,898	1,465,412	874,79	2,165,404	3,040,190
<b>2019</b>	442,95	1,198,219	1,641,171	953,93	2,420,519	3,374,452
<b>2020</b>	302,03	196,06	498,09	748,37	487,60	1,235,971
<b>Index 2020/2019</b>	<b>68.19</b>	<b>16.36</b>	<b>30.35</b>	<b>78.45</b>	<b>20.14</b>	<b>36.63</b>
<b>Average rate of change 2017–2019</b>			<b>12,03</b>			<b>12,26</b>

Source: *Author's research according to the Agency for Statistics of Bosnia and Herzegovina / For Croatian data CBS, Statistical Information*

In the observed period from 2017 to 2019 (see Table 3), the total number of tourist arrivals in the Republic of Croatia increased by an average of 5.9% per year, and the number of overnight stays increased by an average of 2.88% per year. The pandemic period in 2020 led to a decrease in tourist

<sup>3</sup> I - Employees in catering and hotel industry

<sup>4</sup> Op. Cit.

arrivals by 64.22%, of which 68.05% in foreign arrivals, and 34.20% in domestic arrivals. In the same period there was a decrease in the number of overnight stays by 55.32%, of which 57.95 % refers to overnight stays by foreign guests and 23.68% by domestic guests.

Table 3: *Tourist activity of the Republic of Croatia*

Year	Arrivals			Overnight stays		
	Domestic	Foreign	Total	Domestic	Foreign	Total
2017	1,837,681	15,592,899	17,430,580	5,978,264	80,221,997	86,200,261
2018	2,021,709	16,644,871	18,666,580	6,476,646	83,175,143	89,651,789
2019	2,212,658	17,353,488	19,566,146	7,095,300	84,140,574	91,242,931
2020	1,455,849	5,545,279	7,001,128	5,415,391	35,379,064	40,771,344
<b>Index 2020/2019</b>	<b>65.80</b>	<b>31.95</b>	<b>35.78</b>	<b>76.32</b>	<b>42.05</b>	<b>44.68</b>
<b>Average rate of change 2017– 2019</b>			<b>5,95</b>			<b>2,88</b>

Source: *eVisitor, processed by SMCTB*

In the continuation of the paper, secondary research was performed for the area of Tuzla – B&H and Sisak-Moslavina County – Croatia. When it comes to TC-B&H economic operators, the average rate of change for the period 2016–2019 for legal operators increased by 1.96%, and for trades the average rate of change decreased by 1.10%, whereas for the same period the average rate of employees increased by 2.26%. In the same period, the average rate of change for legal operators in Sisak-Moslavina County increased by 15.11% and by 7.32% for the number of employees, whereas for trades it decreased by 1.34% (see Table 4).

Table 4: *Business operators, number of employees (catering and hotel industry)*

Year	Bosnia and Herzegovina – Tuzla County						Croatia – Sisak-Moslavina County					
	Legal entities (Yt) (Vt)		Trade (Yt) (Vt)		Employed (Yt) (Vt)		Legal entities (Yt) (Vt)		Trade (Yt) (Vt)		Employed (Yt) (Vt)	
2016	533		1775		3,198		120	-	251	92.96	966	-
2017	543	101.88	1748	98.48	3,093	96.72	146	121.67	240	95.62	1,035	107.14
2018	551	101.47	1751	100.17	3,34	107.99	172	117.81	250	104.17	1,133	109.47
2019	565	102.54	1717	98.06	3,42	102.40	183	106.40	241	96.40	1,194	105.38
2020	569	100.71	1681	97.90	3,158	92.34	187	102.19	368	152.70	1,402	117.42
	<b>Rate of change 2016-2019</b>	<b>19.625</b>		<b>-1.10</b>		<b>2.26</b>	<b>Rate of change 2016-219</b>	<b>15.11</b>		<b>-1.34</b>		<b>7.32</b>

Source: *For Bosnia and Herzegovina- Federal Bureau of Statistics*  
*For Croatia: Croatian Chamber of Trades and Crafts*

Tourist activity in both counties has been continuously increasing in the period 2017–2019 with an average rate of increase in the number of arrivals of 2.8% for Tuzla County and 5.51% for Sisak-Moslavina County, while the average rate of overnight stays for Tuzla County increased by 7.19%, and increased by 22.84% for Sisak-Moslavina County. The Covid-19 pandemic was drastically reflected in the decline in tourist activity in both counties with a decline in tourist arrivals by about 57%, while Tuzla County had a greater decline of 56% of overnight stays compared to Sisak-Moslavina County, which had a decline in overnight stays of 23.8%.

Table 5: *Tourist activity overview: Tuzla County, Sisak-Moslavina County*

Year	Total	Bosnia and Herzegovina – Tuzla County				Croatia – Sisak-Moslavina County			
		arrivals		overnight stays		arrivals		overnight stays	
		domestic	foreign	domestic	foreign	domestic	foreign	domestic	foreign
2017	Arrivals, overnight stays	25.080	21.151	39.172	40.839	21.330	18.915	71.182	36.564
	TOTAL	46.231		80.011		40.245		107.746	
2018	Arrivals, overnight stays	25.096	21.981	38.117	43.395	24.087	18.916	90.494	41.074
	TOTAL	47.077		81.512		43.003		131.568	
2019	Arrivals, overnight stays	27.648	21.235	47.679	44.244	24.479	20.326	115.512	47.066
	TOTAL	48.883		91.923		44.805		162.578	
2020	Arrivals, overnight stays	14.575	6.302	25.520	14.818	15.949	5.216	101.949	21.839
	TOTAL	20.877		40.338		21.165		123.838	
Rate of change 2017–2019		2,83		7,19		5,51		22,84	
Index (total) 2019		42,7		43,9		47,2		76,2	

Source: *For Bosnia and Herzegovina: Federal Bureau of Statistics*  
*For Croatia: eVisitor, processed by SMCTB*

### ***Empirical analysis of research on a sample of catering and hotel workers TC– B&H and SMC –Croatia***

#### *Socio-demographic data of respondents*

In the sample of the TC respondents, the female population prevailed with 54.5%, while in the SMC sample, the male population prevailed with 65.38%; most respondents were in the age group of 35–50 years; the age of respondents over 50 is the least represented in the sample, while in the SMC sample, the age 25–30 is the least represented; the majority of respondents (85.2%) had a university degree, while in the SMC sample, the majority of respondents had a university degree (48.20%).

*Analysis of responses by descriptive statistics and analysis of statistical differences of independent samples*

In the continuation of the paper, claims will be processed on the basis of which the respondents were asked to express the intensity of their agreement with the claim. The claims are based on the Likert scale of 1–5, where 1 represents the absolute intensity of disagreement with the statement, and 5 represents the absolute intensity of agreement. By using the t-test, the difference between the respondents of Bosnia and Herzegovina – Tuzla County and the respondents of the Republic of Croatia – Sisak-Moslavina County, on issues that have the same or common views on the claims will be analyzed. This test will be done at a significance level of 5%.

Table 6: Claim: “The crisis caused by the pandemic had a negative impact on the tourist turnover and financial operations of economic entities, as well as their survival.”

Descriptive Statistics						Paired Differences		t	df	Sig. (2-tailed)
Country	N	Min	Max	Arithmetic mean	Std. Deviation	Mean	Std. Deviation			
B &H	244	4	5	4.8361	.37174	-	.03846	.574	51	.569
Croatia	104	4.00	5.00	4.8846	.32260					
Sum N	348									

Source: Authors' processing in the statistical program SPSS.20.

Based on the answers received from the respondents of both groups, it can be concluded that they absolutely agree with the statement that “The crisis caused by the pandemic had a negative impact on the tourist turnover and financial operations of economic entities, as well as their survival.” The average response to this statement is 4.8. The obtained research results show that these are extremely homogeneous groups of responses, which is confirmed by the range of the lowest and highest responses, which is 1.

Using the t-test, it was found that there is no significant statistical difference between the attitudes of Bosnia and Herzegovina and Croatian respondents. This claim is based on the results of the t-test, its empirical value is -0.574 and  $P=0.569 > 0.05$ .

Table 7: Claim: “Through their programs and financial incentives, state institutions have insufficiently mitigated the consequences caused by the Covid-19 pandemic to economic operators in the tourism sector. “

Descriptive Statistics						Paired Differences		t	df	Sig. (2-tailed)
Country	N	Min	Max	Arithmetic mean	Std. Deviation	Mean	Std. Deviation			
B & H	244	4.00	5.00	4.7787	.41684	-.07692	.65218	-.851	51	.399
Croatia	104	4.00	5.00	4.5577	.50151					
Sum N	348									

Source: Authors' processing in the statistical program SPSS.20.

As with the previous statement, respondents absolutely agree with this statement, and the average answer was around 4.6, which shows that these are homogeneous groups. Based on the analysis, by using the t-test, it was found that there is no significant statistical difference between the two samples, i.e. between Bosnia and Herzegovina and Croatia, regarding the claim that state institutions insufficiently mitigated the consequences caused by the Covid-19 pandemic with their programs and financial incentives because  $P=0.399 > 0.05$ .

Table 8: Claim: “State institutions should play a key role in overcoming the crisis”

Descriptive Statistics						Paired Differences		t	df	Sig. (2-tailed)
Country	N	Min	Max	Arithmetic mean	Std. Deviation	Mean	Std. Deviation			
B &H	244	4.00	5.00	4.4344	.49773	-.26923	.62983	-3.083	51	.003
Croatia	104	4.00	5.00	4.7308	.44789					
Sum N	348									

Source: Authors' processing in the statistical program SPSS.20.

Respondents from both groups absolutely agree with the claim that the key role in overcoming the crisis should be played by state institutions. Although the t-test showed that there is a significant statistical difference between the respondents, the average response of the respondents is extremely high and ranges from 4.4 to 4.7, while the deviation around the arithmetic mean is minimal. These research results show a high degree of homogeneity of the responses obtained, which makes this claim more accurate.

Table 9: *Claim: “Tourist boards are important institutions in the promotion and affirmation of tourism, which contributed to alleviating the pandemic crisis in the pandemic period with their promotional activities and incentives (through the media, online content).”*

Descriptive Statistics						Paired Differences		t	df	Sig. (2-tailed)
Country	N	Min	Max	Arithmetic mean	Std. Deviation	Mean	Std. Deviation			
B & H	244	4.00	5.00	4.6885	.46501					
Croatia	104	4.00	5.00	4.8077	.39796	.00000	.56011	.000	51	1.000
Sum N	348									

Source: *Authors' processing in the statistical program SPSS.20.*

Respondents from both groups absolutely agree with the claim made, with an average score on this statement ranging from 4.6 to 4.8. Analysis of the collected data of both samples, by using t-test, showed that there is no significant statistical difference between attitudes, and the claim is supported by the fact that the average values of both samples are identical, which can be concluded based on the P value of  $1.00 > 0.05$

Table 10: *Claim: “Digital marketing is an important communication channel in times of crisis, especially in the affirmation of tourism and promotional activities of tourist boards.”*

Descriptive Statistics						Paired Differences		t	df	Sig. (2-tailed)
Country	N	Min	Max	Arithmetic mean	Std. Deviation	Mean	Std. Deviation			
B & H	244	2	5	4.5164	.54898					
Croatia	104	2	5	4.5577	.60758	-.07692	.68158	-.814	51	.420
Sum N	348									

Source: *Authors' processing in the statistical program SPSS.20.*

Respondents from both groups absolutely agree with the claim that digital marketing is an important communication channel in times of crisis, especially in the affirmation of tourism and promotional activities of tourist boards. The average score for this statement is 4.5, with a standard deviation of 0.54 --0.60, which is a slightly larger deviation than was the case in previous claims, but it is still quite acceptable and does not negatively affect the results obtained.

By using the t-test, it was concluded that there is no significant statistical difference between the two examined groups, because the value of  $P=0.420>0.05$ .

### **Concluding remarks**

The crisis caused by the Covid-19 pandemic had a particularly negative effect on the tourism sector worldwide, as in Bosnia and Herzegovina and the Republic of Croatia. The measures taken by the governments of the states of Bosnia and Herzegovina and the Republic of Croatia in terms of the restrictions recommended by the World Health Organization have particularly endangered small and medium-sized enterprises in the tourism and hospitality industry. Likewise, small trades are endangered by this crisis, which even before the pandemic had a negative average rate of change of -1.2 in both countries, and the outbreak of the pandemic poses a danger of total extinction of traditional small trades and crafts. By analyzing the tourist activity of both countries and counties, it is evident that there was a large decline in tourist activity in the number of arrivals and overnight stays, and the largest decline was recorded up to 80% in 2020 in the number of overnight stays of foreign tourists. Considering that the paper sought to reach attitudes of those directly endangered in the segment of catering and hospitality, the results of empirical research showed that the pandemic had a negative impact on tourism and financial operations of economic operators, as well as the survival of their activities. Tourist boards are public non-profit institutions whose activities, through the adjustment of the work program, have contributed to mitigating the consequences of the crisis. Through their websites, Facebook and Instagram, they have enabled the local population to access tourist destinations, and thus promoted and pointed out the abundance of natural, cultural and historical riches of their countries. The fact that tourist boards are important institutions in the affirmation and promotion of tourism, and that they have contributed to mitigating the effects of the pandemic, is confirmed by both groups of respondents with an intensity of claim agreement of an average of 4.7. At a time of limited movement and closed borders, digital marketing is a very important means of communication, especially in the promotion of tourist destinations, through the activities of tourist boards, which is something that the respondents of both groups agree with. The pandemic caused by the Covid-19 virus still gives an uncertain picture of overcoming the crisis, but it is quite certain that this situation has changed the psychological consciousness of the population when it comes to health and safety. Both countries should have tactical

tourism recovery plans, which will be focused on natural destinations: mountain tourism, spa, rural, etc., and target groups should be tagged in the surrounding regions. It is necessary to digitize this offer as to the best extent possible. There is a great possibility that future post-Covid tourists will avoid group travel, and will look for peaceful and safe destinations where they will feel safe. Therefore, a change in the perception of tourists towards travel is to be expected, which could lead to travel to closer destinations, but also to the extension of the length of stay of tourists. This psychological change in the attitude of tourists about travel gives the opportunity to diversify the existing offer and opens up great opportunities for rural tourism.

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