

# Youth Travel and Serbia



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## Youth Travel and Serbia

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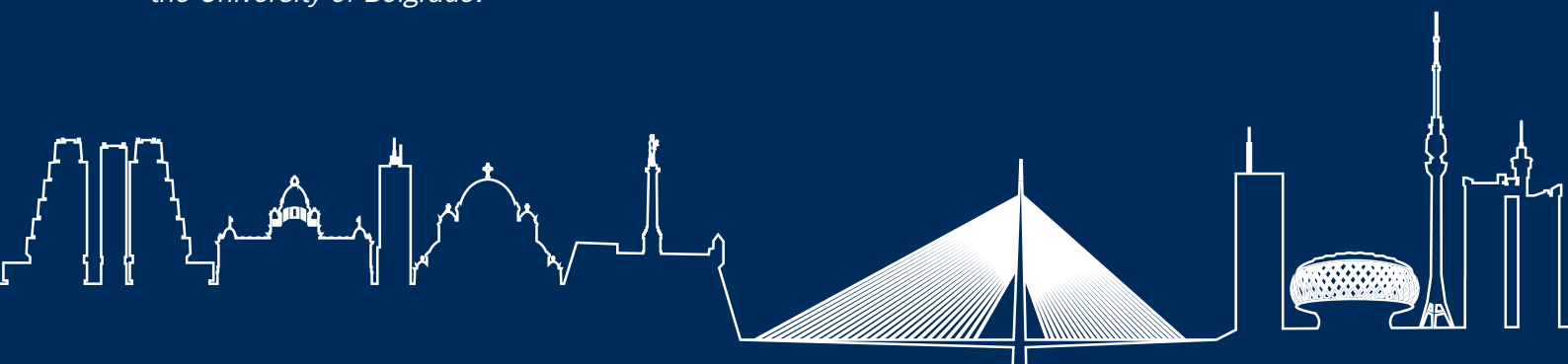


# Background

Serbia has been rebuilding its travel and tourism industry following the Yugoslav Wars between 1991 and 1999 and subsequent political crises. The war created a negative international image of Serbia and these problems were exacerbated by severe flooding in 2014 and a series of economic recessions. Travel and tourism, which accounts for 5.3% of total GDP and supports 80,100 jobs is therefore seen as an important potential source of future growth.

International youth tourism is a very important market for Serbia, and in particular the city of Belgrade. *Lonely Planet* ranked Belgrade fifth in its 'Top ten best places to be in 2015' list. In the period 2004–2013, the number of hostels in Belgrade increased from 0 to 114 (Todorović et al., 2015), reflecting the rapid growth in youth tourism demand. However, data on youth tourism in Serbia are sparse. The aim of this brief report is to review recent survey data on youth travel to Serbia and Belgrade in particular.

*An extract of research conducted by WYSE Travel Confederation, with additional material supplied by Aljoša Budović, Nikola Todorović, Jelena Apelić and Gorana Romić from the Faculty of Geography at the University of Belgrade.*



# Tourism in Serbia

According to the UNWTO, inbound tourism to Serbia increased from 683,000 arrivals in 2010 to 1,029,000 in 2014, a growth of over 50%. As the World Travel & Tourism Council notes, the economic contribution of tourism has also risen significantly:

**The direct contribution of travel and tourism to GDP was EUR 640 million (2.1% of total GDP) in 2014, and is forecast to rise by 1.1% in 2015, and to rise by 5.2% pa, from 2015-2025, to EUR 1 billion (2.5% of total GDP) in 2025. (World Travel & Tourism Council, 2015)**

The growth of tourism in Belgrade and Serbia is being stimulated by the increased number of flights to Belgrade, with the number of passenger arrivals growing by 78% between 2010 and 2015 (CAPA, 2015). Future growth is also likely with the expansion of Air Serbia, which currently has ten new Airbus 320s on order for 2018 and which will begin operating weekly flights to New York City in the summer of 2016. In terms of budget airlines, newcomers since 2010 have included Wizz Air, Norwegian Air Shuttle and Wind Jet. According to the World Travel & Tourism Council (2011), Serbia has a great deal of growth potential, particularly thanks to its unspoilt and undiscovered tourism resources.

However, as Pavlović (2014) found in a survey of 186 young Dutch tourists in 2014, the potential of tourism for Serbia is limited by a relative lack of awareness in key international markets. Her research indicated that the main reason for wanting to visit Serbia is “culture/architecture/art”. The reasons that were also often mentioned were that they think Serbia is a beautiful country and are curious because it is a ‘new’ destination and not much is known about the country. The main reasons for visiting Serbia were culture, fun and sightseeing. Young Dutch people who had visited Serbia before were very positive about their experience, whereas non-visitors had a very weak and stereotypical image of the country.

**“The main reason non-visitors would not like to visit Serbia was because Serbia is relatively unknown to them as a tourism destination and they have hardly any knowledge about the destination.” (Pavlović, 2014)**

There seems to be potential for Serbia if awareness can be raised in key outbound youth markets. The country has particular strengths in terms of culture and also in terms of iconic events such as the EXIT festival (see below). In 2009, for example, a special train ran from Rotterdam to Novi Sad taking Dutch visitors directly to the EXIT festival.

The importance of inbound youth tourism in Belgrade is underlined by the large number of hostels relative to other regional destinations. Belgrade currently has around 110 hostels, surpassed only by Budapest and Prague. However, these cities have many times the total tourist arrivals of Belgrade, so it appears that youth tourism is particularly important as a proportion of the total tourist market in Belgrade.

## Total visitor arrivals and youth hostels in key cities in the region



City	Visitor arrivals *	Number of hostels**
Budapest	3,508,159	222
Prague	6,096,015	197
Belgrade	715,499	112
Zagreb	907,642	74
Warsaw	2,711,800	55
Vienna	6,689,689	52
Bucharest	1,307,567	47
Ljubljana	556,836	39
Sofia	915,815	38
Bratislava	844,524	24

\* at paid accommodation 2013/2014, TourMIS.info

\*\* Hostelworld (May 2016)



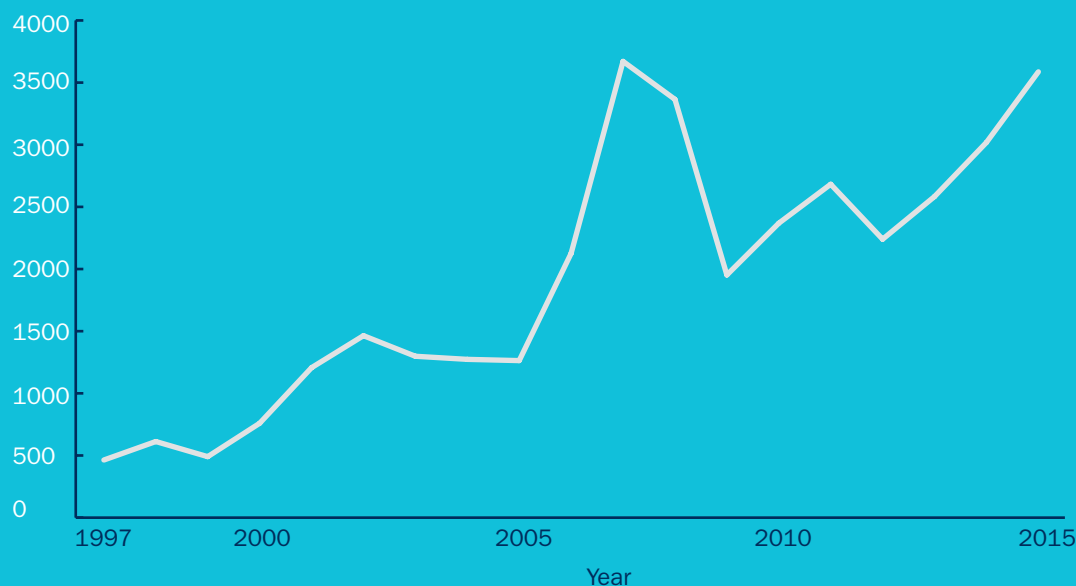
## Outbound youth travel and Serbia

Tomčić, N., & Božić (2015) studied the factors affecting the city destination choice of young Serbian travellers. They found that for young Serbians, “along with good and cheap accommodation, the hospitality of local people and their knowledge of English is also very important.”

Data on the number of J-1 visas issued to young Serbians to work and study in the United States shows a large increase in recent years.



### J-1 visas issued to Serbian visitors to enter the United States, 1997-2015



Source: US Department of State, 2016

An analysis of data from WYSE Travel Confederation's New Horizons III survey shows that in 2013 Serbian respondents who travelled internationally in the previous 12 months were predominantly students (64%). A large proportion of these (50%) travelled to the United States, which is linked to the importance of learning English and gaining work experience for the Serbian market. Almost half the respondents indicated that language learning was their main purpose of travel, and a further 29% cited work experience. Leisure travel seems to be relatively unimportant for the outbound Serbian youth market.

## Serbia | outbound youth traveller

Serbian youth travelling abroad

**64% students**

Main trip purpose

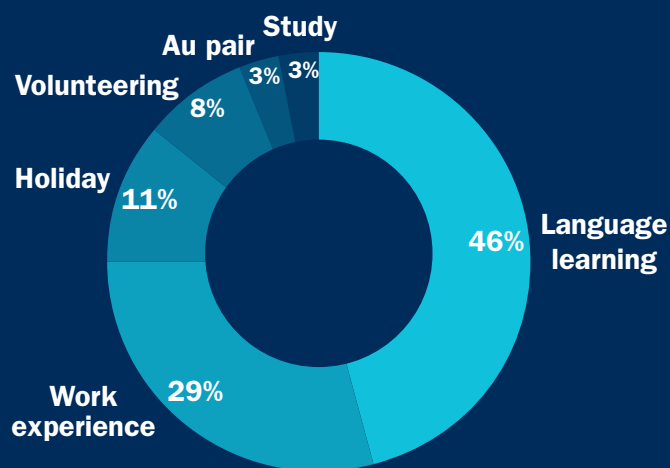
**46% language learning**

Main destination

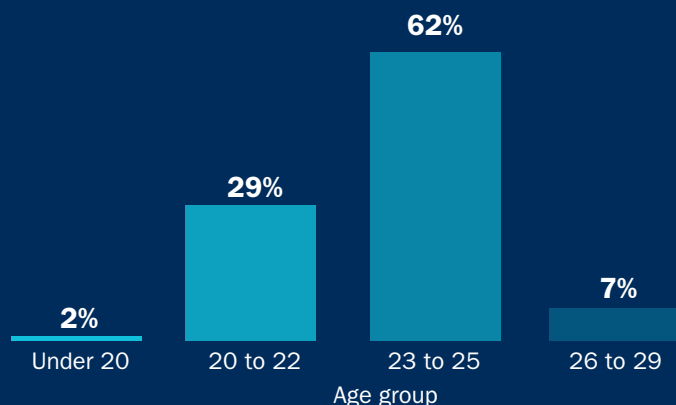
**50% travel to US**



### Main purpose of travel for Serbian youth travellers



### Serbian outbound youth travellers



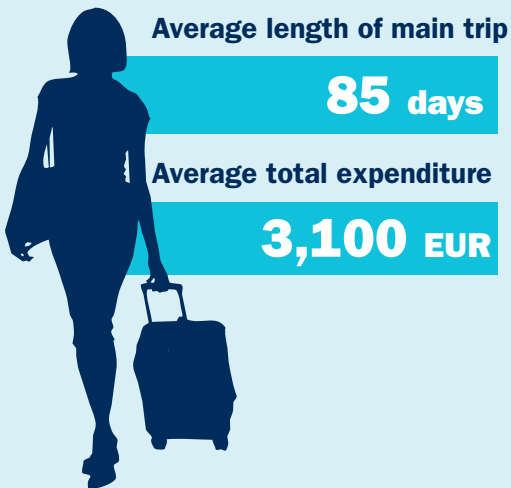
Source: WYSE Travel Confederation, New Horizons III, 2013

The key age group for young Serbian travellers is 23 to 25, which accounted for over 60% of respondents. Almost 60% had studied to Bachelor's degree level.

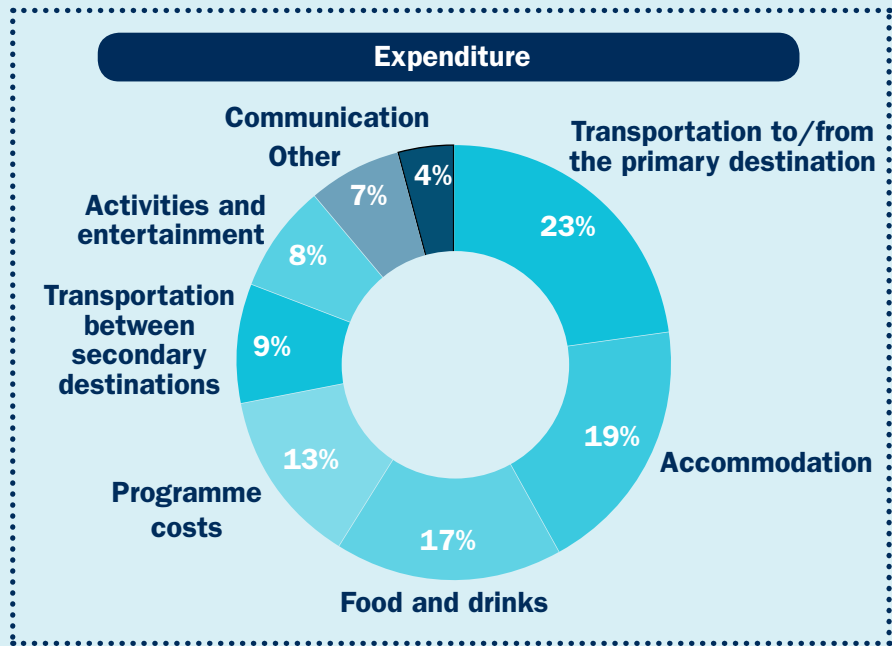
The average length of the last main trip taken by Serbian outbound youth travellers was 85 days, or just short of three months. This is notably longer than the global average for youth travellers (58 days). Average total expenditure was around EUR 3,100. This is slightly higher than the global average (EUR 3,000), but reflects the longer trip length to undertake language study or work experience. The bulk of the expenditure was travel to the main destination, followed by accommodation.



## Serbia | outbound youth traveller

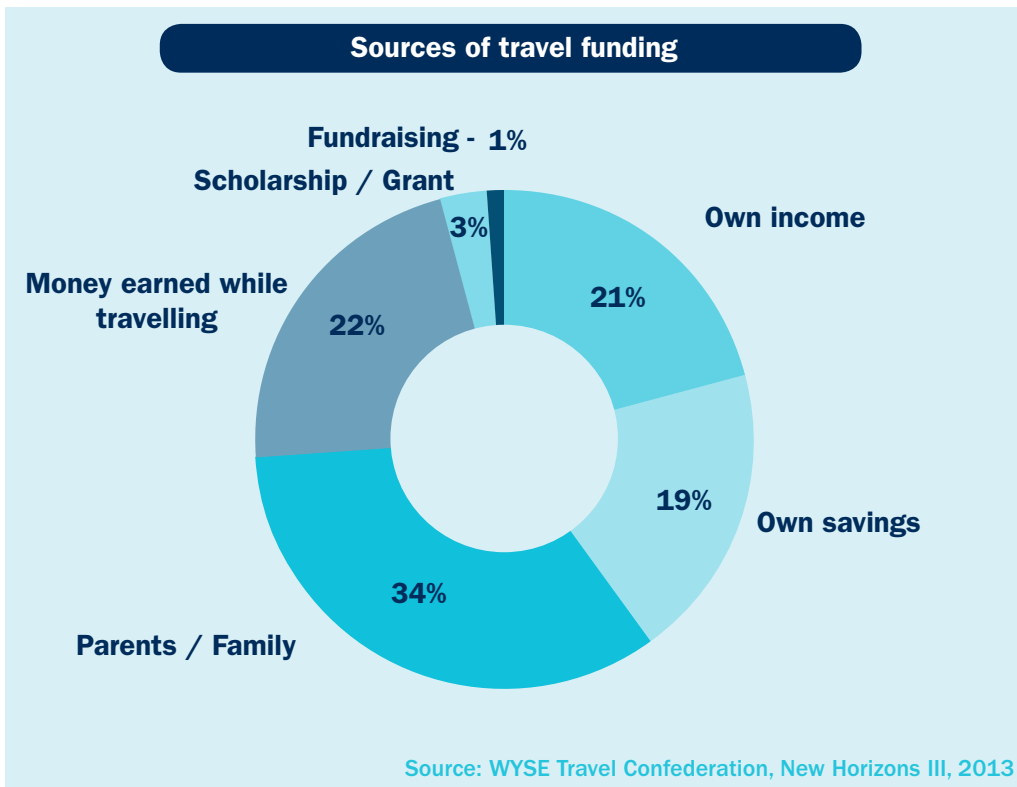


\*Higher than global average for youth travellers



Source: WYSE Travel Confederation, New Horizons III, 2013

In terms of funding sources for travel, young Serbian travellers received considerable support from their families, but were also likely to earn a large proportion of their travel budget by working during their stay abroad. Many of the respondents were visiting the United States, and were likely to have been travelling on a J-1 visa, allowing them to work and study. The number of J-1 visas issued to young Serbians has increased significantly in recent years.



Source: WYSE Travel Confederation, New Horizons III, 2013

# Inbound youth travel and Serbia

For Serbia's inbound youth market, festivals such as EXIT are important. The EXIT festival was voted the "Best Mid-Sized European Festival" in 2015 and Serbia placed 18th globally as a festival destination for young travellers. EXIT attracts a predominantly young audience, with over 80% of the 190,000 visitors being aged between 20 and 30 years (Bjeljac and Lović, 2011). EXIT is important for attracting new visitors to Serbia. Almost 80% of the youth tourists at the festival are visiting Serbia for the first time. Over 50% of visitors to EXIT use the festival camp, but there are also over 30% who use local hostels. Average expenditure at EXIT alone is around EUR 400. According to the World Travel & Tourism Council (2011) "the growth and increasing appeal of the country's music and other festivals has resulted in a large number of new hostels over the last few years catering to backpackers and other budget-minded tourists."

Data on youth travel to Serbia were extracted from two studies conducted by WYSE Travel Confederation. The New Horizons III survey conducted in 2013 covered 34,000 young travellers globally. The Millennial Traveller survey conducted in 2014 covered over 6,000 youth travellers globally. The data from both surveys indicate that Serbia is relatively low ranked as a favourite destination among youth travellers.

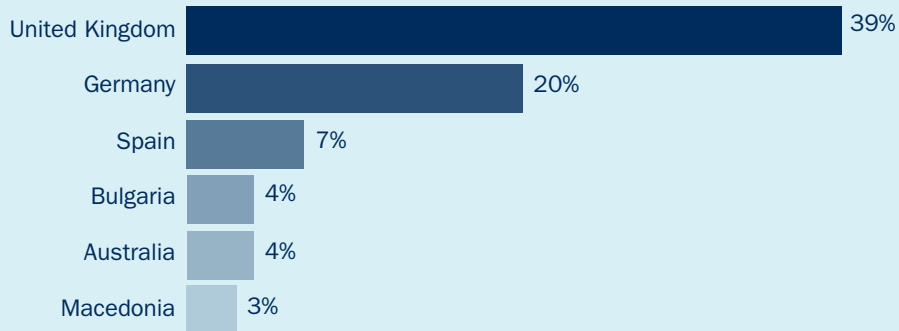
The New Horizons III survey indicated that Serbia was a destination for only 45 of the respondents who specified a destination country for their last main trip. The low number of visitors to Serbia is probably linked to the fact that Serbia is usually a transit stop for young travellers (as Todorović et al point out) rather than a main destination.

The top visitor origins of youth tourists that visited Serbia were the United Kingdom and Germany, which together accounted for over half of the responses.

EXIT Festival



### Main origin countries of youth visitors to Serbia

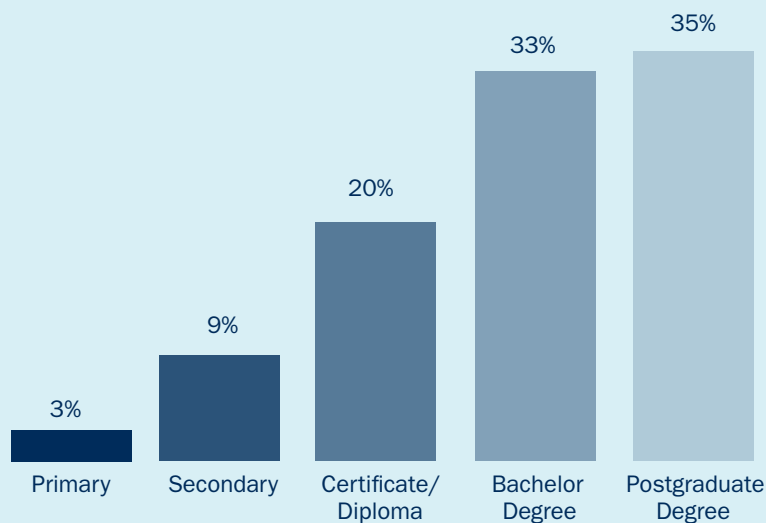


Source: WYSE Travel Confederation, New Horizons III, 2013

The largest age group of visitors to Serbia was 20 to 22, which accounted for over 40% of responses. The mean age of the respondents was 25.

Slightly over half of the respondents were female, reflecting the general balance of youth tourism as a whole. The respondents that visited Serbia were overwhelmingly highly educated, with over 60% having studied to Bachelor's degree level or higher.

### Highest education level of youth visitors to Serbia



Source: WYSE Travel Confederation, New Horizons III, 2013

Students made up over 40% of the youth travellers to Serbia. In terms of income levels most respondents earned less than EUR 20,000 annually. However, there was also a small but significant group with incomes in excess of EUR 30,000, considerably higher than the average youth traveller's annual income.

The main trip purpose for those visiting Serbia was holiday (65%), which is generally in line with the global youth travel market as a whole.

Most of those visiting Serbia were doing so as part of a more extensive trip through Europe. The main destinations combined with a visit to Serbia were neighbouring Hungary, Croatia and Bosnia.

## Serbia | inbound youth traveller



### Youth travellers to Serbia

**40%** students

### Main trip purpose

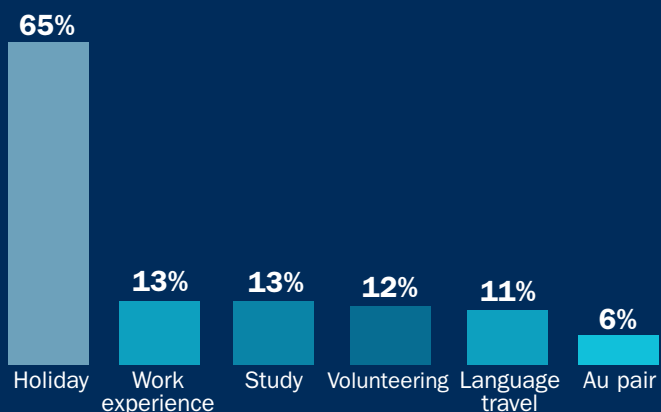
**65%** holiday

### Other destinations combined

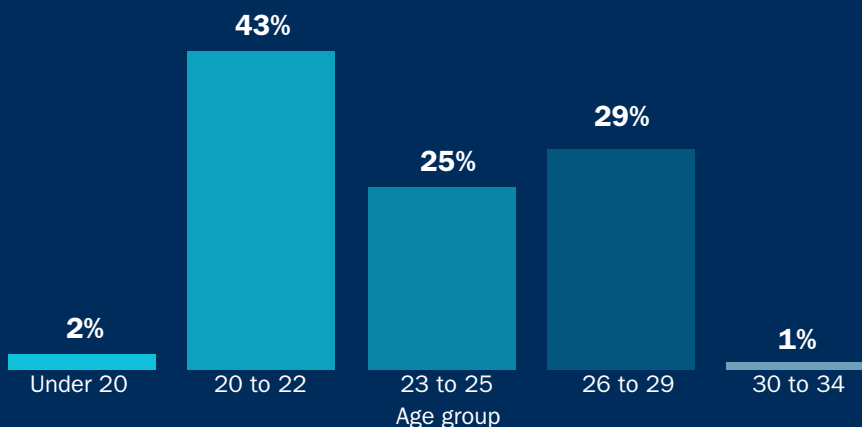
- Hungary
- Croatia
- Bosnia

### Trip purpose of youth visitors to Serbia

(multiple responses possible)



### Youth visitors to Serbia



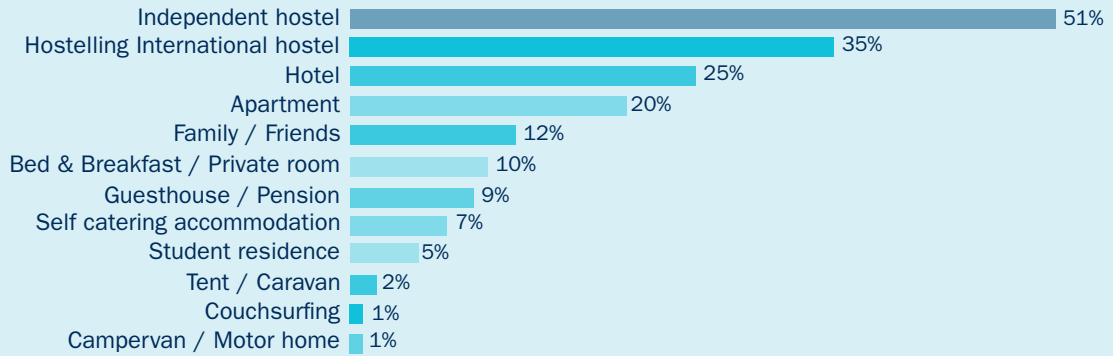
Source: WYSE Travel Confederation, New Horizons III, 2013

The average overall trip length for youth visiting Serbia was 38 days, shorter than the average for youth travellers in general (58 days). It is not possible to establish exactly how much of this time was spent in Serbia, but, as Todorović et al. found, it is likely to have been a relatively small proportion of the total trip length.

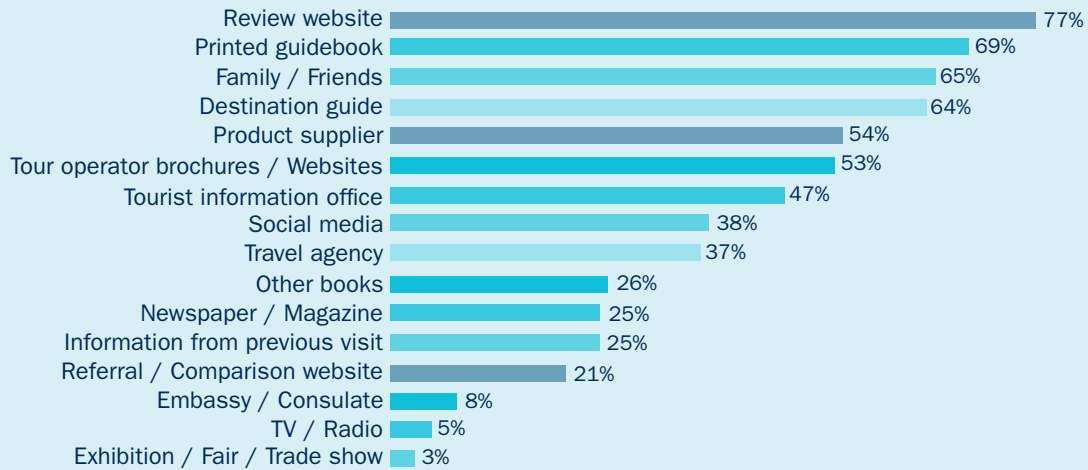
The main sources of information about Serbia that youth travellers consulted before departure were review websites and guidebooks.

The main type of accommodation used by youth visitors to Serbia was independent hostels, followed by Hostelling International establishments. This reflects the rapid growth of hostel accommodation in Belgrade and elsewhere in Serbia.

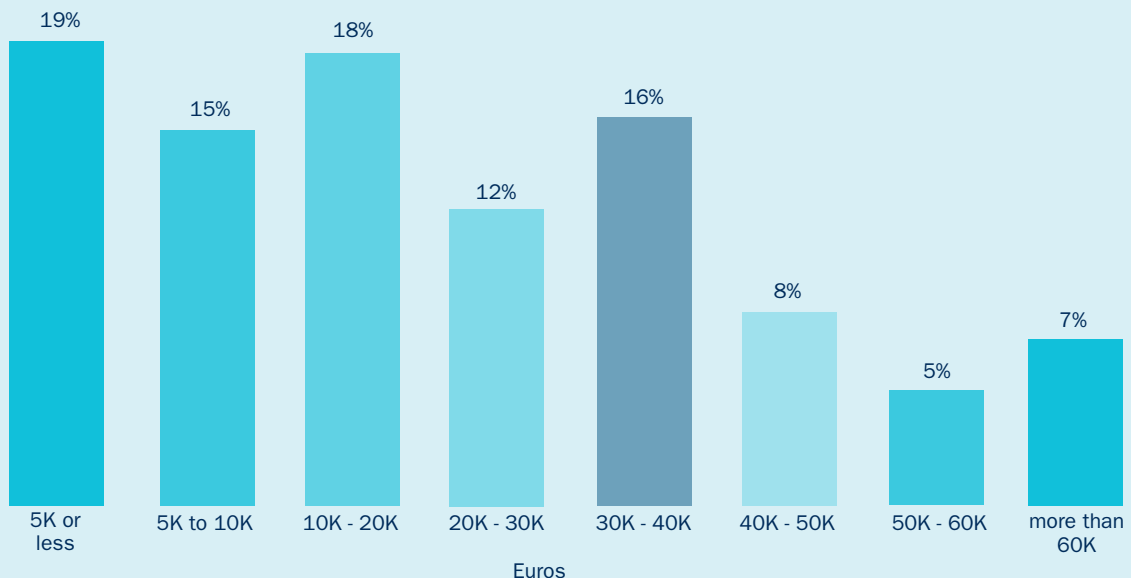
**Accommodation used by youth visitors to Serbia**  
(multiple responses possible)



**Information sources utilised by youth visitors to Serbia**  
(multiple responses possible)



**Annual income of youth visitors to Serbia**



Source: WYSE Travel Confederation, New Horizons III, 2013





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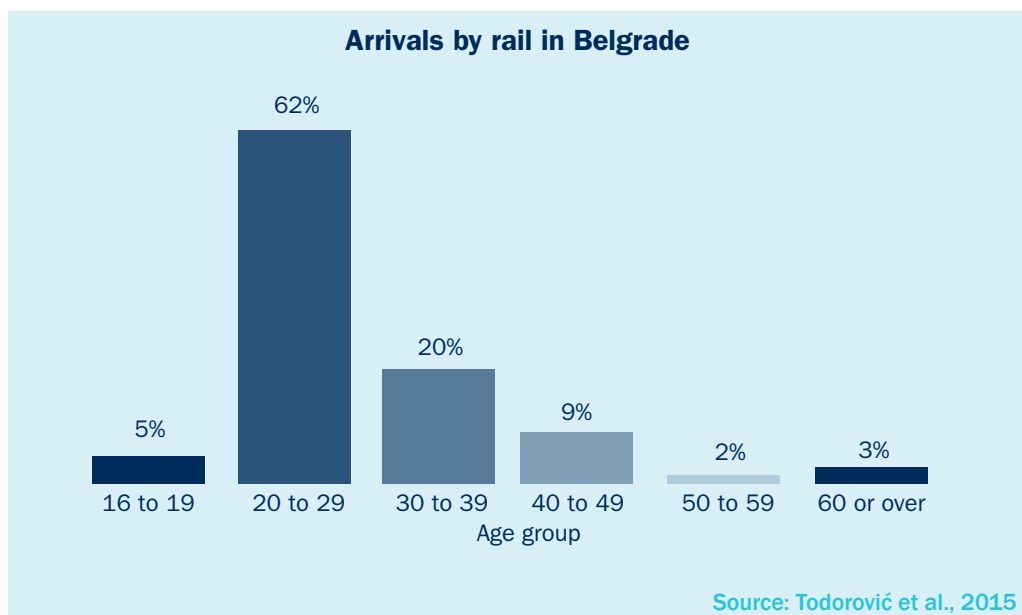
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## Young tourists in Belgrade

A survey was conducted by Aljoša Budović, Nikola Todorović, Jelena Apelić and Gorana Romić (Todorović et al., 2015) of tourists arriving at the main railway station in Belgrade in summer 2013. Of the 323 tourists interviewed, 92% were aged between 15 and 29 years old, confirming the dominance of youth travellers among those arriving by rail in Belgrade.





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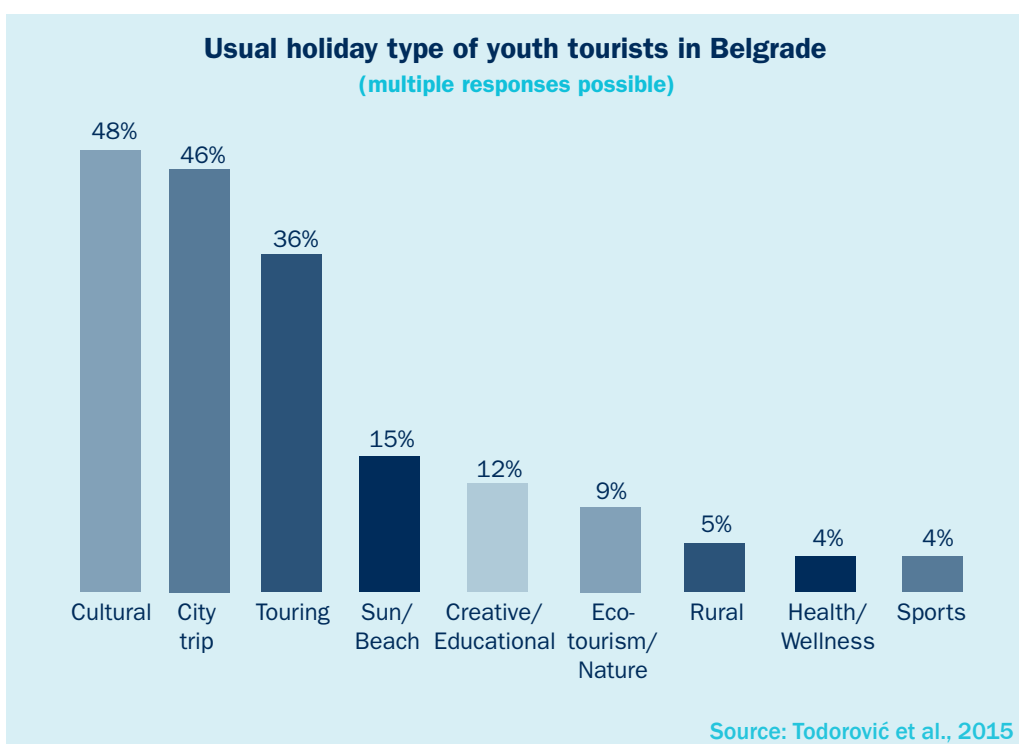
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Similar to WYSE Travel Confederation’s findings on Serbia in general, the vast majority of youth tourists were coming to Belgrade for holiday purposes. However, the data also indicate that cultural tourism is particularly important in Belgrade. Almost 40% of youth tourists were intending to visit a cultural attraction, and a further 8% were coming for a cultural event in Belgrade. Visiting friends and relatives was also a significant motivation (18%), but other visit purposes were relatively unimportant.

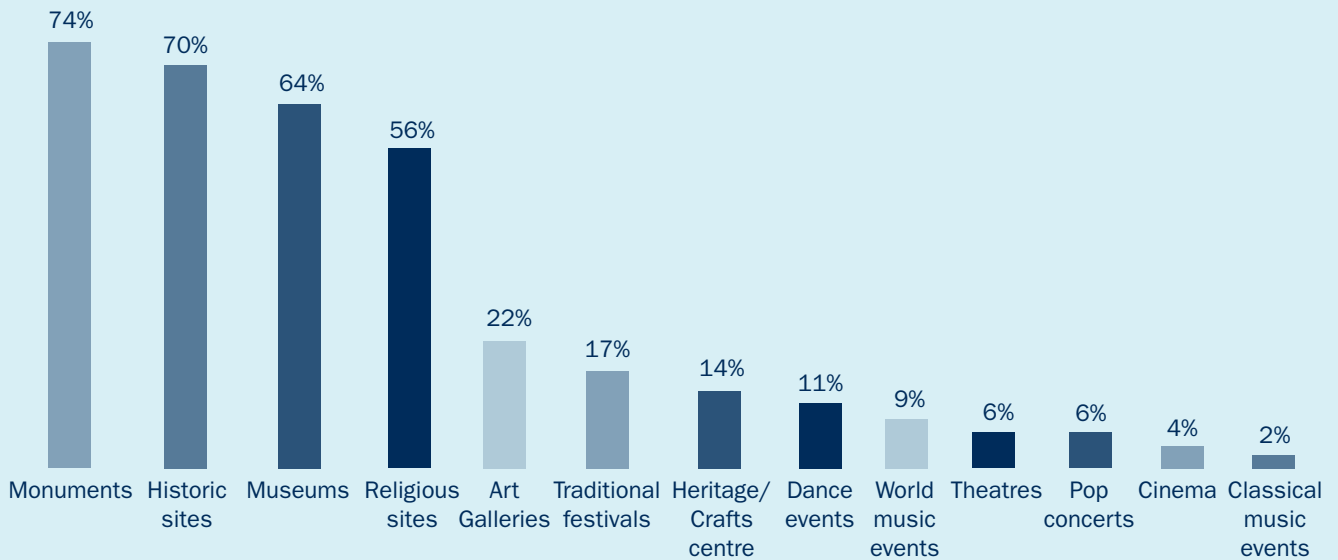


The strong link to cultural tourism was confirmed by the type of holiday usually taken by the respondents. Almost 48% indicated that they usually take cultural holidays, and 46% indicated that city trips were among their usual types of holiday.



The most popular cultural attractions visited by youth tourists in Belgrade were monuments, historic and religious sites and museums. This is not surprising as these sites often feature among the 'must-see' sites of any city, and are likely to be the first points of call for visitors staying for a short time or making a first-time visit to the city.

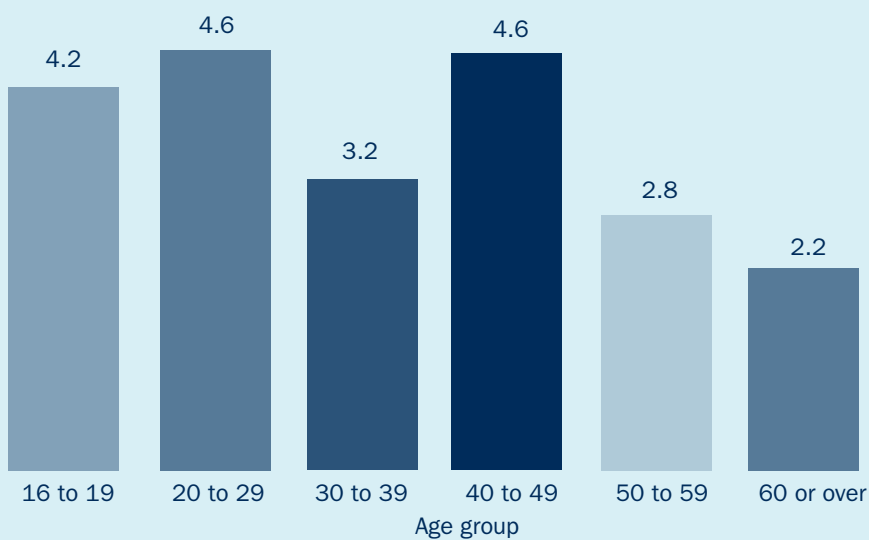
**Attractions visited by youth tourists in Belgrade**  
(multiple responses possible)



Source: Todorović et al., 2015

The average length of stay in Serbia for youth travellers was just over four days. Interestingly, this is longer than tourists in the over 50 age groups.

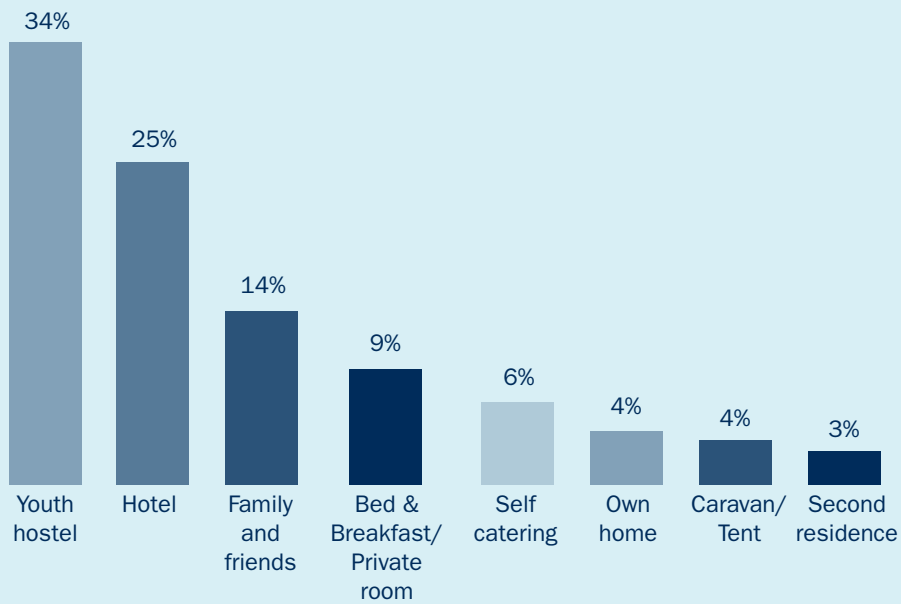
**Average length of stay in Belgrade (days)**



Source: Todorović et al., 2015

The importance of youth hostels for young visitors was underlined by the fact that over a third of youth tourists in Belgrade used this form of accommodation.

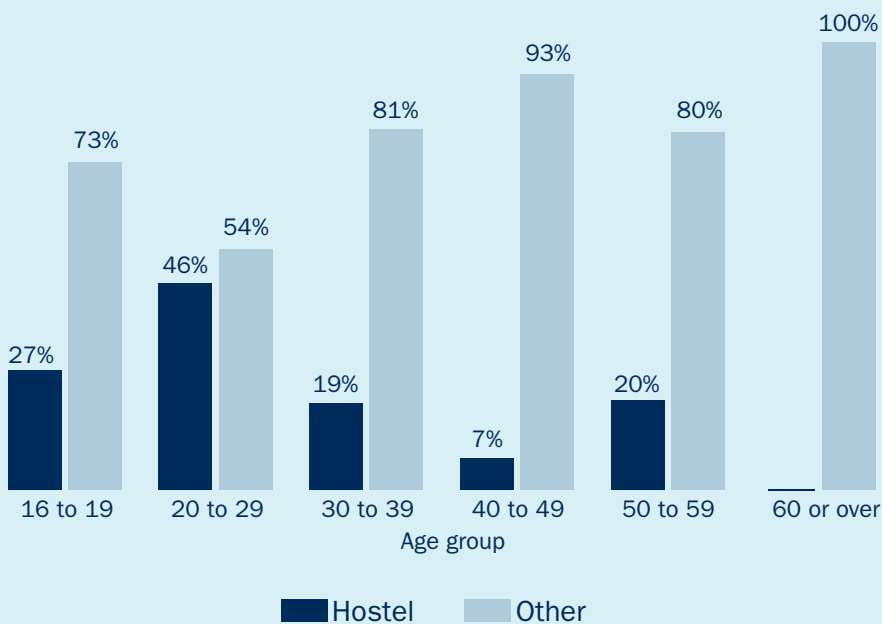
### Accommodation used by youth tourists in Belgrade



Source: Todorović et al., 2015

Looking at accommodation use by age group we can see that older visitors are much more likely to use hotels, and youth tourists more likely to use hostels.

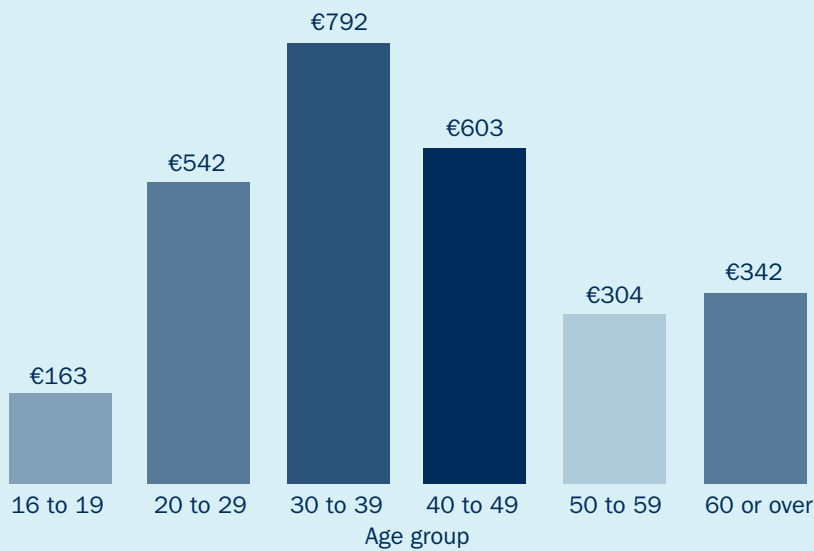
### Hostel and other accommodation use in Belgrade



Source: Todorović et al., 2015

In terms of spending, the average total spend by youth tourists in Belgrade was EUR 540. Although youth travellers are often perceived as low-spending, the expenditure of the 20 to 29 age group was actually higher than that of visitors to Belgrade aged 50 or older.

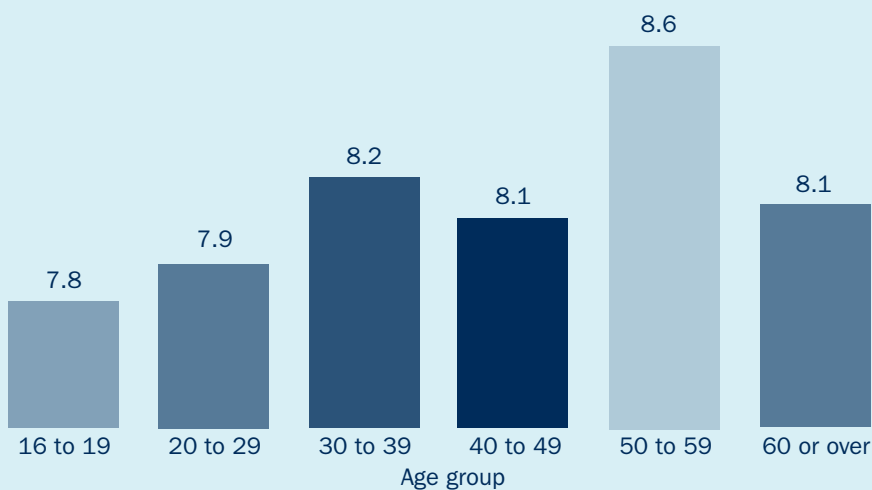
### Average total trip expenditure of tourists in Belgrade (in Euros)



Source: Todorović et al., 2015

One of the major issues identified in the survey conducted by Todorović et al. (2015) was the relatively low satisfaction level of younger tourists visiting Belgrade. For visitors under the age of 30 the average satisfaction level was below 8 out of 10, whereas for older visitors satisfaction levels were notably higher.

### Visit satisfaction level of tourists in Belgrade (scale of 1 to 10)



Source: Todorović et al., 2015



## Conclusions

At present, Serbia does not seem to feature strongly as a must visit destination for most youth travellers. Those who do visit tend to do so as part of a longer trip through South East Europe, and they tend to stay in Serbia just a few days. Even so, youth traveller spend is still significant, and is fueling growth in youth hostel accommodation in Belgrade.

At the moment inbound youth tourism activity seems to be concentrated on a few key sites in Belgrade, such as the Belgrade Fortress and Knez Mihailova shopping street. There may be potential for extending youth visitor stay and spend by highlighting other attractions in the capital as well as throughout the rest of the country, for example using events such as EXIT as a draw. That said, one of the current challenges appears to be that levels of satisfaction among youth tourists are lower than those of older visitors, pointing to gaps in attraction and facility provision aimed at youth visitors. Extending the current short length of stay of youth visitors, as well as encouraging return visits, will be a challenge if youth visitor satisfaction levels are left to languish. Where these young visitors appear to have higher annual incomes and travel spending patterns than the average youth traveller, addressing low satisfaction levels may result in substantial impact on the destination.

Outbound travel measured by the WYSE Travel Confederation New Horizons study seems to indicate that the United States is by far the most popular long haul destination for young Serbs. This is related to the opportunities provided by J-1 visas to work and study there, and the number of visas issued has risen considerably in recent years. There is no doubt potential for growing youth travel to other destinations with well established work and travel programmes.

**Those who do visit tend to do so as part of a longer trip through South East Europe, and they tend to stay in Serbia just a few days. Even so, youth traveller spend is still significant, and is fueling growth in youth hostel accommodation in Belgrade.**

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## Recommendations for the destination

**D**rawing on the research discussed here, WYSE Travel Confederation can outline some recommendations for developing youth travel in Serbia:

- Develop more targeted youth tourism marketing activities, highlighting local youth culture.
- Develop more activities aimed at convincing transit and touring visitors to extend their stay, perhaps in combination with other destinations in the region. This could also be done in combination with youth travel providers, such as hostels.
- Market the attractive destinations in the vicinity of Belgrade in order to distribute expenditure and contribute to balanced regional development.
- Promote the development and/or expansion of youth travel accommodation facilities and attractions, particularly in areas outside of Belgrade that might be attractive for youth.
- Fund initiatives that enable the local travel industry to promote Serbia's youth product at travel trade events.
- Consider initiating discussions with countries with established work/travel and cultural exchange programmes to diversify opportunities for Serbian youth and students to travel under such schemes.

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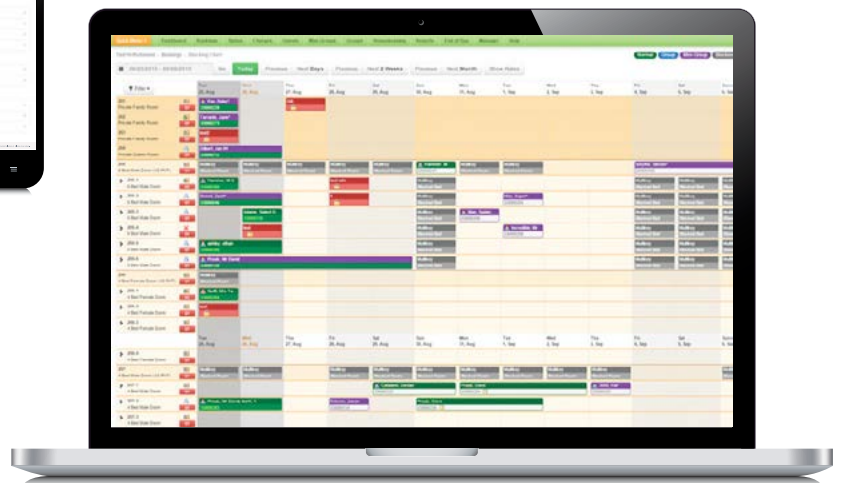
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