

# ANALYSIS OF CONTEMPORARY TRENDS OF TOURIST MOVEMENTS IN SARAJEVO CANTON – CASE STUDY OF TOURISTS FROM ARAB COUNTRIES

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**Abstract:** Sarajevo Canton is by far the most visited tourism region in Bosnia and Herzegovina, considering that it has a share of over one third of all registered tourists in Bosnia and Herzegovina. Sarajevo is a leader also in the context of percentage of foreign tourists (over 85%). In the paper, certain elements of contemporary tourism movement are taken for analysis from the aspect of quantitative indicators, by method of dynamic temporal comparison. Special focus was put on tourists from Arab countries. For the purpose of getting valid indicators of tourist movement trends, authors applied the analytical approach based on monthly quantitative data. Paper's objective is to point out temporal dimension of these elements within the taken period, through analysis of monthly values of number of tourists and nights during the five-year tracking of specific trends, as well as to determine annual tourist distribution. Besides comparison of monthly and annual data about tourist movement, the paper is peculiarly oriented toward recognition of trend related to tourists from Arab countries.

**Key words:** tourism, Sarajevo Canton, tourist movement, tourism trends, Arab tourists.

## INTRODUCTION

Tourism trends are monitored by analyzing numerical data on the movement of tourists in some area. In this sense, one can single out a series of indicators - general, specific, temporal and structural, indicating the existing tendencies that are most often correlated with some factors of social as well as natural character. Precise establishment of these causal relationships represents the main area of activity of

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geographers in the field of tourism. They can thus recognize the potentials and disadvantages of a particular region in terms of tourism development, and accordingly make a significant contribution to the creation of a proper development policy or a set of necessary measures to improve the conditions of the tourism industry.

In the case of the Sarajevo region, such data is collected at the level of Sarajevo Canton, and over the past few years with explosive growth in tourist inflows, greater attention has been devoted to this segment. This paper uses data on the total number of tourists, structures (domestic and foreign), length of stay, as well as the countries from which they come, with a particular emphasis to those from Arab countries.

According to the Bosnian and Herzegovinian Agency for Statistics in 2017, the gross value added from tourism was 6.32 % of the gross domestic product of Bosnia and Herzegovina, which, expressed in total value, amounted to 1.857 billion KM gross profit from tourism to the whole country or, in euros, something more than 900 million solid European currencies.

Problems are diverse, but the most important are: lack of adequate tracking and recording of tourist arrivals and nights, gray economy, imbalance between accommodation capacities and number of tourists, etc. (Nurković et al., 2006)



**Fig. 11.** Administrative units of Sarajevo Canton  
Source: Mirić et al., 2018

Sarajevo Canton is one of the 17 tourist regions in Bosnia and Herzegovina (Mirić et al., 2017). This form of tourism regionalization was carried out on the basis of the administrative structure of the national territory, as well as planning documents. Sarajevo Canton is located in the central part of Bosnia and Herzegovina, with a total of 1277 km<sup>2</sup> and has about 414,000 inhabitants according to the latest census of 2013. It represents the most populated part of the country, and among other cantons in the Federation of Bosnia and Herzegovina, it is the most populated Canton (after the Tuzla Canton). Sarajevo Canton is territorially divided into nine municipalities, of which four (Stari Grad, Centar, Novo Sarajevo, and Novi Grad) make the City of Sarajevo, capital of Bosnia and Herzegovina. The municipalities of Ilidža and Vogošća have a suburban character, while Hadžići, Ilijaš and Trnovo have quite a small urban nucleus, dominated by rural and natural landscapes (Hrelja, 2012).

### **TOURIST MOVEMENTS IN SARAJEVO CANTON**

Affirmation and promotion of tourist motives has led to the rapid and continuous growth of the tourism industry in Sarajevo after the war. Available statistics show that in the period between 2002 and 2017 the number of registered tourists increased six times (from 80.271 to 482.494). The figure of 100,000 tourists for the first time after the war was recorded in 2004, 200 000 was achieved in 2010, 300,000 in 2013 and 2016 was the first in which the total number of tourists in Canton Sarajevo exceeded 400,000 (Mirić et al., 2018). In the analysis of this general trend of growth is evident the slowdown of this pace in the time of the global economic crisis at the end of the first decade of this century. In addition, the decline in tourist traffic in the reporting period was recorded only twice - in 2003 and 2014 as a result of deterioration of the security situation (in the first case at the global, and in the other at the local level). It is interesting that throughout the observed period, the number of domestic tourists stagnates or slightly increases, while international tourist traffic has achieved exceptionally rapid progress.

Canton Sarajevo is by far the most visited tourist destination in Bosnia and Herzegovina, since it accounts for more than one third (35.56% in 2016) of all registered tourists in our country in the current period. Sarajevo is also a leader in the share of foreign tourists in the total number (over 85% in 2016).

Sarajevo Canton makes over one third of tourist nights in Bosnia and Herzegovina (36.3% in 2017), approaching the values that almost half of the total number of foreign tourist nights is realized in Sarajevo (45.2%). Also, Canton Sarajevo has better value for average tourist retention - 2.65 days compared to Bosnia and Herzegovina (2.01 days).

Most tourists in Sarajevo have traditionally consisted of visitors from neighboring countries, but the situation in recent years has significantly changed. Although tourists from Serbia, Croatia and Slovenia are important clients, meanwhile, the rapid influx of visitors from other parts of Europe and the world has led to major changes in the direction of tourism industry development in the capital of Bosnia and Herzegovina.

## **STRUCTURE OF TOURIST FROM ARAB COUNTRIES IN SARAJEVO CANTON**

Not so long ago non-European tourists were rare in Sarajevo, and today they have a significant share of 29.5% in the overall structure of foreign visitors to Sarajevo. In particular, the trend in the number of tourists from the Arab states (Kuwait, United Arab Emirates, Saudi Arabia, Qatar, Oman, etc.) has increased dramatically over the last few years. According to the annual average for the period 2013-2017, tourists from Turkey represent the largest group among all foreign tourists. Since 2013, around 48,000 Turkish tourists visit Sarajevo annually. Among the other countries contributing to the Sarajevo region, on average with more than 10 thousand tourists per year, include the three states of former Yugoslavia - Croatia (37 thousand), Slovenia (18 thousand) and Serbia (13 thousand). The only remaining European country whose tourists are registered in an average of more than 10,000 is Germany (11.000). According to published data, tourists from Arab countries mainly come from the Persian Gulf countries and Egypt. Trend is extremely pronounced since the end of 2013, and until then, only the Saudi Arabia had a significant share in the total number of tourists in Bosnia and Herzegovina.

**Tab. 1.** Arab tourists in Sarajevo by country (2013-2017)

<b>Country</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
Bahrain	n/a	n/a	n/a	5680	5442
Qatar	n/a	n/a	n/a	3105	1801
Kuwait	6602	6447	8967	11609	8498
Oman	n/a	n/a	n/a	n/a	9689
Saudi Arabia	2130	3026	6143	11565	15450
UAE	n/a	n/a	n/a	27060	25847

Source: <http://zis.ks.gov.ba> (9th September 2017)

In 2017, every sixth foreign tourist came from Arab countries. A quarter of foreign tourists accounted for Arab visitors. The average number of days of their stay was 3.3 days. Increasing the ratio of the number of Arab tourists in foreign visitors for the period 2004-2017 amounts to 9.8 times. Number of nights for the period 2004-2017 has increased 65 times, and the number of arrivals 57 time. Tourists from the

Arab countries are particularly important to increase the statistical indicators of the number of overnight stays, as their average stay is much longer than of visitors from any other region. A large number of overnight stays are recorded by tourists from the UAE (about 86.000 in 2016 and 2017).

**Tab. 2.** Number of nights taken by Arab tourists in Sarajevo by country (2013-2017)

Country	2013	2014	2015	2016	2017
Bahrain	n/a	n/a	n/a	18498	18034
Qatar	n/a	n/a	n/a	12024	6553
Kuwait	30299	25694	32770	44631	34809
Oman	n/a	n/a	n/a	n/a	27622
Saudi Arabia	7052	8330	16510	32838	46087
UAE	n/a	n/a	n/a	86658	86119

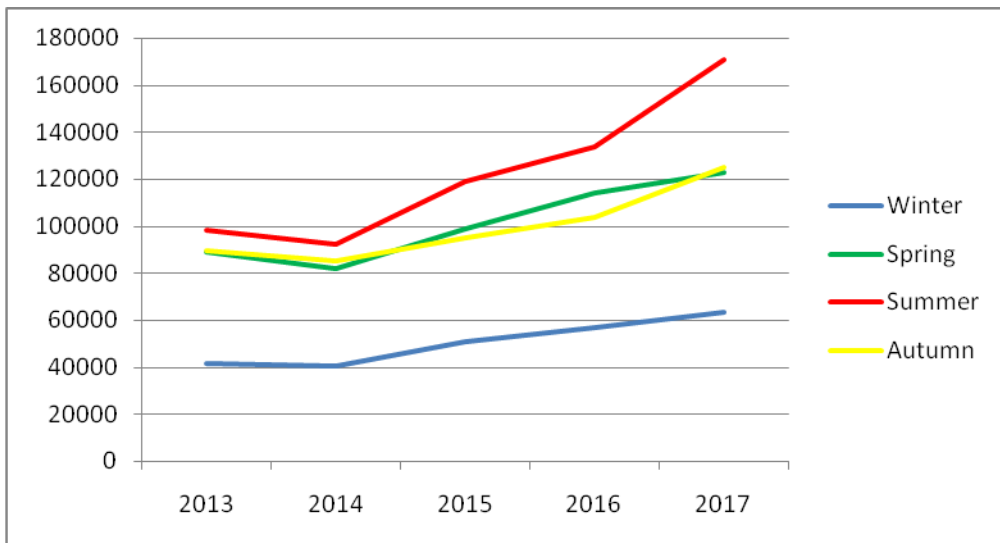
Source: <http://zis.ks.gov.ba> (9th September 2017)

The last three years (from 2015 to 2017. Year) marked the process of "discovery of Sarajevo" by tourists from Arab countries. In terms of seasonality, trends are approximately the same as for general visits of all foreign tourists with fewer deviations. In the period January-March has been recorded a trend of increase in the share, especially in the number of overnight stays. The largest share in this period was realized by tourists from the UAE (record 15.6% of all foreign tourists' nights in March 2017) and Saudi Arabia. In 2017, a significant share of tourists from Bahrain was recorded, whose number has grown rapidly over the past three years.

## SEASONAL DISTRIBUTION OF ARAB TOURISTS

In order to fully elucidate the motivation of Arab tourists to come to Sarajevo, it is necessary to analyze their seasonal distribution. As expected, the largest number of tourists from these countries come during the summer months (June, July and August), with their concentration increasing in the early and late summer, while in the hottest month of July, is somewhat less. It should be noted that the movement of tourists in this period is affected by the holy month of Ramadan. According to data from 2017, over 170 thousand tourists from Asian countries visited Sarajevo during the mentioned three months of which vast majority were tourists from Arab countries, more precisely, the Gulf States. Just five years earlier this number was much smaller - under 100,000. Data on transitional annuals (spring and autumn) also point to a significant trend in tourist growth, but still to a lesser extent than it is with summer. According to the latest figures, the number of visitors from Asian countries during spring and autumn months has in both cases exceeded 120,000. The least number of tourists from Arab and other Asian countries are expected to arrive in the winter period, however, the trend of growth is also evident during these months. In

recent years, in December, January and February, about 60,000 Asian tourists arrive to Sarajevo.



**Fig. 2.** Seasonal trends in number of tourists from Asia (2013-2017)

Source: <http://zis.ks.gov.ba> (9th September 2017)

It is especially pronounced growth trend of arrivals and overnight stays in January and February for tourists from the Asian region in which Arab visitors contribute with 85%, if we are talking about a longer period of time, for example, since 2002, when a more serious tracking of tourist arrivals statistics in Sarajevo started. Exponential growth and the trend of exceptionally large changes in the total number of tourists are noticed, with the notion that Egypt is not included in these trends.

Such a trend continues through the period April-June, with the month of June being relatively poorly visited, which is not in line with the assumption that the number of tourists is increasing with the approach of the summer season, but only if we do not take into account the fact that in the past few years, the Islamic month of Ramadan was mostly during the Gregorian month of June. UAE, Saudi Arabia and Kuwait generate the largest share of visitors during this period. From UAE on average for 2015-2017, every tenth foreign tourist arrive in this spring period. In May 2016, every eighth foreign tourist visiting Canton Sarajevo was from the UAE or Kuwait.

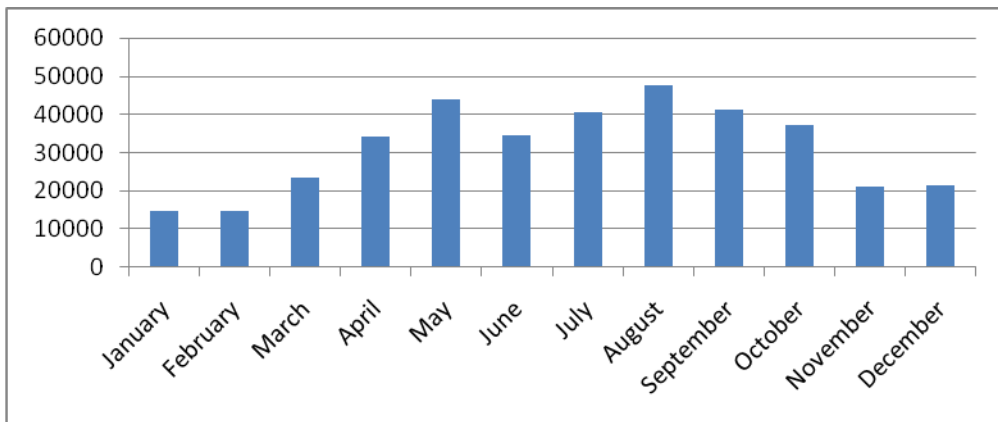
As the summer season approaches, there is the culmination of the number of tourists and nights from Arab countries. This is particularly pronounced in the months of July and August, where tourists make up almost a third of the total number of foreign tourists (2016 - 33.9%), and the number of overnight stays (due to longer

stays) reaches almost half of the total number of foreign tourist nights (48.6% in 2016, 44.2% in 2017). September is characterized by falling trend, although the shares are still relatively high (especially in the number of overnight stays - over the fifth in 2017 and one third in 2016). The largest number of tourists in this period is realized by the UAE. With over 10% arrivals and about 20% overnight stays in July of 2015, tourists from this country realized one third of all foreign tourist nights. As we approach the end of the calendar year, the number of Arab tourists, as well as the number of foreign tourists in general in Sarajevo is rapidly declining, which could be explained by the worsening of weather and environmental conditions (air pollution).

**Tab. 3.** Number of nights taken by Arab tourists in Sarajevo by country (2013-2017)

Month	2013	2014	2015	2016	2017	Average
January	11381	12582	15849	15358	18451	14724
February	13126	11597	15409	16287	16921	14668
March	22125	19100	22269	26121	27864	23496
April	28528	28644	32037	35769	45232	34042
May	38483	34095	44543	52077	49779	43795
June	32975	31440	36244	31494	40891	34609
July	27255	24284	37250	48979	65034	40560
August	37961	36483	45566	53504	65028	47708
September	35069	34592	40488	44062	52319	41306
October	34325	32433	34656	38287	47009	37342
November	19875	18088	20030	21303	25849	21029
December	16933	16383	19890	25446	28117	21354

Source: <http://zis.ks.gov.ba> (9th September 2017)



**Fig. 3.** Monthly distribution of tourists from Asia (2013-2017)

Source: Tab. 3.

## TOURIST MOTIVES FOR ARAB TOURISTS

With the abolition of visas a few years ago, the influx of tourists from Arab countries greatly increased. Unsustainable nature, vegetation, springs, waterfalls, all are the natural beauties and attractions offered by Sarajevo. Besides visits to attractive tourist destinations, such as Vrelo Bosne, Ilidža, Trebević, Bentbaša, Skakavac, Bijambare etc. Arab tourists are omnipresent in shopping malls and shops, such as BBI, SCC, Alta or Mercator, whereby they can buy items and merchandise at very affordable prices. They mostly spend their money on wardrobe and jewelry (Žunić, 2014).

Also, it is evident that business people from the Arab world, based on valid decisions, have built and plan to build a large number of tourist resorts. Legislation for the residents of most Gulf States does not allow property ownership in Bosnia and Herzegovina. The only way for them to obtain ownership right is by setting up companies that will be eligible as legal entities. This is usually done so that the property (for example, the Sarajevo Resort Osenik), is a company "an apartment complex", that is offered to guests for rental. They hire Bosnian construction companies to build, domestic workers are paid for work.



**Fig. 4.** Sarajevo Resort Osenik  
Source: sputniknews.com

A large number of tourists are organized during the month of Ramadan. Some tourists stay the whole as the catering sector has adapted to the dominant role of Arab tourists (serving no alcoholic drinks, offering halal meat products, etc.). Also, a large number of religious buildings (mosques) allow for undisturbed religious



ceremonies/rituals. The largest number of Arab tourists visit Ilidza Municipality (over two thirds), where a large number of hotel facilities have been built.

These are just some of the realized and planned projects for the construction of tourist and residential settlements and facilities in the Canton of Sarajevo and the surrounding areas where the dominant role plays capital investments from the Arab countries: Poljine Hills, City Garden, Sarajevo City Center, Sarajevo Tower, Ilidža Towers, Aljazeera Residential, Duranovići Residential, Sarajevo Ways Riverside Residencies, Buroj Ozone City, Green Residence, Green Valley, Golden Hills, Dobrinja Exclusive, Salam City, Coastal Forest, Sarajevo Sun, Sarajevo Resort Osenik, Ilidža Pearl Resort, Country Side Resort, Saray Resort, Dema Resort, Orchid Resort, Malak Resort, Jasmin Resort, Vlakovo Resort, Smrekovica Resort etc.

## **CONCLUSION**

With the rise of Sarajevo as a tourist destination of global importance, there are significant changes in the structure of tourists visiting the destination. Previously, among foreign tourists dominated the visitors from neighboring countries, however, in recent years, tourists from other continents have become increasingly important. In the last five years there has been a particular expansion of the number of tourists from Arab states, which primarily refers to those from the so-called Gulf countries. Through the analysis of available data, this paper presents a number of outstanding conclusions. Firstly, it is evident that Sarajevo is a particularly popular destination among UAE tourists, who are ahead of the number of visitors from Asia. Previously there has been a significant number of Kuwait tourists, and in recent years, there has been a sharp increase in visitors from the Saudi Arabia, Oman and some other Gulf countries. Secondly, the Arab tourists contribute to the tourism business of Sarajevo Canton even more if the number of overnight stays is taken into account, which is above average compared to tourists from all other world regions. The third feature of this group of tourists is that they visit the destination throughout the year, but that the highest numbers are still evident during the summer season. The main motives of visits to Sarajevo by Arab tourists are a unique blend of cultural and natural heritage in this area, more affordable prices compared to other parts of Europe, as well as greater opportunities for practicing religious regulations. Based on the above, it is easy to make a general conclusion that the Arab market has become an important segment of tourism development in Bosnia and Herzegovina, especially Sarajevo, provided that there are numerous challenges for the continuation of positive trends that have been initiated.

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