

Tourism



USAID CCA Annual Consumer Opinion Survey

June 2006

RESEARCH METHODOLOGY

- ❑ **Survey method:** Face-to-face or personal interviews
- ❑ **Household selection:** Random route technique
- ❑ **Respondent selection:** Last birthday technique (the last person in the household who had a birthday) for those older than 15
- ❑ **Period of survey:** June 2006
- ❑ **Sample:** Random stratified where N (number) = 1521 respondents. The sample is representative on the national level, on the entity level and for the three ethnic majority areas of citizens older than 15
- ❑ **Note:** As the number of respondents in the Brčko District is relatively small, the data collected from these respondents are not considered separately as are the data collected from the respondents in the FB&H and RS.



DEMOGRAPHIC CHARACTERISTICS OF THE SAMPLE

		N	%
ENTITY	FB&H	886	58,3
	RS	603	39,6
	Distrikt Brcko	32	2,1
	<i>Total</i>	<i>1521</i>	<i>100</i>
SEX	Male	745	49
	Female	776	51
	<i>Total</i>	<i>1521</i>	<i>100</i>
SETTLEMENT TYPE	Urban	652	42,9
	Rural	869	57,1
	<i>Total</i>	<i>1521</i>	<i>100</i>
AGE	15-24	242	15,9
	25-34	299	19,6
	35-44	250	16,4
	45-54	266	17,5
	55-64	182	12,0
	65+	283	18,6
	<i>Total</i>	<i>1521</i>	<i>100</i>

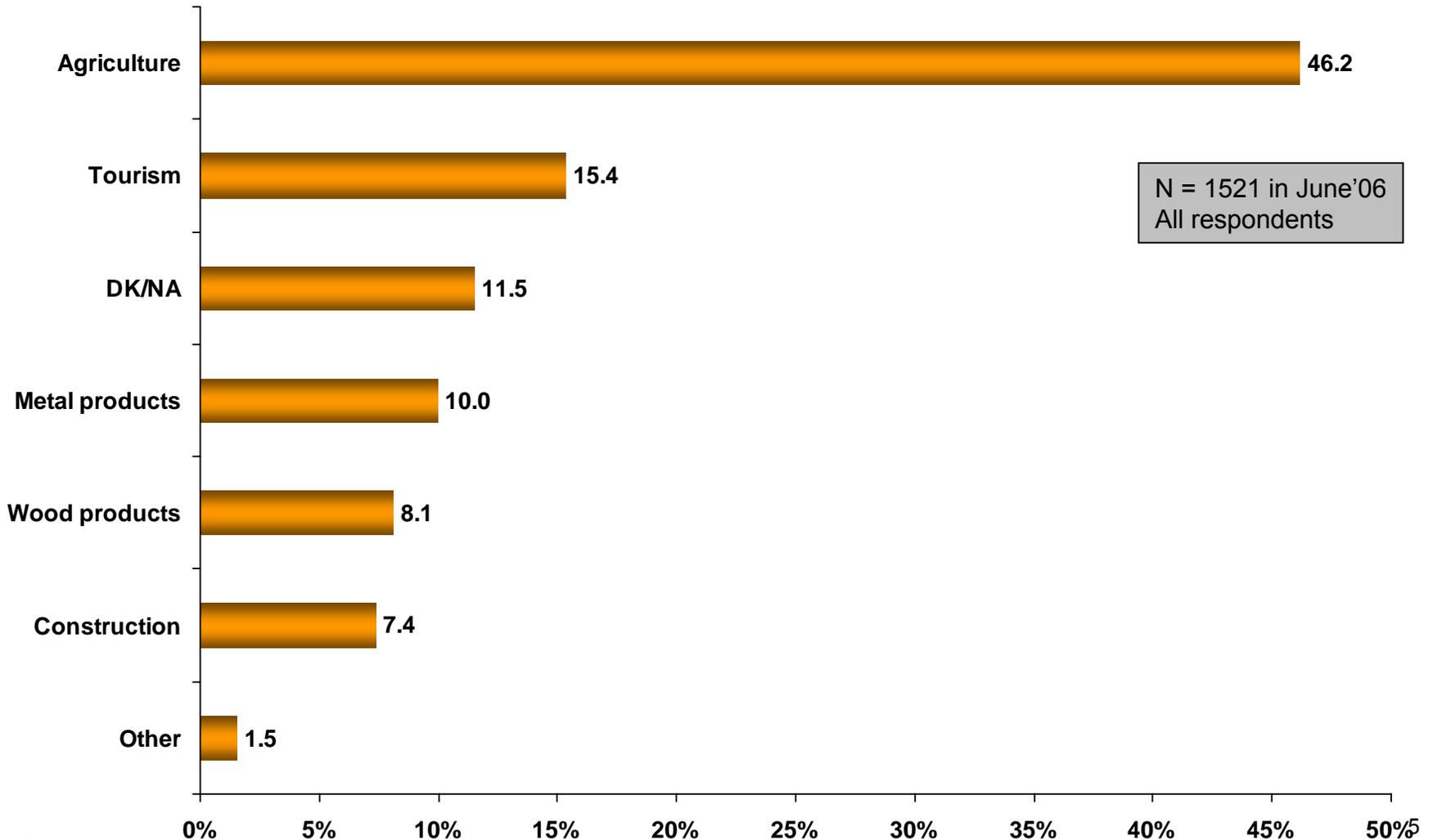
EDUCATION	No formal education	172	11,5
	Primary school	352	23,4
	Highschool	782	52,0
	Two years of University	115	7,7
	University	66	4,4
	Post graduate/PhD	16	1,1
	DK/NA	17	1,1
<i>Total</i>	<i>1521</i>	<i>100</i>	
AREA	Bosniak majority area	690	45,4
	Croat majority area	196	12,9
	Serb majority area	603	39,6
	Distrikt Brcko	32	2,1
	<i>Total</i>	<i>1521</i>	<i>100</i>



MAIN FINDINGS



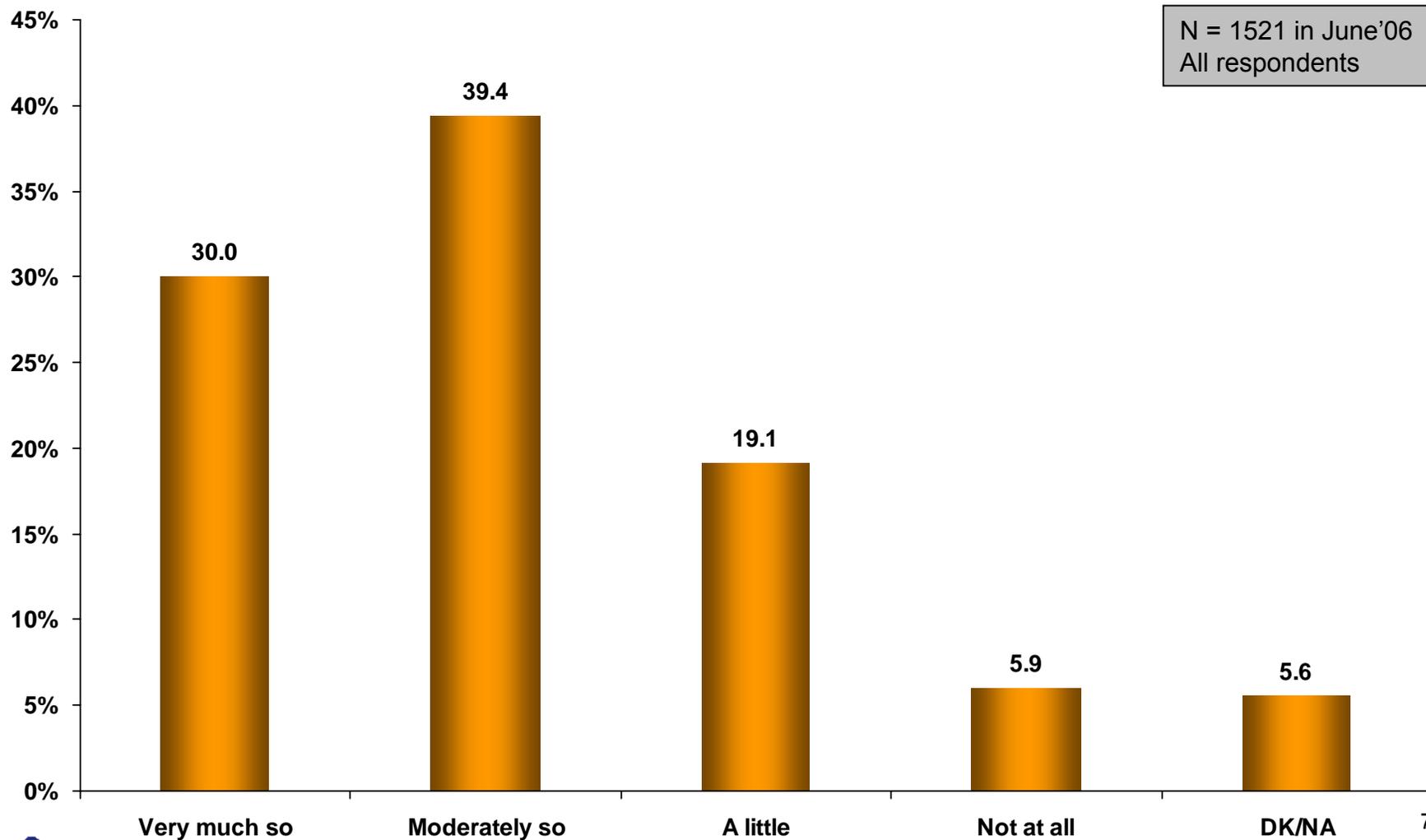
WHICH OF THE FOLLOWING INDUSTRIES DO YOU THINK HAS THE GREATEST POTENTIAL FOR DEVELOPMENT IN B&H OVER THE NEXT 10 TO 20 YEARS?



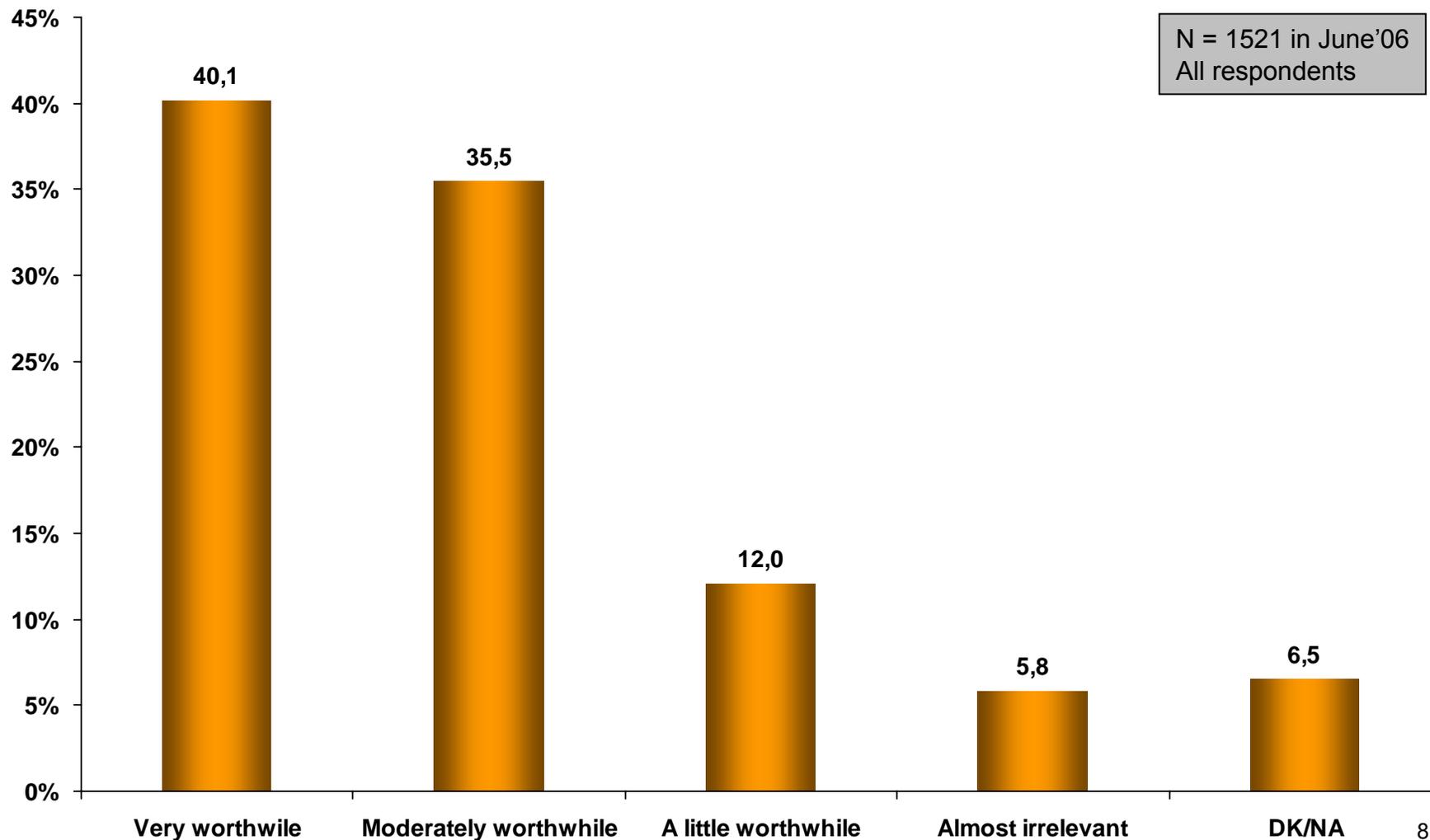
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- Almost 50% of respondents think of B&H primarily as an agrarian economy, while the second greatest percentage (15%) consider tourism as the sector with the greatest potential
 - A significantly larger percentage of rural respondents (50%) consider agriculture to have the greatest potential, while urban respondents rate agriculture at 40%



DO YOU CONSIDER B&H TO BE A TOURIST DESTINATION?



IN YOUR OPINION, HOW WORTHWHILE IS IT TO INVEST IN TOURISM TO IMPROVE THE B&H ECONOMY AND CREATE JOBS?



□ Of total respondents:

- 70% believe that B&H is a tourist destination (30% very much so and 40% moderately so)
- 76% agree that it would be worthwhile to invest in tourism to improve the B&H economy and create jobs (40% think it very worthwhile and 36% moderately worthwhile)



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- A significantly larger percentage of those in the Federation (21%) than those in the RS (7%) consider tourism as the sector with the greatest potential for development
 - Almost 50% of respondents in the Federation consider investment in tourism to be very worthwhile in contrast to 28% of those in the RS

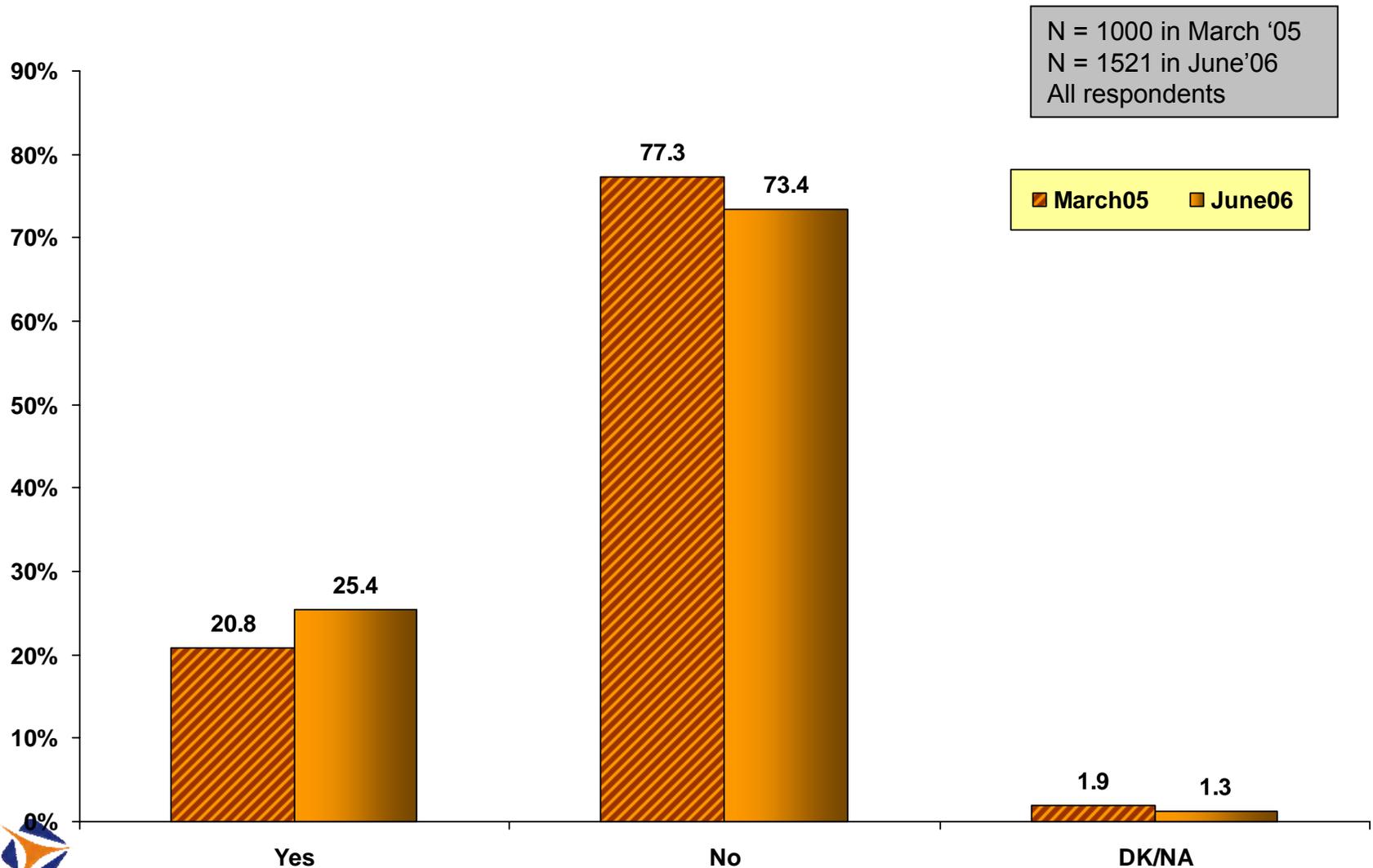


TRAVEL WITHIN B&H



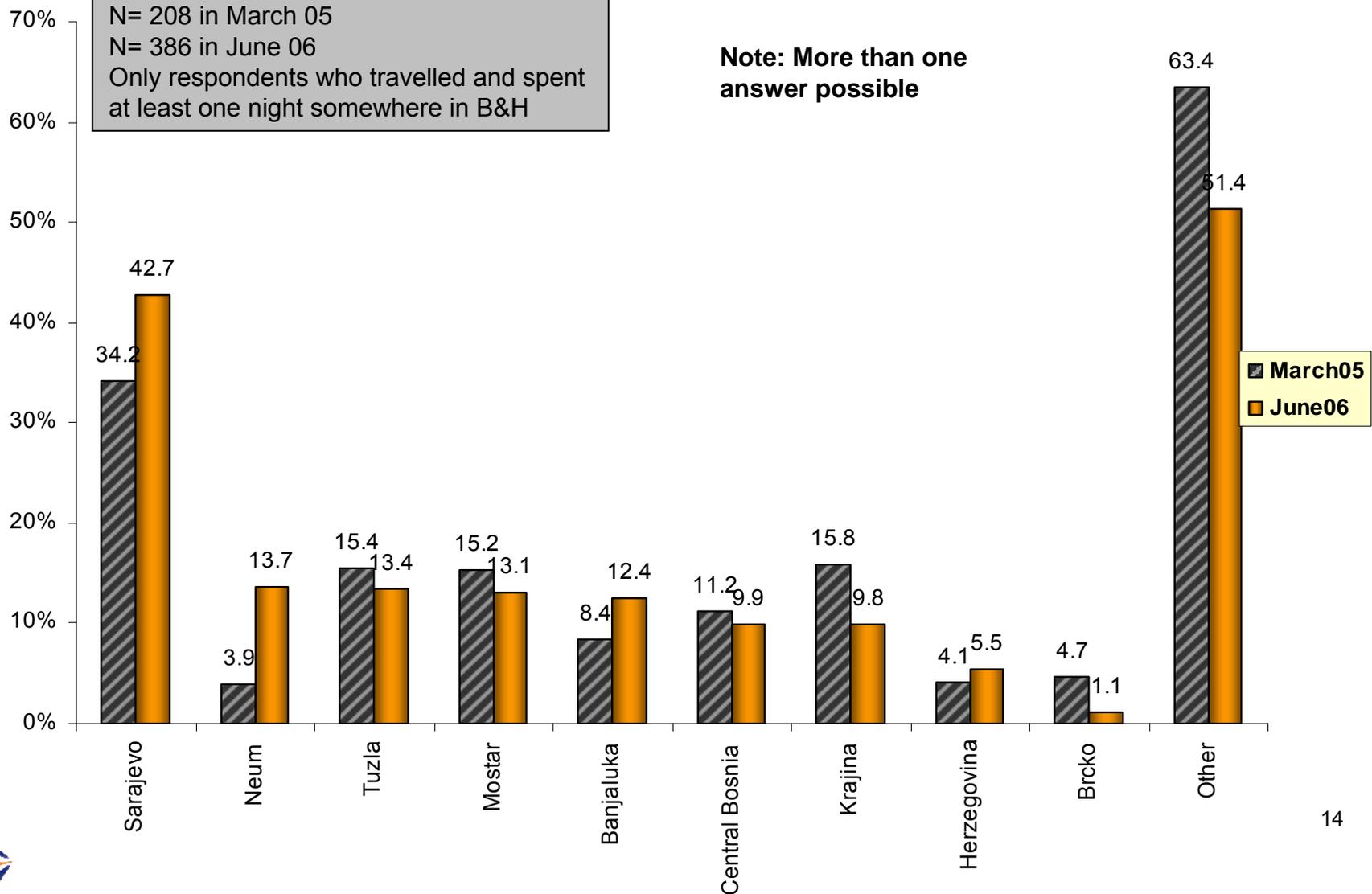
IN THE PAST YEAR, HAVE YOU OR ANY MEMBER OF YOUR FAMILY TRAVELED SOMEWHERE WITHIN B&H AND SPENT AT LEAST ONE NIGHT THERE?

Comparison between March 05 and June 06



WHERE DID YOU TRAVEL IN B&H IN THE LAST YEAR AND SPEND AT LEAST ONE NIGHT ?

Comparison between March 05 between June 06

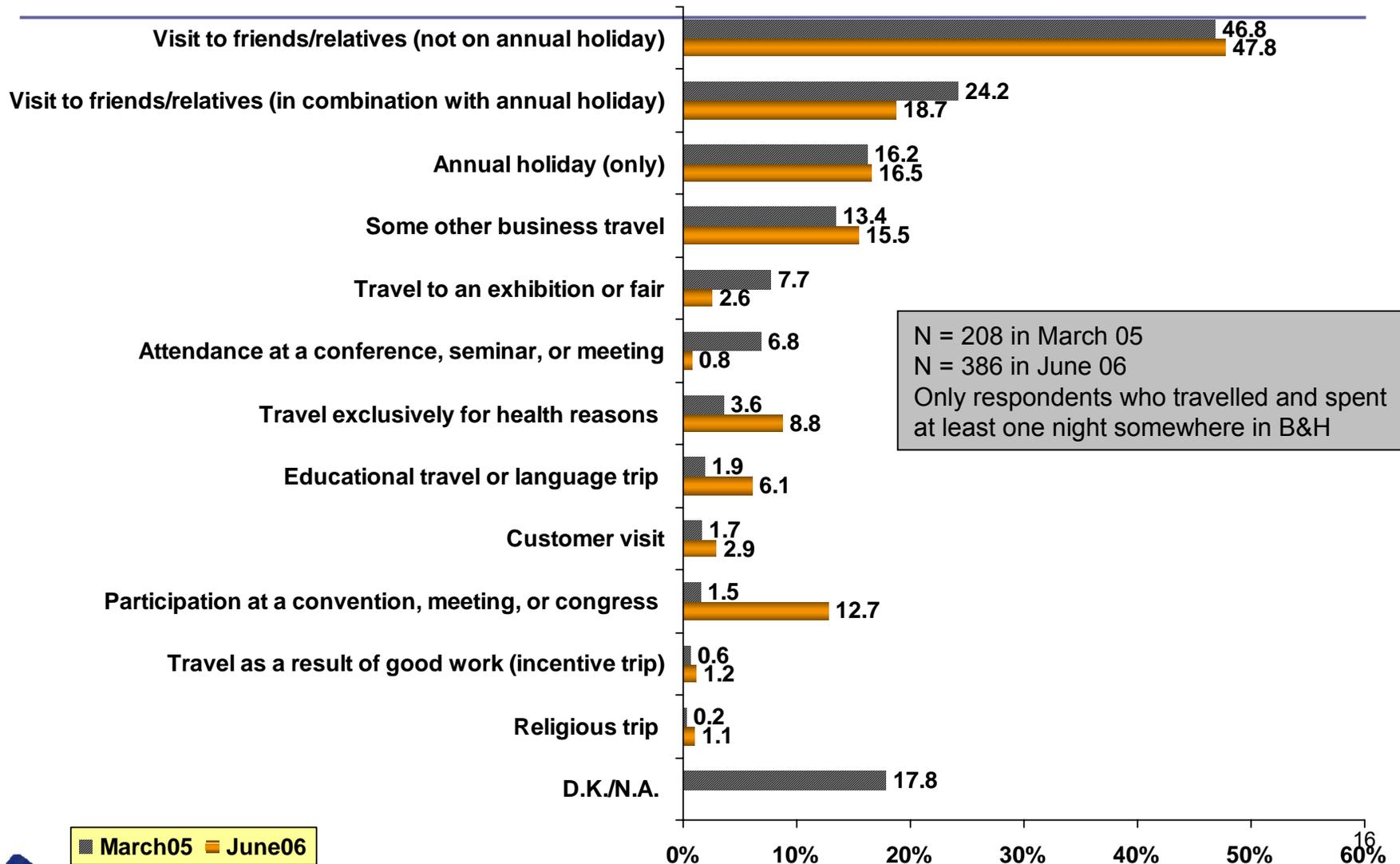


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- Travel within B&H increased significantly from 2004 to 2005; 21% of respondents reported domestic travel in the 2005 survey and 25% in the 2006 survey
 - The Sarajevo area remained the top travel destination in B&H, hosting 43% of all domestic travel. Neum (14%), Mostar (13%), and Tuzla (9%) are also notable destinations
 - Travel to the Sarajevo area increased from 34% of travels in the 2005 survey to 43% of travels in the 2006 survey; travel to Neum increased from 4% to 14% of all travels



REGARDING YOUR MAIN TRAVEL(S), WHAT TYPE OF TRAVEL WAS IT?

Comparison between March 05 and June 06

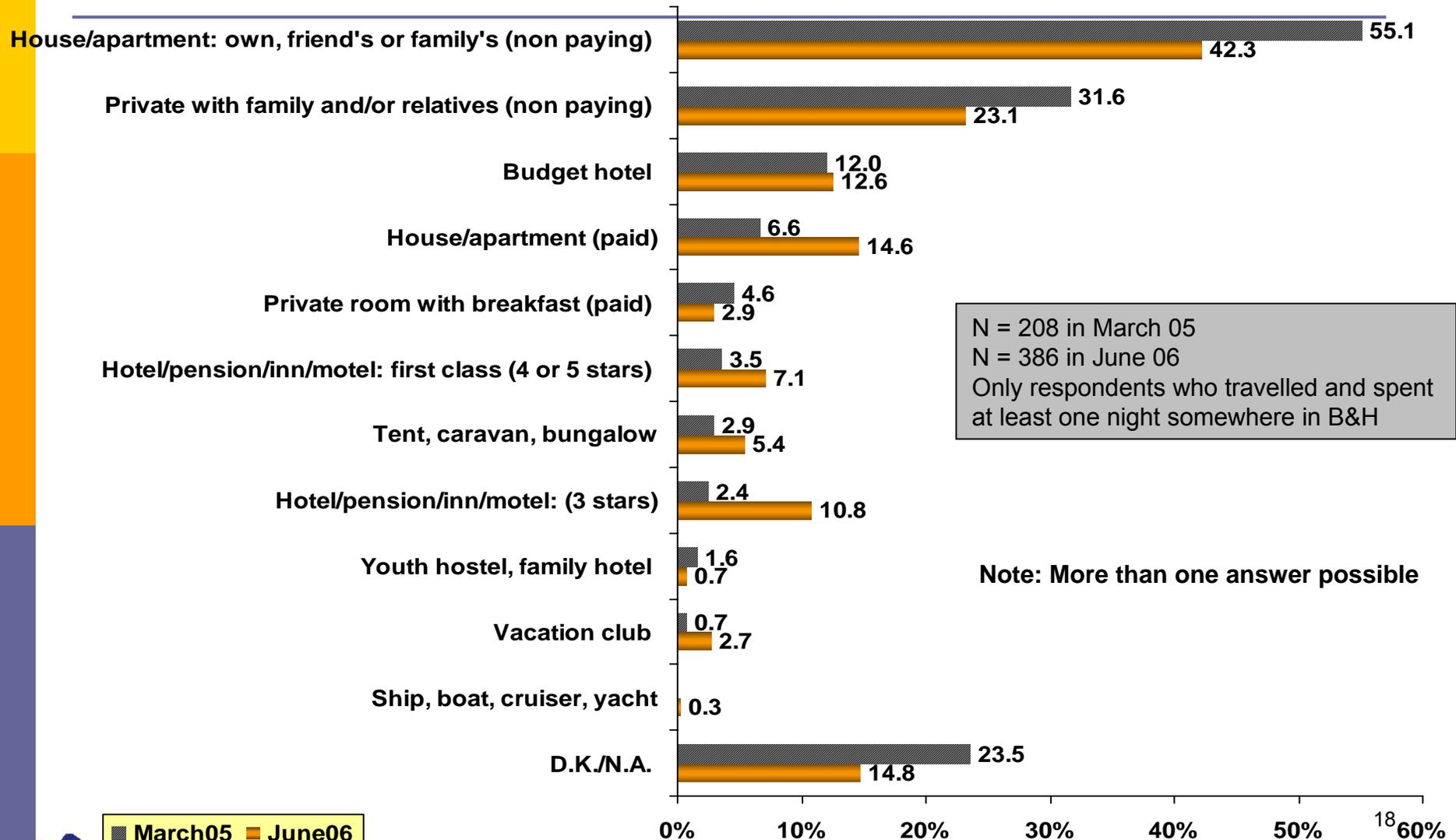


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- As seen in the 2005 survey, a large majority (67%) of domestic travels involve visits to friends or relatives either apart from annual holidays (48%) or in conjunction with annual holidays (19%)
 - Travels to participate in a convention, meeting, or congress showed the greatest increase from the 2005 survey – from 2% to 13%



WHAT TYPE OF ACCOMMODATION DID YOU USE?

Comparison between March 05 and June 06

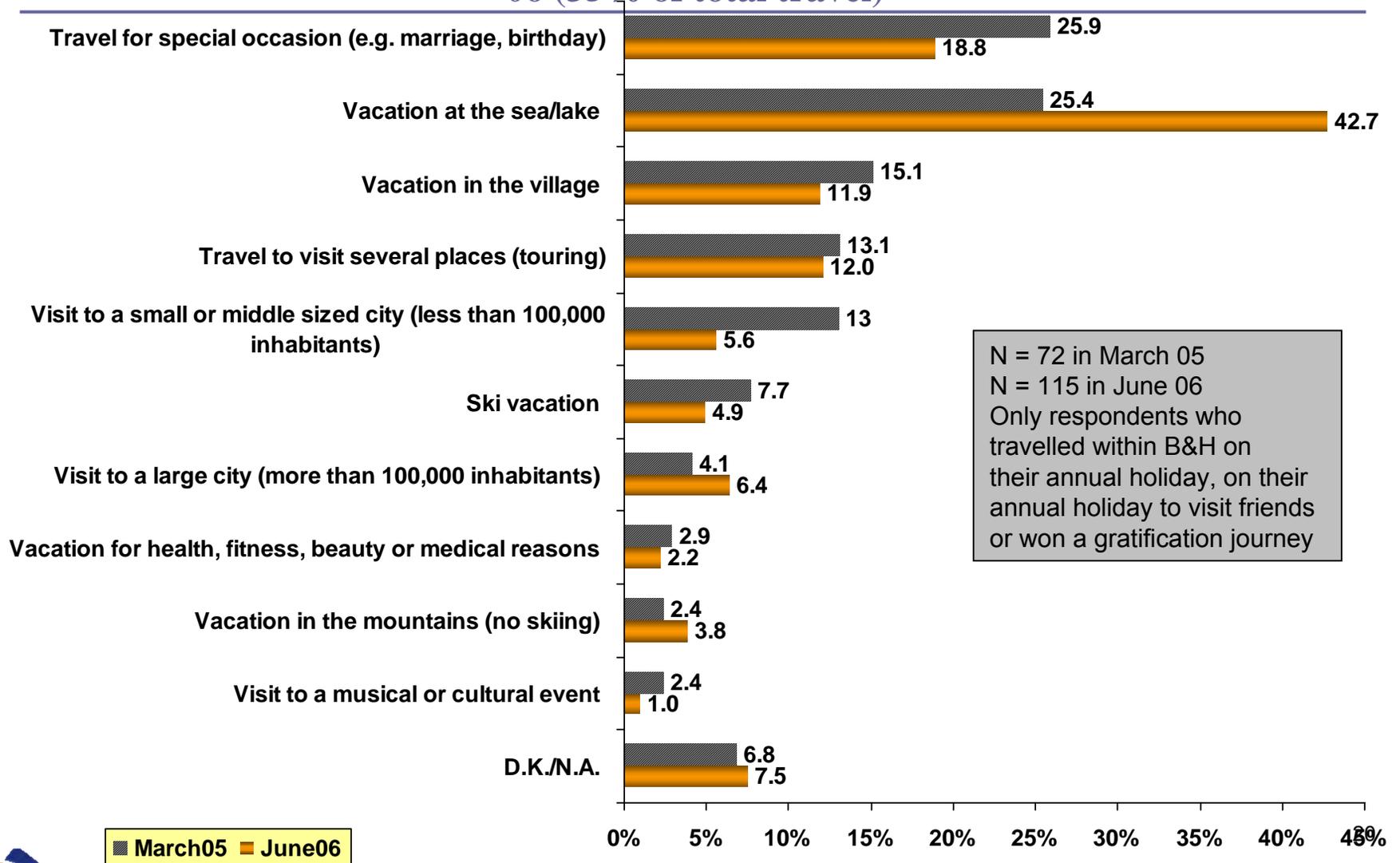


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- In the 2006 survey, a greater percentage of domestic travels involved the use of paid accommodations. The use of unpaid accommodations decreased by 24 points and the use of paid accommodations grew by 17 points
 - An overwhelming 65% of domestic travels still involve unpaid accommodations although this is down significantly from the 87% of travels reported in the previous survey



WHICH OF THE FOLLOWING CATEGORIES BEST DESCRIBES YOUR MAIN JOURNEY(S)?

Comparison between holiday travel in March 05 (30% of total travel) and June 06 (35% of total travel)

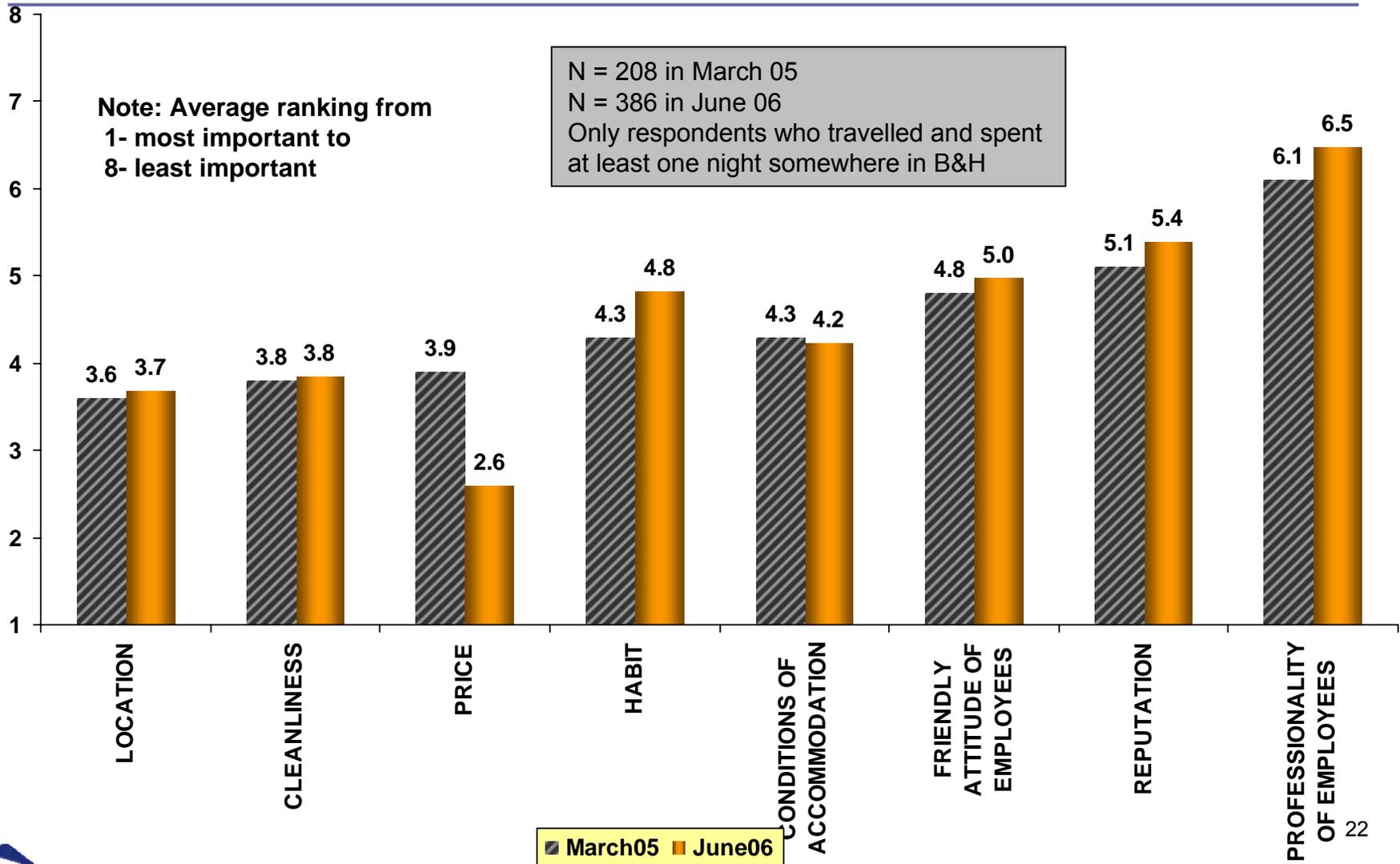


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- Vacations at the sea or lake increased markedly in the 2006 survey from 26% to 43% of holiday travels
 - This corresponds with the increase in travels to Neum from 4% of all reported travels in the 2005 survey to 14% in the 2006 survey



WHAT MOST INFLUENCED THE SELECTION OF YOUR ACCOMMODATION?

Comparison between March 05 and June 06

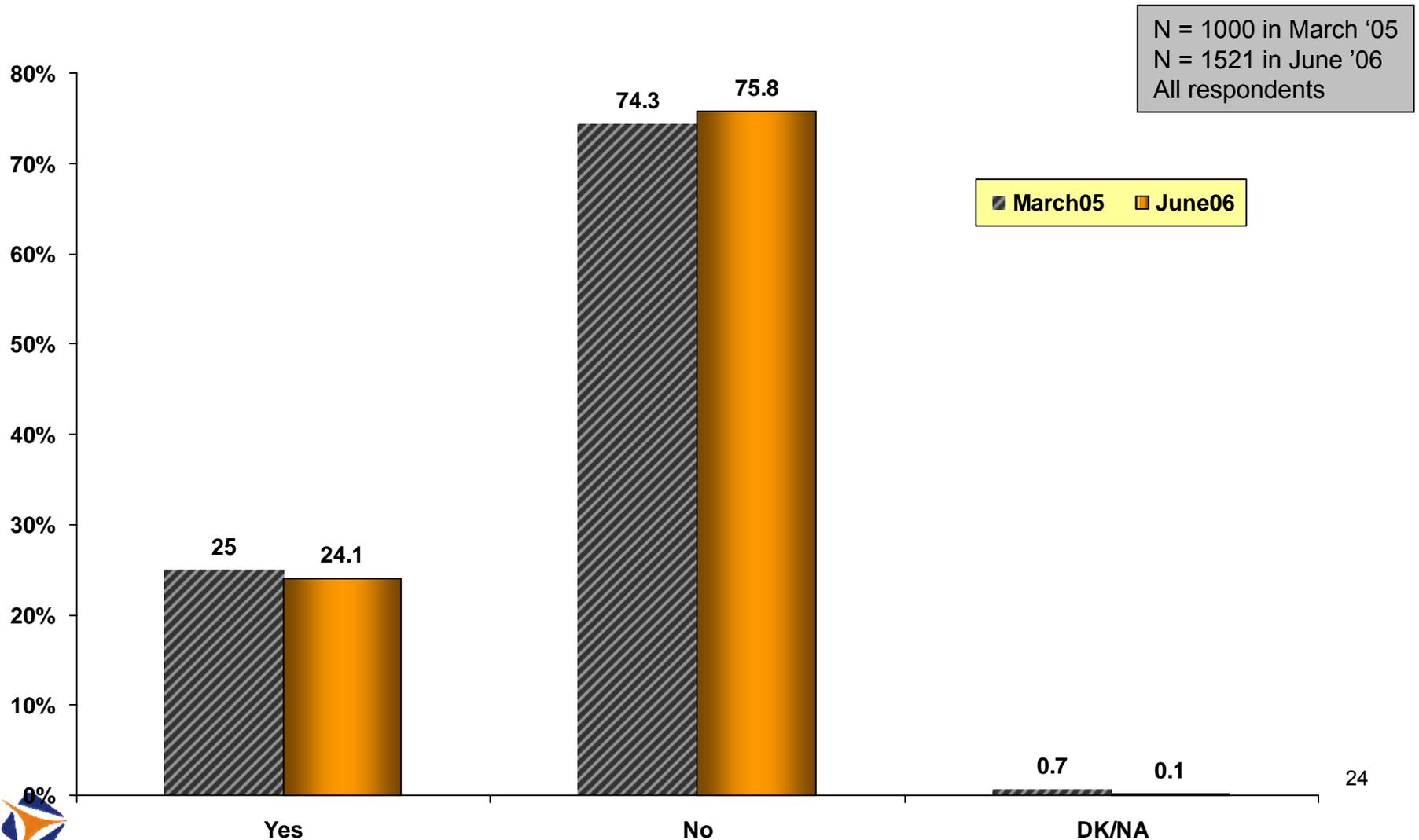


TRAVEL OUTSIDE B&H



DURING 2004 AND 2005, DID YOU OR ANY MEMBER OF YOUR FAMILY TRAVEL TO ANOTHER COUNTRY FOR WORK, PLEASURE OR OTHER REASON AND SPEND AT LEAST ONE NIGHT THERE?

Comparison between March 05 and June 06



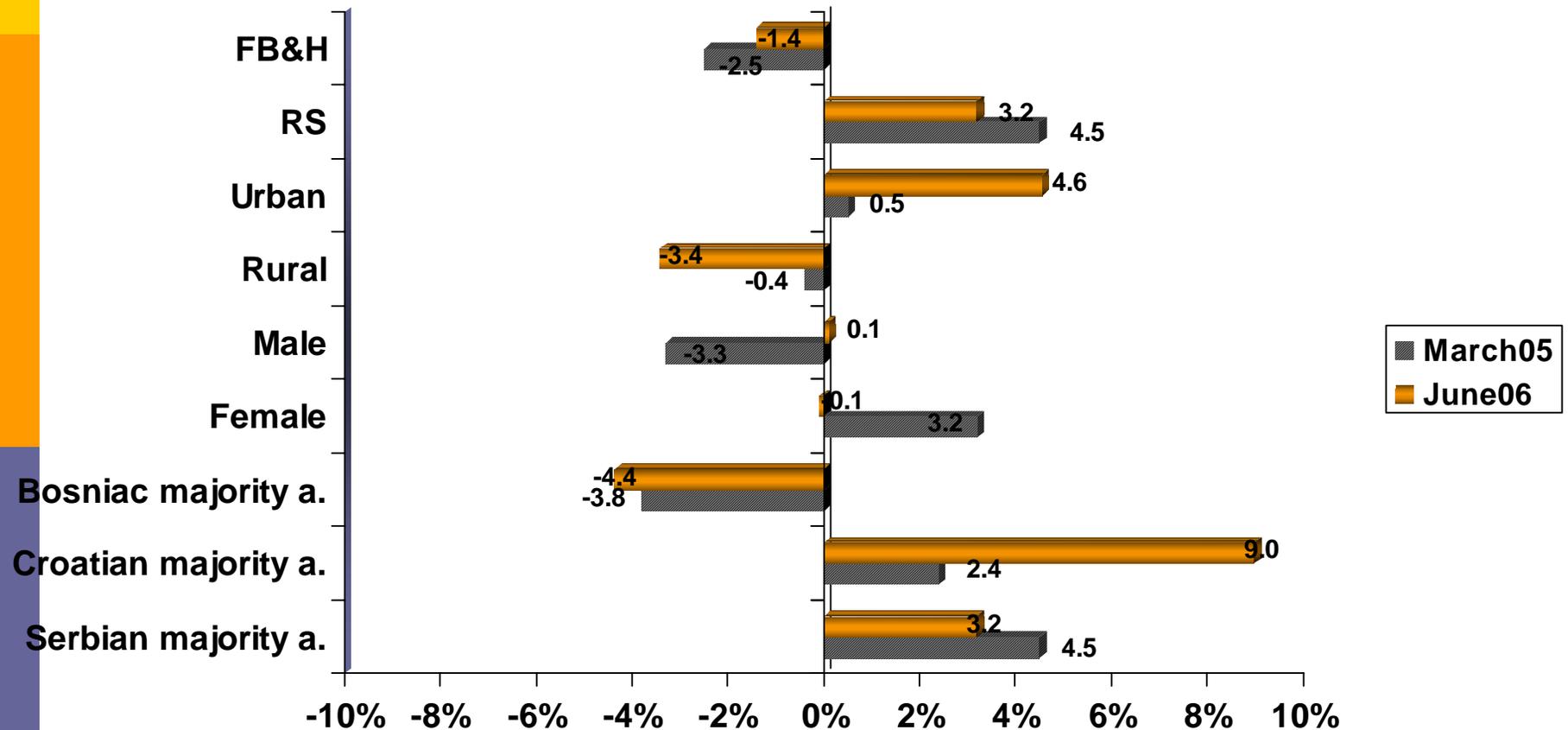
DEMOGRAPHIC PROFILE OF RESPONDENTS WHO TRAVELED IN 2004 AND 2005 SOMEWHERE OUTSIDE B&H AND SPENT AT LEAST ONE NIGHT OVERNIGHT

Comparison between 25% in March 05 and 24% in June 06

negative deviation

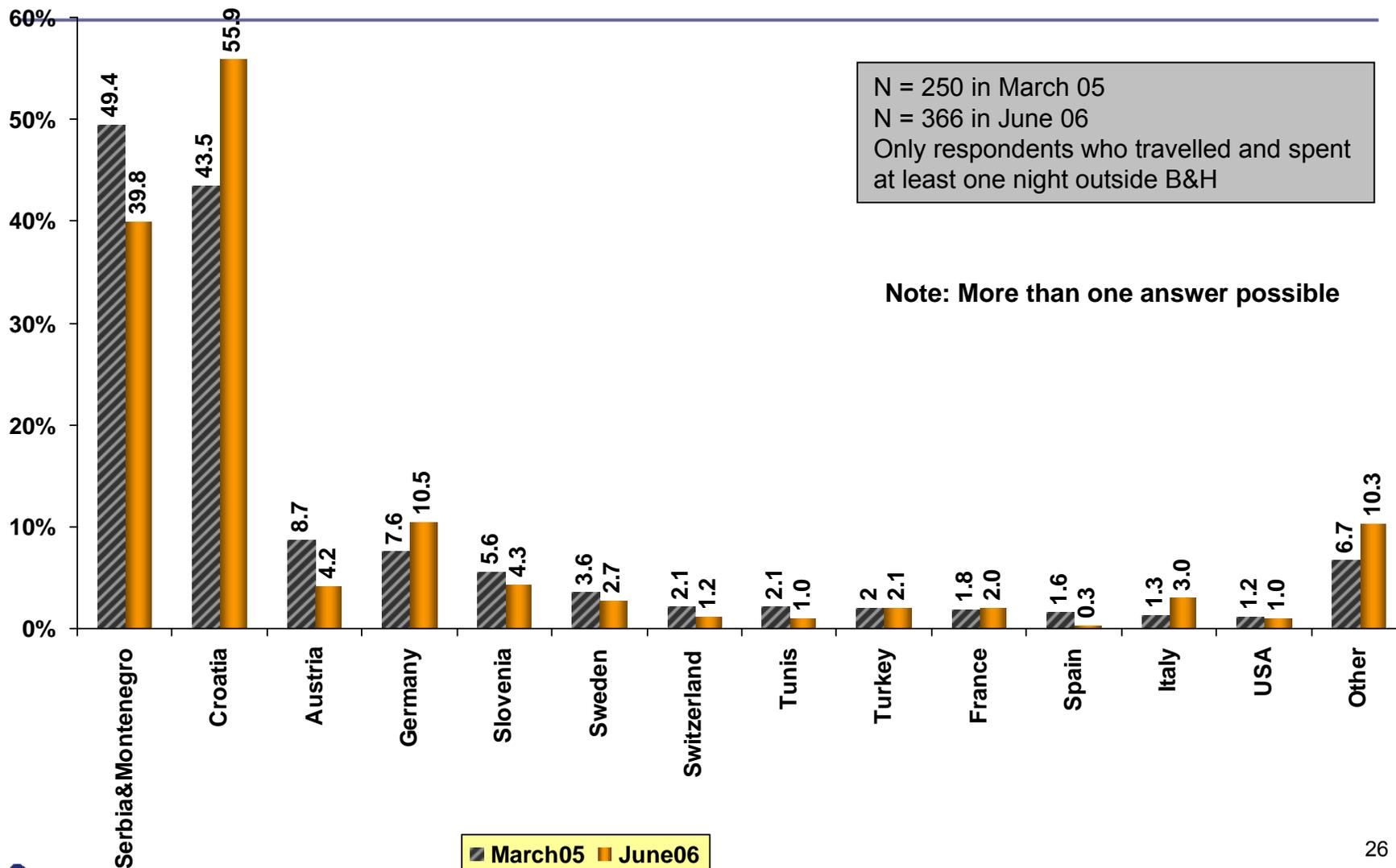
average

positive deviation



WHERE DID YOU TRAVEL OUTSIDE B&H IN THE YEAR 2004 AND SPEND AT LEAST ONE NIGHT?

Comparison between March 05 and June 06



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- Results show that approximately the same percentage of respondents (one quarter) travelled outside B&H as did inside B&H, and that the percentage of travel outside B&H was fairly consistent from the 2005 to the 2006 survey
 - As seen in the previous survey, the largest percentage of trips involved travel to countries in the region, principally Croatia (56%) and Serbia & Montenegro (40%). Less than 10% of trips involved travel to other countries

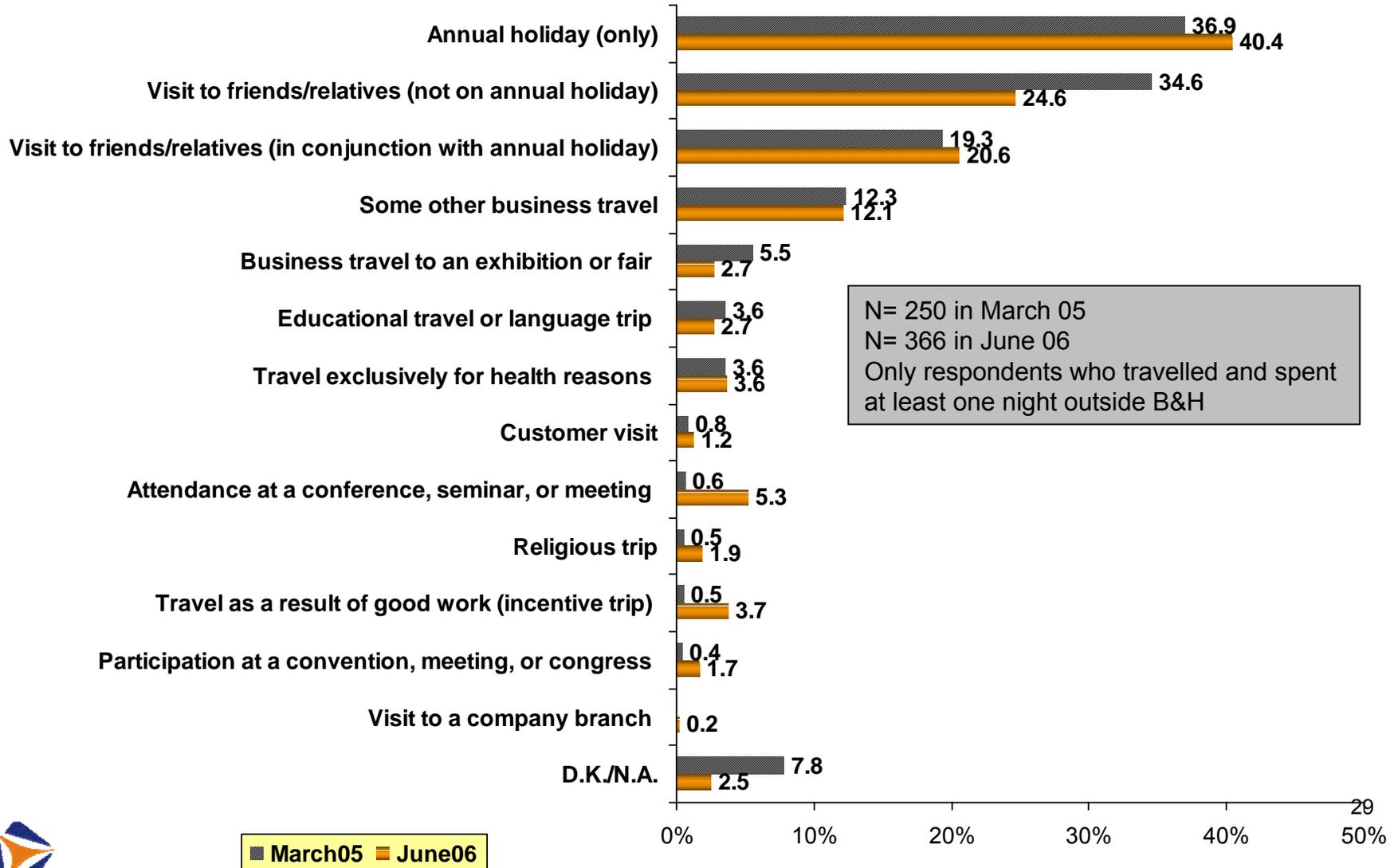


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- Survey results show a significant increase in travel to Croatia (from 41% to 51% of travels) and a decrease (from 44% to 36%) in travel to Serbia and Montenegro



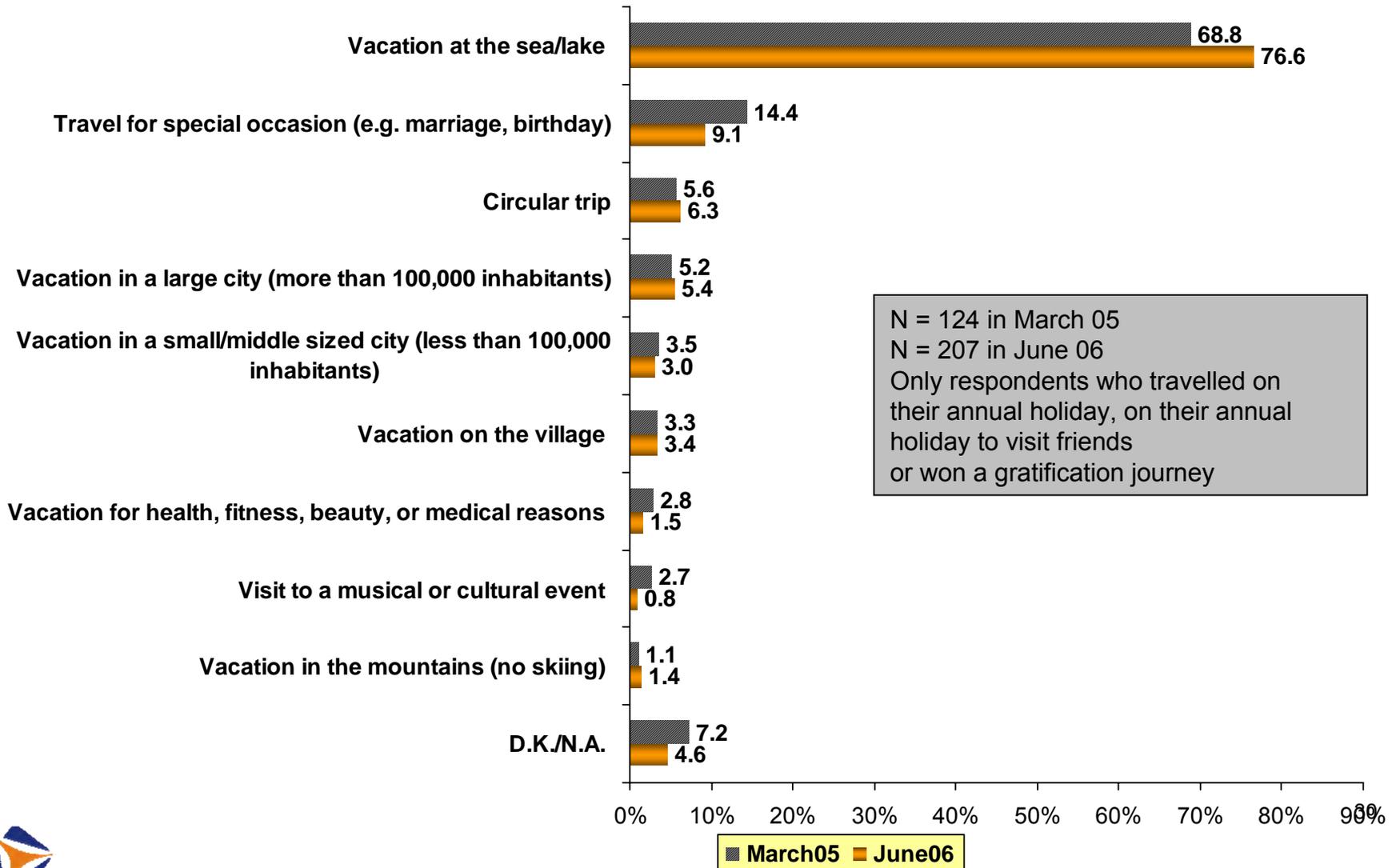
REGARDING YOUR MAIN TRAVELS(S) OUTSIDE OF B&H, WHAT TYPE OF TRAVEL WAS IT?

Comparison between March 05 and June 06



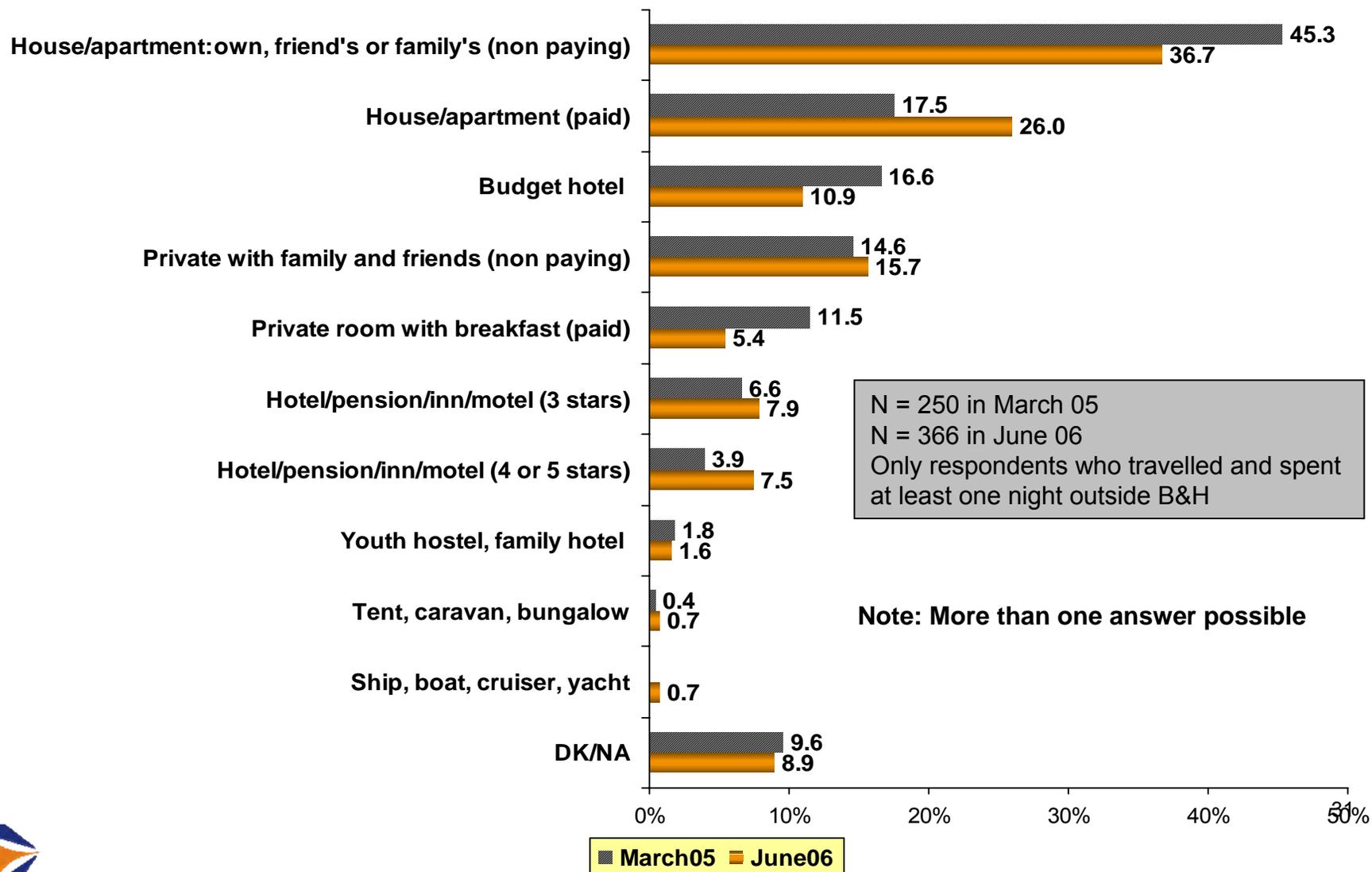
WHICH OF THE FOLLOWING CATEGORIES BEST DESCRIBES YOUR MAIN JOURNEY(S) OUTSIDE B&H?

Comparison between March 05 and June 06



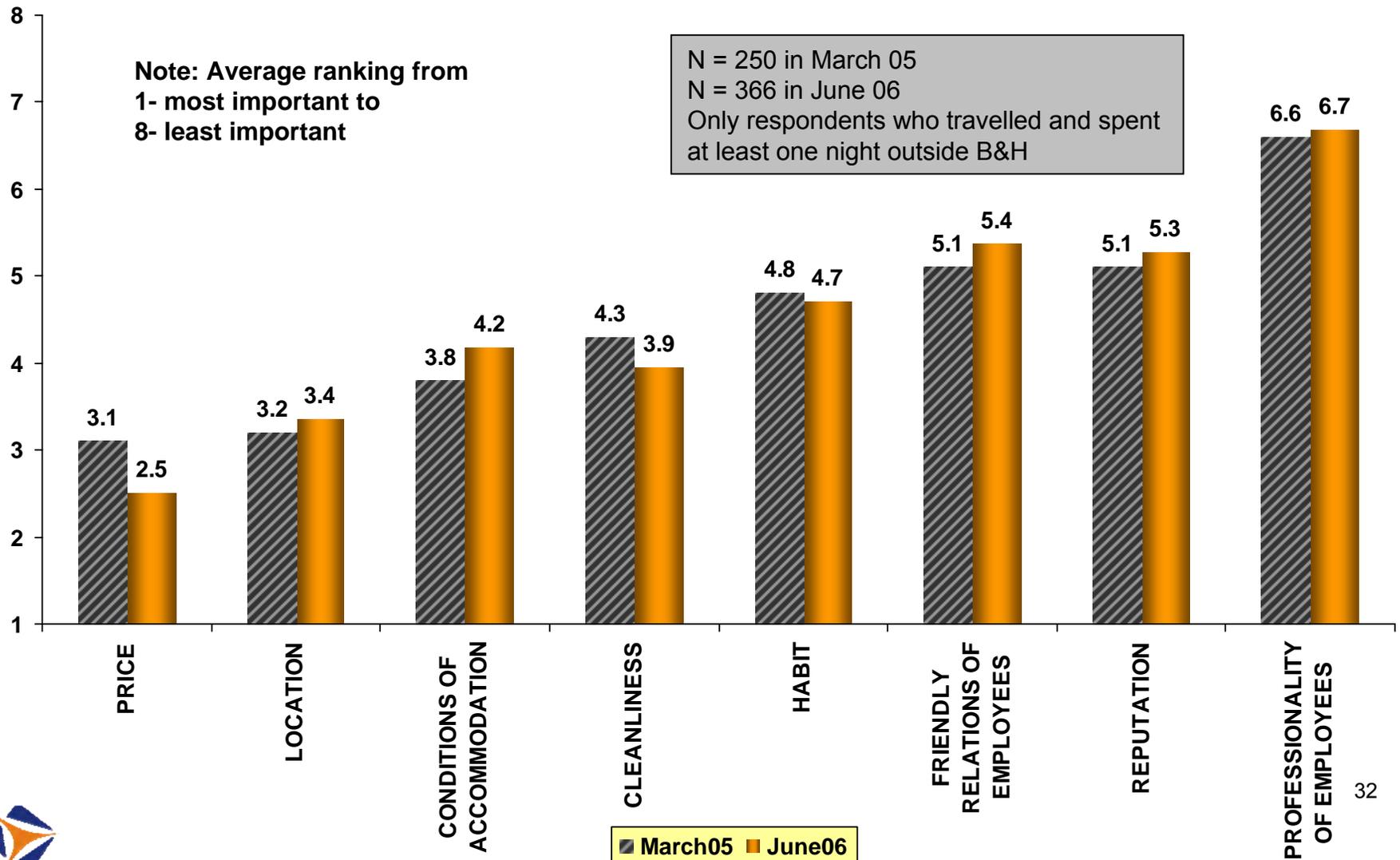
WHAT TYPE OF ACCOMMODATION DID YOU USE ON YOUR JOURNEY/JOURNEYS OUTSIDE B&H?

Comparison between March 05 and June 06



WHAT MOST INFLUENCED THE SELECTION OF YOUR ACCOMMODATION?

Comparison between March 05 and June 06



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- As seen in the 2005 survey, the major categories of travel outside the country are travel on annual holiday (40%) and visits to friends and relatives while on annual holiday (25%)
 - Of travels outside the country on holiday (57% of travels outside of B&H), a vast majority of those trips (75%) were trips to the lake or seaside
 - In last year's survey, 60% of travels outside B&H involved non paid accommodations; in this year's survey that number was 53%



Conclusions

- The travel and tourism industry in B&H is not only popular, but growing:
 - The industry enjoys strong domestic support, and is viewed (after agriculture) as the second most important industry for the country's economic growth



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- Changes in the percentage of domestic trips involving paid vs. non paid accommodations indicate growth in the domestic travel industry from 2004 to 2005:
 - Travels involving the use of paid accommodations grew by 17 points
 - Travels involving unpaid accommodations are down from 87% to 65%

 - Holiday travel to the sea or lake increased substantially from 26% to 43% of holiday travels; journeys to Neum grew from 4% to 14% of all reported travels

