

Regional aspect of tourism development in Bosnia and Herzegovina

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ABSTRACT: Bosnia and Herzegovina is rich in natural and anthropogenic tourist potentials that are the basis for the development of more specific forms of tourism of both local and regional, and national and international importance. The development of tourism in it massively started to develop from the seventies. In this paper we are going to show significant determinants and indicators of this development to the present day, through the presentation and definition of tourist and geographical position, tourist traffic, accommodation facilities and specific forms of tourism that can be developed in Bosnia and Herzegovina.

KEYWORDS: tourist-geographical position, accommodation facilities, natural resources, tourist arrivals, transport network.

1 INTRODUCTION

The increasing importance of tourism as a distinct socio-economic unit, as an economic multiplier in Bosnia and Herzegovina, then the impact of tourism on the transformation of region call for its scientific analysis including the geographic point of view. Precisely because tourism often has very noticeable effect on region, it should be a subject of specific geographic studies.

The tourism sector in Bosnia and Herzegovina records a positive trend for all the main indicators of growth in the last ten years, but there is still considerable room for further use of its undeniable potential. With its natural resources and the potential for outdoor tourism, rich heritage and history, favourable geographic position, internationally renowned events, excellent gastronomic offer at affordable prices and the status of still unknown tourist destination for major market, Bosnia and Herzegovina has all the predetermination of highly successful tourism sector.

According to the World Tourism Organization, Bosnia and Herzegovina is defined as one of three tourist destinations in the world with the overall growth potential of the tourism market of 10.5% (for the period up to 2020). However, this high growth rate also reflects an extremely low base value of the sector: currently, the tourism sector in Bosnia and Herzegovina represents only 0.2% of European tourism. Among others, potential areas for development of tourism sector in Bosnia and Herzegovina are cultural and historical tourism, urban (city break), rural tourism, outdoor tourism, winter sports and mountain tourism, as well as spa and wellness (health) tourism and business / conference tourism.

Most important studies on the research of the economic impacts of the tourist arrivals are in catering sector (Blake & Sinclair, 2003; Hjalager, 2007; Hope, 1980; Milne, 1990; Sinclair, 1998), transport and activities of travel agencies (DeLorme, Gray & Ferguson, 1999; Osti, Turner, & King, 2009; Pearce & Schott, 2005).

2 TOURIST-GEOGRAPHICAL POSITION OF BOSNIA AND HERZEGOVINA

“Tourist-geographical position is one of the spatial elements essential for the tourist movements and it is very important for tourism development of an area, place or motive. It represents the spatial relation of the observed region, area, or motive

to the immediate and distant geographic areas, to the directions of tourist movements and to parent tourist areas“ (Stanković, 2000).

“Tourist-geographical position can be defined as the position which shows relationships of individual attractions and places to the routes of tourist movements“ (Ćomic Đ., Jović G.S., Popović I.B., 2008) .“Tourist-geographical position expresses the relationship of individual motives and places to the routes of tourist movements“ (Jovičić, 1986).

First of all, we will show European tourist routes and where Bosnia and Herzegovina belongs, namely:

- 1) western tourist route, whose ultimate destination is the Iberian Peninsula and the Maghreb countries,
- 2) central tourist route, which leads over or past the Alps to the Apennine Peninsula and surrounding islands, but also to Tunisia and
- 3) eastern tourist route, whose ultimate destination is the Balkans region and the Middle East (Jovičić, 1986).

The territory of Bosnia and Herzegovina is located on the eastern tourist corridor, namely the direction of tourist movements from parents areas of Europe to the Eastern Mediterranean, which indicates that it has a continental tourist-geographical position. Since the eastern tourist route, as opposed to western and central, has intercontinental importance, ie. it links Europe and southwest Asia, it may be considered that Bosnia and Herzegovina has intercontinental tourist-geographical position according to the magnitude of its impact.

In addition to this transit function, Bosnia and Herzegovina has a contact function of its geographical position which is reflected, among other things, in the fact that it borders with three countries: Serbia to the east, Montenegro to the south and Croatia to the north and the west. Having good neighborly relations also has a positive impact on foreign tourist movement, mostly excursion and transit movement. In the Gulf of Neum-Klek, it exits to the Adriatic Sea with the coast 24.5 km long. Its central location, which it has in relation to the neighboring countries, increases its contact tourist zone. Since it is a mountainous, lowland and Mediterranean country as well as for its cultural and historical development, Bosnia and Herzegovina has diverse landscape motifs. We meet these complex tourist motives in various combinations of natural and anthropogenic elements.

The Bosnian regions were under the influence of Roman, Illyrian, Slavic, Ottoman, Austro-Hungarian culture. Moreover, in the First and Second World War, our country was the scene of many great battles of national liberation struggle: Kozara, Sutjeska, Neretva, Drvar, which entered the history and today there are the numerous monuments which are erected in these places in honor of fallen soldiers. Because of their importance, they were a great tourist attraction, and maybe their old glory will come back again soon. Besides, there are indispensable anthropogenic tourist motifs from the period of XIV Winter Olympic Games that took place in 1984, when the capital of Bosnia and Herzegovina was the center of the sports world and fans of the Olympics. Certainly, we should not leave out the period from 1992 to 1995 when the aggression against our country was committed. Numerous monuments were erected after that time to remind us of the suffering and war events which people of Bosnia and Herzegovina went through.

At the Bosnia and Herzegovina's side of the Balkan Peninsula at only 51.209 km², there are acquired a multitude of diverse and attractive natural and anthropogenic tourist motives, that are next to each other creating a mosaic. Functionality of tourist and geographical position through the contacts of Bosnia and Herzegovina is reflected in the fact that it has a small part of the area along the Adriatic coast. Thus, Bosnia and Herzegovina's coast as part of the Mediterranean is one of the world's tourist values (Jovičić, 1986).

Versatility of the tourist and geographical position of Bosnia and Herzegovina is reflected in the possibility for tourists to experience Pannonian plain, the Dinaric mountain range as well as areas the Mediterranean region that contain the various anthropogenic motives.

Transit characteristic of the tourist and geographical position of Bosnia and Herzegovina is particularly significant for the development of its tourism. Transit flows are north-south, namely, a straight line that connects two large and different spatial units, Posavina-Sava and the Adriatic. The tourist-geographical position of Bosnia and Herzegovina is its spatial relationship to the main tourist routes of Southeastern Europe. Otherwise, travel directions, as one of three basic spatial categories of tourism development, most completely express the spatial aspect of tourism trends as well as their meaning.

For a country to be as functional as possible, what is essential are form, direction and characteristics of the entire transport network which is in it and also passing through it, and which is usually related to the costs and profits. “Road transport is dominant in modern tourist trends and in almost all countries of the world, its share in international tourist movements is around 75%, the share of air transport is about 12.5%, the share of railway and ship transport is about 10.5% and about 2% are other means of transport“ (Blažević & Pepeonik, 2002).

This means that good road links with neighboring countries and the integration of Bosnia and Herzegovina in international road communication systems are a good prerequisite for strong economic relations and in particular for tourism development. For a tourist to opt for moving along a certain road, the following characteristics are very important: the quality and capacity of the road, the position of the road in relation to international and interregional routes. All these factors enable the extraction of the most important national and international tourist travel corridors and routes (Fig.1.).

European roads in Bosnia and Herzegovina in many sections do not support the traffic intensity and the desired speed. Among other things, the reasons for this are small radius bends, passing through settlements and inadequate maintenance. The main road network in the country is 3,778 km long. The network of regional roads is 4,842 kilometers long, and the network of local roads around 14,000 kilometers. The total length of roads in Bosnia and Herzegovina is about 22,630 km, of which 14,020 km are gravel roads. The length of European roads in our country is 995 km. Once the entire Corridor Vc is completed, it will be included in the transport network of South East Europe and will lead to Budapest via Osijek and Sarajevo to Ploče. The length of the road through Bosnia and Herzegovina will amount to 330 km. Corridor Vc will connect the following in the transport system: road E-73: Šamac - Doboj - Sarajevo - Mostar - Čapljina - Metkovići; the airports in Sarajevo and Mostar; Inland waterways and ports on the Sava, Bosnia and Neretva. It is in the interest of Bosnia and Herzegovina to urgently build the quality road connection on this corridor, and it would be necessary to upgrade and improve the existing railway lines between the major tourist destinations (Ministry of Communications and Transport of Bosnia and Herzegovina, <http://www.mkt.gov.ba/doc/default.aspx?id=1073&lang Tag=bs-BA>).

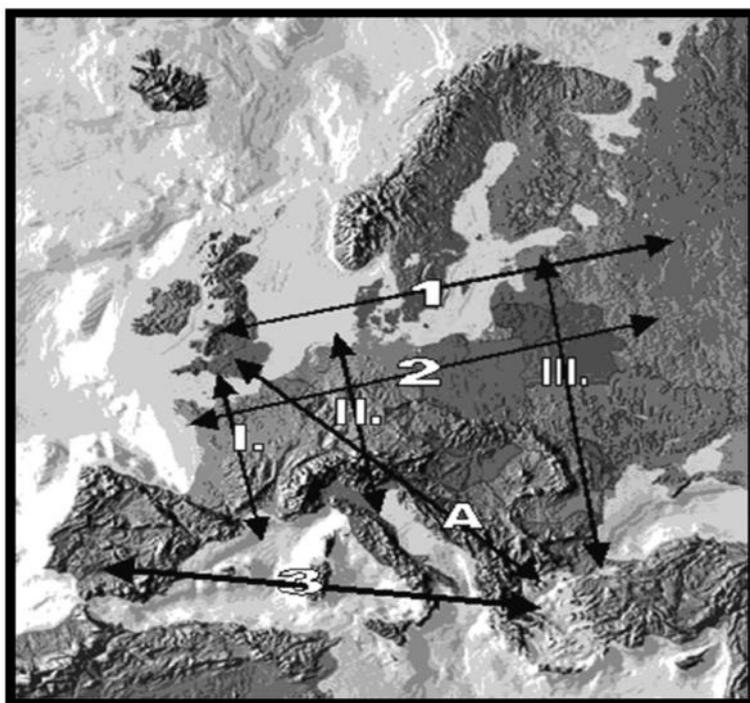


Fig. 1. Main European transport and tourism corridors

1. North direction, 2. Middle direction, 3. South direction, I. West direction, II. Middle direction, III. East direction, A. Northwest-southeast direction

(adapted from Blažević I., Pepeonik Z., 2002 by author)

By the realization of road projects, besides connecting to its neighborhood and the network of European corridors, Bosnia and Herzegovina would finally be integrated within itself. For a country like that with focus on tourism, good roads are also a precondition of economic development. Positive effects on the overall tourist movement in Bosnia and Herzegovina, which are expected after the construction of the motorway, will enable our country a significant involvement in the international division of labor, and it is expected that the implications of the general world development through tourist routes will set foot on the premises of our country, too. On the other hand, construction of the highway will also enable evaluation of so far insufficiently evaluated tourist destinations.

3 ACCOMMODATION FACILITIES AND TOURIST ARRIVALS

Accommodation and catering facilities are not visited by tourists due to their stay at the hotel, but because of motif values that are in the vicinity of these objects (attractive facilities are vital resources without which tourism development is impossible and that with their quality and volume of services, constructed image and the brand have a crucial influence on the results of the tourism economy). Accommodation capacities form the basis of tourism infrastructure and offer and are an essential prerequisite of accepting tourists. These objects, in addition to roads, represent another important precondition for the existence of receptive tourism.

Facilities for accommodation are catering facilities which predominantly provide accommodation as well as facilities of health care institutions where patients stay for medical rehabilitation using primarily natural factors. These are: hotels, motels, guesthouses, inns, spas and health resorts, mountain lodges and houses, youth and children's homes, and more. Number of rooms includes rooms that are available for renting with the situation at the end of the month, or with the situation on the last day of the month when the whole building was open. Property analysis showed that more than 75% of all accommodations in Bosnia and Herzegovina have been categorized as hotels and motels, although there is a considerable number of other facilities in the gray economy zone, which, in the case to be included in the analysis, would significantly increase the structure of available facilities. Almost 90% of all registered visits and 83% of all overnight stays was recorded in hotels and motels (Agency for Statistics of Bosnia and Herzegovina, http://www.bhas.ba/tematskibilteni/BHB_2014_001_01_bh.pdf).

Total number of registered beds according to the Agency for Statistics of Bosnia and Herzegovina is 26,133 and 86% of them were registered in hotels and motels. The remaining part was recorded in boarding houses, private rooms and other types of accommodation. Based on these data, the total number of overnight stays (domestic and foreign) results in an average annual occupancy of beds (all types of accommodation) for 2011 of 15.8%, which shows a large residual capacity.

Officially registered accommodation facilities in 2013 (mainly business-hotel and motels) in Bosnia and Herzegovina were 25,587 beds. Informal data, however, suggest that their number is around 44,000-50,000. More than 90% of the accommodation capacity is concentrated in a few areas: Neum (6000), Međugorje (officially registered 1200, a total of 15,000), Sarajevo Canton, including also the eastern part of the Republic of Srpska entity (10,800), and Banja Luka (1500). The two main spas, Reumal Fojnica and Vrućica Teslić altogether have 1,400 beds. This distribution of accommodation clearly reflects the current movement of tourists in the country. The rest of the country has a shortage of accommodation capacity and quality. This is particularly visible in the national parks / reserves, mountains and places nearby natural attractions (Foreign Trade Chamber of Bosnia and Herzegovina, <http://komorabih.ba/wp-content/uploads/2013/06/bhepa-izvozna-strategija-za-sektora-turizma.pdf>).

In the last twelve years, since official statistics are maintained, tourist developments in Bosnia and Herzegovina in 2013 proved to be the most successful tourist season with a record number of tourists and overnight stays.

Table 1. Tourist arrivals in Bosnia and Herzegovina, 2011-2013 in thousands

DOMESTIC TOURISTS	2011	2012	2013
Arrivals	294	309	316
Nights	668	714	714
Average stay (nights)	2.3	2.3	2.3
FOREIGN TOURISTS	2011	2012	2013
Arrivals	392	439	529
Nights	836	931	1.109
Average stay (nights)	2.1	2.1	2.1
TOTAL	2011	2012	2013
Arrivals	686	748	845
Nights	1.504	1.645	1.823

Source: Agency for Statistics of Bosnia and Herzegovina

In the period January - December 2011, tourists accounted for 686,000 visits, which is higher by 4.5% compared to the same period in 2010. In the period January - December 2012, tourists accounted for 748,000 visits, which is more by 9.0% compared to the same period in 2011. In the period January - April 2013, tourists accounted for 845,000 visits, which is more by 12.9% compared to the same period of 2012 (Table 1.).

In the period January - December 2011, tourists accounted for 1.504.000 overnight stays, which is higher by 6.2% compared to the same period in 2010. In the period January - December 2012, tourists realized 1.645.000 overnight stays, which is more by 9.4% compared to the same period in 2011. In the period January - April 2013, tourists accounted for 1.823.000 overnight stays, which is higher by 10.8% compared to the same period of 2012.

The average length of stay of domestic tourists is higher (2.3 nights) in comparison to the length of stay of foreign tourists (2.1 nights).

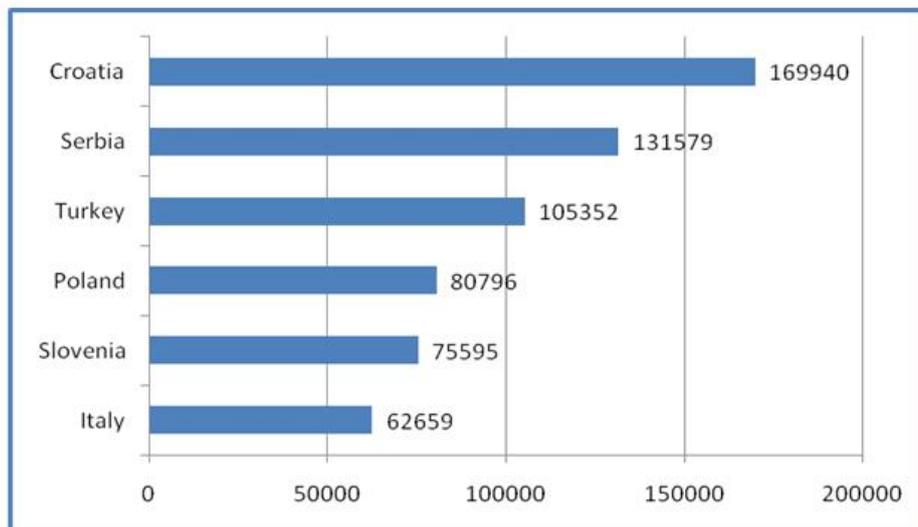


Fig.2. Structure of foreign tourists by overnight stays in Bosnia and Herzegovina, 2013

Source: Agency for Statistics of Bosnia and Herzegovina

In the structure of foreign tourists in the same period, most nights stays were realized by tourists from Croatia (24.6%), Serbia (18.5%) and Turkey (9.2%) making a total of 51.6%. Tourists from other countries realized 48.4% of overnights stays (Fig.2.).

The first city in Bosnia and Herzegovina by the number of tourists is Sarajevo with about 250,000 tourists and approximately half a million nights. According to unofficial data, in the second place is Mostar, and the third Međugorje.

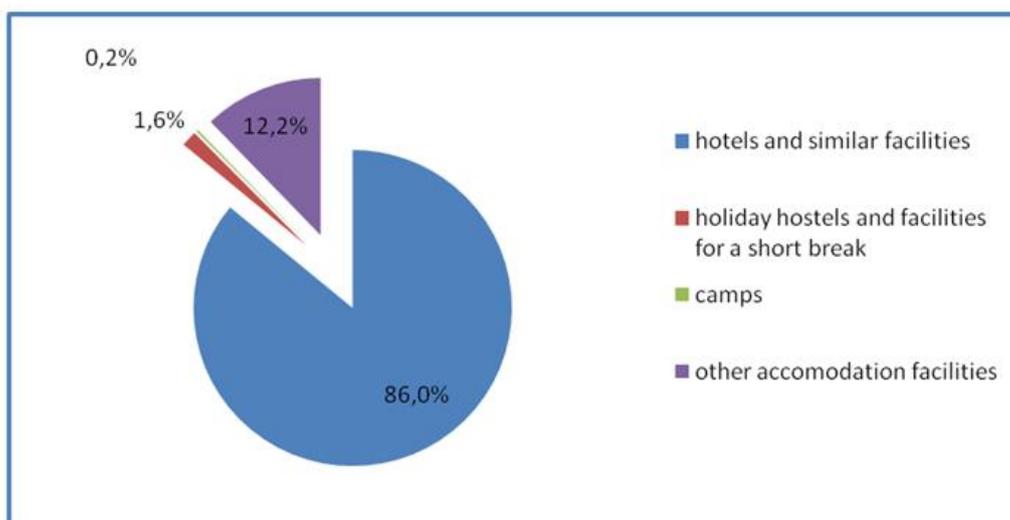


Fig.3. Arrivals and overnight stays of domestic tourists by accomodation facilities, 2013

Source: Agency for Statistics of Bosnia and Herzegovina

Domestic tourists in 2013 have mostly used the services of accommodation in hotels and similar facilities around 86%, then in holiday hostels and facilities for a short break around 1.6%, camps 0.2%, and in other accommodation facilities about 12.2%. The reason for this are favourable prices of hotel accommodation services in contrast to neighboring countries or EU countries which have two or more times higher prices (Fig 3.).

Foreign tourists in 2013, as well as domestic, have mostly used the services of accommodation in hotels and similar facilities around 95.9%, then in holiday hostels and facilities for a short break around 2%, camps 1.2% and other accommodation facilities about 0.9% (Fig.4.).

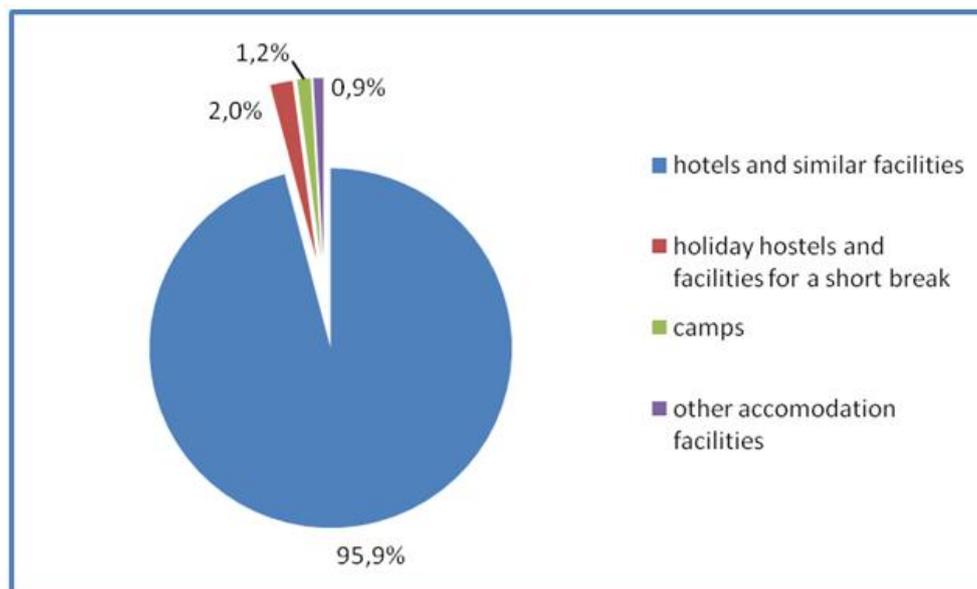


Fig.4. Arrivals and overnight stays of foreign tourists by accommodation facilities, 2013

Source: Agency for Statistics of Bosnia and Herzegovina

Methodology covers the major categories of foreign tourists who have been excluded from the official statistics, such as diaspora tourists, excursionists and tourists who use unregistered accommodation, such as boarding houses or hostels. The research results show that the actual number of arrivals and overnight stays of foreign tourists annually was several times higher than indicated by official statistics.

4 SPECIFIC FORMS OF TOURISM IN BOSNIA AND HERZEGOVINA

Natural resources and diversity of Bosnia nad Herzegovina (mountains, rivers, proximity to the coast, lakes, etc.) provide a strong foundation for the development of outdoor tourism in our country. The geographical position of the country which is located in the center of Europe has the potential to attract large number of tourists within three hours of flying distance. A unique cultural and historical heritage of Bosnia and Herzegovina, including religious sites, also offers great opportunities for the development of creative tourism in this segment. Internationally recognized and important events such as the Sarajevo Film Festival also attract a significant number of tourists. Bosnia and Herzegovina was recognized as a good destination at a reasonable price because of the relatively low price of services and good but not expensive food and drink. Hospitality is very important for making a good general impression and repeated visits to Bosnia and Herzegovina, and in that sense, exit polls show that tourists are very satisfied with this aspect of tourism services in our country.

The natural tourist potentials (geomorphological, hydrographic, climatic and biogeographical) located in tourist geographical areas of Bosnia and Herzegovina represent the tourist resources that are suitable for the development of the following specific forms of tourism: health, sports and recreational, nautical, eco-tourism, rural tourism, hunting and fishing, naturism, Robinson Crusoe tourism, and so on.

The anthropogenic tourist potentials (archaeological sites, monuments of architectural and cultural heritage, museums, galleries and collections, events) which are located in tourist-geographical areas of Bosnia and Herzegovina, represent the tourist resources that are suitable for the development of cultural tourism, which is today the most developed in the world.

There are many forms of cultural tourism through which anthropogenic tourist potentials can be integrated into the tourist offer, and as the most important are: the urban, archaeological, educational, religious and other forms of tourism with cultural content.

The following table provides an overview of Bosnian and Herzegovinian municipalities and a list of specific forms of tourism that can be developed in them. Data were obtained from the official web-sites of municipalities and tourist associations (Table 2.).

Table 2. Review of specific forms of tourism by municipalities in Bosnia and Herzegovina

Forms of tourism	Municipalities
Maritime	Neum
Mountain	Kreševo, Kupres, Livno, Berkovići, Kneževo, Mrkonjić Grad, Pale, Sokolac, Trnovo, Trnovo (RS), Prača, Široki Brijeg, Novi Travnik, Busovača, Tuzla, Fojnica, Hadžići, Kladanj, Konjic, Kupres,
Speleological	Kreševo, Berkovići, Doboj, Pale, Trnovo, Prača, Sanski Most
Hunting	Ključ, Kreševo, Kupres, Livno, Lukavac, Berkovići, Čelinac, Derventa, Kneževo, Pale, Prnjavor, Sokolac, Zepče, Trnovo, Trnovo (RS), Prača, Prozor-Rama, Novi Travnik, Busovača, Bužim, Tuzla, Bugojno, Konjic, Gacko, Foča
Fishing	Ključ, Lukavac, Čelinac, Derventa, Doboj, Kneževo, Prnjavor, Sokolac, Zepče, Prača, Prozor-Rama, Sanski Most, Novi Travnik, Bužim, Tuzla, Čapljina, Jablanica, Banja Luka, Brčko, Konjic, Mostar, Bihać, Bosanska Krupa
Photo-safari	Kreševo, Stolac, Čapljina, Srbac
Spa	Berkovići, Bijeljina, Prnjavor, Ilidža, Tuzla, Fojnica, Gračanica, Kladanj, Olovo, Teslić, Srebrenica, Višegrad, Bihać, Banja Luka, Laktaši, Sanski Most
Lake	Lukavac, Tuzla, Konjic, Fojnica, Mrkonjić Grad, Gradačac, Živinice, Srebrenica
River	Ključ, Jablanica, Konjic, Doboj, Prača, Brčko, Mostar, Ljubuški, Bihać,
Urban	Ključ, Konjic, Kupres, Livno, Lukavac, Ljubuški, Bijeljina, Čelinac, Derventa, Doboj, Mrkonjić Grad, Prnjavor, Srbac, Zenica, Trnovo, Prača, Stari Grad Sarajevo, Široki Brijeg, Novi Travnik, Busovača, Bužim, Tuzla, Čapljina, Čitluk, Gračanica, Hadžići, Jablanica, Jajce
Rural	Ključ, Kupres, Berkovići, Bijeljina, Derventa, Srbac, Sokolac, Prača, Stari Grad Sarajevo, Novi Travnik, Tuzla, Čitluk, Gračanica, Hadžići, Jajce, Konjic, Goražde
Religious	Fojnica, Trebinje, Lukavac, Sokolac, Zenica, Busovača, Čitluk, Gračanica, Kladanj, Travnik, Mostar
Adventure	Ključ, Kreševo, Kupres, Livno, Lukavac, Čelinac, Berkovići, Kneževo, Sokolac, Zenica, Zepče, Trnovo, Stari Grad Sarajevo, Busovača, Tuzla, Fojnica, Konjic, Višegrad, Bihać

Source: Bidžan 2011.

5 CONCLUSION

We need to point out that Bosnia and Herzegovina is a very interesting tourist destination as a result of its tourist and geographical position, exquisite natural beauty, cultural and historical values and favorable climatic conditions. For centuries in Bosnia and Herzegovina there were crossings of different cultures, religions and traditions, easy availability, healthy food, varied gastronomy, the vicinity of the source markets, price-competitive, a large number of educational institutions and great hospitality of people of Bosnia and Herzegovina, which adds to the creation of specific tourist products and enriches the offer. The goal is to create a framework for the further development of quality tourism offer which will increase the competitiveness of tourism of Bosnia and Herzegovina in the world markets of tourism demand and capital investments.

The tourism sector in Bosnia and Herzegovina is still at an early stage of development, as measured by official data showing its share in GDP (gross domestic product) in Bosnia and Herzegovina and employment in terms of total turnover and the number of tourist arrivals / overnights stays in the country.

It should be noted that official statistics on the total number of arrivals and overnight stays are only formally registered indicators of the tourism sector, and that there is still a strong informal part of the tourism sector which, if included, significantly changes the overall analysis of the tourism sector for the better.

Based on the opportunities and comparative advantages of Bosnia and Herzegovina's tourism industry, in the next ten years there will still be a strong potential for growth of this sector. This status is also recognized by international organizations responsible for monitoring the performance of the tourism sector on a global scale.

International growth in terms of tourist niches such as natural / eco tourism, adventure, religious, sports and recreational tourism, health spa tourism, cultural and educational tourism, represent the comparative advantages of Bosnia and Herzegovina in terms of its overall offer. These comparative advantages should be transformed into competitive advantages in the future and it is the primary task of all actors and makers of tourism policy in Bosnia and Herzegovina.

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