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# USAID DEVELOPING SUSTAINABLE TOURISM ACTIVITY IN BOSNIA AND HERZEGOVINA [TURIZAM]

OUTDOOR TOURISM (ADVENTURE) CLUSTER PLAN – BOSNIA  
GREEN



September 30, 2021

This publication was produced for review by the United States Agency for International Development. It was prepared by Chemonics International Inc.

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## OUTDOOR TOURISM (ADVENTURE) CLUSTER PLAN – BOSNIA GREEN

May 1 – September 30, 2021

Prepared for USAID/Bosnia and Herzegovina  
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Turizam is funded under USAID Contract No. 72016820C00004 and is implemented by Chemonics International in collaboration with:

**Subcontractors:**

Enova d.o.o. Sarajevo  
SEGURA Consulting LLC

**And IDIQ Partners:**

Culture Practice LLC  
LixCap Advisory and Capital  
Zavod Tovarna trajnostnega turizma (Good Place)  
Horwath i Horwath Consulting Zagreb d.o.o.  
Crimson Capital

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# ACRONYMS

ADFC	Der Allgemeine Deutsche Fahrrad-Club (German Cyclists Association)
ATA BiH	Adventure Tourism Association of Bosnia and Herzegovina
ATDI	Adventure Tourism Development Index
ATGS	Adventure Travel Guide Standard
ATTA	Adventure Travel Trade Association
ATUS	Association of ski instructors in Bosnia and Herzegovina
BAM	Bosnian Convertible Mark
BCU	Balkan Cycling Union
BD	Brčko District
BFS	Bike Friendly Standard
BHMAC	Bosnia and Herzegovina Mine Action Center
BiH	Bosnia and Herzegovina
BiSaBiH	Cycling Federation of Bosnia and Herzegovina
BMU	Balkan Mountain Union
B2B	Business-to-business
B2C	Business-to-consumer
CAGR	Compound Annual Growth Rate
COVID-19	Coronavirus Disease 2019
CZZS	Center for Environment
DMO	Destination marketing organization
ECF	European Cyclists' Federation
ERA	European Ramblers Association
EU	European Union
FBiH	Federation of Bosnia and Herzegovina
FIS	International Ski Federation
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GPS	Global Positioning System
GSSuBiH	Union of Mountain Rescue Services in Bosnia and Herzegovina
GSS of BD	Mountain Rescue Service of Brčko District
GSS of RS	Mountain Rescue Service of Republika Srpska
GSS of FBiH	Mountain Rescue Service of Federation of Bosnia and Herzegovina
GSTC	Global Sustainable Tourism Council
HR	Human Resources
ICAR	International Commission for Alpine Rescue

IFMGA	International Federation of Mountain Guides Association
ILS	International Life Saving Federation
IRF	International Rafting Federation
IRF GTE	International Rafting Federation Guide Training and Education
ISIA	International Association of Skiing Instructors
ISO	International Organization for Standardization
ITP	Integral Tourism Product
ITRA	International Trail Running Association
LQT	Leading Quality Trails
MA BiH	Mountaineering Association of Bosnia and Herzegovina
MA FBiH	Mountaineering Association of Federation of Bosnia and Herzegovina
MA RS	Mountaineering Association of Republika Srpska
MA HB	Mountaineering Association of Herceg Bosna
MBH	Mountain Bike Holidays
MOFTER	Ministry of Foreign Trade and Economic Relations
MoU	Memorandum of Understanding
MTBA	Mountain Bike Association
MTMSI	Mountain Tourism Meteorology and Snow Indicators system
NECC/C	National Coordination Centre/Coordinator
NGO	Non-governmental organization
PD	Product Development
PR	Public Relations
RCC	Regional Cooperation Council
REDAH	Regional Development Agency for Herzegovina
ROA	Rafting Operator Accreditation
RS	Republika Srpska
SHA	Suspected Hazardous Areas
SEO	Search Engine Optimization
SME	Small and medium-sized enterprises
SWOT	Strengths, Weaknesses, Opportunities and Threats Analysis
TA	Tourist Agency
TBD	To be determined
TO	Tour Operators
TORS	Tourism Organization of Republika Srpska
UCI	Union Cycliste Internationale
UEC	Union Europeenne de Cyclisme
UIAA	International Mountaineering and Climbing Federation



UIMLA	Union of International Mountain Leader Associations
UIMLA IML	Union of International Mountain Leader Associations International Mountain Leader
UK	United Kingdom
UNWTO	United Nations World Tourism Organization
US	United States
USA	United States of America
USAID	United States Agency for International Development
USD	United States Dollar
USP	Unique Selling Proposition
UTA	Udruženje turističkih agencija u Bosni i Hercegovini
WEF	World Economic Forum
WG	Working Group
WTTC	World Travel and Tourism Council
Y1	Year one
Y2	Year two
Y3	Year three
Y4	Year four
Y5	Year five

# EXECUTIVE SUMMARY

The main aim of this document is to provide professional and research-based recommendation for improving the sustainability and enhancing the value of the adventure tourism cluster through product development and the corresponding promotional potential. In the process of preparation of this document, *USAID Developing Sustainable Tourism in Bosnia and Herzegovina Project (Turizam)* conducted wide range of consultations including desk top research, online and focus groups surveys, literature research and individual interviews in effort to understand the current state of adventure tourism in Bosnia and Herzegovina (BiH) and identify the main gaps and challenges in the areas of management and legislation, product development, marketing, and human resources.

Adventure tourism in BiH faces several challenges which hinder its development, visibility, recognizability, and quality:

- The organizational structure of the adventure tourism sector in BiH is complex and undefined; the adventure tourism sector lacks a managerial framework.
- Legislation varies between different parts of the country; compliance and enforcement of regulations and policies are lacking.
- A significant portion of development is donor-driven, making development dependent on external resources and not self-sufficient.
- The presence of international standards, certifications, and trainings in the country is minimal and inconsistent.
- Development of safe, green experiences is often hindered by insufficiently trained staff and a poor state of the environment<sup>12</sup>.
- The quality and content of BiH's adventure tourism offer is limited; inconsistencies in supply and service standards, product gaps, and unrealized potential of high-value tourism products indicate numerous gaps in the capacity of the private sector.
- Inconsistent information and inefficient communication restrict the development of adventure tourism products; this is compounded by a corresponding lack of awareness and recognition in the public sector and local communities.
- Adventure products often lack quality supply chains, basic infrastructure, marking and monitoring systems, publicly available registers and cadasters, classifications and certifications, and internal and external communication.
- Weak promotion limits the awareness and visibility of BiH as an adventure tourism destination; there is no centralized platform for adventure tourism.

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<sup>1</sup>European Commission (2020). Bosnia and Herzegovina 2020 Report. [https://ec.europa.eu/neighbourhood-enlargement/system/files/2020-10/bosnia\\_and\\_herzegovina\\_report\\_2020.pdf](https://ec.europa.eu/neighbourhood-enlargement/system/files/2020-10/bosnia_and_herzegovina_report_2020.pdf)

<sup>2</sup> UN (2019). Voluntary Review - Implementation of Agenda 2030 and the Sustainable Development Goals in Bosnia and Herzegovina. [https://sustainabledevelopment.un.org/content/documents/23345VNR\\_BiH\\_ENG\\_Final.pdf](https://sustainabledevelopment.un.org/content/documents/23345VNR_BiH_ENG_Final.pdf)

Many of these challenges are addressed within this strategic paper in four main pillars: management, product development, marketing, and human resources. An evaluation of and goals for each pillar are defined.

Recommendations for BiH's adventure tourism sector include:

- Cooperation amongst adventure tourism stakeholders in BiH will be strengthened through the formation of product clusters, leading to the eventual establishment of a national-level adventure tourism association leading the management, development, and promotion of the sector.
- Capacity of the adventure travel sector will be strengthened through the introduction of international training, licenses and certificates in BiH; these will eventually be made available for adventure travel personnel through the Turizam Academy.
- Safety, quality and sustainability in adventure tourism will be strengthened through the implementation of international sustainability standards and a localized operational and safety standard, based on international criteria.
- A platform promoting BiH's flagship products, experiences, and integral tourism products (ITP) will be developed for the purpose of presenting the destination to the global market as an appealing adventure tourism option with potential for future investment.
- A common brand and effective communication channels will be built to raise awareness among local adventure tourism stakeholders and to strengthen the position of BiH on international markets.

# METHODOLOGY

USAID Turizam initiated the development of an adventure cluster plan in BiH to advance the sustainability and increase the value of the adventure tourism sector through product development and the corresponding promotional potential. The strategic plan responds to information and data collected on the local conditions to identify the gaps in the current development as well as potential future improvements. This content was previously reported through four internal studies: Product-Market Gap Analysis, Regulatory Gap Analysis, Skills and Trainings Gap Analysis, and Product Audit Report.

Multiple methods were employed for collecting data. These include:

- Data collection from secondary sources
- Online survey completed by BiH adventure tourism stakeholders
- In-depth, semi-structured interviews with BiH adventure tourism stakeholders
- Workshops and focus groups with BiH adventure tourism stakeholders

Desktop analysis comprised collection and analysis of secondary data from various sources including USAID team internal sources, online sources, reports, and marketing material and information from former projects. An analysis of Google keywords was completed using Semrush, an online SaaS platform that acts as a keyword research tool and is specialized for content marketing and online visibility management<sup>3</sup>. Secondary data was used to outline the current state and trends in adventure tourism at the national and global scale and compare BiH's adventure tourism products with competitive countries.

In May 2021, Turizam conducted an online survey of local adventure tourism stakeholders exploring the perception and current conditions of the adventure tourism sector within BiH. Twelve online interviews conducted in May 2021 supplemented the data collected through the survey. Interview participants were selected based upon their knowledge of and experience in BiH's adventure tourism sector. The interviews were semi-structured and sought concrete answers about the current conditions of adventure tourism in BiH and direction of the sector's medium-term development. Seven additional interviews were conducted by the USAID Turizam team as per suggestions received from other interviewees.

Six workshops were organized and held in June 2021. Of these, five were held in person with number of adventure tourism stakeholders at locations throughout BiH,

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<sup>3</sup> Most frequent keywords related to adventure tourism and holidays in BiH in English and German have been identified. The number of results for "keyword (+ in +) country name" has been compared for BiH, Slovenia, Croatia, Serbia, Montenegro, Italy and Austria, BiH's biggest competitors in the field of adventure tourism (identified in the survey of BiH adventure tourism stakeholders, held in May 2021). German language has been chosen as the German market has been identified as one of most desirable target markets for BiH adventure tourism stakeholders (identified in the survey, held in May 2021).

while one was held online. Workshop participants engaged in activities which elicited further feedback to augment the findings of the survey and interviews. Together, the information and data collected facilitated a thorough analysis of the local context and helped to identify the adventure sector's strengths and weaknesses, opportunities and risks, and top development priorities.

# I INDUSTRY ANALYSIS, GROWTH AREAS, AND TRENDS

Globally, adventure tourism is one of the fastest-growing sectors of tourism. In 2020, the global adventure tourism market size was \$112,227 million, and by 2028, it is predicted to reach \$1,169,095 million, at a 20.1% CAGR (Compound Annual Growth Rate) (Allied Market Research, 2021)<sup>4</sup>. Estimates show that adventure tourism represents 30 percent of global tourism expenditures (ATTA, 2019)<sup>5</sup>. In past years, Europe<sup>6</sup> has been the most significant beneficiary of this expenditure and the region is expected to retain this command in the following years.

The COVID-19 pandemic caused significant disruptions in the growth of the entire tourism industry. The market size of adventure tourism decreased by approximately 81% - from \$609,000 million in 2019 to \$112,227 million in 2020. The adventure tourism sector is expected to recover more rapidly from the COVID-19 pandemic than other sectors for a number of reasons, including:

- It is comprised of many small-scale tour operators, which normally have loyal customers.
- The itineraries usually involve small-scale accommodations (less people, more space), which are more adaptable to changing conditions.
- Adventure tourists give travel a greater importance and priority and will be more eager to return to travel (CBI, 2021)<sup>7</sup>.

Europe and North America are the two leading regions in this market. Europe was the largest market in 2020, generating approximately a third of the global adventure tourism market share. Asia-Pacific is the most promising region and expected to grow at a notable rate; this is largely the result of an improved business environment in the region. Globally, there has been a significant increase in government initiatives which often take the form of partnerships between private and public sector representatives and that promote the growth of the global adventure tourism market (Allied Market Research, 2021).

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<sup>4</sup> Allied Market Research (2021). Adventure Tourism Market Outlook. <https://www.alliedmarketresearch.com/adventure-tourism-market>

<sup>5</sup> Adventure Travel Trade Association - ATTA (2019). Adventure Travel Overview and Market Sizing. <https://cdn-research.adventuretravel.biz/research/5bbf8f5b128404.33945465/Adventure-Travel-Market-Sizing-12458901.pdf>

<sup>6</sup> For the purpose of this text, reference of Europe includes Europe as a continent, without the Russian part.

<sup>7</sup> Centre for the Promotion of Imports from developing countries – CBI (2021). The European Market Potential for Adventure Tourism. <https://www.cbi.eu/market-information/tourism/adventure-tourism/adventure-tourism/market-potential>.

ATTA's research (ATTA, 2021)<sup>8</sup> defined the hottest trending destinations for adventure travel:

- |                    |                    |
|--------------------|--------------------|
| 1. United States   | 6. Antarctic       |
| 2. Mediterranean   | 7. Canada          |
| 3. Western Europe  | 8. Southern Africa |
| 4. Central America | 9. Caribbean       |
| 5. Scandinavia     | 10. East Africa    |

According to the Adventure Travel Trade Association (ATTA), the primary source markets are North America, Germany, and the UK (CBI, 2021). The UNWTO estimates that the UK, with 19 percent of the world's adventure travel tourists, offers the largest consumer base for the adventure tourism market in Europe. Besides the UK, the most important adventure tourism markets in Europe are Germany, France, Spain, Italy, and the Netherlands. These markets are, therefore, critical to those countries in the process of developing their adventure tourism sector. Within Europe itself, European tourists are accountable for almost 60 percent of all adventure travelers (CBI, 2021).

Soft activities represent a larger proportion of the products available in the adventure tourism market. Despite this, both soft and hard segments of adventure tourism are expected to grow in the following years as the number of travelers willing to take part in higher risk activities increases.<sup>9</sup>

Adventure tourism comprises a variety of activities and niche products, attracts high-value customers, supports local economies, and encourages sustainable practices. The continued growth of this sector will, therefore, create a net positive impact within the tourism industry as well as for the local communities, environment, and economy of the destination.

Niche products require specialized knowledge and operations. As a result, greater demands are placed on the local supply chain having the effect of creating greater benefits for the local level. Approximately two-thirds of the money spent on adventure travel remains in the destination – on average, this is approximately €350 per visitor, per day (CBI, 2021).

ATTA made a comparison of the benefits of adventure and mass tourism for the local economy (ATTA, 2019). The research revealed the following:

- In the case of Mass Tourism, 14 percent of revenues remain in the country while 1.5 local jobs are created per \$100,00.
- In the case of Adventure Tourism, 65 percent of revenues remain in the country while 2.6 local jobs are created per \$100,00.

<sup>8</sup> ATTA (2021). Adventure Travel Trends Snapshot. <https://cdn-research.adventuretravel.biz/research/8093285679012376901121521/ATTA-Snapshot-Trends-Research-Report-2021.pdf>

<sup>9</sup>Soft adventure tourism activities are characterized by moderate to low risk and do not require many skills and experiences from participants (for example wildlife watching, hiking, fishing, wildlife watching, canoeing, cycling). Hard adventure activities are riskier and require special skills and experiences (for example rock climbing, mountain biking, mountain climbing, parachuting, trekking).

Frequently, tour operators provide a variety of adventure activities. ATTA’s research shows that wildlife watching is the most important niche market in adventure tourism. A survey among European tour operators revealed that 58 percent of tour operators offer wildlife watching activities. Other outstanding adventure tourism products are walking (50 percent of tour operators), ecotourism (42 percent of tour operators) and birdwatching (37 percent of tour operators) (ATTA, 2020<sup>10</sup>).

The fastest growing categories in leisure travel (such as adventure, experiential, cultural, outdoor, nature-based, and rural tourism) rely upon a network of smaller providers delivering a wide range of unique, authentic, and sustainable travel experiences and activities. In many cases, the best experience providers are local stakeholders with a passion for cultural heritage, the local environment, or outdoor pursuits and a corresponding drive to create a business; however, entrepreneurs in the tourism industry often lack business training or experience. Globally, more than 90 percent of service providers in the tourism industry and including a wide variety of specialties (e.g. experiential, adventure travel, rural, agrotourism) have less than three employees. Most small businesses lack the resources to employ specialists in business administration, marketing, sales, logistics, or any other skills needed to run a successful business of any size (ATTA, 2018)<sup>11</sup>.

Adventure Travel Facts 2019 (ATTA, 2020)	
<u>Guest type:</u> 45-64 years old, most frequently couples	Top adventure activities in 2019 were: 1. Hiking/Trekking/Walking 2. Cycling 3. Safaris/Wildlife viewing 4. Cultural 5. Culinary 6. Expedition cruising 7. Kayaking/sea/water 8. Multisport 9. Rafting
<u>Trip length:</u> 8.8 days (world average), 8.2 (European average)	
<u>Average Retail Trip Price (USD):</u> \$3,000 per trip/\$341 per day (world average) \$1,586 per trip/\$193 per day (European average)	
<u>Top distribution channels:</u> direct bookings (61 percent world average, 64 percent European average)	
<u>Top marketing and sales tactics:</u> word of mouth	
<u>Direct marketing:</u> social media as the most popular way to reach customers	

Adventure travelers visit undiscovered destinations as a source of enjoyment and pleasure. The main motivations for adventure travel are new experiences, going off the beaten path, and local immersion. The study by ATTA (2019) reported that 75 percent of travelers look for immersive experiences within local communities; if this is narrowed to adventure travelers, this applies to four out of five travelers. Trending motivations for adventure travel also include travelling as a status symbol, luxury activity, digital detox, personal challenge, and participating in popularized adventures.

<sup>10</sup> ATTA (2020). Adventure Travel Trends Snapshot. <https://cdn-research.adventuretravel.biz/research/5bbf8f4a1010a8.2358546546/Snapshot-Trends-2020-Report.pdf>

<sup>11</sup> Adventure Travel Trade Association – ATTA (2018). Adventure Travel Pulse, industry survey 2018. USAID internal document.



The main trends in the adventure tourism market involve customized itineraries (including authentic experiences), connection with wellness and well-being, and integration of technology. Younger travelers are becoming an important market segment and travel is increasingly understood as an educational opportunity. While some of the most widely available adventure activities are relatively traditional, there are novel activities emerging and gaining popularity among adventure travelers. ATTA identified the following “hot” trending adventure activities for 2019 (ATTA, 2020) and 2020 (ATTA, 2021):

**“Hot” trending activities 2019**

- Hiking
- Culinary
- Cultural
- Wellness-focused activities
- Cycling (electric bikes)
- Safari/Wildlife viewing
- Expedition cruising
- Kayaking
- Photography (wildlife/nature)
- Running

**“Hot” trending activities 2020**

- Hiking
- Wellness-focused activities
- Cycling (electric bikes)
- Cycling (mountain/non-paved surface)
- Safari/Wildlife viewing
- Culinary/Gastronomy
- Photography (wildlife/nature)
- Cultural
- Cycling (road/paved surface)
- Expedition cruising

The top trending adventure tourism activity for Europe in 2019 was hiking (trekking, walking), followed by cycling with electric bikes, cultural and culinary adventure activities, and road cycling. The trends changed in 2020, putting cycling with electric bikes as the number one adventure activity, followed by road cycling, hiking, wellness-based activities, and camping (ATTA 2020; ATTA 2021).

## 2 CONTEXTUAL ANALYSIS

Bosnia and Herzegovina has enormous tourist potential; unfortunately, this potential is underutilized. The country has exceptional natural beauty, attractive cultural resources, a rich history, and favorable climatic conditions. Thanks to its natural wealth including a varied topography of mountains, canyons and rivers, BiH has ideal conditions for the focused development of adventure tourism. There are few countries in the world where tourists can ski at a mountain resort known for its Olympic history and ride a bike along the seaside on the same day. Within Europe, BiH ranks seventh for its water reservoirs with its seemingly pervasive rivers and mountain lakes (MOFTER, 2018)<sup>12</sup>. Diverse cultures, religions, and traditions have come together on the territory of BiH for millennia, each leaving a distinct mark and contributing to and shaping the complex country that exists today. BiH's location in the heart of Europe makes it a convenient destination, enabling large numbers of tourists to arrive within its borders in a quick, three-hour flight even while its cultural and natural landscape suggest to visitors that they have reached a far-away place. BiH's diverse attractions are a significant advantage for tourism development; the country's untouched natural resources including rich riverine and thermal waters, compelling cultural and historical heritage, and numerous sites of religious importance are representative of the potential range of tourism products that can be developed and promoted within the country. Internationally recognized and locally celebrated festivals also attract a substantial number of tourists including an ever-growing population of diaspora.

Keeping these characteristics in mind, it is clear that the tourism sector in BiH has untapped potential that could contribute to much needed economic growth. In recent years, BiH has become increasingly recognized as an excellent destination due to the relatively low cost of services and good and reasonably-priced, quality food and beverage offerings. Hospitality is a notable factor for creating a positive general impression on visitors and which often encourages return visits to BiH; exit polls show that tourists are delighted with this aspect of tourist service in BiH. The country's diverse resources lead to a variety of tourism products; however, amongst the most dominant areas within the industry are cultural, adventure, eco, religious, wellness, and coastal tourism (Terra Dinarica, 2020)<sup>13</sup>. BiH's tourism sector had recorded positive trends for all major growth indicators in the 2014 – 2020 period, but there is still significant room for growth in the industry. The COVID-19 pandemic crippled the global tourism industry. Unfortunately, a period of recovery will be required to

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<sup>12</sup> According to the World Bank data, BiH is the 7th country in Europe regarding the amount of drinking water and one of the richest countries in the world by water resources.

Ministry of Foreign Trade and Economic Relation of BiH - MOFTER (2018).

<http://www.mvteo.gov.ba/content/read/vodni-resursi-turizam-zastita-potrosaca?lang=en>

<sup>13</sup> Terra Dinarica (2020). Analysis of laws, standards, and regulations on adventure tourism in BiH. USAID internal document.

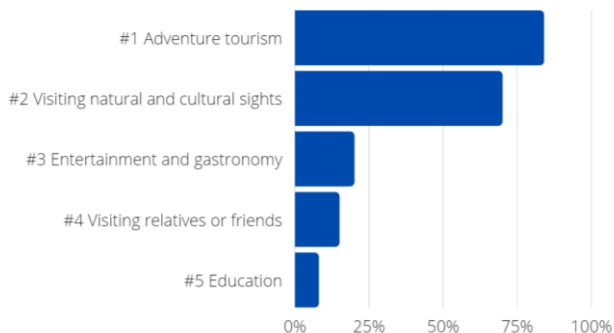
respond and adapt to changes in the industry in order to return BiH to pre-pandemic tourism levels.

Despite BiH's undeniable potential, international competitive indexes do not position the country as a current leader within adventure tourism. This might result from a fragmented and uncoordinated approach to development within the adventure tourism segment. Adventure tourism products are often funded through international, donor-conceptualized projects and focus on either creating individual, stand-alone activities or activities developed to complement a neighboring country's existing offer. The latter only serve to incorporate BiH into external tourism programs and without the possibility of expanding BiH's domestic network or integrating the new product into a local tourism package. BiH providers remain isolated service stations offering a specific activity or attraction with little incentive to build their capacity or create a complete tourism package.

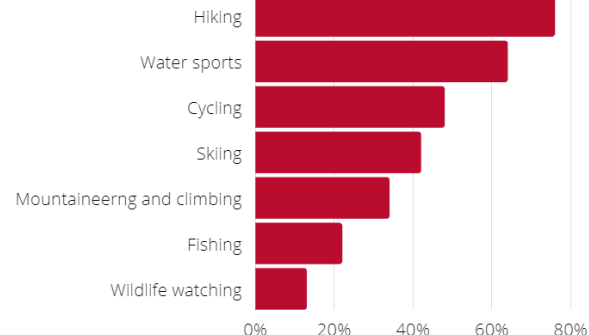
The current situation in the adventure tourism sector has been analyzed through desk research and data collected from BiH's adventure tourism stakeholders. A snapshot of the current situation in adventure tourism in BiH is presented below. The information derives from the survey of BiH adventure tourism stakeholders in May 2021.

## BiH Adventure Tourism Snapshot

### Main motives for arrival to BiH



### Adventure tourism products that bring guests to BiH



46% of tourists come by their personal car



32% of tourists come with friends, 28% of tourists come with family



Main sales channels:  
web and social media + recommendations



Main marketing channels:  
internet advertising + social media + B2B



99% of stakeholders would join a sustainability scheme



...adventure tourism service providers in BiH should be more connected...  
58% of stakeholders favor the establishment of a new organization for BiH's adventure tourism sector

### Countries of origin (before COVID-19)

1. Croatia
2. Serbia
3. Germany
4. Slovenia
5. Austria
6. Italy
7. Poland
8. Switzerland
9. Sweden
10. USA

### Most desirable countries of origin

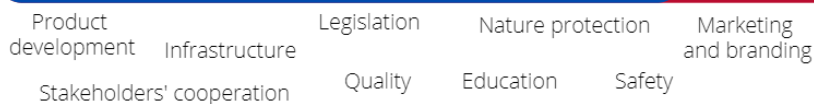
1. Germany
2. Croatia
3. Slovenia
4. Serbia
5. Austria
6. USA
7. Sweden
8. UK
9. Italy
10. France

### The biggest competitors of BiH in the field of adventure tourism:



Croatia Slovenia Serbia Italy Austria Montenegro

### Development priorities



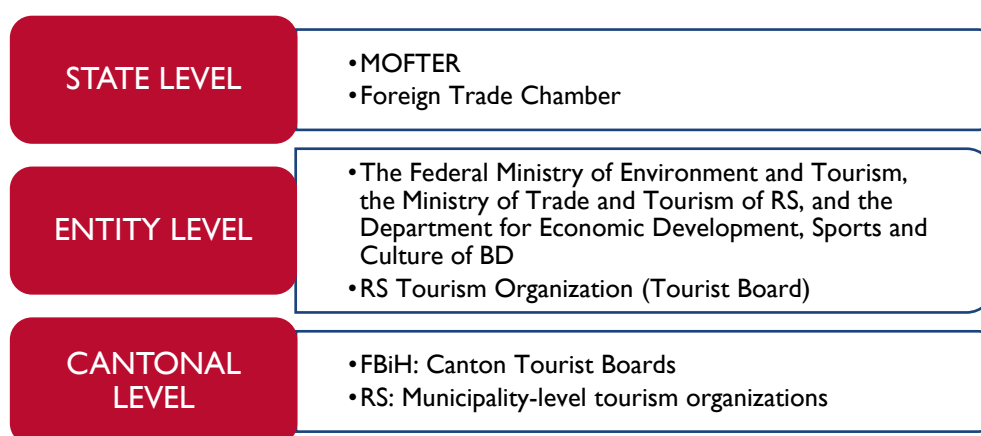
## 2.1 MANAGEMENT

BiH's government structure and political framework contributes to the extreme fragmentation and decentralization of the country. Institutions are organized at three levels: state – entities – cantons. The complexity of institutional arrangement contributes to challenges in creating a cohesive vision for the future of the country and developing and implementing policy. BiH's organization following the establishment of the current constitution (Dayton Peace Accords) negatively impacted the country's performance on the international tourism market.

The Ministry of Foreign Trade and Economic Relations (MOFTER) operates at the state level to coordinate and develop tourism policies. MOFTER is also responsible for defining policies and basic principles of environmental protection, sustainable development, and use of natural resources, which directly influence adventure tourism. State-level tourism promotion is the domain of the Foreign Trade Chamber, the responsibility of which is to strengthen the sector and represent the interests of legal entities active within the tourism and hospitality industry.

Each entity and the Brčko District (BD) have their own institutions responsible for tourism development and legislation. These include the Federal Ministry of Environment and Tourism, the Ministry of Trade and Tourism of Republika Srpska (RS), and the Department for Economic Development, Sports and Culture of BD. Of the three, only the RS has a National Tourism Organization; tourism promotion in RS is in the domain of the Tourist Board, the primary role of which is to promote and strengthen the tourism sector in the RS.

While the RS has municipality-level tourism organizations, in the FBiH, it is the Canton Tourist Boards that are in charge of promoting and developing tourism attractions.



The entities are in the process of adopting their own strategies for tourism development and have their own governance structure and institutional arrangements. While the governance structure and institutional arrangements in the RS are similar to governance structures in other countries, the institutional set-up in FBiH is much more complicated. The FBiH's management of tourism development is divided

between the Federal Ministry of Environment and Tourism and the cantonal ministries for tourism. In BD, due to the small volume of tourism, the management of tourism development is relatively straightforward and assigned to the Department of Economic Development, Sports and Culture within the government of BD.

Different organizational structures and regulations in each of the entities resulted in an uneven development. Regions of BiH are at differing stages of development; this is at least partially attributable to varying access to external funding. Those regions with greater access to external resources are in a position to develop more rapidly and have a foundation upon which they can build.

The working group on tourism (WG) was established by MOFTER to coordinate tourism activities between the RS, FBiH, and BD. Members of the WG are representatives of the ministries responsible for tourism from both entities and BD and the foreign trade chamber of BiH. The WG coordinates activities and harmonizes plans of entity bodies and institutions at the international level. MOFTER also carries out procedures of signing international agreements in the field of tourism. It should be noted, however, that there is no state-level action plan or similar policy document for planning and implementing tourism related activities. There is also no institution at the level of BiH for the promotion and marketing of BiH on the global market.

As a consequence of the fragmented and decentralized organization of BiH's tourism industry, the adventure tourism sector is lacking an umbrella organization that would have the capacity and authority to both integrate and manage this portion of the industry. The Adventure Tourism Association (ATA) BiH was established in 2021 with the aim to connect all major stakeholders and individuals working within the adventure tourism sector in BiH. The common goal of the ATA is the mutual promotion of tourism products and relevant organizations on the international market, the development of new products, and the improvement of adventure services and safety in adventure tourism. Although the ATA still exists on paper, the organization is no longer active because the project USAID CCA through which it was initiated concluded in 2014 (ATA continued with operations during the following two to three years). Currently, the adventure tourism sector is mainly organized at a product level, with no national, top-down structure providing a coordinating effort. The sub-sectors and products within the adventure tourism sector are each organized independently, and in nearly all cases lacking oversight that would guide development, networking, and promotion.

As a legacy from the socialist system of former Yugoslavia, a number of associations exist through which members have become directly involved in the development of adventure tourism, some of which did and continue to play a significant role in the sector. These associations have the mandate and capacity to provide relevant training or manage resources necessary for adventure tourism activities. The law, therefore, enables sport clubs and associations or their individual members to act as tourism

service providers either by providing guiding service for a registered tour operator or even independently organizing tourism products and packages. According to official policy, these organizations are able to work in this manner with the stipulation that their activities are not-for-profit. In doing so, however, they promote inequitable competition to registered operators, which are legally obliged to fulfil certain conditions, pay overhead costs and taxes, and invest in staffing and marketing.

Only RS has a Tourism Register with licensed tourist agencies and tourist organizations at the city level throughout the entity. Of sixty licensed travel agencies, only a handful have activities within adventure tourism. Recently adopted regulations in the RS now allow for registration of travel agencies online, thereby facilitating the legal establishment of new micro-organizations.

#### HIKING – Organizational Structure and Main Stakeholders

The main stakeholders focused on hiking are mountaineering organizations and private sector businesses that have taken individual initiative to develop this adventure tourism product.

The **Mountaineering Association of Bosnia and Herzegovina (MA BiH)** was established by the Joint Agreement of the members of the Association, adopted at the Founding Assembly held in 2008, in accordance with the Law on Associations and Foundations of BiH. It is a non-governmental organization that coordinates the voluntary cooperation of mountaineering associations, mountaineering specialist organizations, Mountain Rescue Service stations and clubs in BiH; member organizations are required to accept the statute of the Association. The MA BiH is a full member of several international mountaineering associations including the International Mountaineering and Climbing Federation (UIAA), the International Commission for Alpine Rescue (ICAR), and the European Ramblers Association (ERA) and is the founder and member of the Balkan Mountain Union (BMU) and the Sports Federation of BiH. Nevertheless, the operational capacity of MA BiH is still in development, and therefore, limited.

There are three major operational mountaineering associations in BiH:

- **Mountaineering Association of Federation of Bosnia and Herzegovina (MA FBiH)**  
MA FBiH has one hundred and six local mountaineering organizations in its membership base. It keeps a broad range of regulations for variety of activities including the marking and mapping trails, categorization of trails, speleology, and organization of mountain tours and trips, and the training of guides. The MA BiH is funded by membership fees, donations, gifts from public institutions, private citizens, public budget grants and contracts, rental fees, and collected interest.
- **Mountaineering Association of Republika Srpska (MA RS)**  
MA RS has forty local member associations and organizes trail mapping, annual mountaineering events and a variety of trainings including mountain guiding, alpinism, and trail marking. It is predominantly funded by the public budget and to a limited extent by membership fees.
- **Mountaineering Association of Herceg Bosna (MA HB)**  
MA HB has identical goals as the previous two associations and claims to be carrying the legacy of mountaineering associations that existed prior to the Wars of Yugoslav Succession that occurred in the 1990s. It has thirty-eight individual clubs and organizations in its membership base.

Local mountaineering organizations regularly offer hiking tours to its members; some also operate commercial tours. The register of licensed guides is available online<sup>14</sup>.

An important role in hiking is played by the NGO Terra Dinarica, the aim of which is to help connect, protect, promote, and sustainably develop the regions along the international Via Dinarica Trail<sup>15</sup>. It performs as the country's lead office for Via Dinarica. Although Terra Dinarica primarily deals with hiking, it also serves as a platform for all outdoor sports.

Although an official agreement was signed between the GSS of RS, FBiH and BD in 2018, there is no relevant law on Mountain Rescue Services (GSS – Gorska Služba Spašavanja) in place and the service works through four distinct organizations which are focused on all categories of rescue and perform in partnership to government institutions:

- **Union of Mountain Rescue Services in BiH (GSSuBiH),**
- **Mountain Rescue Service of Republika Srpska (GSS of RS),**
- **Mountain Rescue Service of Federation of BiH (GSS of FBiH),**
- **Mountain Rescue Service of Brčko District (GSS of BD).**

Agreement signed between three GSSs (RS, FBiH and BD) in 2018 refers to the further improvement of cooperation, which includes, among other activities, the joint organization of rescue training, rescue exercises, project writing, exchange of expert opinions, joint action in the field, assistance in rescue operations, personnel, and equipment.

GSS in BiH, as well as across the world, operates on a voluntary basis and does not have a secured source of funding from the public budget. Under existing regulations, GSS is bound by contract to the municipality or canton, but the local government cannot not pay for their services or provide them with salaries. Some of GSS communities are struggling with funding. Every donation GSS receives must be invested in the purchase of equipment or training. At the same time, there is no Law on Mountain Rescue Service. This area is regulated at the entity level by the Statute of the GSS and the Law on Protection and Rescue.

GSS service appears to have more formal organization and greater capacity in FBiH compared to the RS where some initial steps have been taken to develop the service. RS Law on GSS is in the process of preparation; the entity has four GSS stations with a fifth currently being established. In FBiH there are more GSS stations, the locations of which include Sarajevo, Mostar, Zenica, Bihać, Gorazde, Zavidovici, Konjic, Gornji Vakuf, Travnik, Tuzla, Jajce, Brcko, Prozor, Žepče, Ilidža, HBŽ (Livno) and Visoko.

GSSuBiH has also initiated ICAR (International Commission for Alpine Rescue), a program working toward the development of innovative activities.

### **RAFTING – Organizational Structure and Main Stakeholders**

Currently there is no national umbrella organization in charge of rafting in BiH. A new national rafting association is planned to be officially established by the end of 2021.

There are two main organizations responsible for rafting on the entity level, one leading the development of rafting in FBiH and one in RS:

- **Kayak, Canoe and Rafting Association of Federation of Bosnia and Herzegovina**

<sup>14</sup> Registar licenciranih vodiča PS BiH. [http://psbih.ba/wp-content/uploads/2018/07/Registar-licenciranih-vodi%C4%8Da\\_18.07.2018..pdf](http://psbih.ba/wp-content/uploads/2018/07/Registar-licenciranih-vodi%C4%8Da_18.07.2018..pdf).

<sup>15</sup> Via Dinarica. Homepage. <https://trail.viadinarica.com>.



This association claims to be an umbrella association of kayak, canoe, and rafting clubs within FBiH with the head office located in Zenica.

- **The Association of Rafting of Republika Srpska**

The association connects the rafting clubs in RS and is run by Rafting Cub Kanjon which, in addition to other activities, holds a license for Rescue 3<sup>16</sup> (rescue in water) and runs the Center for Training and Search and Rescue in Water. The association operates as a regional center for the Balkans as part of an EU-funded project.

The exact number of registered clubs and associations is unknown; however, estimates suggest that approximately twenty rafting/diving/kayaking clubs and operators are based on the Una River, ten on Vrbas River, twenty on Neretva River, and thirty on Tara River. Due to an undefined management structure and minimal regulatory enforcement, there are numerous illegal rafting providers active on BiH rivers.

### **CYCLING – Organizational Structure and Main Stakeholders**

The umbrella organization for cycling in BiH is the **Cycling Federation of Bosnia and Herzegovina (BiSaBiH)**<sup>17</sup>. The BiSaBiH was founded in Banja Luka in 2010 and has thirty-two member clubs across the country. It is a member of Union Cycliste Internationale (UCI), Union Europeenne de Cyclisme (UEC,) and Balkan Cycling Union (BCU). The organization has established sport competitions and events at the local, regional, and international levels. The federation works through a management board, supervisory board, and assembly. Most of the focus of BiSaBiH is on sports competition programming rather than tourism and related activities. In the future, however, the organization plans to advance cycling as a tourism product.

In addition to this BiSaBiH, there is also the **Cycling Association of Republika Srpska (Srpska Cycling)**<sup>18</sup>. **Srpska Cycling is a cooperative** of seven local clubs in the RS that are also members of BiSaBiH. The predominant activity of the Association is the organization of competitions and events in the RS and Serbia as well as major international cycling events and competitions. The structure of the association is unclear.

The **Mountain Bike Association (MTBA)**<sup>19</sup> was registered in BiH in 2011. The MTBA gathers together mountain bike enthusiasts from throughout BiH. Their activities are not commercially driven and are oriented around the mapping, marking, and creation of biking trails; support of environmental protection initiatives; organization of bike tours; education through the publication of expert and technical reviews; promotion of biking, healthy lifestyle, sport, and BiH; providing advisory services to its members; participation in public debates related to the planning of biking trails; and work with children and youth.

### **SKIING – Organizational Structure and Main Stakeholders**

There are many stakeholders involved in skiing and other winter sports in BiH, however, the leading actors are the skiing associations.

The **Skiing Association of Bosnia and Herzegovina** is the main stakeholder in winter sports in BiH and is the official owner of the Alpine skiing competitions held in BiH. Under governmental ownership, it works on the development of relevant sports and to support the activities of athletes

<sup>16</sup> Rescue 3 Europe. <https://www.rescue3europe.com/>.

<sup>17</sup> Cycling Federation of BiH. <https://bisabih.ba/>.

<sup>18</sup> Cycling Association of RS. <https://srpskacycling.com/>.

<sup>19</sup> Mtb.ba. <https://www.mtb.ba/>.

in BiH. The goal of the association is to increase recognition by international associations and enhance BiH's eligibility for the organization of international competitions.

Another important stakeholder is the **Association of Ski Instructors in BiH (ATUS)**. ATUS is the only organized association in BiH which manages the education of ski and snowboard instructors and is a member of International Association of Skiing Instructors (ISIA). The association's training and licensing programs adhere to the standards of ISIA, including all the prescribed norms for the training of professional snow sports educators.

## 2.2 LEGISLATION

There are no national or local-level policies focusing on adventure tourism in BiH; however, adventure tourism is referenced as a priority area in both public sector legislation and private sector initiatives. Both sectors must understand the global trends in the adventure tourism industry and how available resources can be used to further develop the local industry.

Both the RS and BD have their own Laws on Tourism. In 2017, the Ministry of Environment and Tourism of the Federation of BiH drafted the Law on Tourism in FBiH with the intention to harmonize with RS policy. Although this initiated extensive public debate, a standard policy guiding both FBiH and RS has not yet been implemented.

Significant legislation directing the tourism industry exists at the entity and cantonal level. In addition to relevant tourism strategies, each local community is entitled to adopt its own master plan for the development of selected tourism locations or destinations.

Nearly all FBiH Cantons<sup>20</sup> have their own laws on tourism; some cantonal laws mandate tourism boards to work on tourism development as well as promotion. Municipalities (local level) also have the legal capacity to adopt their own strategies for tourism development. The newly proposed legal framework governing the planning and development of tourism in FBiH predicts the formation of tourism organizations at all levels of government. This means that tourism organizations may be formed at the level of entity, canton, municipality, and city as well as inter-municipally. The law determines new forms and measures for financing and provides incentives to the development of tourism, tourism agencies, and tourist guides. The FBiH Law on Tourism proposes legal solutions meant to suppress the grey economy and ensure the protection of consumers.

On the other hand, the RS includes tourism as an option within local development strategies. At the moment, tourist organizations located within RS are working on the tourism offer in accordance with the 2011-2020 Tourism Development Strategy in the

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<sup>20</sup> except for Canton 10, Zenica Doboje Canton and Posavina Canton

RS. RS law recognizes certain forms of adventure tourism under “services in tourism.” More specifically, it lists tourist services that encompass sports and recreational activities and defines them in Article 58 as follows: tourist services in wild waters, such as rafting, kayaking, canoeing, rafting, canyoning, and other similar activities and other tourist services, such as sport climbing services, paragliding, speleological exploration, diving, cave-diving, cycling, mountain biking, mountaineering, mountain guiding, rappelling, skydiving, walking, trekking, riverboarding, and similar activities. The RS Ministry plans to prepare bylaws to regulate all the above mentioned //tourism activities but has not yet done so. The RS also has several bylaws including the Bylaw on the Requirements and Ways to Provide Rafting Services as a Tourism Activity (Official Gazette of RS, 10/11) and Bylaw on Minimum Requirements for Providing Tourism Service in Swimming Areas (Official Gazette of RS, 89/12) and is currently in the process of amending regulations on tourist guides. The process is still in the consultation and preparation phase within the framework of an EU-funded project Safe Together (Interreg IPA Cross-border Cooperation Programme Croatia-BiH-Montenegro)<sup>21</sup>. This project aims to provide standardized skill sets to adventure tourism guides who, in turn, will be recognized by public authorities as official guides. The most important laws are listed in an Annex to this document.

BiH does not have any particular laws recognizing adventure guides as a distinct type of tourist guide. Each entity has a policy that regulates a traditional, non-specialized type of tourism guide. According to entity laws, guides are obliged to take an exam implemented by the relevant Ministry and which has a specified curriculum. Both in RS and FBiH municipalities are also entitled to license guides for their own areas. For example, guides in Banja Luka and Jajce had to go through additional training (besides the ministry-prescribed one) to become licensed as guides for these municipalities.

The nature of adventure tourism brings the key considerations of risk and safety to the forefront. A limited number of operators comply with international standards (most often, rafting). To become a member of the Travel Agents Association of BiH (UTA BiH)<sup>22</sup> tour operators must retain insurance and practice accepted industry standards; however, it is not clear if and how these requirements are enforced. No standards of risk management specific to adventure tourism are implemented within BiH. RS law does require all providers of adventure tourism services to “inform tourism service users about all types of risk involved in a given tourism service” (Article 59) as well as inspect the equipment used in the services provided. Again, however, it is unclear how these policies are enforced or monitored.

All adventure activities have a potential negative impact on the environment including energy and water consumption, a carbon footprint, and the production of waste; because adventure tourism activities generally take place in and rely upon pristine or

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<sup>21</sup> Interreg IPA Cross-border Cooperation Programme Croatia – Bosnia and Herzegovina – Montenegro 2014-2020: <https://www.interreg-hr-ba-me2014-2020.eu/>

<sup>22</sup> Udruženje turističkih agencija u Bosni i Hercegovini – UTA BiH. <https://uta.ba/cms/>.

underdeveloped areas, these impacts can be all the more damaging. The management of these negative environmental ramifications should be included within the business plan of all adventure tourism operators. Apart from a few select pioneers in green and ecotourism, it is unknown if tour operators and businesses consider or comply with any of these concerns and associated standards. RS law does require all providers of adventure tourism services to “undertake measures aiming to protect the environment during the tourism service” (Article 59). It is not clear how compliance is ensured particularly because each national park and protected area has individualized law pertaining to its management and operations.

RS law also prescribes that the Republic Administration for Inspection Works and special organizational units for inspection in the city (i.e. municipality management units) is tasked to monitor compliance with articles of the law through inspection (e.g. market, health, technical, traffic, special planning and construction and ecology) (Article 93). FBiH also has its laws on trade and tourism inspection (e.g. laws on environment, air protection, waste management)<sup>23</sup>. Because most cantons have their own laws on tourism, it is uncertain how these policies are enforced.

### 2.3 PRODUCT DEVELOPMENT

The development of adventure tourism products in BiH is mainly donor driven (e.g. USAID, GIZ) and is implemented through associations, NGOs, and local businesses. Some developmental activities also take place by the following:

- business level development, in which TOs develop their own tourism products
- level of destinations, at which some enthusiasts assume the role of DMO and develop a local tourism offer
- through development agencies (for example PREDA - Feel Kozara Project, REDAH - Ćiro Trail)

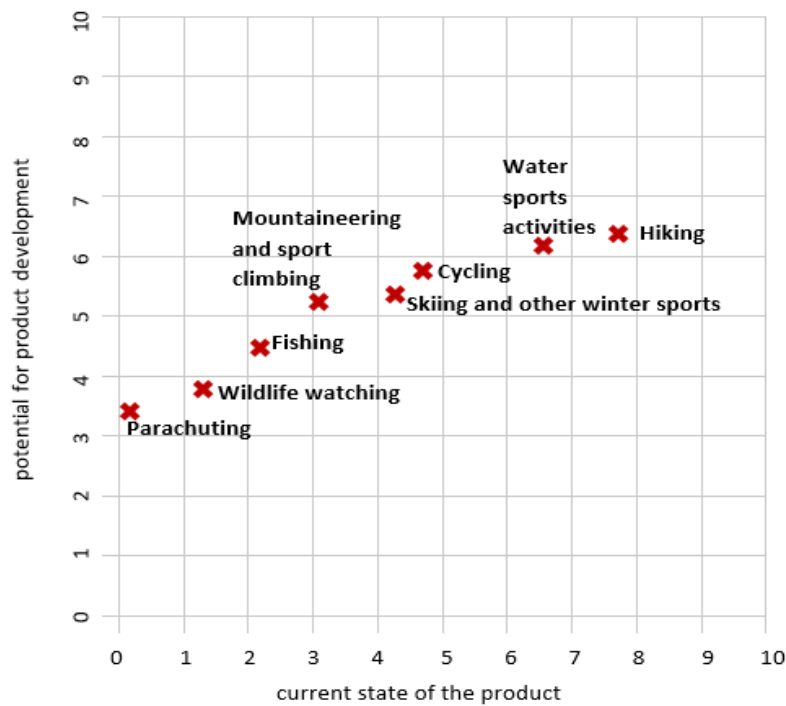
The matrix below (Figure 1) illustrates the current state of product development in BiH and the long-term potential of individual adventure tourism products<sup>24</sup>. The information, gathered through the survey of BiH adventure tourism stakeholders, interviews with BiH adventure tourism stakeholders (both held in May 2021) and workshops with BiH adventure tourism stakeholders, held in June 2021, was the basis for the identification of **key adventure tourism products in BiH**.

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<sup>23</sup> Kantonalna uprava za inspekcijske poslove Tuzlanskog kantona BiH.  
<https://www.kuiptk.ba/index.php/inspektorat-za-promet-roba-usluga-i-saobracaja/trzisno-turisticka-inspekcija/zakoni-trzisno-turisticke-inspekcije.html>

<sup>24</sup> Figure 1 positions adventure tourism products based on BiH adventure tourism stakeholders' evaluation. The current state of the products was determined through an online survey, workshops, and interviews with the most relevant adventure stakeholders in BiH. In our scale, "1" means a product is not developed at all and "10" means the product is in a state of advanced development. The potential for product development has been determined in the same way. In our scale, "1" means that the product does not have potential for future development and "10" means that the product has a very high potential.

Figure I: Product Development Matrix (own work).



As can be seen from the matrix above (Figure I), hiking, water sports activities, cycling, and skiing are currently the most developed products and likewise, have the strongest long-term potential for development. Since key adventure tourism products have not yet been defined at the national level, the following is proposed based on the findings:

<b>Primary adventure tourism products in BiH</b>	<ol style="list-style-type: none"> <li>1. Hiking</li> <li>2. Rafting and other water sports (kayaking, stand-up paddling, canyoning)</li> <li>3. Cycling (all types: road, gravel, mountain biking, touring)</li> <li>4. Skiing (and other winter sports, such as snowshoeing, tour skiing)</li> </ol>
<b>Secondary adventure tourism products in BiH</b>	<ol style="list-style-type: none"> <li>5. Wildlife watching</li> <li>6. (Fly)Fishing</li> <li>7. Climbing</li> </ol>

There are no specific organizations responsible for tourism products on the national, entity, or cantonal levels. Such organizations should be established from the top-down and carry responsibility for developing and promoting a specific tourism product in BiH. There are, however, many product initiatives throughout BiH which are playing an important developmental role in the current adventure offer.

In the following sections, the current situation and specifics of the four primary adventure tourism products – hiking, rafting, cycling and skiing – is presented.

### 2.3.1 HIKING

BiH is a geographically diverse country, characterized by hilly and mountainous terrain, 50 percent of which is forested. Mountains and hills account for 42 and 24 percent of the country's total land surface, respectively, and the average elevation is 500 meters above sea level. Only 8 percent of the country's territory rests below 150 meters above sea level. The mountains of BiH are part of the central Dinaric Alps; twelve peaks within BiH reach over two thousand meters, the highest peak being Mt. Magić at 2,386 meters. The mountains of BiH are suitable for long-distance hiking (EEA, 2015<sup>25</sup>; Malcolm, 2021<sup>26</sup>; USTFBiH, n.d.<sup>27</sup>).

The development of hiking products intended for promotion on the international market are largely concentrated on the Via Dinarica Trail. The White Trail is relatively well developed in comparison to the Blue and Green Trails. Through interviews and online research, at least six local tour operators offering excursions on the Via Dinarica Trails were identified. Hiking tours are also being offered through business to consumer (B2C) and business to business (B2B) channels through some foreign agencies and tour operators such as Exodus and Much Better Adventures. The most recognized tour operator in BiH is likely Green Visions which is offering hiking tours through its web platform on a B2C level and through its partnership network on a B2B level through international markets.

The Via Dinarica platform offers information on the range of possibilities that this long-distance trail offers to visitors. BiH has dedicated significant funds to the development of Via Dinarica, resulting in a listing of well-established routes, accommodations, and mountain hut facilities on the Via Dinarica website, which uses Outdoor Active platform.

The experiences from Via Dinarica show that the hiking products are mainly developed and promoted through B2B channels, and there is room for improvement within B2C channels with direct reach to independent or individual travelers. The feedback from individual travelers and travelers in organized groups was analyzed in the Marketing Strategy 2020-2024 for Via Dinarica. The document outlines the different experiences that these two groups may have while hiking on Via Dinarica. Individual hikers in BiH may have difficulty following designated trail markings and GPS coverage. The most completed listing of trails and infrastructure are included on the Outdoor Active platform introduced to BiH by Terra Dinarica in 2015; this resource has subsequently been connected with Via Dinarica webpage. Apart from Via Dinarica and Outdoor Active platform, information on BiH hiking trails is available on Komoot and Wikiloc,

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<sup>25</sup> European Environmental Agency - EEA (2015). Bosnia and Herzegovina - country briefing. <https://www.eea.europa.eu/soer/2015/countries/bosnia-and-herzegovina>.

<sup>26</sup> Malcolm, N., R. (2021). Bosnia and Herzegovina. Britannica. <https://www.britannica.com/place/Bosnia-and-Herzegovina>

<sup>27</sup> Udruženje inženjera i tehničara šumarstva Federacije Bosne i Hercegovine – USTFBiH (n.d.). Šumarstvo Bosne i Hercegovine. <https://usitfbih.ba/sumarstvo/>.

as well as the BiH platform [planinarenje.ba](http://planinarenje.ba).<sup>28</sup> This local resource is dedicated to hiking and provides information on hiking associations and huts and has a GPS tracker to which platform registrants can contribute. The information on this platform, however, is only available in the local language(s).

In addition, mountain huts in BiH are included on the platform [mountain-huts.net](http://mountain-huts.net).<sup>29</sup> Despite the presence of many mountain huts in BiH, the interviewees and participants of the workshops (BiH adventure tourism stakeholders) pointed out that the main challenge is the maintenance of the already-established infrastructure.

Although the Via Dinarica has been the focus of much recent development for hiking activities, an alternative system of national trails has not yet been developed for the purpose of tourism development. Adventure tourism stakeholders, who participated in workshops raised the question of the lack of national hiking trails and coordination between different public and private sector actors in mapping, marking, and maintaining them. It often happens that even within the same mountaineering association this process is not coordinated, and although they have significant impact on trail creation and quality, there is an absence of cooperation with forest management companies. In 2009, the Law on Forests was repealed and since then, legislation guiding forested areas has been ineffective at the level of FBiH. This policy gap has led to illegal deforestation and occupation of state forest land as well as poor communication between parties invested or involved in the management of forested terrain in BiH. The lack of mapping and marking can be especially dangerous in BiH due to the presence of landmines. The estimations show that mines are still present in nearly 2 percent of the country's territory (i.e. 965 km<sup>2</sup>)<sup>30</sup>. Without a formalized national trails system, it is impossible to secure long-term sustainability and safety of trails; the presence of such a unified trail system would be a signal that the state takes tourism seriously, a factor which might reflect on BiH's overall competitiveness index. A national trail system would also help to shape the management and protection of park resources and promote respect towards and amongst diverse stakeholders (e.g. foresters, demining centers).

The ERA owns a label for certifying trails: Leading Quality Trails (LQT) – Best of Europe. This quality certificate offers a transparent system of criteria for the improvement of trails throughout Europe. There are currently seven certified auditors in BiH for the LQT Portions of the Via Dinarica trail were already assessed for the purpose of the LQT certification, a process initiated by Terra Dinarica.

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<sup>28</sup> Planinarenje.ba is a local portal run by experienced mountaineers and enthusiasts. It offers a range of hiking tours with downloadable GPS tracks free for use. The portal also serves as a tour booking platform.

<sup>29</sup> Mountain-huts.net is a project prepared by Alpine Association of Slovenia and supported by the Balkan Mountaineering Union and all participating mountaineering associations. The country specific information on mountain-huts.net was provided by national mountaineering associations.

<sup>30</sup> Bosnia and Herzegovina Mine Action Center - BHMACH. BiH landmines area: <http://www.bhmac.org/?lang=en>

Apart from hiking, trail running has become a very popular activity in recent years. Trail runners make use of the same infrastructure as hikers (i.e. hiking trails); therefore, the development of these two tourism products can be considered jointly. Currently, six races in BiH are recognized by the International Trail Running Association (ITRA): Vučko Trail, Hranisava Ultra Trail, Jahorina Ultra-Trail, Čvrstica Ultra Trail, Skakavac Trail and Kozara Ultra Trail. The 100km Kozara Ultra Trail is even classified for 5 ITRA points<sup>31</sup>.

### 2.3.2 RAFTING

The natural characteristics of BiH provide favorable conditions for the development of water sports. BiH is ranked seventh in Europe for its substantial water reservoirs including numerous rivers and mountain lakes (MOFTER, 2018). There are several agencies that offer rafting activities on the Tara, Neretva, Una and Vrbas Rivers. Because the river courses are not demanding, rafting is accessible to a broader target audience, including individuals with little or no rafting experiences and a wide range of age groups.

Despite being a potentially inclusive activity, the quality of rafting products in BiH is, at times, questionable. The rafting sector in BiH faces challenges with the development of associated policy and the enforcement of standards. A general lack of regulations regarding licensing and authorizations for those offering and leading these activities and an absence of safety standards threatens the quality of the offer and could have serious repercussions. The reputation of the destination is being damaged by sub-standard management and mitigation of risk within adventure tourism activities such as rafting. This is compounded by illegal outfits that operate without the necessary registrations and licenses and which often undercut pricing to attract a greater market share. These types of common business practices negatively impact the quality tourism offers that operate legally within BiH.

Rafting as a tourism product in BiH is not standardized or managed on a country-wide level. Due to a lack of policy harmonization and enforcement as well as the presence of many illegal operations within the sector, it is difficult to define the exact number of registered and operating clubs and associations in BiH. Estimations of kayaking, rafting, and diving providers in BiH are as follows: twenty on the Una River, ten on the Vrbas River, twenty on the Neretva River, and thirty on the Tara River (on the Tara River alone, there are about 250 boats).

BiH is among the countries that have, at least partially, adopted IRF's certification as their industry standard. The RS has adopted IRF-based rafting bylaw but enforcement was brought into question; currently, the RS operates in a grey zone. In FBiH, cantons also apply their own regulations; rafting is included within local traffic law. Traffic law

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<sup>31</sup> International Trail Running Association - ITRA. <https://itra.run/>.  
International Trail Running Association. Trail Running Evaluation Tools. <https://itra.run/content/measuring-tools> .



focuses mainly on the technical equipment requirements, rather than operational aspects of the activity.

At the time of writing, there are twenty-eight rafting guides and two instructors certified by the IRF in BiH. Of these, twenty-one operate on Tara River while seven are based on the Vrbas River. Notably, there are no IRF-certified guides operating on the Una or Neretva Rivers.

The only company that (alongside IRF-certified guides) holds the Rescue 3 license for rescue services on wild waters and therefore provides safety assurance for the guests is Search and Rescue Training Center Kanjon on the Vrbas River. Even with licensing, the implementation of accepted standards of practice is insufficient. In general, international safety measures are rarely applied and adventure guides are often inadequately trained.

**There are 28 rafting guides and 2 instructors certified by IRF in BiH at the moment. Most of them operate on Tara River (21), 7 on Vrbas River, while there is no IRF certified guide operating on Una or Neretva.**

Despite having abundant resources, there are several threats to the long-term environmental sustainability and development of rafting in BiH. Climate change has already caused some disruption to the environment. The observable water shortages of the last decade will certainly have negative consequences for tourism as well. Additionally, the development of rafting and other water sports is impacted by the uncontrolled construction of hydroelectric power plants on the rivers of BiH; an astounding three hundred and forty-one mini hydroelectric power plants were planned to be built in BiH<sup>32</sup>. For the moment, there is no major activity in this field, and projects are hindered due to requisite financial investments as well as corruption (Dogmus & Nielsen, 2019)<sup>33</sup>. There is also major resistance to this plan led by citizens groups but also by some municipalities<sup>34</sup>. Environmentalists and providers of water activities agree that these plants and dams will harm the environment and may impact the future development of water sports in BiH.

Apart from the threats of unmitigated development in the form of hydroelectric power plants and climate change, over-tourism is also a significant concern for BiH's water sources. Over-rafting during the peak season, particularly on the Neretva and Tara Rivers, directly affects and places pressure on the riverine environment. During the

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<sup>32</sup> Vode BiH. Ukupan broj MHE planiranih ili u izgradnji – export. Last accessed 15 October 2021.

[https://voda.ekoakcija.org/bs/u\\_pripremi?language=en](https://voda.ekoakcija.org/bs/u_pripremi?language=en)

<sup>33</sup> Dogmus, Z. C. and Nielsen, J. (2019). Is the hydropower boom actually taking place? A case study of a South East European country, Bosnia and Herzegovina. *Renewable and Sustainable Energy Reviews* 110, 278–289. <https://doi.org/10.1016/j.rser.2019.04.077>.

<sup>34</sup> On October 21 for example Jajce parliament voted to ban construction of mini power plants on Pliva river in general. <https://ba.n1info.com/vijesti/jajce-izglasalo-nema-izgradnje-mini-hidroelektrane/>

high season, more than two hundred boats a day can run the courses on these rivers and with no infrastructure on river banks.

### 2.3.3 CYCLING

BiH has large areas that are relatively uninhabited as well as an expansive network of paths and rural roadways, characteristics which are ideal for the development of cycling. In the Sarajevo area alone, there are an estimated 2,000-3,000 forest roads which are especially suitable for gravel and mountain biking.

An exact number of cycling paths in BiH is not currently available. According to the information available on the Bikemap platform<sup>35</sup>, there are 4,672 cycling routes in FBiH, 1,150 cycling routes in RS, and 28 cycling routes in BD. Currently, an EU-financed project “Cycling Rural,” is being implemented. Within the context of this project, around 3,000 km of cycling paths have been organized in West Herzegovina and Montenegro.

The most well-known and popular of the long-distance cycling routes in BiH is the Ćiro Trail. The Ćiro Trail is a thematic route following the old railway from Dubrovnik to Mostar and has been identified as an example of best practice in BiH. Another long-distance route is the Trans Dinarica. The Trans Dinarica is a mountain biking route beginning in Kobarid, Slovenia and ending in Sarajevo, BiH. The BiSaBiH is currently in the process of developing guidelines for mapping and marking biking trails.

In the past, the EuroVelo route 8 crossed the coastal area of BiH; however, it has more recently been rerouted through Croatia. There are currently no official EuroVelo routes in BiH, but two routes are in the assessment phase for inclusion in this scheme (the Sava cycling route and a part of Ćiro Trail). BiH does not have a national EuroVelo Coordination Center as of yet; however, the role of an informal EuroVelo contact point has been assumed by the Center for the Environment, Banja Luka. This center facilitates discussions with BiSaBiH on the topics of coordination and intensification of activities related to BiH’s connection to EuroVelo. The Sava cycling route is a likely contender for inclusion, while the Ćiro Trail could become a part of EuroVelo only if attached to a longer route.

The progress made in the development of cycling products and the potential of cycling routes as a tourism attraction are reflected in the development of a special national standard: Bike Friendly Standard (BFS)<sup>36</sup>. The BFS certifies cyclist-friendly accommodations and catering facilities, travel agencies, service stations, and parking facilities. The standard was introduced as part of the EU-funded Regional Cooperation Council's project and is managed by the Regional Development Agency for Herzegovina (REDAH) with support of the national technical secretariats Regional

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<sup>35</sup> Bikemap. Cycling routes and Bike Maps in and around Bosnia and Herzegovina. Last accessed 15 October 2021. <https://www.bikemap.net/en/1/3277605/>.

<sup>36</sup> Bike Friendly Standard. Što je to Bike Friendly Standard? <https://www.bikefriendlystandard.com/bfs/>.

Development Agency Zlatibor (Republic of Serbia) and Tourism Cluster Montenegro. Facilities marked Bike Friendly must meet minimum requirements adapted to cycling tourists and their needs; the standard provides recognition and enhanced visibility in response to targeted efforts intended to create a comfortable environment for cyclists. BFS currently certifies five accommodation facilities, seven catering facilities, and one travel agency. The standard is not yet recognized on the national level, has limited members, and is not well promoted.

Central Bosnia Canton is the only canton implementing its own bike friendly certification in conjunction with mapping and trail marking activities. This cantonal initiative is not related to BFS.

Very few local tour operators offer cycling products on a B2B and B2C level. One such example is Green Vision, based out of Sarajevo. Some foreign tour operators also offer cycling products on B2B and B2C level. Such operators include Exodus, Biking Croatia, Biketours.com, Spiceroads, and others. There are also some international navigational platforms offering tracks of cycling routes in BiH. The most well-known are Outdoor Active, Komoot, Ride with GPS, Wikiloc, and Trailforks. Outdoor Active promotes a number of best mountain bike trails within BiH. Apart from the prevailing mountain bike trails, the platform also lists possibilities of bike touring in BiH. The use of this platform in BiH is promoted by GIZ, one of the main donors in BiH.

Cycling guides in BiH were only recently trained and licensed within the frame of the Cycling Rural project (EU cross-border cooperation BiH - Montenegro) and under the responsibility of the BiSaBiH. This project trained thirty-four guides who were recognized by the Union Cycliste Internationale (UCI). The list of licensed cycling guides is publicly available on the BiSaBiH webpage.<sup>37</sup> The future of such training and their sustainability remains unknown.

#### **2.3.4 SKIING**

There are eleven ski resorts in BiH; however, Jahorina, Bjelasnica, Igman and Vlasica are considered the most important based upon existing infrastructure and size. Some investments to ski centers have been made in recent years to comply with the standards necessary to host European and international competitions. Both skiing centers and skiing clubs operate independently. Individual skiing clubs are registered as organizations that promote the sport, culture, and tourism in the area where they are located. It is not possible to find an exact number of ski clubs currently in operation within BiH. Up-to-date information related to skiing events at both BiH and international venues is gathered on the web portal Ski.ba<sup>38</sup>. However, this content is only available in the local language.

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<sup>37</sup> BiSaBiH. Licencirani članovi. <https://bisabih.ba/licencirani/>

<sup>38</sup> Ski.ba. <https://www.ski.ba/>

The National Association of Ski Instructors (ATUS) provides training for ski instructors (Ski teacher 1, 2, 3) for qualification of the ISIA Stamp Title. Unfortunately, training is not available for the internationally recognized ISIA Card, which would allow instructors to teach skiing in other countries. There are seven hundred and forty certified ski and snowboard instructors in BiH. The official register is available online<sup>39</sup>.

BiH adventure tourism stakeholders agree that winter sports in BiH require an increased capacity in the operation of rescue services. Stakeholders believe that the management of winter sports tourism in BiH is too political and places too great of an emphasis on hotels rather than the skiing and related winter sports products. Statistics show that Bjelašnica and Jahorina are the cheapest ski resorts in Europe (Statista, 2016)<sup>40</sup>.

The advantage of mountain destinations is that they can host adventure sports in both winter and summer season. Global warming represents a significant threat to winter mountain tourism, but on the other hand, there is an opportunity to develop summer mountain tourism. Climate change will especially affect smaller and low-altitude ski resorts. To promote their profitability and long-term sustainability, structural changes and new approaches will have to be adopted. In order to diversify the winter tourism offer and reduce the seasonality of winter resorts and mountain destinations, traditional winter destinations have begun a global trend of developing their summer offer<sup>41</sup>. Destinations in the Alps, the world's most popular ski destination, now show that there are more visitors arriving during the summer season than in winter. Some of the larger ski centers in BiH have developed their summer offers (e.g. Ravna Planina and Jahorina). Despite this, desk research indicates that these seasonal opportunities are not yet satisfactorily developed, and there is still too little emphasis on summer activities in traditionally winter sports centers.

Climate change will have significant impacts on the future development of winter sports. Figure 2 shows the predicted measure of snow reliability and conditions in the upcoming years without a reliance upon artificial snowmaking. BiH, however, is not included in the Mountain Tourism Meteorology and Snow Indicators System (MTMSI)<sup>42</sup>. More accurate information for future snow conditions in BiH would be helpful in planning the future of winter tourism. The map shows neighboring destinations which are predicted to have between thirty and fifty days of snowfall annually (with a measurable depth of above thirty centimeters) during the next two decades. Compared to recent years, the annual number of days suitable for skiing will decrease by about 5 days. The "hundred-day rule" by Witmer (1986) suggests that commercially viable ski areas need at least one hundred days of snowfall of thirty centimeters or

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<sup>39</sup> ATUS - Asocijacija Trenera i Učitelja Skijanja u Bosni i Hercegovini. Učitelji. <https://atus.ba/ucitelji/>.

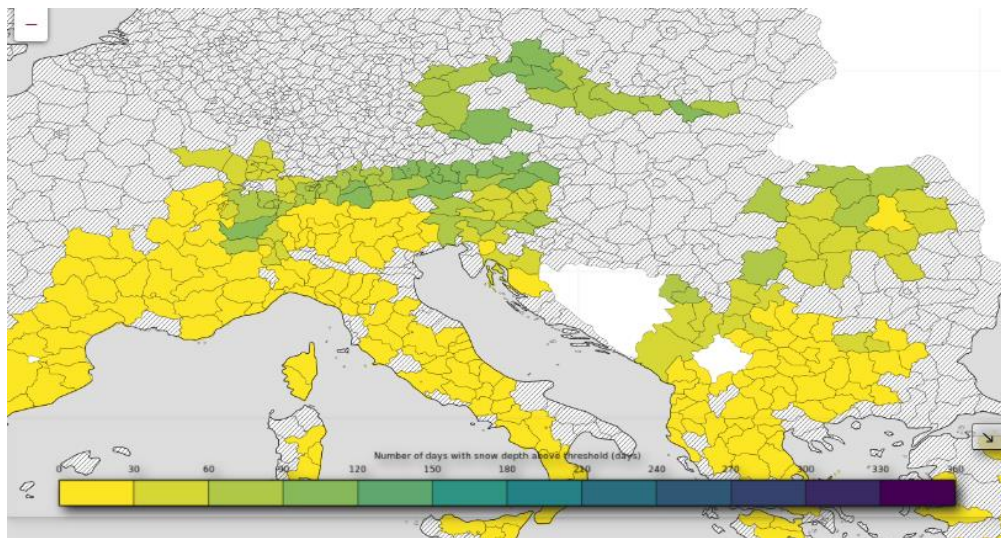
<sup>40</sup> Statista (2016). Cheapest ski resorts for a day-pass in Europe 2015/16. <https://www.statista.com/>.

<sup>41</sup> UNWTO (2018). Sustainable mountain tourism: opportunities for local communities. UNWTO, Madrid. <https://www.e-unwto.org/doi/pdf/10.18111/9789284420261>.

<sup>42</sup> European Centre for Medium-Range Weather Forecasts. Mountain Tourism Meteorology and Snow Indicators. <https://climate.copernicus.eu/mountain-tourism-meteorology-and-snow-indicators>

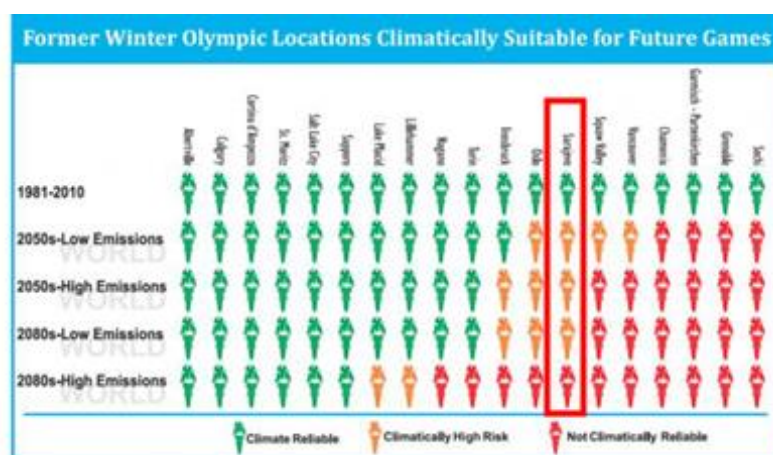
more (Yang & Wan, 2010)<sup>43</sup>. If this is accurate, the winter season is under threat in the areas included on the map.

Figure 2: Mountain Tourism Meteorological & Snow Indicators illustrating the projected snow reliability (depth above 30cm) predicted for 2021-2040 (Climate Data Store<sup>44</sup>).



A study on the future of Winter Olympic Games resorts (Scott, Steiger, Rutty & Johnson, 2015) made projections on how climate change will impact ski tourism in the upcoming decades. Figure 3, below, illustrates that climate change will have an impact on skiing tourism. The former Winter Olympic Games locations surrounding Sarajevo were identified as having climatically high risk by the 2050s (see Figure 3).

Figure 3: Climate change impacts on tourism: ski tourism (Scott, Steiger, Rutty & Johnson, 2015).



<sup>43</sup> Yang, J. & Wan, C. (2010). Progress in Research on the Impacts of Global Climate Change on Winter Ski Tourism. *Advances in Climate Change Research* 1(2), 55–62. <https://doi.org/10.3724/sp.j.1248.2010.00055>.

<sup>44</sup> European Centre for Medium-Range Weather Forecasts. Mountain tourism meteorological and snow indicators for Europe from 1986 to 2100 derived from reanalysis and climate projections. <https://cds.climate.copernicus.eu/cdsapp#!/software/app-tourism-mountain-indicators-projections?tab=app>

## 2.4 HUMAN RESOURCES

The tourism industry is one of the greatest employers in BiH with an estimated workforce of 30,322. As projected by World Travel and Tourism Council (WTTC), jobs in tourism represented 8.4 percent of the total employment in BiH in 2020, a decrease from 10.5 percent in 2019. Within this group, food and beverage services, including restaurants, had the highest numbers at 41 percent. The accommodation subsector, comprising hotels, apartment hotels, camping, and other forms has the next highest employment rates at approximately 35 percent. Women make up 42 percent of the tourism industry’s workforce. Table I elaborates upon the total number of employees by sectors. FBiH accounts for the most employees at 66 percent, followed by the RS at 33 percent, and BD with 1 percent of employees in tourism. Table I details the distribution of tourism employees by entity in the tourism leisure subsector.

Table I: Entity-level employment within the Tourism Leisure Services Subsector, 2019/2020 (USAID, 2021c)<sup>45</sup>.

Tourism Leisure Activity Providers	No. Business	No. of Direct Employees by Entity 2019/2020				
		FBiH	RS	BD	Total	percentage
Sports and Adventure Tourism	62	680	500	20	2,200	53%
Amusement and Theme Parks	10	410	190		600	27%
Conventions and Trade Shows	44	290	140	10	440	20%
Employees within Tourism Leisure Services		1,380	830	30	2,240	
Distribution of Employees by Entity		62%	37%	1%		100%

Although adventure tourism service providers are not listed as a separate category within Table I, the tourism leisure subsector does include sports and adventure, amusement parks, and convention businesses in BiH. While it is difficult to know exactly how many adventure and sport providers there are in BiH, Table I provides estimated numbers of companies operating in BiH in 2019/2020. It should be noted that while there are two hundred and forty-four leisure activity businesses providing products and services for tourists, these businesses were reduced by more than half when a measurement of “direct tourism engagement and employment” was applied (USAID, 2021c).

### 2.4.1 ADVENTURE GUIDES

Guides play a critical role in adventure tourism and are considered as one of the key elements of the adventure tourism offer. Despite this, there is currently no specific training or education available for guides working within the adventure tourism sector. The initial development of the sector was organic and largely driven by individual enthusiasts involved in sport and recreational activities linked to sports and recreational associations such as the Association of Mountaineers, the Kayak and Canoe Association, the Mountain Rescue Service, and Biking Associations. Individual owners of accommodation facilities also encouraged the growth of the adventure

<sup>45</sup> USAID (2021c). Human Capital Needs Assessment and Forecast. Internal document.

tourism sector through the development of camping sites, family-owned houses, and vacation homes for business purposes.

There are no specific requirements for adventure tourism guides or guides specializing in specific niche areas such as hiking, biking, and fishing. Trainings for adventure tourism guides are limited to those that have been provided internally by individual organizations and companies for their own hires as well as by some internationally funded projects related to specific thematic orientations or targeting particular regions.

The FBiH and the RS have different procedures for tour guide licensing. The process for obtaining an official tour guide license is described in Annex C.

It is estimated that there are approximately 1,300 tour guides in BiH. The breakdown of this number by entity is estimated at 1,250 licensed guides in FBiH and 50 licensed guides in the RS. It is neither known how many of these guides are actually engaged in providing guiding services, nor is it clear how many of them work within the outdoor tourism sector, a sector which demands specific training and skills.

#### **RCC Adventure Guides Training with Adventure Travel Trade Association (ATTA)**

ATTA training, which included: trip organization, psychology of guiding, group management, risk assessment, emergency procedure, general knowledge (sustainability awareness - leave-no-trace principle - reasons which jeopardize safety in the outdoors (subjective and objective) - strategies for dealing with various situations in the outdoors, including lightning, rockfall, crossing streams, flash floods,... - importance of fitness, energy conservation, adequate hydration and nutrition, and hygiene on multi day adventure trips - managing allergies and diets of guests), weather, wilderness first aid, public speaking, storytelling and interpretation.

Most relevant training for outdoor guides took place as part of a project funded by the Regional Cooperation Council (RCC) in 2016. At this time, a number of guides from six Western Balkan countries (BiH, North Macedonia, Serbia, Albania, Montenegro, Kosovo) participated in ATTA training. Training included: trip organization; psychology of guiding; group management; risk assessment; emergency procedures; general knowledge such as sustainability awareness, leave-no-trace principle, and threats to safety in the outdoors (subjective and objective); strategic response to dangerous situations including lightning, rockfall, crossing streams, and flash floods; the importance of fitness, energy conservation, adequate hydration, nutrition, and hygiene on multi-day adventure trips including the management of medical and dietary needs of guests; weather events; wilderness first aid; public speaking; storytelling; and interpretation. In 2020, the RCC ran an online training for a small number of participants from BiH. These trainings are not organized regularly, and therefore, do not meet the needs of the industry.

The tour operator Green Visions has embarked on a journey to develop training curricula based on ATTA's standard for adventure travel guides (ATGS) and provides regular trainings to the private sector.

#### **Private Sector Initiative in Adventure Guide Training**

Based on the ATTA training and its own experience, Green Visions developed adventure guide training curricula evolving around 5 core competencies of adventure travel guide as defined by the International Adventure Travel Guide Qualification and Performance Standard: technical competencies, wilderness medicine and first aid, customer service and group management skills, natural and cultural history interpretation and sustainability.

The company is working on obtaining the status of a publicly recognized certificate from Sarajevo's cantonal government. During the past seven years, Green Visions has regularly organized trainings for the company's guides and educated approximately one hundred and forty persons in accordance with standards of ATTA and Green Visions' specific needs. Although the curriculum and training are of high quality, the training is not formally recognized by the legal framework and institutions of BiH. Green Visions developed its adventure guide training curriculum based on ATTA training as well as the company's extensive local industry experience. The training is centered on five core competencies required of the adventure travel guide as defined by the International Adventure Travel Guide Qualification and Performance Standard<sup>46</sup>: technical competencies, wilderness medicine and first aid, customer service and group management skills, natural and cultural history interpretation, and sustainability.

#### **MOUNTAINEERING GUIDES and INSTRUCTORS**

None of the four mountaineering associations in BiH (MA BiH, MA FBiH, MA RS, and MA HB) is a member of the International Federation of Mountain Guides Association (IFMGA)<sup>47</sup> or the Union of International Mountain Leader Associations (UIMLA) which are the only internationally recognized mountain guiding qualifications available in Europe. However, the Mountaineering Association of BiH is a member of the International Mountaineering and Climbing Federation (UIAA)<sup>48</sup> which has developed standards and guidelines for mountaineering and climbing activities. MA FBiH is currently undergoing the assessment process to receive their Mountain Qualification Label, a globally recognized accreditation and certification scheme that reviews and assesses the training and assessment programs of UIAA member federations. The law, however, still does not allow mountaineering associations to provide guiding service to anyone but its own members or members of other mountaineering clubs. In practice, locally licensed guides do provide commercial trainings because the law restricting such activities is rarely enforced by the public authorities.

The four BiH mountain associations each have their own mountain guide curricula. The associations provide mountain guides' training in a range of categories based on proficiency level in outdoor activity; however, the entity's ministries are in charge of organizing the training, exams, and licensing

<sup>46</sup>Adventure Travel Trade Association. International Adventure Travel Guide Qualification and Performance Standard. <https://www.adventuretravel.biz/education/guide-standard/>.

<sup>47</sup> International Federation of Mountain Guides Association – IFMGA. <https://ifmga.info/>

<sup>48</sup> International Mountaineering and Climbing Federation (UIAA). <https://www.theuiaa.org/>.



of traditional tourist guides. Neither of these trainings include first aid certification or adventure skills and knowledge specific to guiding.

MA FBiH provides training for guides in the following categories<sup>49</sup>:

- A category – summer tours (requires basic guide knowledge, excursions and hikes through plains, hilly and mountainous terrains, knowledge of use of ropes, insurance on the tour, use of sticks) - guided tours on (un)marked roads, marked hiking trails with little snow and easy unmarked trails
- B category – winter (snow) tours (basic winter guidance, use of ice axes, crampons, sticks and snowshoes, knowledge of the use of ropes, guiding in winter conditions, good orientation knowledge) - guiding includes category A and easy marked and easy unmarked trails on snow, marked winter roads, organized security raids, demanding and difficult marked and unmarked trails in snow
- C category – heavy summer tours (including knowledge from B category, moving with safety measures and equipment, climbing on light rocks, good knowledge of orientation) - guiding includes category B, difficult demanding and unmarked paths, secured roads (ferratas)
- F category – easy tour skiing (requires knowledge from category B and knowledge of skiing and walking with tour skis on different terrains, special knowledge of orientation) - guiding includes everything from categories A, B and C
- G category – easy glacier tours (requires knowledge of walking with crampons and ice axe on ice, safety on ice, rescue from snow gaps and special knowledge of orientation) - guiding includes all from categories B and C, easy marked and unmarked trails with snow cracks, easy unmarked, icy (snowy) and combined trails and demanding unmarked trails
- H category – climbing in all conditions (required categories B, C and G, knowledge of climbing with(out) snow, with ice and combined, icy waterfalls, rescue and orientation) - guiding includes all from categories B, C and G, climbing in all directions, with(out) snow up to IV degree of severity according to the UIAA scale

A mountain guiding license is valid for two years after which guides are required to renew it. Regulations do not require skills such as first aid training, cultural and natural interpretation, or client management; licensing also does not require an official examination. In addition to official curricula, some attempts have been made to provide information on the skills necessary for mountain guides.

Similar to MA FBiH, the MA RS also provides for the training of mountain guides. The MA RS curriculum is aligned with other organizations, however, including the Serbia-based Mountaineering Association, which adheres to UIAA standards. It includes the training of guides for the following skills<sup>50</sup>:

- Leading hiking tours (according to the program and rules of European Hiking Federation)
- Mountain guide of category III (summer conditions at heights above 3000 meters above sea level)
- Mountain guide of category II (winter conditions on mountains not higher than 3000 meters)
- Mountain guide of category Ib (guide category II with completed training for ice terrain up to 6000 meters by UIAA standard)
- Mountain guide of category I (trip leader for above 6000 meters, tropical regions, ice terrain and lava-flow hazard areas, and mountain guide – instructor)

<sup>49</sup> Planinarski savez FBiH. Pravilnik za vodiče <https://psbih.ba/wp-content/uploads/2020/11/286.-Pravilnik-za-vodi%C4%8De-PS-FBiH.pdf>

<sup>50</sup> Planinarski savez RS. Pravilnik za vodiče. <https://pss.rs/wp-content/uploads/2015/01/program-obuke-planinarskih-vodica.pdf>.

Legally, mountaineering associations can only provide training to their members. Anyone who wants to provide guiding service first needs to become a member of a mountaineering association in order to operate within the law. Nonetheless, this does not prevent many individuals from providing commercial tours either as part of an agency's offer or as a freelancer. At the same time, trips that mountaineering clubs organize give an impression of expanded tourism offer while, in essence, have a very limited link to commercial tour guiding.

In the area of GSS, the current challenge is a low number of trained rescue staff available across the country. The huge potential of BiH's mountains and parklands within the tourism sector as well as for general use by the local population requires the further development of the GSS, including the training of additional personnel for search and rescue teams.

### RAFTING GUIDES and INSTRUCTORS

BiH is among the countries that - partially - adopted the IRF certification as the rafting industry's standard. There is one certified Rescue 3 provider, Search and Rescue Training Center Kanjon, but implementation remains insufficient. In general, international safety standards are rarely applied and adventure guides are often inadequately trained. Because local regulations are either not required to adopt or lack enforcement of international standards, service providers do not feel compelled to adhere to standards of practice or invest in the training and licensing of their river guides. The general dismissal of such regulations by the majority of local providers does not impact the high demand for rafting activities during the height of the tourist season. Despite the seasonality of rafting, rafting outfits can earn sufficient income to support their businesses and employees.

Some rafting operators have gone through IRF training<sup>51</sup> and as such are eligible for listing on the official IRF website. Due to various reasons (e.g. obligations to regularly extend the license or pay for recertification), these operators may not have been included on the list or were subsequently removed due to the expiration of their training and/or licensing. At the moment, there are twenty-eight rafting guides and only two instructors certified by IRF in BiH. **Of these, twenty-one operate on Tara River while seven are based on the Vrbas River. Notably, there are no IRF-certified guides operating on the Una or Neretva Rivers.** In contrast, the number of rafting agencies is estimated to be close to 100 across BiH, most of which have several boats in their fleet.

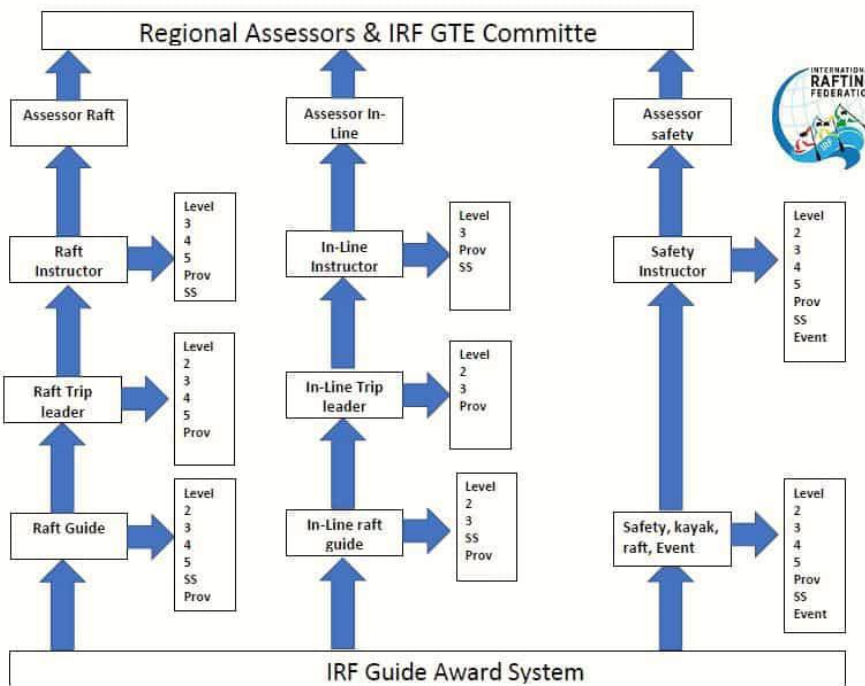
The RS did adopt bylaw regulating the legal requirements for rafting service providers, but due to heavy lobbying, it has not been fully enforced. In FBiH, cantons have different regulations and rafting is regulated as part of traffic law which mainly focuses on the requirements of the technical equipment, rather than the operational aspects of the service. The relevant public body can issue authorization to specific local agencies to conduct their own rafting skipper trainings. It is not clear if and how an assessment of training quality is carried out.

The IRF, the official world governing body for rafting, has its own GTE Certification Requirements and Processes, which are shown in Figure 4, below.

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<sup>51</sup> International Rafting Federation. GTE Certification Requirements, Processes and Fees. <https://www.internationalrafting.com/guiding/gte-requirements/>

Figure 4: GTE certification requirements and processes (IRF<sup>52</sup>).



Rescue 3<sup>53</sup> is a training program for life saving during rafting activities and is provided by the licensed Rafting Center Canyon to all undergoing rafting training. According to IRF standards, guides should not be leading rafting tours unless they complete this training.

To develop the full spectrum of rafting and kayaking skills and standards in BiH there should be a long-term and sustainable effort made to establish a local group of certified instructors; this group would be given the authority to provide training to lower-level professionals in the field. Managed in an official, organized capacity, it may be possible to standardize the safety measures of rafting activities as well as their quality. This process needs to occur from both directions such that a sufficient number of beginners receive the basic training and certification required for tour operation, while those individuals who qualify for the instructor level certification through skills and expertise gained from previous experience as rafting trip leaders are given the opportunity for advancement.

The diving club BUK from Banja Luka is the holder of the International Life Saving Federation's (ILS) license to organize trainings for those organizations or individuals that offer water-based activities, especially in swimming pools and natural beaches. The RS does not have regulations in place for risk assessment at swimming areas (also provided by BUK) or demanding lifeguards on site if guests are present.

### CYCLING GUIDES and INSTRUCTORS

Cycling guides in BiH have been recently trained and licensed under the supervision of the BiSaBiH as part of the Cycling Rural Project (EU cross-border cooperation BiH - Montenegro). The UCI acknowledged a total of thirty-four regional guides who completed the training. The list of licensed

<sup>52</sup> International Rafting Federation. IRF GTE – Guide Training Program (GTP) Content and Learning Outcomes. <https://www.internationalrafting.com/wp-content/uploads/2019/09/IRF-GTE-Guide-Training-Program-minimum-content-ver2.pdf>.

<sup>53</sup> Rescue 3 Europe. <https://www.rescue3europe.com/>.

guides is publicly available on the BiSaBiH webpage<sup>54</sup>. The future of such trainings and their continuity remains unknown.

Cycling guides must possess both technical and guiding skills. Training should therefore include a technical cycling module (i.e. cycling techniques, theoretical knowledge, and bike repairs) and a guiding module (i.e. leadership skills, orientation, and first aid). The European Organization of Mountain Bike Instructor-Guides<sup>55</sup> strives to harmonize cycling guide trainings and licensing on the European level. This standardization would be beneficial for adoption within BiH to help define, develop, and represent the profession of a mountain bike instructor-guide on the international level and align national standards and training with those accepted internationally.

### **SKIING GUIDES and INSTRUCTORS**

Ski instructors in BiH are trained by ATUS which offers three categories of expertise: Ski Instructor 1 (Učitelj Skijanja 1 – U1), Ski Instructor 2 (Učitelj Skijanja 2 – U2), and Ski Instructor 3 (Učitelj Skijanja 3 – U3).

Ski instructors who obtain the national certification for Ski Instructor 3 (Učitelj Skijanja 3) qualify for the ISIA Stamp Title<sup>56</sup>, but not for the higher, internationally recognized ISIA Card. The ISIA Card is assigned to ISIA Qualified Teachers who obtain education recognized by ISIA and aligns with ISIA Performance Level 3 (defined by ISIA Quality Standard). The standards and trainings in BiH do not cover all the required training to comply with the requirements to obtain the ISIA Card<sup>57</sup>.

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<sup>54</sup> BiSaBiH. Licencirani članovi. <https://bisabih.ba/licencirani/>

<sup>55</sup> European Organisation of Mountain Bike Instructor-Guides. <http://europeanbikeguides.com/>.

<sup>56</sup> International Ski Instructors Association. ISIA inspection to ATUS courses and ISIA membership status (correspondence). <http://atus.ba/wp/wp-content/uploads/2018/08/2013-InspectionFeedbackATUS.pdf>. International Ski Instructors Association. Qualification list 2018-19. [https://isia.ski/UPI/wp-content/uploads/ISIA\\_Qualifications\\_Status\\_2018-19\\_1.0.pdf](https://isia.ski/UPI/wp-content/uploads/ISIA_Qualifications_Status_2018-19_1.0.pdf).

<sup>57</sup> The quality standard for ISIA Stamp comprises the training regarding: technique, safety on/off-piste, didactics, first aid, tourism, marketing, communication and basic rights, languages, environment, nature, history and culture. Further in-depth training is required in ISIA Stamp standard and the ISIA technique test and ISIA safety test to successfully obtain an ISIA Card. ISIA quality standard for the ISIA stamp and ISIA card: <http://isia.ski/quality-standards/?lang=en>

## 2.5 SWOT ANALYSIS

Table 2 represents the Strengths, Weaknesses, Opportunities and Threats Analysis (SWOT) for the adventure tourism industry in BiH.

Table 2: SWOT analysis of adventure tourism in BiH.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>● Unexplored and undeveloped rural areas</li> <li>● Rich cultural and natural heritage</li> <li>● Hospitable people and communities</li> <li>● Geographical location: small and easily accessible to the Western Balkans, coastal areas, and shares border with Croatia</li> <li>● Multiple points of diversity including culture, nature, landscape, religion, and historical narratives</li> <li>● Affordability</li> <li>● Year-round opportunities and climate for tourism adventure offers</li> <li>● Variety of outdoor activities</li> <li>● Authentic gastronomic offer that includes continental and coastal specialties as well as wine and spirits</li> <li>● Mountainous landscape suitable for the development of adventure tourism</li> </ul>	<ul style="list-style-type: none"> <li>● Untrained and inexperienced guides (lack of training, low numbers of qualified guides, insufficient educational resources and opportunities)</li> <li>● Weak government support: corruption, unregulated laws, inappropriate laws and bylaws, unstable political conditions, lack of industry visibility and recognition of economic potential by decision makers and investors, and insufficient financial support from the authorities</li> <li>● Lack of destination management: weak organization by the appropriate institutions, non-existent state strategy, undefined tourist destinations, lack of local strategy for development of tourism promotion</li> <li>● Tourism development achieved mainly through individual and NGO initiatives with very little contribution from officials and authorities</li> <li>● Little compliance with accepted international standards</li> <li>● Insufficiently developed tourism infrastructure: lack of incoming agencies, large number of illegally operating businesses (e.g. accommodation and tour operators), poor transportation infrastructure and lack of accessibility</li> <li>● Insufficient connection of stakeholders: lack of connectivity and joint action between service providers in the adventure tourism sector, weak cooperation of travel agencies, guides, and organizations</li> <li>● Areas with landmines</li> <li>● Insufficient and inefficient marketing and promotion of BiH as a tourist destination, no strategic marketing, limited information available on the foreign market</li> <li>● Low environmental awareness (e.g. illegal dumping in rural areas and near protected sites)</li> <li>● Lack of awareness, practices, and policies on destination sustainability</li> </ul>
OPPORTUNITIES	THREATS

<ul style="list-style-type: none"> <li>● Impact of Pandemic: increased number of domestic and regional tourists and increased awareness and interest in adventure tourism</li> <li>● Possibility to use EU, USAID, and GIZ funds with the aim of improving business conditions</li> <li>● Development of green, adventure, and rural tourism</li> <li>● Better connection amongst adventure tourism stakeholders</li> <li>● Development of airline services</li> <li>● Vicinity of Croatian coast with lots of potential customers</li> <li>● Involvement of the private sector in tourism development projects</li> <li>● Tourism is a fast-growing industry, which is indirectly or directly connected with most other industries; the development of each of its segments is important.</li> <li>● Development of new activities and products in pristine areas</li> </ul>	<ul style="list-style-type: none"> <li>● Increased destruction of natural and cultural heritage, pollution</li> <li>● Climate change</li> <li>● Unstable political situation</li> <li>● Covid-19 and its negative impact on tourism</li> <li>● Government focuses on conventional forms of tourism with too little awareness of opportunities and benefits of adventure tourism</li> <li>● Negative marketing due to the recent history of conflict and poor service</li> <li>● Unpredictability and lack of planning in investment into the development of tourism infrastructure</li> <li>● Dependence upon donations and international interventions and general lack of sustainability after project execution</li> <li>● Lack or non-implementation of tourism development strategies</li> <li>● Positive growth trends of tourism within competitive countries in the region</li> <li>● Migrant crisis</li> <li>● Lack of human resources and emigration of young people</li> </ul>
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# 3 ANALYSIS OF REGIONAL COMPETITION

The development of adventure tourism is dependent upon the presence of specific natural characteristics and conditions. Thanks to its diverse natural wealth of mountains, canyons, caves, lakes, and rivers, BiH has significant potential for the continued development of adventure tourism.

Consultations with BiH adventure tourism stakeholders through surveys, interviews and workshops, held in May and June 2021, revealed that the main regional competitors of BiH in the field of adventure tourism are Croatia, Slovenia, Montenegro, Italy, Austria, Serbia, Albania, Switzerland, North Macedonia and Turkey.

Despite the numerous newly developed adventure tourism activities and overall growth of the adventure tourism sector, BiH ranks quite low on the Adventure Tourism Development Index (ATDI, 2020)<sup>58</sup>. BiH ranks 92<sup>nd</sup>, well behind surrounding countries such as Slovenia (4<sup>th</sup>), Croatia (11<sup>th</sup>), Montenegro (19<sup>th</sup>), Serbia (26<sup>th</sup>) Albania (27<sup>th</sup>), and North Macedonia (57<sup>th</sup>).

The following competitive analysis of BiH's primary adventure tourism products (hiking, rafting, cycling, and skiing) focuses upon the neighboring countries of Croatia, Slovenia, Montenegro, Serbia, Austria, and Italy. These countries represent the most intense competition for BiH's burgeoning adventure tourism sector.

## 3.1 HIKING

The neighboring countries of Croatia, Slovenia, Serbia, Montenegro, and Austria, have similar landscape features as BiH, and therefore, present its biggest competition in the field of hiking.

According to ATTA (ATTA, 2020; ATTA, 2021), hiking is one of the hottest trending adventure activities in the world. Together with trekking and walking it is currently the top activity in Europe and Asia and one of the top five activities in the rest of the world. Lonely planet<sup>59</sup> identified long-distance hikes as a travel trend for 2021 as well. Among tour operators (included in ATTA's research), hiking was also identified as the most popular adventure product in 2019 (ATTA, 2019).

Tourists who choose hiking as their main activity have a tendency to stay longer in the destination

<sup>58</sup>Adventure Travel Trade Association. Adventure Tourism Development Index 2020. <https://cdn-research.adventuretravel.biz/research/7832975982376892.2352352/atdi-report2020.pdf>.

Adventure Tourism Development Index ranks 191 countries and assesses adventure tourism competitiveness of countries worldwide. There are ten categories: Sustainable Development Policy, Safety & Security, Health, Natural Resources, Cultural Resources, Adventure Activity Resources, Entrepreneurship, Humanitarian, Tourism Infrastructure and Image. Data derives from GDP, population density statistics, protected areas, Environmental Performance Index, World Rescue Institute, Foregin and Commonwealth Travel Warnings and an expert panel.

<sup>59</sup> Lonely Planet. Travel trends for 2021: long distance hikes. <https://www.lonelyplanet.com/articles/travel-trends-long-distance-hikes>.

and their expenditure often spreads tourism benefits to the entire local economy. The demand for this type of tourism increases annually.

BiH is characterized by a mountainous terrain with long, wide ranges, which are sparsely populated and therefore offer pristine areas and expansive views. These features are suitable for long-distance hikers. Because the mountains have lower elevations than those found in, for example, Slovenia and Austria, the winter weather tends to be much milder although fairly wet. The climatic difference does allow for an extended season between spring and late autumn with weather conditions still favorable for hiking.

A precise number of hiking trails that are registered and accessible in each of the competitor countries cannot be found. There are some online platforms that enable an estimation for individual countries. The information available on the platforms All Trails and Outdoor Active has been used to outline the estimated number of trails present in each country. As can be seen in Table 3, the numbers provided by the two platforms for each of the six countries listed here vary<sup>60</sup>.

Table 3: Number of hiking trails in BiH and competitive countries (All Trails and Outdoor Active platforms).

	<b>ALL TRAILS<sup>61</sup></b>	<b>OUTDOORACTIVE<sup>62</sup></b>
Austria	3,017 hiking trails	3363 hiking and mountain trails
Croatia	835 hiking trails	667 hiking and mountain trails
Slovenia	454 hiking trails	790 hiking and mountain trails
Serbia	196 hiking trails	119 hiking and mountain trails
BiH	54 hiking trails	363 hiking and mountain trails
Montenegro	43 hiking trails	221 hiking and mountain trails

Overall, there are fewer hiking trails in BiH registered on the All Trails platform as compared to the competitor countries. For all countries (except Croatia and Serbia), more information is available on Outdoor Active, which is a result of the wider use and presence of this platform in the region. While these are not precise numbers and cannot be treated as absolute authority, this content does provide a relative understanding of trail numbers and accessibility of hiking trails in the region.

Another platform showcasing the differences present between countries is Waymarked Trails<sup>63</sup> (see Figure 5). The data on this platform is crowd sourced enabling anyone to contribute. This platform shows a relative absence of trails in BiH compared to the countries to the north. This gap could have two possible causes. The

<sup>60</sup> The content is updated regularly, nevertheless, the trails included in the numbers below only comprise those officially added by the website creators and their partners and not those added by individuals (a division exists between curated trails and community content).

<sup>61</sup> Information obtained on 20th July 2021 from <https://www.alltrails.com/?ref=header> (the content is updated regularly, therefore the number of search results can vary).

<sup>62</sup> Information obtained on 7th September 2021 from <https://www.outdooractive.com/en/> (the content is updated regularly, therefore the number of search results can vary).

<sup>63</sup> Information obtained on 20th July 2021 from <https://hiking.waymarkedtrails.org/#?map=5!29.5642!1.0698> (the content is updated regularly, therefore the number of search results can vary).



number of marked trails in the country may still be low or alternatively, users are not registering existing trails on this particular platform despite being a useful aid for hikers researching and choosing their hiking destinations.

Figure 5: Hiking trails in BiH and the surrounding competitive countries based on data available on the Waymarked Trails platform.



The limited availability of trail options in BiH on the Waymarked Trails and other platforms decreases the country’s competitiveness when compared to surrounding countries and hinders the overall development potential of this adventure tourism product. In order to see the actual availability of online information about hiking in BiH in comparison to competitors, a keyword analysis was conducted through the Google search engine<sup>64</sup>. The number of results for the phrase “hiking in BiH/Bosnia/Balkans” is significantly higher in the English language compared to the results for the German language. Generally, there is less information available on hiking in BiH in the German language when compared to competitive countries; “hiking in Bosnia” leads to more results in the English language than does the parallel search for “hiking in Slovenia” or “hiking in Montenegro.”

The keyword analysis emphasized BiH’s lagging position behind its major competitors; this conclusion is drawn from the general lack of information available about this tourism product online. German-speaking guests are among the most desirable guests<sup>65</sup> in BiH, therefore, increasing the availability of information in the German language is critical to reaching the German speaking demographic, thereby attracting greater numbers to the destination.

<sup>64</sup> An analysis of Google keywords was completed using Semrush, an online SaaS platform that acts as a keyword research tool and is specialized for content marketing and online visibility management. Most frequent keywords related to hiking in English and German have been identified. The number of results for “keyword + in + country name” has been compared for BiH, Slovenia, Croatia, Serbia, Montenegro, Italy and Austria.

<sup>65</sup> In the survey held in May 2021, BiH adventure tourism stakeholders were asked to define the source markets, where they would like to get more visitors from. The most frequently mentioned countries were: Germany, Croatia, Slovenia, Serbia, Austria, USA, Sweden, UK, Italy and France.

## 3.2 RAFTING

Additional online research led to the conclusion that Slovenia, Croatia, and Montenegro are BiH's biggest competitors in rafting and water sports. These countries all have similar water resources, including rivers desirable for white water rafting activities.

Despite being included on the list of top ten adventure activities of 2019 (ATTA, 2020), rafting is no longer considered a trending activity. On the other hand, kayaking was listed as one of the top activities of 2019, and in the following year (2020), identified as a trending activity (ATTA, 2019; ATTA, 2020).

The newest list of "hot trending adventure activities" (ATTA, 2021) does not include any of these water sports activities.

BiH ranks best among these countries in terms of water resources (7<sup>th</sup> in Europe - continent) and is well known for its abundant rivers and mountain lakes (MOFTER, 2018). Slovenia (12<sup>th</sup>) and Croatia (11<sup>th</sup>) are likewise known for their water resources and rivers.<sup>66</sup> However, the sheer number of rivers does not necessarily reflect the numbers of riverways that are suitable for rafting activities. The characteristics of individual rivers may also offer a varied course which attracts a broader group of potential rafters, from beginner to expert.

The unexploited tourism potential of BiH includes rafting as well. The most suitable rivers for rafting in BiH are the Tara, Una, Neretva, Drina and Vrbas Rivers. In Slovenia, rafting activities are present on the Soča, Sava Dolinka, Sava Bohinjka, Savinja, Kolpa, and Krka Rivers, while in Croatia rafting is possible on the Cetina, Mrežnica, Dobra, Kupa, Korana Una, and Zrmanja Rivers. Online research showed that rafting in Montenegro is mainly being developed on the Tara River.

The availability of online information featuring rafting activities may be one of the factors that informs the decision-making of tourists, particularly in choosing a destination. An analysis of Google results<sup>67</sup> indicates that there are fewer search results available for BiH in both English and German languages in comparison to the results for competitive countries in the region. Search results in the German<sup>68</sup> language are especially limited, which may inadvertently serve to dissuade German-speaking consumers from exploring the BiH market. These search results should serve as a red flag for DMOs and TOs looking to expand their international reach. Since German-

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<sup>66</sup> World Bank (n.d.). Renewable internal freshwater resources per capita (cubic meters). [https://data.worldbank.org/indicator/ER.H2O.INTR.PC?most\\_recent\\_value\\_desc=true](https://data.worldbank.org/indicator/ER.H2O.INTR.PC?most_recent_value_desc=true)

<sup>67</sup> An analysis of Google keywords was completed using Semrush, an online SaaS platform that acts as a keyword research tool and is specialized for content marketing and online visibility management. Most frequent keywords related to rafting in English and German have been identified. The number of results for "keyword + in + country name" has been compared for BiH, Slovenia, Croatia, Serbia, Montenegro, Italy and Austria.

<sup>68</sup> In the survey held in May 2021, BiH adventure tourism stakeholders were asked to define the source markets, where they would like to get more visitors from. The most frequently mentioned countries were: Germany, Croatia, Slovenia, Serbia, Austria, USA, Sweden, UK, Italy and France. As Germans are the most desirable guests, this language has been chosen for the analysis.

speaking markets are among most desirable target markets for BiH's adventure tourism stakeholders, increasing the availability of German-language materials is a clear means by which to improve tourist traffic to the region, both in the number of visits and expenditure. The limited number of resources in the German language promoting BiH's rafting opportunities reduces the competitiveness of the destination, particularly in comparison to the surrounding countries with similar rafting possibilities (Slovenia, Montenegro, Croatia).

### 3.3 CYCLING

With the exception of Austria and Italy, competitive countries (Croatia, Slovenia, Montenegro and Serbia) are similar in size and terrain and geographical characteristics. The arrangement of the infrastructure, network of routes, and availability of information to a wide market is therefore crucial for the recognition of this tourism segment on the target markets. Information on cycling in a number of countries and GPS trackers are made accessible through a variety of online platforms. Drawing from the information available on the Bikemap platform, Table 4 shows a comparison of mapped ways and cycling routes in BiH and its main regional competitors.

According to ATTA, cycling, in particular e-biking, is a hot trending adventure activity, but also cycling on road/paved surface and mountain/non-paved surface are recognized as warm trending activities (ATTA, 2021).

According to the European Cyclists Federation (ECF), the economic benefits of cycling are huge - over 500 billion € for the EU-28 (ECF, 2016)<sup>69</sup>. Cycling has also many positive externalities for the environment, public health and the mobility system. A report in "Cycling tourism from Europe" (CBI, 2018)<sup>70</sup> outlined that there is an increase in demand for customized cycling itineraries instead of standardized programs and that cycling travelers tend to more and more frequently research and plan their trip online.

Table 4: Cycling routes in BiH and its regional competitors (Bikemap<sup>71</sup>).

	MAPPED WAYS	CYCLE ROUTES
Italy	29,886,554 km	384,314 km
Austria	17,331,802 km	232,222 km
Slovenia	6,537,030 km	86,147 km
Croatia	4,312,117 km	52,539 km
Serbia	1,034,062 km	6,475 km
BiH	615,283 km	5,917 km
Montenegro	524,231 km	3,488 km

As can be seen in Table 4, there are fewer cycling routes recorded in BiH, compared to other countries (except Montenegro) and the number of mapped ways is

<sup>69</sup> European Cyclists' Federation - ECF (2016). The EU Cycling Economy: Arguments for an Integrated EU Cycling Policy. [https://ecf.com/sites/ecf.com/files/FINAL%20THE%20EU%20CYCLING%20ECONOMY\\_low%20res.pdf](https://ecf.com/sites/ecf.com/files/FINAL%20THE%20EU%20CYCLING%20ECONOMY_low%20res.pdf).

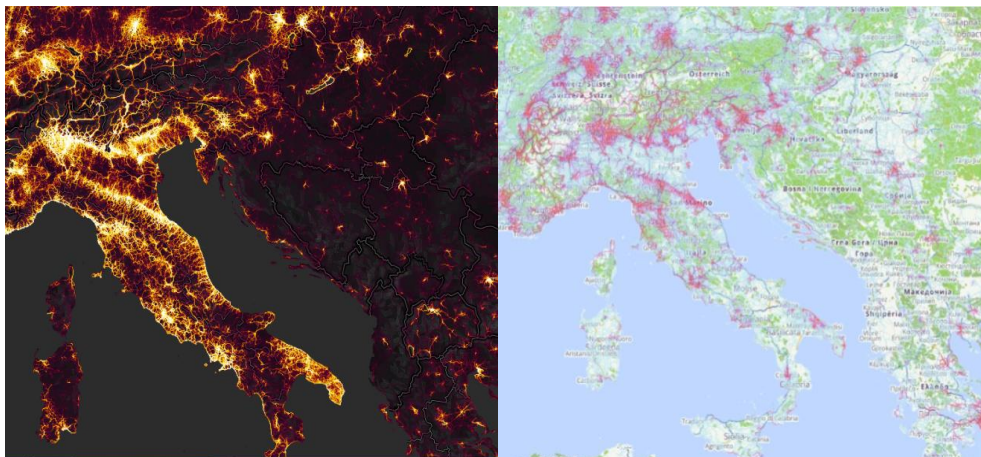
<sup>70</sup> Centre for the Promotion of Imports from Developing Countries – CBI (2018). Cycling Tourism from Europe. <https://www.cbi.eu/market-information/tourism/cycling-tourism/europe#which-european-markets-offer-opportunities-for-cycling-tourism>

<sup>71</sup>Bikemap. Cycling routes and Bike Maps in and around Bosnia and Herzegovina. <https://www.bikemap.net/en//3277605/>

significantly lower. A similar conclusion can be made when comparing the coverage of cycling routes in BiH on two most widely used GPS heatmap tools for cyclists (Strava and Ride with GPS) in comparison with the surrounding countries. As shown in Figure 6, the GPS coordinates in BiH are not well covered, which may cause planning and navigational difficulties for cyclists. Italy, Slovenia, and Austria stand out with the number of recorded trails while Croatia, Serbia, and Montenegro are similar to BiH. Two reasons might contribute to the lower visibility of BiH's cycling routes on international platforms. Cyclists on BiH's trails may not be registered on the platforms or lack the technology necessary to contribute data. Alternatively, the number of marked, organized trails may still be low in BiH compared to other countries in the region.

Cyclists are not a homogenous target group but distinctly heterogenous with specific wishes and needs. When discussing cycling we always need to have a specific target group in mind (road, touring, mountain biking, gravel, etc.). The analysis of the guest requirements on the Drau route and Eurovelo lead to similar conclusions. The most important factors for cyclists are the maintenance of the trail, good signage, bikers' friendly accommodation establishments, availability of quality information, bike service and rental shops, cycling friendly gastronomy and transport and logistics<sup>72</sup>.

Figure 6: GPS tracks on Strava Heatmap<sup>73</sup> (left) and Ride with GPS<sup>74</sup> (right)



The availability of online information regarding cycling options and infrastructure in BiH is critical for attracting international tourists. Research shows that the Internet is the main source of information when planning cycling holidays (ADFC, 2021)<sup>75</sup>. Similar to rafting, the analysis conducted on Google keywords<sup>76</sup> revealed that there are very

<sup>72</sup> European Parliament (2012). The European Cycling Route Network EuroVelo.

<https://ecf.com/sites/ecf.com/files/EP%20study%20on%20EuroVelo%20network.pdf>.

<sup>73</sup> Strava. The Global Heatmap. Last accessed 15 October 2021. <https://www.strava.com/heatmap#7.00/-120.90000/38.36000/hot/all>.

<sup>74</sup> Ride with GPS heatmap. Last accessed 15 October 2021. <https://ridewithgps.com/heatmap>.

<sup>75</sup> Allgemeiner Deutscher Fahrrad-Club - ADFC (2021). ADFC Bicycle Travel Analysis 2021. Available at <https://www.adfc.de/artikel/adfc-radreiseanalyse-2021>

<sup>76</sup> An analysis of Google keywords was completed using Semrush, an online SaaS platform that acts as a keyword research tool and is specialized for content marketing and online visibility management. Most frequent keywords related to cycling in English and German have been identified. The number of results for "keyword + in + country name" has been compared for BiH, Slovenia, Croatia, Serbia, Montenegro, Italy and Austria.

few search results for cycling in BiH in the German language. In comparison to the search results for competitor countries, BiH has a negligible number of informational sources available in German. Despite significantly more results in English (even more than for Slovenia and Croatia), the unavailability of information in German hinders the competitiveness within German-speaking target markets, identified as the most desirable target markets for adventure tourism stakeholders in BiH<sup>77</sup>.

### 3.4 SKIING

BiH is known for hosting the 1984 Winter Olympic Games in Sarajevo. This history is often shared with and promoted amongst guests and provides part of the attraction for visiting certain mountains in the Sarajevo area. Among the countries in the region, Italy and Austria each hosted the Winter Olympics twice, while other countries have not yet done so. Global events of this nature are a significant contributor to tourism, not only in terms of attracting visitors during the event, but in creating a long-term international reputation and visibility. FIS (International Ski Federation) records the number of ski races hosted in individual countries. According to FIS statistics on alpine racing<sup>78</sup>, BiH (282 FIS races) ranks higher than Serbia (193) and Montenegro (86) with numbers roughly equivalent to Croatia (312). On the other hand, Slovenia (1,552), Austria (4,413) and Italy (10,452) are more frequent and active organizers of alpine racing events. The significant income and attention these events garner result in increased investment and the development of necessary infrastructure and winter facilities.

The International Report on Snow & Mountain Tourism (Vanat, 2020)<sup>79</sup> outlines that Eastern Europe is (together with China) the most obvious emerging skiing destination (BiH is a part of Eastern Europe). However, the Alps are still the major competitor, accounting for 43 percent of worlds' ski visits.

As mentioned in Chapter 2 (Contextual Analysis), BiH ski teachers and instructors must be certified in accordance to national standards with training through the ISIA Stamp license. The same is required for ski teachers and instructors in Serbia and Montenegro; however, in Slovenia and Croatia one can also qualify for ISIA Card. In 2015, Austria and Italy left the ISIA<sup>80</sup> certification due to disagreements regarding trainings (Italy is, however still a member of ISIA but does not align instructors' training with ISIA). As a result, many Italians register as skiing instructors in Slovenia. Table 5

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<sup>77</sup> In the survey held in May 2021, BiH adventure tourism stakeholders were asked to define the source markets, where they would like to get more visitors from. The most frequently mentioned countries were: Germany, Croatia, Slovenia, Serbia, Austria, USA, Sweden, UK, Italy and France.

<sup>78</sup> FIS – International Ski Federation. Statistics: Races by Places and Nation. <https://www.fis-ski.com/DB/general/statistics.html?statistictype=places&sectorcode=AL>

<sup>79</sup> Vanat, L. (2020). International Report on Snow & Mountain Tourism: Overview of the key industry figures for ski resorts. <https://www.vanat.ch/RM-world-report-2020.pdf>.

<sup>80</sup> ISIA member countries: Andorra, Argentina, Australia, Belgium, BiH, bulgaria, Canada, Chile, Croatia, Czech Republic, Denmark, Finland, Germany, Great Britain, Greece, Hungary, Ireland, Israel, Italy, Japan, Korea, Montenegro, Netherlands, New Zealand, Norway, Poland, Romania, Russia, San Marino, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, USA.

illustrates the number of ISIA-licensed ski instructors in BiH, Slovenia and Croatia according to the ISIA's official website. Data for Montenegro and Serbia is not available.

Table 5: ISIA Stamp and ISIA Card licensed ski instructors per country<sup>81</sup>.

	ISIA Stamp	ISIA Card
BiH	109	0
Slovenia	489	45
Croatia	565	51

The last two years (because of Covid-19 pandemic) have highlighted the importance of domestic markets. Table 6 shows the proportion of the potential domestic market for skiing in BiH alongside its main international competition. As can be seen, Austria has the far greatest share of identified skiers in its population. The small percentage of potential domestic guests for BiH emphasizes the need to focus on attracting international guests.

Table 6: Population of competitor countries and share of population actively participating in winter sports (Statista, 2020<sup>82</sup>; Vanat, 2020).

	POPULATION (2020)	NUMBER OF SKIERS (2020)	PERCENTAGE OF POPULATION
Italy	60,461,826	7,266,000	12%
Austria	9,006,398	2,960,000	33%
Slovenia	2,097,195	299,000	14%
Croatia	4,105,267	227,000	5%
Serbia	8,737,371	211,000	2%
BiH	3,280,819	175,000	5%
Montenegro	628,066	62,000	10%

Statistics show that only about 5 percent of the population in BiH skis. Most international visitors are regional, traveling from the major competitor countries including Serbia, Slovenia, Croatia, and Montenegro. The mountains in BiH are less demanding, and therefore, are more suited to families who are seeking recreational activities accessible to all skill levels. Table 7 shows a comparison of BiH's ski infrastructure to its biggest competitors in the region (Vanat, 2020). With the exception of Austria, BiH has the greatest dependency on foreign skiers. BiH has more ski areas and lifts than Montenegro and Croatia, possibly contributing to the higher number of skier visits per year. Serbia and Slovenia both have better infrastructure and greater numbers of visitors. While Austria and Italy are included, their numbers far exceed the other countries represented and have less relevance as a point of comparison.

<sup>81</sup> International Ski Instructors Association. Instructors. <https://isiadb.ski/instructor>.

<sup>82</sup> Statista. Number of people who ski in Europe as of 2020, by country. <https://www.statista.com/statistics/801008/europe-number-of-people-skiing-by-country/>

Table 7: A comparison of skiing infrastructure in BiH and competitive countries (Vanat, 2020).

	NUMBER OF SKI AREAS	NUMBER OF SKI LIFTS	AVERAGE SKIER VISITS	PROPORTION OF FOREIGN SKIERS
Montenegro	4	23	250,000	25%
Croatia	13	25	150,000	10%
BiH	18	50	400,000	50%
Serbia	31	77	750,000	20%
Slovenia	44	217	1,212,000	17%
Austria	253	2,930	52,540,000	66%
Italy	349	2,127	27,749,000	35%

Statistics show that Bjelašnica and Jahorina are the cheapest ski resorts in Europe (Statista, 2016). On the other hand, there are six Austrian and two Italian ski resorts included among the twenty most expensive in European within the same time frame.

Desktop research reviewing online information about skiing in BiH showed that resources were unavailable in a wide range of foreign languages<sup>83</sup>. The keyword analysis<sup>84</sup> confirmed that there are minimal search results in the German language for the (German) keywords “skifahren/winterurlaub/skigebiete/skiurlaub Bosnien und Herzegowina.” There is significantly more information available in English language with keywords such as “skiing/winter holidays/ski resorts in Bosnia and Herzegovina” providing many more results. The analysis also showed that the keyword “Balkans,” (as a region), has greater visibility online, but this groups the neighboring competitor countries (Croatia, Serbia, and Montenegro) together with BiH. This suggests that although winter tourists may be interested in the region, their unfamiliarity with the market requires a more general online search. As a result, there is an opening to attract potential travelers to BiH if the information available to them online was accessible and in their native language.

<sup>83</sup> In the survey held in May 2021, BiH adventure tourism stakeholders were asked to define the source markets, where they would like to get more visitors from. The most frequently mentioned countries were: Germany, Croatia, Slovenia, Serbia, Austria, USA, Sweden, UK, Italy and France. German market is the most interesting for BiH adventure tourism stakeholders, therefore German language has been chosen for the analysis.

<sup>84</sup> An analysis of Google keywords was completed using Semrush, an online SaaS platform that acts as a keyword research tool and is specialized for content marketing and online visibility management. Most frequent keywords related to skiing in English and German have been identified. The number of results for “keyword + in + country name” has been compared for BiH, Slovenia, Croatia, Serbia, Montenegro, Italy and Austria.

# 4 KEY CHALLENGES FOR ADVENTURE TOURISM IN BIH

Adventure tourism in BiH faces several challenges that hinder its development: visibility, recognizability, and quality.

## 4.1 MANAGEMENT

Adventure tourism in BiH has a complex and undefined organizational structure. The lack of common legislation on the national level as well as the distinct approaches of the three entities (RS, FBiH, and BD) are among the biggest challenges that adventure tourism in BiH faces.

There is a lack of country-wide organizations which bring together actors who are involved in development and promotion of individual adventure tourism products (e.g. cycling association of BiH, hiking association of BiH, rafting association of BiH). Some NGOs, associations and businesses are attempting to fill this gap, but most initiatives are donor driven, the result being that many projects are not organizationally or financially sustainable. Since a large part of development is driven by donors, there is a lack of long-term financing of many projects and products. It is not rare to find projects which see no further development, maintenance, or promotion after official completion. Moreover, no local organizations exist or are charged with the responsibility to develop and promote new tourism-related projects, products, or programs or contribute to sustaining those which have been completed.

The specific adventure tourism products of hiking and cycling face difficulties within the delegation of infrastructural maintenance and trail marking. The lack of managerial structure and insufficient communication amongst key stakeholders results in missed opportunities in the development of tourism products. Many tourism SMEs lack the core competencies (eg. business management and planning, managing finances, pricing, profit and loss) required to manage successful businesses. Few tourism businesses have a clearly articulated business strategy or active management plan.

The management of safety and risk is not given a high enough priority by tourism businesses and DMOs. Many activity and experience providers, transfer companies, and accommodation providers in BiH are not aware of the importance of safety planning, not only to ensure the wellbeing of travel consumers, but to minimize the potential negative impacts of incidents on their businesses and the wider destination (i.e. reputational cost).



## 4.2 LEGISLATION

There is no relevant adventure tourism organization in place which could take upon itself the regulation of policy and associated practice within the industry. Adventure tourism as such was not recognized or addressed by tourism law as an activity that requires a specific set of regulations at the time of preparing this document. The harmonization and compliance of laws among the entities is another challenge that hinders rapid change. However, new tourism development strategies seem to have embraced adventure tourism as a specific tourism offer.

Many other actors, besides tour operators, are legally enabled to organize tours although without the necessary knowledge and training to do so. This is particularly true for water activities; several illegal companies staffed with untrained personnel have been identified. Lack of recognized safety measures and compliance lead to serious safety concerns and decrease the quality of the offer as well as the reputation of entire adventure tourism industry in BiH. A number of licensed organizations holding licenses and franchises specializing in various adventure tourism activities do exist in BiH, but standards and practices are not harmonized. This results in a lack of consistency within visitor experience. Rafting activities best illustrate this weakness of the adventure tourism sector. Rafting is an activity offered by numerous providers yet require no standard set of qualifications for operation, lack environmental and infrastructural guidelines, and do not ensure the safety of or quality experience for their guests.

International standards do exist for activities such as rafting, hiking, and swimming; however, obligation to adopt them in BiH is minimal. Some such exceptions are swimming areas in the RS and the registration of rafting boats with port authorities. In addition, services provided by official sport clubs and associations must be done in accordance with the international standards upon which the organization (and membership) has agreed. Many tourism providers are not familiar with international safety standards. Supplier compliance with the International Organization for Standardization (ISO) safety standards<sup>85</sup> is a minimum requirement for many international outbound trade partners, particularly in the higher spending segments. The absence of robust liabilities insurance for tourism businesses in BiH makes the need for comprehensive and transparent safety planning even greater. If a potential trade partner cannot defray liabilities insurance risk, they will need even greater assurance that suppliers follow international safety standards.

## 4.3 PRODUCT DEVELOPMENT

The lack of environmental awareness among the local population and stakeholders results in a poor state of the environment, which prevents the development of a green

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<sup>85</sup> International Standard. Adventure Tourism – Safety Management Systems – Requirements. 2014. <https://www.sis.se/api/document/preview/917247/>.

and safe adventure tourism sector. Quality, safety, and (environmental) sustainability are among the main challenges of adventure tourism in BiH.

The quality of BiH's adventure tourism offer is limited with inconsistencies in both supply and service standards, significant product gaps, and unrealized potential for new higher value tourism opportunities pointing to major capacity gaps in the private sector. There is a lack of communication and unified information in the adventure tourism sector regarding the development of adventure tourism products as well as lack of awareness and recognition of adventure tourism in the local communities and the public sector. Also, many outdoor operators are not combining their activities with culture or nature-based experiences. Doing so would create an all-around more impactful experience for guests and increase value for higher spending adventure travelers, thereby attracting new markets to the destination. Such notable gaps in the development of the industry represent the unexploited potential of BiH's adventure tourism.

The management of safety and risk is not given a high enough priority by outdoor activity providers. Many outdoor operators are not familiar with international safety standards and access to relevant certifications and licensing is restricted.

Hiking and biking activity providers are not sufficiently connected into the supply chain. There is no national hiking or cycling trail system in place helping to facilitate the further development of the associated infrastructure; this includes trail cutting and blazing as well as the general upkeep of existing trails and signage. The roles of the parties responsible for such activities are poorly defined. The absence of the cadaster makes it difficult to prepare for and organize a plan for proper maintenance, trail blazing, and signage.

BiH lacks a consistent classification and certification of hiking and cycling routes and trails. The only certification and standard for cycling which exists is the BFS. Without national level recognition, increased membership, and greater promotion, its potential impact on the cycling industry is severely limited.

Because adventure tourism is reliant upon the natural environment and the conservation of its resources, environmental degradation needs to be considered. For example, the construction of hydroelectric power plants threatens the existence and continued development of water-based sports. More generally, climate change will be the greatest factor in the future success of winter adventure tourism. Activities reliant upon regular snowfall (e.g. skiing) will face uncertainty in the upcoming decades, therefore requiring traditional ski resorts to restructure and diversify the activities they can offer to both domestic and international guests.

#### 4.4 MARKETING

As there is no national tourism organization or umbrella organization that manages adventure tourism in BiH, there can be no top-down promotion at the state level. The resultant gaps in management and promotion are being filled by a few local DMOs, the RS tourist board, and a few cantonal boards. Despite these efforts, the weak promotion of BiH's tourism industry limits the awareness and visibility of BiH as an adventure tourism destination on the international market.

There is no common marketing strategy at either the national or product level or an organization that would be in charge of its realization. There is no clear vision and positioning of what BiH represents as a tourist or adventure tourism destination. Consequently, international awareness of the national brand is limited. This is further confused by the different narratives which exist about and emit from the RS, FBiH (and cantons) and BD.

Additionally, there is no national platform for adventure tourism. Such a platform would offer adventure tourism products to the international market and would serve as a clearinghouse for information on adventure tourism in BiH, thereby increasing the marketing of the destination and increasing sales on behalf of local businesses. The desk research revealed that there is a lack of availability of information in foreign languages<sup>86</sup>, which may be a liability when aiming to attract a broad pool of international tourists.

#### 4.5 HUMAN RESOURCES

Trained and certified adventure travel guides provide the assurance of quality and safety for adventure tourists. In BiH, there is no specialist training for adventure tourism guides. The RS Law on Tourism offers a minor exception; Article 58 of the law mentions adventure activities as a potential form of tourism services but currently does not stipulate specialized training for those operating within that sector.

A number of internationally-funded projects have implemented various trainings resulting in the certification of local participants (e.g. ATTA training, cycling guide training done as part of the EU-funded project in Herzegovina region), but these certificates have no valid leverage in within BiH. Some of the participants of such projects do provide guiding services; however, the effort participants put into training is undermined because certifications are voluntary rather than required. Lack of control over guide training and certification threatens the safety of guests and the quality of service. Recent trainings, for example the 2016 ATTA guide training program, have raised the overall standard of outdoor guiding skills, but the shortage

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<sup>86</sup> In the survey held in May 2021, BiH adventure tourism stakeholders were asked to define the source markets, where they would like to get more visitors from. The most frequently mentioned countries were: Germany, Croatia, Slovenia, Serbia, Austria, USA, Sweden, UK, Italy and France. Availability of information in these languages would increase visibility of adventure tourism in BiH in these source markets.

of expert outdoor guides is still a limiting factor for growth. Many knowledge gaps remain.

The development of a specialized curriculum for adventure guides designed for the needs of BiH and with content addressing specific activities within the adventure tourism sector is needed. The level of technical competencies for specific activities (e.g. climbing, skiing) is considered sufficient by representatives and employees of the local industry, but enforced local qualifications would require the adoption of more widely accepted international standards and an overall increase in the education and skills required by guides. For example, in hiking, current trainings provided by the Association of Mountaineers do not include a first aid course and are not up to standards necessary for adventure tourism guides.

The local population inevitably impacts the current and future development of adventure tourism activities in BiH; local communities must be included within and encouraged to contribute to developmental efforts in order to enhance industry sustainability. One of the greatest challenges is the lack of environmental awareness and knowledge about sustainability. Many outdoor activity providers are not aware of the importance of sustainability and how adopting its principles can actually help improve business efforts, while the local population also needs more awareness-raising in this area.

# 5 STRATEGIC DIRECTION AND APPROACH

## 5.1 VISION

*By 2026, BiH will become a preferred destination for adventure travelers in the Western Balkans, recognized for its appealing offer of safe and sustainable adventure experiences.*

## 5.2 MISSION

The mission of adventure tourism stakeholders in BiH is to attract international visitors by developing quality, safe, and sustainable adventure tourism products.

To achieve this, stakeholders will:

- Strengthen cooperation among them by forming product clusters which will eventually grow into a national adventure tourism association in charge of management, development, and promotion.
- Build capacity of those working in the adventure tourism sector in BiH by introducing international trainings and licensing which will eventually be available in the frame of the Academy for adventure tourism.
- Create a development platform for flagship products, experiences, and integral tourism products to present BiH to the global markets as an appealing adventure destination with a potential for future investments.
- Establish a common brand and communication channels to raise awareness among local adventure tourism stakeholders and to strengthen the position of BiH on international markets.

## 5.3 GOALS AND SMART OBJECTIVES

By the conclusion of 2026, the adventure tourism sector in BiH will:

- Bring together at least forty stakeholders as active members of the national association for adventure tourism.
- Train and license two hundred adventure tour guides.
- Develop sixteen flagship products and experiences which will be recognized by international buyers and media.
- Establish at least fifty bookable experiences and products for inclusion on the Adventure BiH webpage.
- Be a part of at least four international transversal hiking and cycling routes.
- Have two internationally certified hiking and cycling routes, forty specialized adventure businesses, and twenty certified sustainable businesses.
- Host one hundred and twenty international TAs and TOs and forty international media representatives at events and study tours in BiH.

**The long-term aim for an organization connecting all relevant BiH stakeholders and which is responsible for the management, development, and marketing of adventure tourism is simple: BiH deserves the chance to become self-sufficient and grow naturally without the continual intervention and outside organization of international projects.**

This strategic document is divided into four sections:

- **M: MANAGEMENT AND LEGISLATION**
- **PD: PRODUCT DEVELOPMENT**
- **HR: HUMAN RESOURCES**
- **C: MARKETING**

For each of the sections smart objectives were determined, supporting the key goals.

<b>M: MANAGEMENT AND LEGISLATION</b>
<ul style="list-style-type: none"> <li>• To establish from bottom-up efficient informal bodies for each product (Product Clusters) of product representatives bringing together interests and needs of local communities to serve as an effective model of product management.</li> <li>• To build cooperation among product clusters, with public institutions and donors.</li> <li>• To implement new Operational and Safety Standard Guide, assure compliance with entity laws and regulations and improve sustainable operation of business by implementation of international certifications as “Good travel seal” and “Travelife for Tour Operators”.</li> <li>• To monitor and evaluate implementation of the strategy and introduce corrective measures within annual operation plans.</li> </ul>
<b>PD: PRODUCT DEVELOPMENT</b>
<ul style="list-style-type: none"> <li>• To identify and categorize routes and trails involving all stakeholders, prepare a cadaster of trails and prioritize investments on the trails, ensure legality and establish efficient maintenance system.</li> <li>• To foster the transformation of the tourist offer along the trails and establish new accommodations.</li> <li>• To establish and implement national system of marking and support it with digital marking and print of guidebooks and maps, including mapping of minefields to ensure safety.</li> <li>• To prepare and implement system for standardization, regulation and quality assurance of travel products and experience and introduce efficient pricing policies.</li> <li>• To support and guide the process of product and experience development with the priorities on development of flagship products, connection of transversals with the special focus on fighting climate change, addressing seasonality through diversification of tourism offer at ski resorts, protecting rivers from hydropower plants’ construction, supporting sports events and classification and certification of routes.</li> <li>• To introduce and implement needed specialization of supply chain through introduction of internationally recognized quality programs.</li> </ul>
<b>HR: HUMAN RESOURCES</b>
<ul style="list-style-type: none"> <li>• To train and license adventure guides (adventure travel guides, cycling guides, hiking guides, rafting guides, ski instructors).</li> <li>• To provide long-term capacity building on sustainability, leadership and adventure tourism in the form of adventure tourism academy.</li> </ul>
<b>C: MARKETING AND COMMUNICATION</b>
<ul style="list-style-type: none"> <li>• To start the cooperation within product cluster, between product clusters and with entities through joint marketing activities.</li> </ul>

- To differentiate Adventure BiH from competing destinations, reinforce (or change) the image of BiH as a safe adventure tourism destination.
- To increase the visibility and recognition of BiH as an adventure tourism destination through key products, increase the cooperation and sales by international B2B market, increase overall media presence and set up joint key communication media (web page) for Adventure BiH.
- To build internal communication and raise awareness of the BiH brand.
- To understand and follow the demand of target groups.

# 6 STRATEGY PILLARS, RECOMMENDATIONS, AND ACTIONS

## 6.1 MANAGEMENT AND LEGISLATION

The constitutional and political order in BiH requires a specific form of governance and institutional arrangements. As a result, the management of the adventure travel offer and the development of its associated products are fragmented; there is no easy solution for establishing a functioning model for the management of the tourism industry. As in many other countries in the world, an ideal scenario would be for one organization to assume a management role for the adventure tourism sector as a whole. This organization could then speak in a unified voice to address the many basic necessities the country needs to be competitive in the adventure tourism market. This organization's responsibilities would include:

- The promotion of BiH Adventure Tourism and its offers
- Act as ambassadors of BiH Adventure Tourism around the world and as advocates for adventure tourism at home.
- Ensure that members comply with much-needed safety regulations.
- Prioritize guide training.
- Work toward an enforced policy of sustainability.
- Concentrate on the issue of inappropriate garbage disposal, including trash accumulation along trails and river, on mountains, and in lakes.
- Develop and maintain innovative adventure tourism products such as hiking and cycling routes.
- Continue to increase the quality of the products already available to consumers.
- Manage the growing adventure tourism market as it arrives to BiH.
- Lobby and advocate for public sector involvement on as needed basis.

There has already been an attempt to bring together all adventure tourism stakeholders under one umbrella. Adventure Tourism Association (ATA) BiH was established to connect all major stakeholders and individuals in adventure tourism in BiH with the common goal of mutual promotion of BiH's adventure tourism sector on the international market, development of new products, improvement of adventure services and safety in adventure tourism. Although ATA still exists on paper, the association stopped its operations when the project through which it was initiated, USAID CCA, came to a conclusion in 2014 (ATA continued with operations during the following two to three years). At present, adventure tourism is mainly organized at the product level, with no country-wide, top-down organizational structure. Each



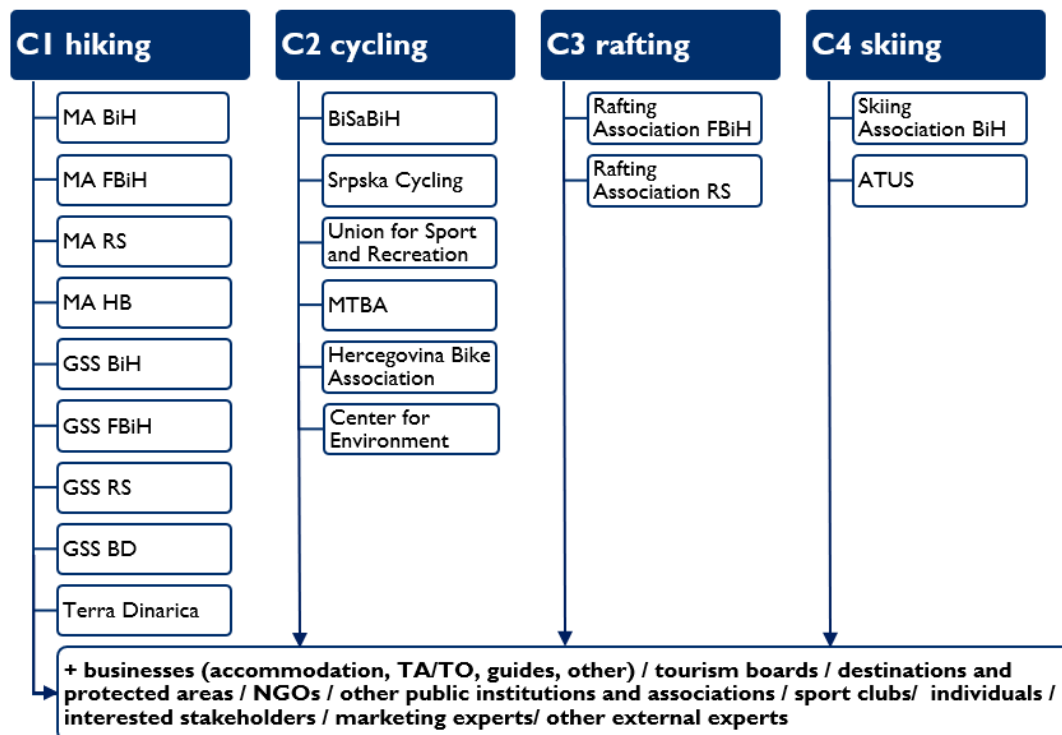
of the adventure tourism segments is organized in a different way, in most cases lacking an umbrella organization charged with development, networking, and promotion.

**The long-term aim for an organization connecting all relevant BiH stakeholders and which is responsible for the management, development, and marketing of adventure tourism is simple: BiH deserves the chance to become self-sufficient and grow naturally without the continual intervention and outside organization of international projects.**

Lessons learned from the one failed attempt at establishing such an organization (ATA) and the current fragmentation of adventure tourism in BiH at the moment indicate that a new approach must be found for the management of BiH's adventure tourism sector. Hence, it is proposed that a focus is placed on the establishment of working groups (clusters), one for each key adventure tourism product; these clusters will be composed of existing product associations, tourism businesses, tourism professionals, tourism boards and DMOs, protected areas, sport clubs, NGOs, marketing and other experts, and other relevant public institutions. The aim of these clusters is to bring together relevant stakeholders' representative of the entire state. Together, these stakeholders will contribute to a national product association – one per cluster – with a mandate to represent the interests of each cluster. Only in later stages is it advised for all four clusters to establish one joint national association for adventure travel.

The figure below (Figure 7) proposes the four clusters (C), one per key adventure product, and identifies the main stakeholders who should participate in each of them.

Figure 7: Proposed organization of BiH adventure tourism sector.



Upon their initial development, clusters will be informal associations. Clusters will meet several times a year to discuss product related matters in the area of product development, human resources, legislation, and marketing. Each cluster can operate independently from other clusters, but the final long-term aim is to establish a joint BiH adventure travel association by merging all four clusters into one.

The first joint actions, as thoroughly explained in Chapter 7 on Marketing Strategy for the Adventure Cluster, are development of a joint brand, website, and marketing activities (primarily for the international market).

In the table below, four operational goals are identified for within the field of management, each of which include measures requiring implementation.

<b>M 1: Product Clusters</b>	M 1.1 Establishment of product clusters M 1.2 Internal management of clusters M 1.3 Annual operational plans M 1.4 Business model M 1.5 BiH Adventure Travel Association
<b>M 2: Cooperation</b>	M 2.1 Cooperation among product clusters M 2.2 Cooperation with public institutions (state - entity - canton) M 2.3 Cooperation with donors
<b>M 3: Improving Quality and Safety</b>	M 3.1 Operational and safety standard guide M 3.2 Regulatory compliance M 3.3 Public registers M 3.4 Sustainability standards
<b>M 4: Strategy Evaluation</b>	M 4.1 Monitoring and Evaluation

<b>M I Product Clusters</b>	
<b>M I.1</b>	<b>Establishment of Product Clusters</b>
<p>Product clusters are informal bodies composed of representatives of product associations, relevant businesses (e.g. accommodations, travel agents and tour operators, guides), DMOs, destination managers, managers of protected areas, other public institutions and associations, sport clubs, individuals, and other interested stakeholders, marketing experts, and external experts.</p> <p>These clusters will engage with relevant institutions and donors, work on product and experience design, establish a service chain, provide information from the field, identify necessary investments and contribute to the maintenance of the infrastructure, and manage marketing and educational needs.</p> <p><b>This bottom-up approach will bring together the interests and needs of local communities and will serve as a basis for an effective model of product management.</b></p> <p>Activities of clusters should include:</p> <ul style="list-style-type: none"> <li>● Task delegation, outlining forms of stakeholder involvement</li> <li>● Development of a business model</li> <li>● Participation in regular work meetings and contribution to reporting</li> <li>● Development of an annual operational plan</li> <li>● Development of a priority product infrastructure list</li> </ul>	

- Seek investments
- Development of regional partnerships and networking
- Upgrade existing and development of new flagship products and experiences
- Participation in decision making processes
- Communication with relevant stakeholders on regional, entity, and national level
- Promotion and support of safety and sustainability standards
- Promotion and support of the development of a tourist friendly offer
- Capacity building
- Marketing and promotion of existing offer in domestic and international markets

Clusters are actively involved in the implementation of all measures outlined here, including Product Development, Human Resources, and Marketing. The formation of all 4 clusters should occur in Y1.

### **M I.2** Internal Management of Clusters

Although clusters are informal associations, they will need to have at least a semi-formal structure in order to operate and implement the action plan successfully. Each cluster will need to divide tasks among the members; to help facilitate this, a cluster member must be nominated to a leadership role. When a national association associated with the cluster already exists, the management of the cluster will be assigned to that association. When there is no national association, members will vote to select a leader. Leadership roles can rotate until a national association is established.

The following associations are recommended to assume the leading roles for each cluster, but the final decision shall be made by cluster members:

- Hiking cluster: MA BiH
- Cycling cluster: BiSaBiH
- Rafting cluster: TBD
- Skiing cluster: Skiing Association BiH

Although clusters will be led by associations, businesses will play an important role in their operations.

Each cluster must meet at least three times a year either on-site or on-line.

### **M I.3** Annual Operational Plans

On an annual basis, each cluster needs to define an operational plan with its main goals and objectives. Plans should be based on this strategic paper which already states numerous challenges that need to be addressed in adventure tourism in BiH. Activities should cover product development, marketing, legislation, and human resources. For more information, see chapters 6.2, 6.3 and 7.8.

The implementation of the plan is in the domain of all cluster members, while activities are coordinated by the cluster leader.

### **M I.4** Business Model

Upon establishment, clusters will function as informal bodies where interested stakeholders will be brought together through shared interests. Clusters will be addressing issues which are relevant to all their members, thereby providing an opportunity to improve conditions for all members. No financial contribution will be required or financial incentives given during Y1.

Over time, clusters will assume more varied roles and greater responsibility as well as organize and implement activities requiring funding (e.g. marketing, product development, and training). In order to finance these activities and to compensate leading members for their engagement, business models will be developed and legal forms and financing defined.

**M 1.5** **BiH Adventure Tourism Association**

The ultimate aim is that all four product clusters merge into one BiH Adventure Tourism association. This association will connect all relevant stakeholders and is responsible for the management, development, and marketing of adventure tourism in the country. The organization should eventually become self-sufficient and grow naturally without the continual intervention and outside organization of international projects. Early in its development, however, international donors and projects could contribute financial and human investments to aid the establishment of the association, development of the business model, and initial management.

The association’s objectives include:

- Promote BiH Adventure Tourism and its offers.
- Act as an ambassador of BiH Adventure Tourism around the world and as an advocate for adventure tourism at home.
- Ensure member compliance with much-needed safety regulations.
- Prioritize guide training.
- Work toward an enforced policy of sustainability.
- Address inappropriate garbage disposal, especially trash accumulation on trails, rivers, mountains, and lakes.
- Develop and maintain innovative adventure tourism products such as hiking and cycling routes.
- Increase the quality of the products already on the market.
- Manage the growing adventure tourism market as it arrives in BiH.

**M 2 Cooperation**

**M 2.1** **Cooperation Among Product Clusters**

While each cluster can operate independently and address topics which are relevant for the adventure product they are representing, a certain level of cooperation between the clusters is also needed.

It is advised that in the beginning, all four cluster members meet at least two times a year to discuss all relevant matters, exchange experience, and contribute to the overall growth of the adventure tourism community in BiH. This can be accomplished through the organization of and participation in an event (see measure 3.8). Eventually, the four clusters should reach a point when they are able to merge into one national association for adventure tourism.

The first concrete joint activities of the four clusters are outlined in Chapter 7 - Marketing Strategy for the Adventure Cluster, with specific sections dedicated to each segment and niche. Since these activities will require financial resources, it is advised that a MoU is signed between representatives (leaders) of all four clusters to define the scope of cooperation and financing. The MoU is also the first step towards the formal establishment of the national association for adventure tourism.

**M 2.2** **Cooperation with Public Institutions (State - Entity - Canton)**

This strategic plan for development of adventure tourism in BiH outlines numerous challenges and suggests activities which need to be implemented in BiH on the state, entity, or cantonal level.

It should be in the interest and in the domain of the clusters to become the main interlocutors of the public institutions responsible for development and implementation of a strategic plan for tourism development on the level of the state, entity and canton. The clusters will be able to advocate for the inclusion of measures described here on subsequent strategic plans. This approach will enable the involvement of the authorities at all levels of BiH governance and encourage the dedication of more significant financial resources and institutional support to the growth and promotion of adventure tourism. Besides influencing strategies, clusters should also be involved in all the policy matters concerning (adventure) tourism.

Both entities are currently in the process of designing their new tourism development strategies which presents a great first opportunity.

**It is important that product clusters become recognized as key tourism stakeholders by relevant public bodies. As such, a cluster will not only contribute to the strategic plans in the phase of development, but also during implementation.**

### **M 2.3** Cooperation with Donors

To increase the visibility of clusters, it is important that all donors in BiH are familiarized with the proposed adventure tourism product management and development plan.

This strategic plan should be communicated to all active and potential donors for use as a guideline for planning new activities in BiH. The organization of an event (see measure 3.8) is one such opportunity that can be used to help achieve strategy goals.

## **M 3 Improving Quality and Safety**

### **M 3.1** Operational and Safety Standard Guide

Many organizations holding licenses or franchises for various adventure tourism activities already exist in BiH, but standards and practices need to be harmonized in order to provide the same level of quality to visitors across BiH.

A new *Operational and Safety Standard Guide* for the adventure tourism cluster in BiH was developed; this guide outlines the minimum requirements for adventure tourism activity providers. It should be promoted to all adventure tourism stakeholders to achieve the highest possible implementation.

Clusters could play an important role in the promotion of the standard and offer support to its members to help speed the adoption of its criteria. As a key stakeholder, the clusters should also actively participate in each future revision of the standard.

### **M 3.2** Regulatory Compliance

Many laws and regulations governing adventure tourism activities are already in place with more to be implemented in accordance with this strategic plan. However, this is not enough. Without control, there is still no assurance that businesses will comply with minimum standards and that they will employ only fully licensed guides.

It is important that all national and entity laws and regulations in the area of adventure tourism are revisited and mechanisms established to check compliance.

### **M 3.3** Public Registers

Lists of tour operators, travel agents, and tour guides with valid licenses in BiH should be publicly available. Registers should be made available at the state and entity levels in several languages and easy for B2B and B2C users to find.

**M 3.4**

**Sustainability Standards**

Travelers are becoming more and more savvy and are often aware of the potential negative impact unchecked tourism may have on the environment and local communities. To mitigate these repercussions, travelers are seeking activities which are environmentally and socially responsible. BiH's well preserved natural and cultural attractions and the welcome of local communities are increasingly valuable tourism assets which must be preserved for future tourism; however, environmental issues present a challenge that needs to be addressed. This all can be done by implementation of sustainability standards in the travel sector, both on the level of businesses and destinations.

Implementation of the *Good Travel Seal* and *Travelife for Tour Operators* for Businesses is a recommended step in the improvement of sustainability. The *Green Destinations Standard* is also beneficial and can be applied at the level of destinations and protected areas.

**M 4 Strategy Evaluation**

**M 4.1**

**Monitoring and Evaluation**

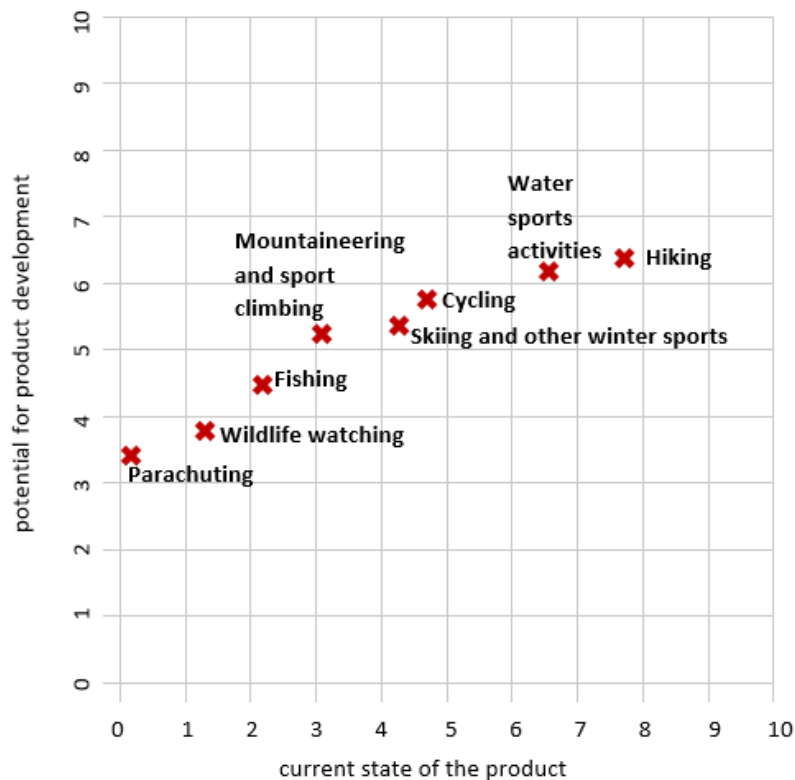
Implementation of measures outlined here should be regularly monitored and the results recorded. Each of the four clusters should evaluate its achievements separately and share findings with others at the annual event (see measure 3.8). Annual operational plans (M 1.3) should be based on these evaluations.

**6.2 PRODUCT DEVELOPMENT**

**6.2.1 TOURISM PRODUCT DEVELOPMENT**

The phrase “tourist offer” signifies an appropriately managed area of natural and cultural heritage intended for tourist visitation (the so-called primary tourist offer) and includes the infrastructure necessary to accommodate tourists with features such as accommodation, restaurants, attractions, products, and paths (the secondary tourist offer). Many of the features encompassed within the tourist offer are also utilized by the local population; these elements of the local landscape need to be both understood and taken into account when considering the development of sustainable tourism. Responsible tourist destinations place increasing emphasis on expanding local tourism while also respecting the needs of the local population; sustainable destination management will create as many business opportunities for residents and maximizes the positive impact of tourist visits for the local community. In pursuing a more sustainable tourism industry through the development of the tourist offer and its products, consideration must be given to the local community as well as tourists.

Figure 8: Current state of product development in BiH and potential for product development<sup>87</sup>.



Local stakeholders believe that the most developed tourism products currently available in BiH are hiking, water sports activities (especially rafting), skiing, and cycling. The same products are also perceived as having the greatest potential for future development (Figure 8).

## 6.2.2 TOURISM PRODUCTS AND EXPERIENCES MATRIX

The relationship between an integral product, flagship product, and experience is defined as follows:

### Integral or Integrated Tourist Product

- An **integral or integrated tourist product** consists of a large number of partial products or a combination of products; it is a product as seen by the consumer including transport, accommodation, and attractions. From the consumer's point of view, a tourism product is a set of many and diverse services, goods, and experiences that a tourist uses and experiences in the period from leaving his permanent residence to returning to it.
  - *Example: Cycling tourism product in BiH as a whole, including all stakeholders, cycling infrastructure, trainings, and cycling supply chain.*

### Flagship Product

<sup>87</sup> The current state of the products was determined through an online survey, workshops, and interviews with the most relevant adventure stakeholders in BiH. In our scale, "1" means a product is not developed at all and "10" means the product is in a state of advanced development.

- The **flagship product** is a specific combination of products that includes the best offer possible by one integral product.
  - *Example: The Trans Dinarica, the long-distance mountain biking and touring route, which crosses BiH and significantly enhances the cycling offer available at the destination. It is the mountain biking equivalent of the Via Dinarica Trail.*

### **Experience**

- The **experience** is one of the building blocks of an integral tourism product. It is an upgrade of a product or service and requires the emotional, physical, intellectual, or even spiritual participation of the individual consumer.
  - *Example: A one-day cycling trip from Sarajevo to Lukomir including a homemade lunch with locals at the end of the day.*

The development of an integral tourism product requires strategic leadership and guidance and consequently requires a significant time and financial investment. The development of flagship products and experiences is less demanding and can be accomplished more rapidly.

Experiences are primarily developed as either an attraction to bring visitors to a destination or to extend the duration of tourist visits by offering additional activities (i.e. experiences). Experiences are therefore normally a secondary motivation for the arrival and help to extend the average length of stay, increase the market performance of the destination, and increase tourist consumption.

Flagship products are often the primary motivation for a visit. Experiences and flagship products are the best means to promote an integrated tourism product; they represent the best of what a destination can offer and are considered the building blocks of a successful tourism product. Alternatively, integral products can be both improved or newly established in effort to create a primary incentive for tourists to visit the destination, thereby preparing a (new) platform for the development of additional experiences and flagship products. The success of these endeavors can be tracked through the generation of positive impacts, such as mitigation of seasonality, expansion and growth of tourist consumption, and increase in the number of overnight stays. Product-organized destinations have managers, action plans, and product strategies that guide the actions of all stakeholders involved in the product service chain.

The development of integral tourism products, flagship products, and experiences must be organized in such a way that they reinforce and contribute to the success of the destination within the tourism market. Integral products should find further promotion through the presence of experiences and flagship products, and likewise, existing experiences and flagship products must be integrated, improved, and supported through the establishment of well-organized integral tourism products. Simultaneously, a base for the development of new experiences is also being prepared.



The integral tourism products in BiH have been divided into primary and secondary tourism products (see Table 8).

Table 8: Primary and secondary adventure tourism products in BiH.

<b>Primary Adventure Tourism Products in BiH</b>	<b>Hiking</b>
	<b>Rafting</b> and other water sports (kayaking, canoeing, stand up paddle boarding, canyoning)
	<b>Cycling</b> (all types: road, gravel, mountain biking, touring)
	<b>Alpine Skiing</b> and other winter sports (snow boarding, cross country, snow snowshoeing)
<b>Secondary Adventure Tourism Products in BiH</b>	Wildlife watching
	(Fly) fishing and hunting
	Climbing (rock climbing, bouldering, slacklining)

Integral tourism products were identified through desktop analysis, in-depth interviews, online surveys, and stakeholder workshops. Notably, the identified products align with the general trends which have emerged as a result of the Covid-19 pandemic. According to the World Tourism Organization’s (UNWTO) publication "Global Guidelines for the Re-start of Tourism" published in May 2020, it is necessary to develop segmented and sustainable products that focus on nature, countryside, and culture (e.g. eco-tourism, historical tourism, outdoor sports, animal observation); these activities must be made suitable for small groups and adapted to specific consumer needs.<sup>88</sup>

### 6.2.3 TWO DEVELOPMENT PHASES OF TOURIST OFFER

The development of the tourist offer in BiH is divided into two phases. The first phase will focus on the following goals:

- Development of new and the upgrade of existing experiences and flagship products
- Establishment of an organized tourist management strategy
- Laying the foundations of primary adventure integral products (e.g. specialized accommodations and special routes)
- Identification of urgently needed investments in infrastructure
- Promotion of the existing adventure tourist offer
- Development of human capacities (adventure guide training – training of skiing, cycling, hiking, and rafting guides)

The first phase of developing the tourist offer focuses on the creation of experiences and flagship products in effort to quickly achieve better recognition on the international market. The intent of this activity is to increase the interest of private and public sector investors in adventure tourism and promote BiH as an attractive

<sup>88</sup> "Global Guidelines to Restart Tourism." UNWTO. 28 May 2020. <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/UNWTO-Global-Guidelines-to-Restart-Tourism.pdf>.

adventure destination. Successfully accomplishing these goals will expedite the work of phase two.

The second phase of the development includes:

- Development of primary and secondary tourism products
- Investments in tourism infrastructure according to the priority list
- Continued development of new and upgrading of already established experiences and flagship products
- Promoting the further development of the tourist offer
- Development of human capacities (adventure guide training – training of skiing, cycling, hiking, and rafting guides)

The transition from the first to the second phase is an organic process that follows the planned trajectory for the development of the tourist offer. This document focuses on the development of just one primary adventure tourism product. Currently, the adventure tourism sector is receiving the most substantial investment because it is already well-established and has the greatest potential, particularly given the impact of the Covid-19 pandemic on global tourism trends.

#### 6.2.4 HIKING

<b>HIKING TOURISM PRODUCT</b>	
<p><b>Requirements for the development of a hiking tourism product:</b></p> <ul style="list-style-type: none"> <li>● Well-maintained and digitally marked hiking trails</li> <li>● Long-distance hiking transversals</li> <li>● Specialized providers en route (e.g. accommodation, luggage transportation, guide services)</li> <li>● Quality navigational and promotional materials</li> <li>● Diverse landscapes and trails demanding varying levels of expertise</li> </ul>	
<p><b>Challenges for BiH</b></p> <ul style="list-style-type: none"> <li>● Identification of hiking trails and preparation of cadaster</li> <li>● Lack of centralized management for hiking product</li> <li>● Most mountain huts do not adhere to international standards and lack amenities</li> <li>● Properly marketed and maintained trails</li> <li>● Lack of specialized services (e.g. accommodation, luggage transfer, specialized tour operators) along the trails</li> <li>● Quality guide service</li> <li>● Quality navigation package (i.e. maps, GPS, apps)</li> <li>● Lack of well-developed hiking products and experiences</li> <li>● Areas contaminated with mines</li> </ul>	<p><b>Opportunities for BiH</b></p> <ul style="list-style-type: none"> <li>● Multitude of hiking trails and other infrastructure suitable for hiking (e.g. forest roads, gravel roads)</li> <li>● Recognized long distance hiking routes Via Dinarica with three different trails (Green, White, Blue)</li> <li>● Proximity to tourist centers which can be connected to hiking routes</li> <li>● Wide potential target group of hiking guests</li> <li>● Unpopulated, pristine areas</li> <li>● “Undiscovered” Dinaric Alps for international clients</li> <li>● “The Ultimate” adventure in the heart of Europe, easily accessible</li> <li>● Unknown destination for hikers</li> <li>● A variety of different experiences/products to combine with hiking (e.g. culture, gastronomy)</li> </ul>

	<ul style="list-style-type: none"> <li>• Trekking and trail running, both quickly developing trends for which BiH has basic infrastructure and services</li> </ul>
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Although not as pronounced as within the cycling community, hikers can also be subdivided into different categories based largely upon interest and ability. These categories of hikers include:

- Easy and Joy hiker
- Alpine hiker
- Ferrata hiker
- Families

These categories are described in more detail in the Marketing Strategy (see section 7.1.3.3).

Easy and Joy hikers are the most suitable category for BiH since this segment is looking for less technical hiking trails and likes to combine physical activity with cultural experience. BiH is not a competitive market for Alpine hikers; European countries including Italy, Austria, and Slovenia are more traditional destinations for this group of hikers. In the region there are also emerging destinations, such as Albania and Montenegro, which can more readily fulfill the demands of Alpine hikers. The infrastructure for Ferrata hikers is crucial and requires significant development in order to attract an international audience. At present, Ferrata hikers remain largely regional; however, with an expansion of dedicated infrastructure, the destination will see an increase in Ferrata hikers from the international market.

A key challenge in attracting a wider tourist base is concerns about safety; basic online research about hiking (and adventure tourism more generally) in BiH highlights a lack of standardized safety measures. BiH is also in need of dedicated infrastructure (e.g. parks, thematic trails, and child-friendly attractions) which easily combines with hiking. As a result, BiH lacks the basic needs for Family hikers.

In recent years, new outdoor trends have gained international traction including **Trail Running**. Although trail running first developed as a sport, it has gained popularity as a leisure activity and has a presence within the tourism industry. BiH is well-equipped to take advantage of the interest in this activity; the destination has well-recognized trail running events and substantial infrastructure (i.e. trails). Because trail runners tend to have wider interests in adventure tourism, this group may play a wider role in the future of BiH's hiking tourism.

#### 6.2.5 RAFTING AND OTHER WATER SPORTS

<b>RAFTING (AND OTHER WATER SPORTS) TOURISM PRODUCT</b>
<b>Requirements for the development of a rafting tourism product:</b> <ul style="list-style-type: none"> <li>• Clean, wild rivers; attractive surrounding landscape</li> </ul>

<ul style="list-style-type: none"> <li>• Specialized agencies and guides to ensure a safe experience</li> <li>• Clearly defined rules for all stakeholders (e.g. defined entry and exit points, operating conditions)</li> <li>• Basic infrastructure (e.g. changing facilities, restrooms)</li> </ul>	
<p><b>Challenges for BiH</b></p> <ul style="list-style-type: none"> <li>• Plans for the construction of new hydroelectric power plants</li> <li>• Pollution and illegal dumping</li> <li>• Unregistered companies</li> <li>• Untrained or underqualified guide service</li> <li>• Lack of safety standards</li> <li>• Lack of control over compliance with standards (see regulatory gap measure in M 3.2)</li> <li>• Questionable pricing policy</li> </ul>	<p><b>Opportunities for BiH</b></p> <ul style="list-style-type: none"> <li>• BiH is ranked 7th in Europe for its water resources<sup>89</sup></li> <li>• At least five rivers are suitable for rafting: Tara, Una, Neretva, Drina and Vrbas</li> <li>• Proximity to tourist centers and attractions, which can attract visitors (e.g. Plitvice, Dubrovnik, Mostar)</li> <li>• A variety of different experiences and products which can be combined with rafting (e.g. culture, gastronomy, hiking, cycling)</li> <li>• Rafting does not require any skills, may be suitable for all levels</li> <li>• BiH has strong tradition in rafting as a sport</li> <li>• Possible to extend summer season into spring and autumn</li> </ul>

Whitewater rafting is broken into distinct classes based upon the International Scale of River Difficulty, ranging from Class I (calm waters and free of obstructions) to Class VI (extreme and exploratory rapids for experts). Thus, guided whitewater rafting down a Class II River, consisting of easy-to-navigate rapids that are easy to traverse, has minimal risk. On the other hand, a hard-adventure rafting trip on Class III, IV, V or VI rapids consists of a higher degree of unpredictability, which leads to a medium-to-high degree of risk or danger.

BiH rivers have a degree of difficulty that varies with the calendar and weather. Depending on the amount of snow in the winter and the timing of the seasonal melt, the river levels and intensity of the rapids can fluctuate. Most rafting clients participate in excursions during the summer season (July and August) when water level is low, and consequently, the difficulty of rivers in BiH are around a Class III. In most cases, this means that these rivers are suitable for everyone, including families, and the risk is minimal. When accompanied by a skilled guide and undertaken with the necessary safety equipment, little to no skill is required to complete the activity; however, the activity remains fun and exciting for the participants.

The greatest snow melt occurs during the spring, while autumn typically experiences heavy rain fall. During these periods, rivers in BiH experience their peak flow with Class IV rapids and are more suited for experienced or adventure-driven target groups. The presence of these environmental conditions is useful in target marketing

<sup>89</sup> According to the World Bank data, BiH is the 7th country in Europe regarding the amount of drinking water and one of the richest countries in the world by water resources. Ministry of Foreign Trade and Economic Relation of BiH: <http://www.mvteo.gov.ba/content/read/vodni-resursi-turizam-zastita-potrosaca?lang=en>

and provides outfits with the opportunity to extend their seasons into spring and autumn for both rafting guests and kayakers, the latter group typically being the first and last guests for the season. This pattern of tourism activity is also seen in locations such as the Soča River (Soča Valley), Slovenia, a strong competitor in the tourism market both in adventure tourism (including rafting) and more generally.

Currently, rafting tours within BiH attract clients from all over the world; the Una and Tara Rivers are among the most popular because they are well connected to tourism flows in Montenegro and Croatia.

### 6.2.6 CYCLING

<b>CYCLING TOURISM PRODUCT</b>	
<p><b>Requirements for the development of a cycling tourism product:</b></p> <ul style="list-style-type: none"> <li>● Well-maintained and digitally marked trails</li> <li>● Long-distance cycling transversals</li> <li>● Specialized providers en route (e.g. cyclist-friendly accommodations, luggage transport, specialized shops, bicycle-friendly public transport)</li> <li>● Quality navigational and promotional material</li> <li>● Recognizable cycling routes and events</li> </ul>	
<p><b>Challenges for BiH</b></p> <ul style="list-style-type: none"> <li>● Identification of cycling paths</li> <li>● There is no system of cycling trails, which define national, regional, and local routes</li> <li>● No management of cycling product</li> <li>● Digital marking of routes</li> <li>● Lack of specialized bike-friendly accommodation and other services (e.g. luggage shuttle, bike shops, specialized tour operators)</li> <li>● Quality guide service</li> <li>● Quality navigation package (i.e. maps, GPS, apps)</li> <li>● Lack of well-developed cycling products and experiences</li> <li>● Lack of uniform signaling system for cycling routes</li> <li>● Lack of dedicated cycling infrastructure (e.g. bike trail parks, cycling roads)</li> <li>● Areas contaminated with mines</li> </ul>	<p><b>Opportunities for BiH</b></p> <ul style="list-style-type: none"> <li>● A multitude of non-traffic, light-traffic, gravel, and forest routes</li> <li>● Proximity to tourist centers which can be connected with cycling routes</li> <li>● A wide potential target group of cycling guests</li> <li>● Establishment of cycling transversals (e.g. Eurovelo, Trans Dinarica)</li> <li>● Unpopulated, pristine areas</li> <li>● “The Ultimate” adventure in the heart of Europe, easily accessible</li> <li>● A genuine relationship between residents and cyclists</li> <li>● Varied terrain</li> </ul>

Cyclists are not a homogeneous target group and can be divided into distinct subgroups based upon their specific demands and needs. When considering cycling as an activity within adventure tourism, it is necessary to address the specific subgroup rather than the whole.

Within the cycling target group, we can define five subgroups according to the type of bicycle they use and surface they prefer:

- A **cyclist-traveler** typically uses a trekking bicycle and rides on asphalt roads and macadams, which usually run along dedicated infrastructure (cycling routes). An example of such a route is the EuroVelo route.
- A **road cyclist** typically uses a road bike and rides on the existing road network with a good (paved) asphalt surface and minimal traffic.
- A **touring cyclist** typically uses a cross country or all mountain bike and most often rides on existing forest, field, and hiking trails; they mainly use single track for descents. Included with this group are gravel cyclists who use gravel bikes and prefer forest, macadams, and generally keep off the beaten path.
- A **gravity mountain biker** typically uses a downhill/enduro or freeride bike and rides on technically demanding single tracks and requires dedicated infrastructure.
- A **family cyclist** rides with their family and children, for which they need dedicated infrastructure.

While cyclists can be categorized into the subgroups defined above, cyclists are increasingly choosing to participate in more than one type of cycling. As part of the analysis, cyclists were categorized based on their primary or predominant mode of cycling.

Based upon the challenges and opportunities for BiH described above, cycling travelers and touring cyclists are the most suitable cycling target groups for the destination. BiH has a multitude of non-traffic, gravel, and forest routes throughout the country which would accommodate the needs of these groups. In addition, cycling travelers and touring cyclists' groups are accustomed to navigating with digital navigation tools, tend to be less risk averse, and more independent. The number of these cyclists is increasing rapidly, which suggests positive growth in this sector for BiH. With only minimal investment, BiH can quickly make significant gains in providing for and attracting these two groups to the destination, thereby contributing to the development of long-term products and infrastructure for all other cycling target groups.

Currently, BiH is not ideal for road cyclists; the paved asphalt roads in good condition serve as main transportation routes and are prone to heavy traffic. Gravity mountain bikers (Enduro, Downhill) are looking for dedicated infrastructure like bike and trail parks. In BiH there are not many of these centers, but Sarajevo and its surroundings, including Trebević, Igman, Jahorina, Bjelašnica, have the potential to become such locations for this group in the future. This group of cyclists is especially interesting for existing ski resorts since gravity mountain biking activities would help expand tourism to year-round, contributing to its overall sustainability. In recent years, major ski resorts located worldwide (including BiH competitor, Slovenia) have invested substantially in the infrastructure for summer season activities as these tourism products (including gravity mountain biking) have become increasingly lucrative. For family cycling, dedicated roads are extremely important; unfortunately, BiH does not have such infrastructure at present. Investing in the infrastructure required by road,

gravity, and family cycling subgroups is connected with substantial investments which will not pay off in the short-term. In the long-term, such investments are necessary and justified.

### 6.2.7 ALPINE SKIING WITH OTHER WINTER SPORTS

<b>ALPINE SKIING TOURISM PRODUCT</b>	
<p><b>Requirements for the development of alpine skiing tourism product:</b></p> <ul style="list-style-type: none"> <li>● Quality ski lifts with possibility for artificial snow production</li> <li>● Sufficient length and amount of ski slopes</li> <li>● Quality and quantity within tourism offer (e.g. accommodations, restaurants, equipment rental, ski schools, specialized shops)</li> <li>● Improved connectivity (e.g. proximity to airports, road accessibility, and maintenance)</li> <li>● Proximity to major cities</li> <li>● Varied and expanded offer outside the ski season</li> </ul>	
<p><b>Challenges for BiH</b></p> <ul style="list-style-type: none"> <li>● Only 5 percent of BiH nationals identify as skiers; resorts are heavily dependent on foreign markets, but this is often limited to regional guests</li> <li>● BiH ski resorts are smaller and cannot compete with ski resorts in the Alps</li> <li>● Alpine skiing infrastructure requires constant large investments</li> <li>● Projections show that by the 2050s BiH ski resorts (especially around Sarajevo) will be facing climatic risk</li> <li>● Underdeveloped offer outside the winter season</li> <li>● Remoteness and poor connectivity to interested markets</li> </ul>	<p><b>Opportunities for BiH</b></p> <ul style="list-style-type: none"> <li>● BiH ski resorts are suitable for undemanding skiers in terms of quantity of ski slopes and number of resort amenities</li> <li>● Vicinity to Sarajevo is an opportunity for Bjelašnica and Jahorina locations</li> <li>● Combining skiing with other products like culture and gastronomy</li> <li>● BiH amongst the most reasonably priced ski resorts in Europe</li> </ul>

Compared to European ski resorts, the resorts in BiH are relatively small; the number of ski lifts, number and total length of runs, and accommodation and entertainment at these resorts are limited and therefore, attract mostly local and regional clients (e.g. Slovenia, Croatia, Serbia). Because BiH has insufficient resources for additional investment into the infrastructure for skiing and winter activities, it is unlikely that this trend will drastically change in the upcoming years; experienced skiers originating from countries with a history of high-end skiing seek out the larger resorts in Austria, France, and Italy for their winter holidays. For short ski holidays, BiH ski resorts are not accessible enough to Europeans living in countries with a strong tradition of skiing and other winter sports activities.

With the recent expansion in air transport services between Sarajevo International Airport and neighboring countries (e.g. Zagreb, Split), BiH ski resorts can begin to target countries with less developed skiing cultures. Locations such as the UK, for example, offer a notable opportunity for attracting less-demanding skiers including

families who may not desire large, well-known ski resorts, but instead, favor smaller, less intimidating options. BiH ski resorts have to focus on developing ski products and infrastructure to accommodate this target group, while also increasing the international awareness of the options available in BiH.

#### 6.2.8 OPERATIONAL OBJECTIVES AND MEASURES TAKEN AT THE LEVEL OF INTEGRAL TOURISM PRODUCT DEVELOPMENT

Through the measures and actions applied to integral tourism products, a model of directed and coordinated product development will be established. With such a coordinated approach, BiH's position on the domestic and international markets will expand, thereby increasing the number of overnights, reducing seasonal ebbs and flows, extending the average length of stay, and improving overall income from tourism. By highlighting the potential of the adventure tourism industry, the intention is to motivate local residents to invest in the development of a proven tourist product.

Each of the products in development has its own requirements; however, some of these requirements are common to all or several of the products. Some of the objectives and measures outlined will be specific to an individual product, while others are more widely relevant.

The objectives and measures are divided into: infrastructure, development, and supply chain.

<p><b>P.D. 1: Identification and Categorization of Existing and Future Infrastructure and Potential Obstacles</b></p>	<p>P.D. 1.1 Identify and categorize existing infrastructure  P.D. 1.2 Develop priority-based list of needed infrastructure  P.D. 1.3 Minefield mapping  P.D. 1.4 Co-finance the transformation of the tourist offer and establish new accommodations  P.D. 1.5 Lobby against the installation of hydroelectric power plants</p>
<p><b>P.D. 2: Infrastructure Marking and Monitoring</b></p>	<p>P.D. 2.1 Establish and implement national system for marking trails and routes  P.D. 2.2 Digital marking of the infrastructure  P.D. 2.3 Translation and reprint of existing and preparation of new printed guidebooks and maps  P.D. 2.4 Establish system for monitoring the infrastructure</p>
<p><b>P.D. 3: Development of Guidelines</b></p>	<p>P.D. 3.1 Guidelines for products and experiences  P.D. 3.2 Pricing</p>
<p><b>P.D. 4: Development of Products and Experiences</b></p>	<p>P.D. 4.1 Development of flagship products  P.D. 4.2 Establishment of and connection to transversals  P.D. 4.3 Establishing and upgrading experiences  P.D. 4.4 Combine products and experiences with culture and gastronomy  P.D. 4.5 Climate change impact analysis  P.D. 4.6 Reduce seasonality of ski resorts  P.D. 4.7 Support organization of sporting events  P.D. 4.8 Classification and certification of routes</p>



<b>P.D. 5: Creation and Specialization of Supply Chain</b>	P.D. 5.1 Specialization of the supply chain P.D. 5.2 Establishment of National Coordination Centre/Coordinator P.D. 5.3 Hike and Bike friendly accommodations P.D. 5.4 Specialized white water rafting operators
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<b>P.D. 1 Identification and Categorization of Existing and Future Infrastructure and Potential Obstacles</b>	
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<b>P.D. 1.1</b>	<b>Identify and Categorize Existing Infrastructure</b>
<b>Relevant for:</b>	<b>Hiking, Cycling</b>

Every hiking and cycling destination — whether national, regional or municipal — needs the cadaster related to cycling and hiking infrastructure. While this should be the initial step in the process, it is often one of the last undertaken in developing countries because it requires time and is dependent upon the availability of specialized information.

The purpose of this action is to:

- Identify and then categorize (national, regional, local, thematic) routes and trails for the purpose of prioritizing subsequent investment.
- Place infrastructure in the environment according to local legislation (i.e. ensure legality).
- Establish a monitoring and maintenance system.
- Share with stakeholders involved with the routes (e.g. forestry service).

Actions:

- Review and inventory existing infrastructure.
- Record available sources for capturing spatial and attribute data.
- Develop a conceptual model including the structure of the database, assessment of the extent of the database, ideas and solutions regarding the establishment of the database, data capture, management, and organization of the database.
- Define the topological model with which spatial data will be covered including lines, points, polygons and how they will be segmented, interconnected, managed, and maintained.
- Digitize and establish the graphic portions of the database according to the topological model.
- Define the object catalog (which objects or object types will be included in the database); the object catalog determines the content, definitions, properties, source, capture methods, and other criteria of each object type.
- Define the metadata catalog (data on the properties of the data in the database).
- Define the database model - precise definition of attributes and code lists (i.e. attributes for all individual objects, their mutual relations, and relations with the graphic part of the database).
- Collect and enter attribute data in accordance with the defined data model (i.e. orderly and systematic "filling" of the database).
- Share cadaster with relevant institutions for its greater recognition.

<b>P.D. 1.2</b>	<b>Develop priority-based list of needed infrastructure</b>
<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>

Once the identification and categorization of existing infrastructure is completed, the priority infrastructure list must be prepared. For cycling and hiking, for instance, these can take the form of multiple investments each targeting a short section of a trail in effort to establish a complete, long-distance route. For rafting, the identification of entry and exit points used by rafting excursions is a key example. For ski resorts, identifying information about snowmaking and bike parks is relevant for inclusion on the infrastructural priority list.

The purpose of this action is to:

- Spend the limited resources made available through various channels (e.g. tenders, donors, ministries) wisely in terms of short and long-term goals.
- Align investments with the needs of the local community and tourists and with an awareness of any existing limitations (e.g. legislation, land ownership).

Actions:

- Establishment of a working group with all relevant stakeholders (e.g. ministries, relevant public institutions such as forestry service, tourism stakeholders) to identify the most important and realistic infrastructural investments.
- Share a priority list of infrastructural projects and lobby for its recognition by all relevant institutions.

**P.D 1.3**

**Minefield Mapping**

**Relevant for:**

**Hiking, Cycling, Rafting, Skiing**

Since one of the main concerns in BiH is safety with the main worry being minefields, it is advised to link adventure infrastructure (e.g. cycling and hiking route and trails, entry and exit points on rivers, ski areas, especially for tour skiing) with special data of the existing minefields.

The purpose of this action is to:

- Address the concerns of potential customers and gain their trust.
- Avoid any potential danger while performing the activity.

Actions:

- Identify and map all minefields in BiH (using one of the existing solutions/data).
- Upgrade all navigation with information about minefields in BiH.
- Advocate for mine free trails, focusing on the flagship products like Via Dinarica to become mine-free.
- Coordinate with BHMACH to check the status of relevant mine action tasks and the status of the suspected hazardous areas (SHA).
- Define methods required for SHAs (clearance, technical survey, mine risk awareness, marking).

**P.D. 1.4**

**Co-finance the Transformation of the Tourist Offer and Establish New Accommodations**

**Relevant for:**

**Hiking, Cycling, Rafting, Skiing**

With the aim of raising the quality of the existing tourist offer, which is in line with guidelines for the development of experiences, new mechanisms for co-financing the development of tourism should be established. It is important that financial resources be allocated to those tourism products and providers that supplement or renew their offer in accordance with the guidelines of the strategy.

Funds should also be invested in new accommodation capacities, especially in the case of important transversals and flagship products, where there is a shortage or no other offer. In addition, important investments should focus on the offer in the mountain huts, which, at the moment and in most cases, are not suitable for international guests.

The purpose of this action is to:

- Invest limited resources in products and services which are in line with strategy.
- Invest in new accommodations and other services along the most heavily traveled transversals and flagship products where another offer does not exist or is limited.

Actions:

- Establish criteria for (co)financing tourist offers which are in line with the strategy.
- (Co)finance tourist offer aligned with criteria.

<ul style="list-style-type: none"> <li>Identify gaps in the offer along the most important transversals and flag ship products and make targeted investments.</li> </ul>	
<b>P.D. 1.5</b>	<b>Lobby Against the Installation of Hydroelectric Power Plants</b>
<b>Relevant for:</b>	<b>Rafting</b>
<p>In BiH there are many plans for the future development of hydroelectric power, which, in some cases, conflicts with the further development of water sports and activities (e.g. rafting, kayaking, flyfishing). Simply put, the most important rivers should be protected.</p> <p>The purpose of this action is to:</p> <ul style="list-style-type: none"> <li>Protect the resource from harmful interventions and work towards the sustainable development of rafting and other water sports.</li> </ul> <p>Actions:</p> <ul style="list-style-type: none"> <li>Identify the most important rivers for rafting and other water sports and keep informed about plans for new hydroelectric power in BiH.</li> <li>Gather relevant stakeholders who have a shared interest in protecting the rivers against new hydroelectric power and prepare the plan for lobbying and protecting the rivers.</li> </ul>	

<b>P.D. 2 Infrastructure Marking and Monitoring</b>	
<b>P.D. 2.1</b>	<b>Establish and Implement a System for Marking Trails and Routes</b>
<b>Relevant for:</b>	<b>Hiking, Cycling</b>
<p>Generally speaking, hiking and cycling products and quests do not know political boundaries of countries, regions, entities, and cantons. Therefore, it would be essential that any paths would be uniformly marked to avoid any confusions while performing a chosen activity. Uniform marking would be especially essential for trails that cross and traverse multiple entities (long-distance routes).</p> <p>The purpose of this action is to:</p> <ul style="list-style-type: none"> <li>Avoid confusion for tourists and to ease their navigation on paths and trails.</li> <li>Help position the products on international markets.</li> </ul> <p>Actions:</p> <ul style="list-style-type: none"> <li>Unify the system of trail blazing on BiH hiking trails.</li> <li>Unify the system of trail blazing on BiH cycling paths.</li> </ul>	
<b>P.D. 2.2</b>	<b>Digital Marking of the Infrastructure</b>
<b>Relevant for:</b>	<b>Hiking, Cycling, Skiing (ski touring)</b>
<p>Since physical marking of the infrastructure can be both financially and physically demanding as well as impossible (in case of tour skiing), it is necessary to invest in digital marking as the primary method for identifying safe, established routes. Substandard trail blazing is worse than having none. The plan for proper trail-marking needs to be implemented since visitors rely heavily on the destination for navigation (self-navigating is becoming more common with technology on smart phones as well as specialized equipment such as Garmin). Without proper investment, visitors will get lost and/or have negative experiences.</p> <p>The purpose of this action is to address:</p> <ul style="list-style-type: none"> <li>Digital marking as the first step for the preparation of physical maps</li> <li>Preventative measures for user navigational safety</li> <li>Guarantees that routes will be marked and to avoid high costs for establishment and maintenance of trail blazing</li> </ul> <p>Actions:</p> <ul style="list-style-type: none"> <li>Digitize the routes (data can be used from cadasters) and potentially collect other important data (e.g. tourism offer, surface type, danger points, and main crossroads) and</li> </ul>	

publish them on different digital media (landing pages, specialized portals like Komoot, Outdoor Active, and Trailforks).

- Prepare navigation packs including GPS tracks and maps.

<b>P.D. 2.3</b>	<b>Translation and Reprint of Existing and Preparation of New Guidebooks and Maps</b>
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<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
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Printed guidebooks and maps are still important decision-making tools used by travelers to plan their next adventure holidays. This may be particularly true for a slightly older or computer-illiterate customer who may not rely entirely upon digital media. BiH has some well-prepared guidebooks for hiking; however, some of these lack translations and are only available in the local languages. Products such as tour skiing, snowshoeing, kayaking, stand up paddling, and cycling do not have proper guidebook material. In the future, it would be wise to invest in the preparation of such material.

The purpose of this action is to:

- Announce to the international markets that BiH has the offer they are looking for and that it is well described in one place.
- Give quality information for easier decision-making process to come to BiH and properly organize their adventure holidays in BiH.

Actions:

- Identify the existing guidebooks.
- Decide where new guidebooks are needed and which ones require translated and reprinting.
- Distribute guidebooks to international markets.

<b>P.D. 2.4</b>	<b>Establish System for Monitoring the Infrastructure</b>
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<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting</b>
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In the long-term, it is necessary to establish monitoring systems of the most important corridors/paths/sections on land and along rivers.

The purpose of this action is to:

- Identify the volume of individuals using particular sections of infrastructure and product.
- Establish the basis for the calculation of economic impact.
- Gather important data for lobbying, establishing regulations, and imposing restrictions.

Actions:

- Identify the most important corridors/sections/paths used by major tourist flows.
- Establish monitoring system including specialized cameras to count number of crafts on the rivers and automatic counters for hikers and cyclists on paths.
- Gather and process data and communicate to the relevant stakeholders (industry, ministries, institutions).

<b>P.D. 3 Development of Guidelines</b>	
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<b>P.D. 3.1</b>	<b>Guidelines for Products and Experiences</b>
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<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
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The development of new products and experiences will necessitate and justify the preparation of a system for standardization, regulation, and quality assurance to help streamline the efforts of the different stakeholders involved in the process (e.g. TOs, TAs, and DMOs). Establishing a system for standardization at the onset of product development will lend to the future capacity of experiences and products to be promoted together.

The purpose of this action is to:

<ul style="list-style-type: none"> <li>● Ensure experiences and products support at least one of the identified adventure products and will be developed in the direction of unique 5-star experiences and products that offer top quality in terms of experience as opposed to price (i.e. local, authentic, unique, experiential, boutique, sustainable, green, and premium).</li> <li>● Have all the necessary components of a product defined: carrier, contractor, marketing, and price.</li> <li>● Make the experiences and products affordable while retaining quality.</li> <li>● Make it feasible to provide the product or experience within twenty-four hours of receiving an inquiry for booking.</li> <li>● Create a uniform plan for the products and experiences to start marketing and selling through one landing page.</li> </ul> <p>Actions:</p> <ul style="list-style-type: none"> <li>● Prepare guidelines for developing experiences and products.</li> <li>● Publish guidelines and distribute them to the relevant businesses and DMOs.</li> </ul>
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<b>P.D. 3.2</b>	<b>Pricing</b>
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<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
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In some cases, DMOs are developing and selling experiences and products. Their primary task is not to directly generate the profit for themselves, but for the entire destination. The DMOs should strive to make the experiences as affordable as possible for visitors, but at the same time build a cost-sustainable destination policy for the long run.

It is different with businesses in which the only mission is to generate profit, but in BiH many of the services offered to tourists are not regulated or avoid taxes. For the future, it would be beneficial for all stakeholders (DMOs, businesses, and also other organizations offering services) to start setting the pricing policy for different products.

The purpose of this action is to:

- Start setting the pricing policy and therefore standards for each product.
- Avoid lowering the price which often accompanies the decrease in the quality of products and experiences.
- Increase the tourist consumption.

Actions:

- Gather relevant stakeholders involved in a particular product and start setting the standards and pricing.

<b>P.D. 4 Development of Products and Experiences</b>	
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<b>P.D. 4.1</b>	<b>Development of Flagship Products</b>
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<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
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The most important role of flagship products is to position the country on the international map of tourists whose main motive for coming to the destination is a particular product (e.g. mountain biking, long distance hiking, rafting, and alpine skiing). Examples include the Via Dinarica White Trail for hiking, the Trans Dinarica for tour cycling, the Ćiro trail for travel cycling, a series of rafting areas for a week-long organized itinerary of “best rafting” in BiH, and a common ski pass for all BiH ski resorts.

The purpose of this action is to:

- Develop products that will present the best of what country or destination can offer in one particular product.
- Compel foreign media to highlight BiH travel options and concurrently promote the product and the destination as a whole.

<ul style="list-style-type: none"> <li>● Create new and increase existing overnight guests.</li> <li>● Use flagship products to showcase and motivate other sectors of the industry in the country (in terms of pricing, economic impact, level of service).</li> </ul> <p>Actions:</p> <ul style="list-style-type: none"> <li>● For each product, identify the best possible destinations, services, providers.</li> <li>● Connect these elements into a discrete, packaged flag ship product.</li> </ul>	
<b>P.D. 4.2</b>	<b>Establishment of and Connection to Transversals</b>
<b>Relevant for:</b>	<b>Hiking, Cycling</b>
<p>Transversals are not only good for tourism, but they are a marketable product because they bring visitors to a destination, where — if offered a great experience with additional routes and offers — they stay longer or return for future visits. Transversals also attract a lot of world media, especially when a likable narrative is developed to help present and express the character of a trail.</p> <p>Long-distance hiking and biking trails are also a connecting element of destinations. In BiH’s case, transversals connect entities, cantons, and municipalities and help to foster cooperation amongst one another. Hiking transversals are present in BiH and can be further developed like Via Dinarica’s White, Blue, and Green Trails. For cycling, the most important trail is the Eurovelo. Unfortunately, Eurovelo does not currently enter BiH. The establishment of the Eurovelo Coordination Centar and Contact in Banja Luka may be key for the reestablishment of the Eurovelo in BiH. For the future, important transversals will be the Sava Cycling Route and Trans Dinarica. Transversals are flagship products; they are intended to serve as a literal connection between the best of what BiH has to offer, and their development should, therefore, be prioritized.</p> <p>The purpose of this action is to:</p> <ul style="list-style-type: none"> <li>● Position BiH on international cycling/hiking maps and attract international guests.</li> <li>● Promote BiH through long distance transversals.</li> <li>● Attract foreign media attention and coverage.</li> <li>● Facilitate connection within established tourist corridors.</li> <li>● Establish and showcase other routes in the country and revive old transversals located in BiH.</li> </ul> <p>Actions:</p> <ul style="list-style-type: none"> <li>● Identify and prioritize the most important transversals in the country.</li> <li>● Begin the development of the product in terms of management, infrastructure, human resources, and marketing.</li> </ul>	
<b>P.D. 4.3</b>	<b>Establishing and Upgrading Visitor Experiences</b>
<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
<p>A complete listing of all successfully established experiences should be prepared. This will help to identify gaps in the offerings so that new experiences can be developed in an informed and targeted manner. The intent is to help curate a future list of additional experiences that are likely to have great promotional potential accompanied by high sales margins. Compelling and unique experiences are the best tool for supporting and promoting the destination and its key products. Once the list of current offerings have been prepared, the brainstorming and development of new experiences should start in accordance with the guidelines from P.D 3.1.</p> <p>The purpose of this action is to:</p> <ul style="list-style-type: none"> <li>● Prepare the list of the best current and potential new experiences through which a product can be promoted on the international markets.</li> <li>● Establish a list of experiences in line with the guidelines from P.D 3.1 and represent the best of what the country can offer in terms of experiences, safety standards, pricing, and sustainable offer.</li> </ul>	

Activities:	
<ul style="list-style-type: none"> <li>● Identify existing and new experiences.</li> <li>● Upgrade existing experiences.</li> <li>● Develop new experiences.</li> </ul>	
<b>P.D. 4.4</b>	<b>Combine Products and Experiences with Culture and Gastronomy</b>
<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
<p>According to the interviews, workshops, and online survey, one of the strongest factors for differentiating BiH as a tourist destination is the diverse and rich culture and culinary possibilities. Since adventure tourism is a type of tourism that “includes at least two of the following three elements: physical activity, cultural exchange, or interaction and contact with nature” (ATTA), it is necessary to integrate culture within adventure tourism products since it is also BiH’s unique selling proposition.</p> <p>The same is true for gastronomy since it is a part of overall experience and can be one of the decisive factors for whether clients will be ambassadors or adversaries of adventure tourism in BiH.</p> <p>The purpose of this action is to:</p> <ul style="list-style-type: none"> <li>● Develop experiences and products which include local culture and experiences.</li> <li>● Highlight the importance of local culture and cuisine in the overall client experience.</li> </ul> <p>Activities:</p> <ul style="list-style-type: none"> <li>● Support the development of the products and experiences which include local culture and cuisine.</li> <li>● Develop a tourist guidebook for BiH’s local culinary landscape. This can be a resource for BiH’s tourism industry and visitors as well as be incorporated into products and experiences.</li> </ul>	
<b>P.D. 4.5</b>	<b>Climate Change Impact Analysis</b>
<b>Relevant for:</b>	<b>Skiing</b>
<p>Due to climate change, winters will be increasingly mild in the future and snowfall much more irregular. Higher winter temperatures will increase the cost of artificial snow production. Over time, this is expected to become a major challenge for the ski industry to overcome. Given that the main ski resorts (Jahorina, Bjelašnica, Vlašič, and Igman) depend heavily on the winter climatic conditions, it is all the more important to understand the impact of climate change and its trajectory. What changes are expected and what does this mean for the ski resorts? The proposed analysis should be used as a starting point for the preparation of the action plan for the ski resorts in the future.</p> <p>The purpose of this action is to:</p> <ul style="list-style-type: none"> <li>● Understand how the winter season will look in the future at different ski resorts.</li> <li>● Help to decide where and in what to make future investments.</li> </ul> <p>Activities:</p> <ul style="list-style-type: none"> <li>● Identify the main ski resorts and include them in the analysis.</li> <li>● Prepare the analysis.</li> <li>● Prepare the future action plan.</li> </ul>	
<b>P.D. 4.6</b>	<b>Reduce Seasonality of Ski Resorts</b>
<b>Relevant for:</b>	<b>Skiing</b>
<p>Winter tourism is already a well-developed product at some ski resorts, which are filled nearly to available capacity during the main tourist season. Because there are no high-elevation ski resorts in BiH (2000m or more above sea level), the business/financial model is not sustainable in the long run</p>	

due to mild winters and decreasing or erratic snowfall. Long-term investment in winter-focused infrastructure lacks financial acuity.

The ski slopes have an exceptional natural and cultural landscape and are ideal for easier hiking tours and gravity or touring cycling. Destinations and ski resorts should strive to establish and upgrade dedicated infrastructure for cycling and hiking (e.g. bike park, theme trails). In this way, the ski resorts will be able to operate all year, thereby justifying long-term investments in cableways, catering, and accommodation infrastructure. This will also keep local resorts competitive; globally, many ski resorts are investing more and more in the development of infrastructure and products that lay outside of its traditional seasonal offer. Cycling and hiking products dominate this burgeoning area of the market.

In addition to the aforementioned products, there is potential in the development and offer of wellness-focused incentive programs and other specific experiences meant for desired target groups.

The purpose of this action is to:

- Prolong the winter season and reduce the strict seasonality typically associated with ski resorts.
- Utilize skiing infrastructure throughout the year.
- Justify new investments for resort infrastructure.
- Become/stay more competitive with other ski resorts in the region.
- Successfully address and respond to climate changes impacting the tourism industry.

Activities:

- Identify which products are the most suitable for each ski resort in terms of landscape, existing offer, financial limitations, interests and capacities of the local providers.
- Initiate the development of the off-season offer.

**P.D. 4.7**

**Support Organization of Sporting Events**

**Relevant for:**

**Hiking, Cycling, Rafting, Skiing**

The organization of sporting events is a necessary and cost-effective approach for promoting a tourist product at the destination; such events often fill the tourist capacity (especially outside the main tourist season) and support or build the story of the destination. Financial and human resources should be invested into the organization of events that meets all three of the above criteria. Some such events already exist in BiH (e.g. IRF World Rafting Championships 2023, various trail run events (e.g. Vučko Trail, Jahorina Ultra-Trail), 2021 UCI Gran fond World Championships, and the Drill and Chill Climbing and Highlining Festival), but these can be improved upon and expanded and new events to fill in content gaps can be developed. Sporting events that can be linked to or support existing products and experiences in BiH should be given particular focus.

The purpose of this action is to:

- Clearly identify the events to be supported in the future and their roles within the industry.
- Modify events for tourist consumption so that overnight stays can be generated and expenditure increased.
- Shape events for the best possible marketing outcomes for adventure tourism products.

Activities:

- Identify established events needed upgrade and support.
- Identify new events that have significant potential for the promotion and marketing of the adventure tourism sector and its products.
- Prepare a priority list of events that have the greatest potential.
- Improve established and develop new events; transform events into tourist attractions.



<b>P.D. 4.8</b>	<b>Classification and Certification of Routes</b>
<b>Relevant for:</b>	<b>Hiking, Cycling</b>
<p>The certification of hiking and cycling routes is highly recommended. Certified long-distance routes and flagship products will find greater traction on the international marketplace. International certifications provide quality assurance of the product to tourists and give greater incentive for travel to BiH for the experience of the country's hiking and cycling opportunities.</p> <p>The most appropriate certification for cycling is the ADFC standard for Quality Routes and for hiking, Leading Quality Trails (LQT) - Best of Europe Label. Both of these certifications target the German-speaking market, which was recognized as the most critical for the future expansion of the BiH market.</p> <p>The purpose of this action is to:</p> <ul style="list-style-type: none"> <li>● Identify the means to improve the quality of routes.</li> <li>● Establish trust on the international markets.</li> <li>● Increase visibility on key markets, particularly German-speaking.</li> </ul> <p>Activities:</p> <ul style="list-style-type: none"> <li>● Identify existing events that should be given further support and improved.</li> <li>● Identify new events with potential to improve tourism capacity.</li> <li>● Prepare a priority list of events that have the greatest potential.</li> <li>● Upgrade and develop new events and their transformation into tourist product</li> </ul>	

<b>P.D. 5 Creation and Specialization of Supply Chain</b>	
<b>P.D. 5.1</b>	<b>Specialization of the Supply Chain</b>
<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
<p>When developing innovative products and experiences and marketing them to international markets, it is essential that the supply chain is specialized and knows how to fulfill varied customer needs. The supply chain includes but is not limited to destinations, DMOs, a range of businesses, and attractions.</p> <p>For instance, in the case of cycling destinations, there is a need for well-developed and marked infrastructure. DMOs require good promotional and navigational material. Accommodations must be cycling friendly. Transportation services are needed for luggage. Attractions need to be accessible by bicycle and provide safe bicycle storage. TOs must employ quality guides. Other demands must be identified and fully addressed.</p> <p>The purpose of this action is to:</p> <ul style="list-style-type: none"> <li>● Specialize and educate elements of the supply chain with the aim of increasing the quality of customer experience.</li> <li>● Foster brand loyalty amongst customers who then become the most persuasive promoter of products and experiences.</li> </ul> <p>Activities:</p> <ul style="list-style-type: none"> <li>● Identify stakeholders in the supply chain of the product.</li> <li>● Educate stakeholders on how to become bike/hike/skiing/rafting friendly.</li> </ul>	
<b>P.D. 5.2</b>	<b>Establishment of National Coordination Center/Coordinator (NECC/C)</b>
<b>Relevant for:</b>	<b>Cycling</b>
<p>The NECC/Cs insure the implementation, operation, and quality assurance of EuroVelo at a national level. In addition, they are responsible for communicating EuroVelo nationally, providing accurate</p>	

and up-to-date information on the sections of EuroVelo routes that pass through their area, and ensure the inclusion of EuroVelo routes in new publications.

The different titles – Coordination Center and Coordinator – refer to the maturity of the organization. National EuroVelo Coordinators typically consist of one organization which is often (but not always) one of the national cycling federations. Over time, the coordinator might incorporate representatives from public authorities, tourism boards, cycling organizations, public transport companies, and other service providers in order to create a Coordination Center.

At the moment, there is no official NECC/C in BiH, but the representative of Centar za Životnu Sredinu/Center for Environment is strongly connected to the representatives of EuroVelo.

The purpose of this action is to:

- Officially connect with representatives of EuroVelo.
- Officially represent the needs of BiH.
- Establish EuroVelo routes in BiH.

Activities:

- Identify the most suitable representative of BiH together with previously established contacts (representative of Centar za Životnu Sredinu/Center for Environment).
- Decide which form of coordination is the most suitable for BiH (Center and Coordinator) and establish the coordination.
- Begin lobbying efforts for the establishment of EuroVelo routes in BiH and performing the tasks connected with coordination.

#### **P.D. 5.3**

#### **Hike and Bike Friendly Accommodations**

#### **Relevant for:**

#### **Hiking, Cycling**

Tourist providers, especially accommodations, have a significant impact on the satisfaction of hiking and cycling guests. Therefore, knowledge of the specific needs for each of these groups is essential. Specialized standards for hike and bike friendly accommodations address these needs and help providers implement appropriate solutions.

For cycling, BFS, Bett & Bike, and Mountain Bike Holidays (MBH) standards are recognized as the most appropriate. BFS was developed and implemented by REDAH. Similar to BFS is Bett & Bike, a German standard that helps to gain the trust of German tourists and provides BiH access to relevant marketing channels. MBH is a more complex certification, suitable for specialized mountain bike centers and ski resorts that would like to attract greater numbers of German-speaking mountain bikers. The main benefit of the label is very strong marketing and promotional support.

Since none of the existing hiking friendly standards are international (e.g. Hiking Marketing Standard in Slovenia, Hikers Friendly in Greece, Wandelaars Welcom in Netherlands), it is recommended that following the example of the Bike Friendly standard, Hikers Friendly standard is developed in BiH to certify accommodation facilities and other businesses that welcome hikers.

The purpose of this action is to:

- Increase the satisfaction of hiking and cycling guests coming to BiH.
- Give international recognition and promotion of BiH cycling and hiking products.

Activities:

- Together with the National Cycling Association of BiH, speed up the process of a state-wide adoption of BFS.
- Investigate opportunities for introducing Bett & Bike and the MBH standard.
- Develop a hiking friendly standard following the example of BFS

<b>P.D. 5.4</b>	<b>Specialized White Water Rafting Operators</b>
<b>Relevant for:</b>	<b>Rafting</b>
<p>Rafting is one of the most popular adventure activities in BiH. One of the main challenges is to ensure the safe implementation of the activity. The Rafting Operator Accreditation (ROA)<sup>90</sup> by IRF is encouraged for adoption amongst rafting operators which will significantly improve the safety and quality of their rafting services.</p> <p>The purpose of this action is to:</p> <ul style="list-style-type: none"> <li>• Increase safety and quality of the service.</li> <li>• Distinguish and promote the operators who choose the ROA on the international market.</li> </ul> <p>Activities:</p> <ul style="list-style-type: none"> <li>• Investigate opportunities for introducing ROA to rafting operators.</li> <li>• The rafting cluster should accept the ROA and be actively promoted on the international; limit promotion to those operators who have the ROA.</li> </ul>	

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<sup>90</sup> International Rafting Federation. Rafting Operator Accreditation Scheme. 8 April 2020. <https://www.internationalrafting.com/2020/04/roa/>.

### 6.3 HUMAN RESOURCES

A critical factor for success in tourism is the availability of human resources. Only properly qualified and compensated employees can deliver quality service. The education of staff and local population has been recognized as one of the top priorities in the development of adventure tourism in BiH.

Guides play a critical role in adventure tourism and are considered as one of the key elements of an adventure tourism offer. However, there is currently no organized training or educational curriculum for the adventure tourism sector. The lack of control over guide training and certification threatens the safety of guests and the quality of service.

Capacity building in adventure tourism should begin within the four product clusters with a clear focus on guide training for each key product. In the long-run, it is recommended that an *Academy for Adventure Tourism* is established to involve a larger spectrum of adventure tourism stakeholders (accommodations, DMOs, TOs, TAs etc.) in essential training and education through a variety of online courses (e.g. sustainable tourism and development, safety and risk management, organization and management of tours, business management and planning, product development, and marketing).

<b>HR 1: Adventure Guide Training and Licensing</b>	HR 1.1 Adventure Travel Guide Standard HR 1.2 Cycling guides HR 1.3 Hiking guides HR 1.4 Rafting guides HR 1.5 Ski instructors
<b>HR 2: Capacity Building</b>	HR 2.1 Sustainability HR 2.2 Cluster Leaders HR 2.3 Academy for Adventure Tourism

HR I Adventure Guide Training and Licensing	
<b>HR 1.1</b>	<b>Adventure Travel Guide Standard</b>
<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
<p>Trained and certified adventure travel guides represent an assurance of quality and safety for adventure tourists. Adventure Travel Guide Standard (ATGS) represents a comprehensive guideline which should be adopted and used as a basis for the training and education of adventure travel guides in BiH.</p> <p>Green Visions is currently developing training curricula based on ATGS focusing on following five core competencies of a guide:</p> <ol style="list-style-type: none"> <li>1. Technical Competencies</li> <li>2. Wilderness Medicine and First Aid</li> <li>3. Customer Service and Group Management Skills</li> <li>4. Natural and Cultural History Interpretation</li> <li>5. Sustainability</li> </ol> <p>Green Visions is currently working on the government recognition of this training curriculum. The existing initiative aims to standardize the skills and qualification of adventure tourist guides through</p>	

official certification and licensure. To encourage success, a taskforce should be created to lobby with relevant public sector organizations to incorporate the training curriculum into a publicly recognized qualification framework. Product clusters are in the position to play a significant role in this process.

**HR 1.2**      **Cycling Guides**

**Relevant for:**      **Cycling**

BiSaBiH has so far trained thirty-four cycling guides through the support of an EU-funded project. Such cycling guide training should become continuous and not project-dependent. Training materials which were used for guide training should be examined and aligned with international training materials and standards. Cooperation with an experienced international organization in this field, such as the European Organization of Mountain Bike Instructors-Guides<sup>91</sup>, is advised.

**HR 1.3**      **Hiking Guides**

**Relevant for:**      **Hiking**

BiH inclusion in the Union of International Mountain Leader Associations (UIMLA) is recommended. The UIMLA is an organization which offers the internationally recognized mountain guiding qualification *International Mountain Leader* (UIMLA IML Guide). Since UIMLA members are able to provide trainings and assessment of guides, implementation of UIMLA standard in BiH will ease the process for BiH guides to obtain an internationally recognized license. An increase of guiding certifications will also improve the quality and safety of the final product.

The UIMLA trained guides can work with Mountain Associations in BiH and transfer newly obtained knowledge to local hiking guides.

**HR 1.4**      **Rafting Guides**

**Relevant for:**      **Rafting**

In effort to establish a cadre of highly trained rafting guides within BiH, a training course on each of the four major rafting rivers in BiH (Tara, Vrbas, Una, and Neretva Rivers) should be organized. Guides should be trained in a category Class 2 River and should reach IRF certification. Ideally, eighteen guides per river and sixty-four in total will take part in the training program. In the long run, BiH will also need more Rescue 3 certified guides for whom training should also be organized.

**HR 1.5**      **Ski Instructors**

**Relevant for:**      **Skiing**

Ski instructors and teachers in BiH are trained by the Association of Ski Instructors (ATUS). Once they obtain the highest national license (i.e. Ski Teacher 3), they qualify for the ISIA Stamp (but not the highest qualification, the ISIA Card). The ISIA Card is assigned only to ISIA Qualified Teachers who obtain education that is recognized by ISIA and matches ISIA Performance Level 3 (defined by ISIA Quality Standard).

It is recommended that the national regulations are revisited and that the highest national qualification for ski instructors and teachers aligns with the highest ISIA qualification. By aligning national education with the ISIA, BiH ski instructors and schools would be able to better position themselves on the international market and strengthen the trust of foreign tourists who take ski instruction in BiH.

**HR 2 Capacity Building**

<sup>91</sup> European Organisation of Mountain Bike Instructor-Guides. Become a licensed guide. Last accessed 15 October. <http://europeanbikeguides.com/become-a-licensed-guide/>

<b>HR 2.1</b>	<b>Sustainability</b>
<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
<p>Sustainable tourism development is becoming a growing industry standard and an in-depth understanding of sustainability is increasingly required by those who work in tourism. In BiH, training on sustainability is only available as part of projects and occasional workshops and trainings<sup>92</sup>.</p> <p>It is recommended that internationally recognized sustainable tourism courses are introduced as an industry standard. The two most appropriate educational programs to be identified on this topic are the GSTC Sustainable Tourism Training Programme and The Seven Principles of Leave No Trace.</p>	
<b>HR 2.2</b>	<b>Cluster Leaders</b>
<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
<p>Each of the clusters identified in <i>6.1 Management</i> will have a leader. Even though capacity building is important for all tourism stakeholders in BiH, it is of additional importance that people leading the clusters have all the necessary competencies not only in tourism but also in business management, sustainability, and product development.</p> <p>It is recommended that cluster leaders are educated and trained according to international standards.</p>	
<b>HR 2.3</b>	<b>Academy for Adventure Tourism</b>
<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
<p>Since trained and specialized guides and other stakeholders are key to safe and quality adventure tourism services, an Academy for Adventure Tourism will be established. The Academy will act as a central clearinghouse for relevant information and make it accessible to participants. The primary focus would be adventure tourism guide training, but the entire tourism supply chain could also take part (e.g. TOs, TAs, DMOs, and accommodations). The Academy would eventually take on the role of a competence center for the capacity building of the adventure tourism sector.</p> <p>The academy can be run as an independent organization or within the adventure tourism cluster.</p>	

<sup>92</sup> An important role is currently played by Regional development agencies (REDAH in Hercegovina, NERDA in NE BiH, REZ in Central BiH, SERDA in Sarajevo) which are partners in many international projects and organize numerous trainings, such as *Study tour in Istria with best practices and seminar on destination management and role of DMOs* in the frame of EU4Business project, REZ, 2020; *Sustainable development of UNESCO heritage - informal training for young people on sustainable development, environmental protection, natural and cultural resources and climate change* in the frame of UN Dialogue for the Future, REDAH, August 2020 - March 2021; *Webinar Green Mind - Green and Smart Mobility Industry Innovation* in the frame of Greenmind project, SERDA, September 2020; *Webinar on green economy* in the frame of Connecting Nature project, SERDA, October 2020. Sustainable tourism was also a topic at some conferences in Bosnia and Hercegovina, such as conference *Via Dinarica - a platform for sustainable tourism development and local economic growth in Bosnia and Herzegovina*, Sarajevo, December 2017; conference *Sustainable tourism as potential for development in BiH*, Jajce, September 2019 (organized by Pina, Slovenia, in the frame of "Support environment for social entrepreneurship and tourism for women in BiH" project); *International conference on sustainable tourism*, Sarajevo, September 2019 (organized in cooperation between Slovenia and BiH).

# 7 MARKETING STRATEGY FOR THE ADVENTURE CLUSTER

## 7.1 COUNTRY CONTEXT

BiH is a geographically diverse country with a pristine and largely undeveloped natural environment. The Balkans geopolitical position had a profound impact on the country's historical development, which resulted in a wonderfully diverse cultural and historical heritage. The main tourism products available in the country rely on these exceptional cultural and natural resources.

In 2020, the population of BiH was estimated at 3,280,819 people with a population density of 64 people/km<sup>2</sup>. More than 50 percent of the population lives in urban areas; however, this number is spread throughout many smaller cities in the country. The largest city, Sarajevo, has 440,00 inhabitants, followed by Banja Luka, which has a population of 199,191. Other larger cities with populations over 100,000 include Zenica, Bijeljina, and Mostar<sup>93</sup>.

Because the population of BiH is rather concentrated, large undeveloped and uninhabited areas exist in the country (see Figure 9). This is a substantial asset to the tourism industry; visitors experience a remote, unspoiled space ideal for hiking in the mountains and cycling endless routes through dense forest. Along the pathways and routes, adventurers will encounter spectacular displays of wild weather systems, observe a diverse flora and fauna, and be transfixed by the unexpected landscapes that rise up to greet them. Although these areas are a resource, they can also present a challenge when offering tourism products to the end user due to the lack of infrastructure including accommodation and restaurants. While this lack of infrastructure is sought out and valued by some, it can also be a liability.

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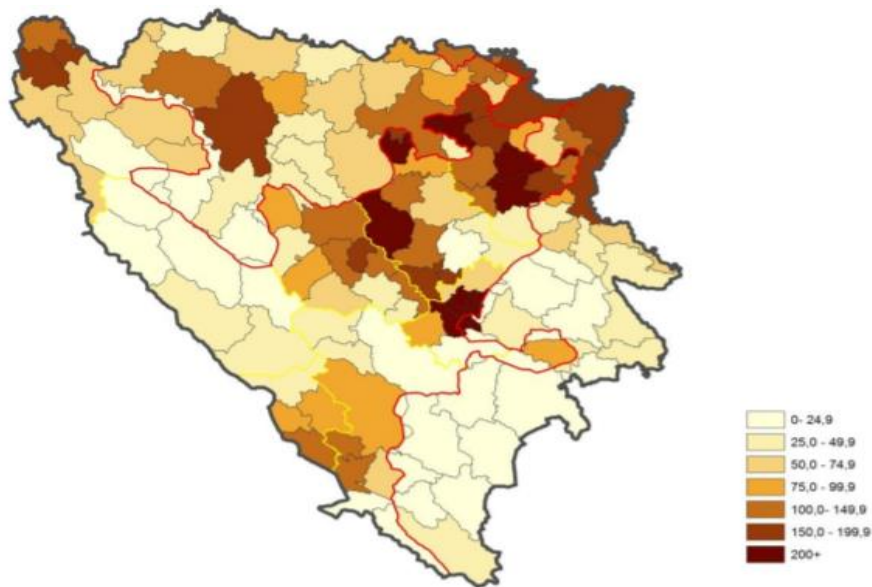
<sup>93</sup> Worldometer. Bosnia and Herzegovina Population. Last accessed 15 October 2021.

<https://www.worldometers.info/world-population/bosnia-and-herzegovina-population/>.

World Population Review. Bosnia And Herzegovina Population 2021. Last accessed 15 October 2021.

<https://worldpopulationreview.com/countries/bosnia-and-herzegovina-population>.

Figure 9: BiH population density map, persons per square kilometer, 2013 (Ćorović, 2015)<sup>94</sup>.



The total area of forested land in BiH is 50 percent, of which 20 percent is privately owned; the remaining 80 percent of forests are state owned. A majority of forest in BiH is relatively undeveloped and not actively utilized by the local population. Much of these forests (81,5%) are natural forests in various developmental stages. Because of their unique character, these forests have greater value for the tourism industry; their increasing rarity contribute to their being tourist attractions in and of themselves (USTFBiH, n.d.). BiH's large network of forested pathways provides additional interest for cyclists.

Despite the abundance of intact nature, less than three percent of it is protected (leaving out also some of the main natural sites, such as Kravice Waterfalls). This is the lowest percentage among the countries in the region and threatens the long-term environmental sustainability of BiH. By comparison, 50 percent of the natural space in Slovenia (identified as one of the main competitors within the regional tourism industry) is protected. Based on the Travel and Tourism Competitiveness Index (WEF, 2019)<sup>95</sup>, BiH ranks 97<sup>th</sup> (out of 140 countries) on the attractiveness of its natural assets and 128<sup>th</sup> on designated protected areas. BiH is among the countries with the highest biodiversity level in Europe, which can represent a good base and a competitive advantage in the development of wildlife watching tourism products.

BiH is ranked 7<sup>th</sup> in Europe (MOFTER, 2018) for its outstanding water reservoirs – including its abundance of dramatic rivers and mountain lakes. The rivers are not

<sup>94</sup> Ćorović, R. (2015). The main characteristics of the demographic development and the spatial distribution of population in Bosnia and Herzegovina. Fifth International Conference of Balkans demography, Ohrid, North Macedonia. Available at [http://www.demobalk.org/Demobalk\\_conferences\\_seminars/Docs/Demobalk\\_Conferences\\_Seminars\\_Doc\\_00164\\_gr.pdf](http://www.demobalk.org/Demobalk_conferences_seminars/Docs/Demobalk_Conferences_Seminars_Doc_00164_gr.pdf)

<sup>95</sup> World Economic Forum - WEF (2019). The Travel and Tourism Competitiveness Report: Travel and Tourism at a Tipping Point. 2019. [http://www3.weforum.org/docs/WEF\\_TTCR\\_2019.pdf](http://www3.weforum.org/docs/WEF_TTCR_2019.pdf).



especially turbulent and are therefore suitable for a wider target group, including inexperienced individuals and families. Rafting is possible on several rivers in BiH, including the Tara, Una, Neretva, Drina and Vrbas.

Mountains and hills account for 42 and 24 percent of the country's total land surface, respectively, and the average elevation is 500 meters above sea level. Only 8 percent of the country's territory rests below 150 meters above sea level. The mountains of BiH are part of the central Dinaric Alps; twelve peaks within BiH reach over two thousand meters, the highest peak being Mt. Maglić at 2,386 meters. The mountains of BiH are suitable for long-distance hiking. In comparison to the Julian Alps located to the northeast, the Dinaric Alps are lower. There are 172 peaks higher than 2,000 meters above sea level in the Julian Alps<sup>96</sup> (the highest is Triglav with 2,864 meters) (EEA, 2015; Malcolm, 2021; USTFBiH, n.d.).

The average altitude of BiH's territory is 500 meters above the sea level and the land area is characterized as follows: 5 percent lowlands, 24 percent hills, 42 percent mountains, and 29 percent karst. The wide, long mountains are suitable for long-distance hiking with the occasional small village, shepherds, and expansive views along the trails. Hiking and tourism are connected to farming traditions in BiH; however, animal husbandry represents only 37 percent of BiH's local food production, and the shepherds are abandoning traditional practices. Long-distance hiking can also be used as a means of connection between different tourism destinations. Developing new tourism products based in the mountains can provide an alternative income for shepherds and other inhabitants, many who may otherwise consider leaving the mountain villages to seek opportunities elsewhere. Developments supporting the adventure tourism sector may give rise to opportunities for villagers, enabling them to remain on their land and keep with their traditional way of life.

The altitude of the mountains influences the climate of BiH. As compared to Slovenia, the mountains are lower, and therefore, the winters are milder but fairly rainy. Since weather conditions in spring and autumn are typically favorable, the tourism season can be extended through October and November and also begin earlier in spring.

Participants at workshops (held in June 2021<sup>97</sup>) pointed out the poor utilization of natural heritage as a tourist attraction, the insufficient environmental awareness among the local population, uncontrolled pollution, and the ecologically controversial projects intended by the state (e.g. construction of hydroelectric power plants). Although marked, landmines still exist in the country and pose a risk. It is estimated that 1.97 percent of the country (965km<sup>2</sup>) is still contaminated with mines and is therefore dangerous. The contaminated areas are a potential threat to the safety of 13 percent

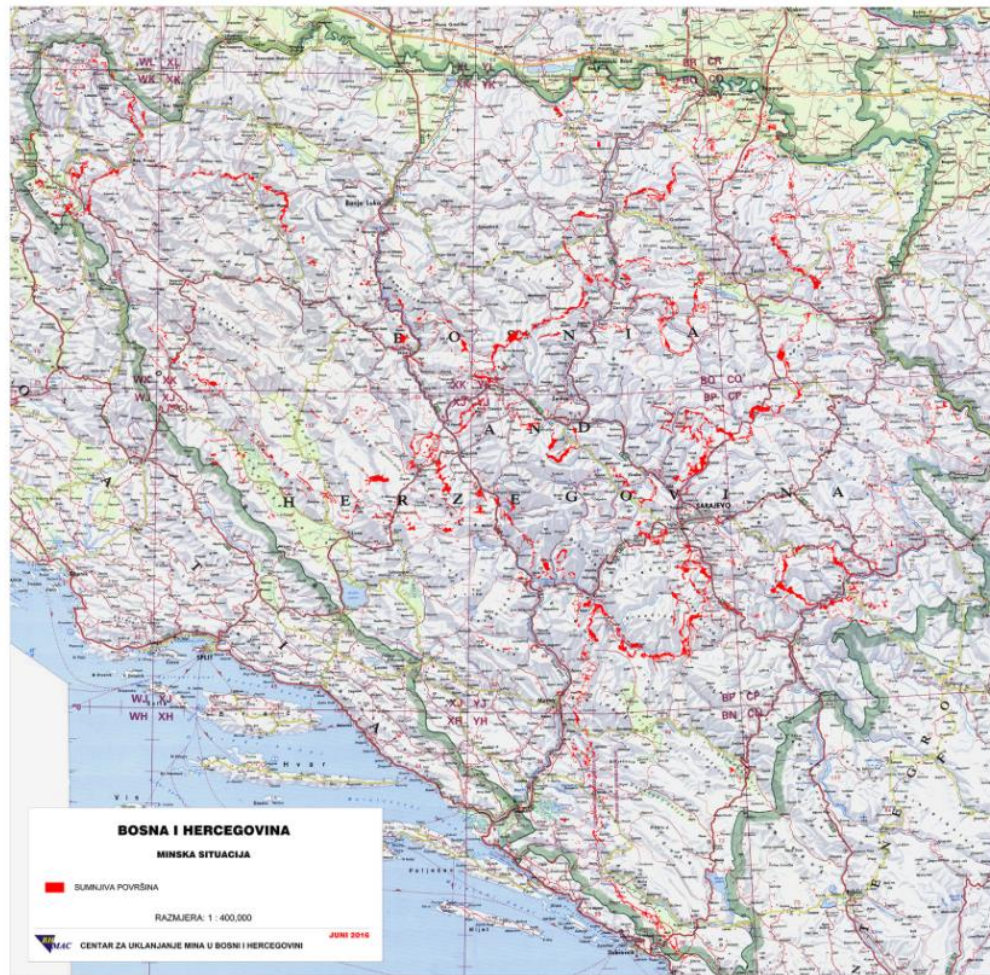
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<sup>96</sup> Hribi.net. Julijske Alpe. [https://www.hribi.net/gorovje/julijske\\_alpe/1](https://www.hribi.net/gorovje/julijske_alpe/1).

<sup>97</sup> Workshops with BiH adventure tourism stakeholders were held in June 2021. For more information see Annex A.

of BiH's population (see Figure 10) (BHMACH, n.d.)<sup>98</sup>. In response, a mobile application was developed (BiH Mine Suspected Areas) to notify the user if they are in proximity to a minefield (suspected or confirmed). The application could be of great help to adventure travelers, especially hikers and bikers.

Figure 10: Area in BiH contaminated with landmines (BHMACH, n.d.).



BiH's natural and cultural attributes are critical for increasing the competitiveness of country on the international tourism market. Participants at workshops see the diversity and abundance of "undiscovered" natural areas as an advantage for positioning, the tourism potential of which has not been sufficiently exploited. The geographical position and relatively short distances between natural areas and urban centers enables easy access to locations which are ripe for the development of a wide range of activities. This proximity should be treated as an opportunity for connecting varied activities as well as integrating experiences focused on both natural and cultural heritage.

Adventure tourism stakeholders see natural and cultural attributes as the most critical to increasing the competitiveness of BiH opposed to tourism offer. Participants at

<sup>98</sup> Bosnia and Herzegovina Mine Action Center - BHMACH (n.d.). BiH landmines area: <http://www.bhmac.org/?lang=en>

workshops have identified the main selling point of BiH as follows: BiH offers an unparalleled natural beauty and diverse biodiversity for a wide range of outdoor activities accessible to all skill levels which, together with a complex cultural heritage and compelling history, will surely delight all of the senses. Bosnian countryside offers an extremely rich record of human civilization, which supposedly dates between 40,000 and 100,000 years back in the history (Bohannon, 2008)<sup>99</sup>.

### **7.1.1 TOURISM OFFER FOR ADVENTURE TRAVEL**

Hiking, rafting, cycling, and skiing have been identified as the four primary adventure tourism products; this is based on data which shows that they are currently the most developed of the activities available in BiH with as of yet untapped potential for future development. Common to all adventure tourism products offered within BiH is the unclear division of responsibilities, lack of related policy, and ambiguous standards. The most important areas of development that would help to stimulate and improve the tourism offer includes the connectivity amongst stakeholders, infrastructural improvements, quality guidelines (enforced), education of tourism suppliers, and promotion.

Based on the research through surveys, interviews and workshops with BiH adventure tourism stakeholders in May and June 2021, hiking is currently the most developed adventure tourism product in BiH. There are several hiking possibilities in BiH, and the country's natural resources offer a good base for the development of this activity. Through the interviews and workshops, it became evident that despite having several mountain huts and lodges, infrastructural and quality improvements would be needed. The arrangement and maintenance of the trails are a top priority, alongside additional trail blazing, installation of signage, and availability of information. Hiking-focused tourism products are not sufficiently customized for an individual traveler, and instead, the products are mainly developed on B2B level. There are some tour operators in BiH as well as some foreign agencies that offer hiking as a tourism product. The product most frequently presented is the White Trail of the Via Dinarica. The White Trail is the most developed of the trails established which has led to its increased visibility on the international market. The interviews revealed a concern that the Via Dinarica focuses on a niche market (those who prefer cross country trails) and does not sufficiently address domestic guests. The lack of communication among stakeholders resulted in local providers lacking an awareness of the Via Dinarica and consequent absence of the product as a tourism offer.

BiH has conditions especially suited for the development of water sports. Rafting is the most represented within the offer of water activities available on the rivers of BiH. There are many agencies that offer rafting activities on the Tara, Neretva, Una and Vrbas Rivers. Despite the wide offer, the quality provided to guests can be variable.

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<sup>99</sup> Bohannon, J. (2008). The Man Who Went Up a Hill and Came Down a Pyramid. Discover Magazine. <https://www.discovermagazine.com/planet-earth/the-man-who-went-up-a-hill-and-came-down-a-pyramid>

Based on the findings from workshops, surveys, and interviews (held with BiH adventure tourism stakeholders in May and June 2021), there are several problems with regulations and policy in this sector, especially regarding permissions, licensing, and safety. The quality of the offer is threatened by illegally operated companies that create unequitable competition. These operations contribute significantly to inconsistencies in quality through undercutting prices, thereby causing market destabilization. The features of BiH's natural environment allow for a range of cycling styles: road, gravel, mountain, and touring. These styles of cycling also equate to distinct subsets of guests who have preferences that will require accommodation as the cycling offer is further developed. Adventure tourism stakeholders have pointed out that the supply chain supporting this tourism product often lacks the necessary skills and qualifications. There are, however, initiatives that aim to raise the quality of this product and connect the stakeholders in the supply chain. For example, there is BFS, a certification that provides visibility to cyclist friendly accommodations, catering facilities, and agencies. Similar to other adventure tourism products, cycling infrastructure is frequently being developed on a donor driven project-by-project basis. The key priorities for the improvement of offer within cycling tourism are the expansion, mapping, and maintenance of established pathways, standardization of signage, and improved access to information about cycling trails.

BiH's mountainous terrain is ideally suited for a range of adventure activities. The established mountain resorts in BiH are reliant on winter sports, particularly skiing. Global warming and shorter winters have, however, forced mountain destinations and resorts to restructure and expand their offering with the introduction of activities that are not confined to the winter season. Hiking and cycling (mountain biking) are two of the most common activities and have been identified as primary adventure tourism products.

## 7.1.2 CURRENT VISITORS' ANALYSIS AND TRENDS

### 7.1.2.1 Key trends

As outlined in *Global and Domestic Developments Impacting Tourism Performance Post COVID-19 Pandemic* Report (USAID, 2021b)<sup>100</sup>, the impact of the COVID-19 pandemic on tourism has been unprecedented. In 2020, there was a 74 percent fall in international tourist arrivals globally, and 32 percent of all destinations worldwide were completely closed to international tourism. **Recovery is dependent on mitigating the impact and reducing the continued spread of Covid-19 as well as vaccination rates.** Despite the known factors that will influence the speed of recovery, the situation remains uncertain in 2021. Another aspect of the new post-covid reality is **changed consumer behavior**. This includes increased digitization of travel planning in all areas: research, booking, communications, and promotional materials. There are also **demand changes** in tourism products: consumers are

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<sup>100</sup>USAID (2021b). Global and domestic developments impacting tourism performance post covid-19 pandemic.

seeking nature-based and outdoor products, individual or small-size group experiences in rural locations, including private and remote settings. The latter is also related to reduced consumer expenditure in some cases, in such cases disposable incomes (reduced during pandemic) will encourage drive-in, local tourism to less crowded destinations, and shorter, local stays over air travel, distant destinations, and crowded attractions. Another trend – digital nomads and workcations – is also gaining greater traction (USAID, 2021b).

Regarding the UNWTO industry forecasts for recovery, the most positive scenario would be to actively mitigate the effects and continued spread of the pandemic in combination with high rates of vaccination on a global scale. Given current conditions (locally and globally), tourism demand will likely not return to 2019 levels during the 2021 season and it is possible that the industry will not make a full recovery until 2024. The **opportunity for recovery in BiH** lies in international outbound trade partnerships. Tour operators are increasingly moving their offer from mass tours to more experiential and nature-based tours. Because this form of tourism program is already being developed in BiH, there is a significant opportunity for BiH to respond to and capitalize on these changing market trends (USAID; 2021b).

Another three drivers of change within recovery trends are particularly important and present opportunities for a small destination such as BiH (USAID, 2021b):

- The rise of Millennials
- Experiential travel beyond the mass market
- Destination brands with segmented markets

*The Global and Domestic Developments Impacting Tourism Performance Post COVID-19 Pandemic* Report (USAID, 2021b) notes that the most important resource, marketplace, and management and marketing tool for the travel sector is **digital**, with almost half of the global population being social media users. There is a clear emphasis on the **importance of an online presence**. The online visibility of BiH's tourism industry and the availability of relevant content is inadequate; a significant portion of the tourism sector is still operating offline. While social media use in BiH is growing, its instrumentalization as a marketing tool for tourism is almost non-existent. Of those who do use social media for marketing, the most commonly used platforms are Facebook, Instagram and TripAdvisor. The lack of a Destination Brand or DMO presence at a destination level has caused a major gap in the online visibility.

According to the study *The European Market Potential for Adventure Tourism* (CBI, 2021), the **adventure travel sector is expected to recover more quickly** than other segments of the tourism industry. This is because the sector involves small-scale tour operators with high credibility and loyal customers as well as small-scale accommodations with greater flexibility. In addition, adventure tourists will be more willing to travel again. The recovery will be critical to the local economy, since approximately two-thirds of the money (350€/day/visitor) spent on adventure travel stays on location (CBI, 2021).

### 7.1.2.2 Current visitors

According to the BiH Agency for Statistics (source: Situation Analysis), tourists in 2020 realized only 498,090 arrivals in BiH, which was a decrease of over 69 percent when compared to 2019. In the same period, overnight stays decreased by about 63 percent. The majority of arrivals and overnight stays are made by domestic guests (60.5 percent). The largest decrease in 2020 was in the arrival of international tourists and overnight stays.

BiH's **most frequent adventure tourism guests** come from Germany and the neighboring countries of **Croatia and Serbia**. Other countries from which tourists originate are **Slovenia, Austria, and Italy**. The top ten concludes with the guests from Poland, Switzerland, Sweden, and the USA. According to the BiH Agency for Statistics, the top three markets in 2020 (based wholly upon arrivals) were Serbia, Croatia, and the United Arab Emirates. This pattern holds for overnight stays.

As per the results of the online survey, conducted with BiH adventure tourism stakeholders in May 2021, current adventure tourism guests are mainly **individuals**, traveling with their **friends or families** by personal car. While the main motivations for their visit is **adventure tourism**, these individuals also seek out and experience natural and cultural sights, enjoy entertainment and gastronomy, and visit friends and relatives.

*Bosnia and Herzegovina Tourism Sector Diagnostic (2021)* shows that international visitors are concentrated around just a few attractions. This is reflected in the high number of **TripAdvisor<sup>101</sup> Reviews** for what are considered the key attractions in BiH. Based on these numbers, the **Old Bridge in Mostar is the top attraction**, followed by the Bazaar in Sarajevo (Baščaršija), the Sarajevo War Tunnel, Gallery 11/07/95, Kravice Waterfalls and Blagaj Tekke. **BiH rates extremely well on the TripAdvisor platform** – the average review score for hotel, attraction, and restaurants are 4.3 (out of 5) or higher, which is better than the global average. On average, TripAdvisor users research and book travel to BiH approximately forty-three days prior to travel; this time frame is reduced to twenty-five days during the summer season. Over 50 percent of the travel booked to BiH on TripAdvisor is for between June and September.

The online survey of BiH adventure tourism stakeholders, held in May 2021, showed that the main adventure tourism products that attract guests to BiH are hiking, water sports activities - mainly rafting, cycling and skiing with other winter sports.

### 7.1.2.3 Potential consumers and visitors

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<sup>101</sup> Tripadvisor. Explore Bosnia and Herzegovina. [https://www.tripadvisor.com/Tourism-g294449-Bosnia\\_and\\_Herzegovina-Vacations.html](https://www.tripadvisor.com/Tourism-g294449-Bosnia_and_Herzegovina-Vacations.html)

Adventure tourism stakeholders would like to have more guests from the following countries: **Germany, Croatia, Slovenia, Serbia, Austria, USA, Sweden, UK, Italy, and France. Generally, this list includes the countries from where current tourists already originate.** Stakeholders, therefore, are more interested in attracting greater numbers of guests from these established source markets, rather than working to expand visitor demographics by creating interest in new locations. **On this list, Germany and the United Kingdom stand out; according to the UNWTO, the United Kingdom holds the largest adventure tourism market in Europe, while Germany is the second-largest (CBI, 2021).**

Therefore, the Google keyword analysis described above (German and English language keywords) is quite relevant here. Although the UNWTO results are not directly linked to the specific destination country – in this case BiH – they provide a strong sense of the main interests of tourists traveling from these two locations. Visitors from German and English language groups are typically seeking an active holiday with outdoor adventure programming including hiking, biking and rafting, and the online content for this tourism sector is most visible in these languages.

**The highest number of keyword searches for adventure tourism products in the German speaking markets are for:**

- Bike travel (radreisen)
- Hiking vacation (wanderurlaub)
- Whitewater rafting (wildwasser rafting)

The wording “urlaub bosnien” (**vacation bosnia**) is among the least searched. The research also shows how difficult it is to rank in Google’s search results for a specific term; the highest scale of keyword difficulty includes the word “radreisen” (bike travel). That means that **providers of specific products like cycling and rafting have better optimized web pages**, including domain and quality content (important for SEO). In the Google index, the highest number of results (page hits) is currently held by the keyword **rafting tour**, which indicates **strong competition in this area.**

**The highest number of keyword searches for adventure tourism products in the English-speaking markets are for:**

- River rafting
- Water rafting
- Cycle tour

“Hiking holidays” and “hiking trips” are not amongst the top English language keyword searches. **The wording “holiday Bosnia” is the least searched.** The highest scale of keyword difficulty includes the words “river rafting”. The highest number of results (page hits) is currently held by the keyword “cycle tour”.

**Keyword analysis by country** (keywords: holiday, hiking, mountain bike holidays and rafting in combination with one of the six competitive countries: Bosnia, Croatia, Slovenia, Montenegro, Italy and Austria) in German and English-speaking markets (through google.de and google.com) illustrates some notable trends. On google.de, the keywords “holiday,” “hiking and biking,” and “Bosnia” are always at the bottom of the results list. The only ranking performing similarly to other countries is achieved within the keyword “water rafting.” The analysis of keyword results on google.com is slightly better in terms of number of hits, but generally, the performance of BiH remains at the bottom of the list (fourth or fifth place). This indicates that when potential visitors search for information about the adventure activities available in the region, **BiH is outperformed by other countries.**

Notably, when searching for information about hiking, google.com users ask about safety (“is it safe to hike in Bosnia” and “is Bosnia safe for tourists”). This shows that potential visitors are concerned about safety in BiH, especially related to the landmines that are still not deactivated and removed. Insufficient assurance of safety and its communication results in a distorted image of BiH and potentially influences the decision of tourists to choose BiH as their destination.

*Bosnia and Herzegovina Tourism Sector Diagnostic (USAID, 2021a)*<sup>102</sup> report outlines the **importance of market segmentation** in order to understand consumer profiles and attract the desired demographic of potential visitors. Segmentation helps to plan for and address specific tastes, preferences, and patterns, rather than making an uninformed attempt to please a broad group of consumers. There are **four significant drivers from the area of future demand and key markets** that will impact BiH over the next five years and are therefore critical for the development of adventure tourism products:

1. **Nature-based Tourism** is estimated to account for 20 percent of international travel or about 240 million trips per year. The desire to spend time in protected natural areas and other natural sites is growing. BiH has an abundance of nature, especially mountains, but few tourism products that are market ready.
2. **Adventure Tourism Market** is one of the fastest growing markets. It attracts high-value travelers who are willing to pay a premium for exciting and authentic experiences and sustainable practices. BiH is well-poised to compete in this market, but besides the bike and hike trails, the adventure market has not been fully developed beyond the winter sport resorts around Sarajevo.
3. **Niche Travelers** from Europe and the United States and Canada tend to be independent planners and usually travel by themselves, in couples, or small groups. They travel to and within BiH to engage in active outdoor exploration

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<sup>102</sup> USAID (2021a). Bosnia and Herzegovina tourism sector diagnostic



(hiking and biking) combined with cultural and culinary experiences. They often combine a visit to BiH with one or more other countries in the region.

4. **Hard and Soft Adventure Travelers** are passionate about hard adventure activities (rock climbing, long-distance hiking), or soft adventures (walking and biking). They might seek to combine those activities with culinary and cultural experiences. The Ćiro bike trail is an example of a tourism product that attracts hard adventure travelers as is the long-distance hiking trail Via Dinarica.

Another perspective of market segmentation is described in the study *The European Market Potential for Adventure Tourism* (CBI, 2021), which considers a range of age groups and both low and high specialism adventure travelers:

- **Z tourists and millennials** (Generation Y) are the **most active** during their holidays, especially before having children. The younger subset of this group is interested in hard adventure activities.
- **Older European travelers (baby-boomers) are engaging more in adventure travel** than in the past, but they still prefer to combine active holidays with culture and nature-based experiences (except hard adventure).
- **Millennials** (Generation Y) are more likely to engage with **new experiences**, including camping parks or protected areas.
- **Low specialism OR soft adventure travelers** is the largest segment of adventure tourism, most interested in soft adventures in combination with other activities.
- **High specialism OR hard adventure travelers** are well prepared with clear focus on one hard activity and a willingness to spend more money on it.

When creating experiences for European travelers and subsequent marketing, it is necessary to keep in mind their **desire for unique adventure experiences** (less mass marketed tours available via tour operators), **customized travel itineraries**, and **flexibility** in activities (for example tailor made and customized programs.).

According to the report *Adventure Tourism Market 2021-2028* (Allied Market Research, 2021), the **soft segment** of adventure travelers is expected to remain dominant with a large customer base. This includes **land-based activities** described as being easy to do, having a low level of risk, and require little skill. The main interest of travelers is still focused on undiscovered. The largest and the fastest growing market segment was the **couples' segment, most frequently** in the age group of between **30-41 years**. In 2020 the most dominant **sales channel was the direct** one (mostly through web pages and social media). Once again, travelers are interested in visiting what are considered **undiscovered destinations**.

As stated in the *Global Report on Adventure Tourism (2013)*<sup>103</sup> by the UNWTO and ATTA, the benefits of adventure tourism to the environment, local people, and economies are well documented. This potential benefit is one of the reasons **adventure tourism** is identified as a **tool for sustainable and responsible economic growth** that delivers benefits to all.

The *Adventure Tourism Development Index 2020 (ATDI, 2020)* by ATTA assesses the potential and readiness of countries to compete in the global adventure tourism market. **BiH ranks 92<sup>nd</sup> out of 163 developing countries**; developed countries are ranked separately<sup>104</sup>.

With the exception of the 2019 data set dating from prior to the onset of the pandemic, information captured in the Adventure Travel Trends Snapshot can help guide the rebuilding and planning process for when travelers return as COVID-related impacts lessen:

- The most popular way to reach customers is **social media**, followed by email.
- The most helpful marketing and sales tactics are **word of mouth and email marketing**.
- The top **3 acquisition methods** are word of mouth, TO partnerships, and **Google AdWords advertising**.
- The most popular consumer motivations for traveling were **new experiences, to get off the beaten track, and to travel like a local**.
- Half of the bookings were completed **online** through the company website/online booking platforms (reservation system taking **credit cards**).
- Among the top ten trending activities are hiking, cycling (electric bikes), and whitewater, the first two are top trending activities in Europe.

Working efficiently on marketing activities requires the segmentation of adventure tourism consumers, moving beyond a basic distinction between hikers, bikers, and rafters. The following is a more detailed breakdown of target groups:

For the **hiking** product, four groups are defined:

1. **Alpine hikers** are looking for new destinations and interested in advanced tours, but do not necessarily require high-quality accommodations
2. **Easy & joy hiker** walk on less demanding trails, combining hiking activity with a variety of experience including cultural and culinary
3. **Families** need several attractions along the trail and because this group is broad requires a lot of different information to help in planning
4. **Ferrata hiker** are independent travelers including both climbers and active, experienced hikers

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<sup>103</sup> UNWTO (2014). *Global Report on Adventure Tourism*, UNWTO, Madrid. <https://skift.com/wp-content/uploads/2014/11/unwto-global-report-on-adventure-tourism.pdf>.

<sup>104</sup> ATDI divides countries into developed and developing, based on UN designation. [https://www.un.org/development/desa/dpad/wp-content/uploads/sites/45/WESP2020\\_Annex.pdf](https://www.un.org/development/desa/dpad/wp-content/uploads/sites/45/WESP2020_Annex.pdf)

For the **biking** product, five groups are defined:

1. **Classic tour and trail bikers** mostly identify as mountain bikers, looking for new destinations with the majority being adult men.
2. **Easy and joy bikers** combine activity with wellness, cultural, and culinary interests; they typically have more limited technical biking skills.
3. **Family bikers** choose easy trails for children and often require rental bikes, childcare, and high-quality accommodations for longer stays.
4. **Gravity bikers** are a younger demographic seeking cheaper accommodations for shorter stays; downhill infrastructure and bike shops are required.
5. **Trekking bikers** desire long distance trails with a lot of technical information and cheaper accommodation.

Depending upon the characteristics of the river, rafting can accommodate a wide range of participants. Therefore, the audience can vary from novice rafters, including families and those who are risk adverse and prefer calm rivers, to high adrenaline risk seekers looking for adventure on white water. Rafting tourists can be divided into two groups: recreational and experienced. Recreational rafters are the larger subset and comprise those for whom rafting activities usually represent a part of or single activity within their holiday itinerary. On the other hand, experienced rafters are a smaller segment, whose main focus is the challenge of the experience. The whitewater rafting industry usually attracts tourists with higher budgets leading to greater expenditures in the local economies during their trips.

### 7.1.3 ADVENTURE TOURISM PROMOTION ACTIVITIES

Because of the absence of a national tourist board, BiH lacks a top-down promotional strategy for the adventure tourism sector. As a result, individual initiatives, businesses, and platforms have had to take on the role as the main promoters of BiH's tourism industry. Without the leadership of a national tourist board, the marketing and promotion of BiH as a tourism destination is without an integrated marketing scheme, severely limiting the availability of information on foreign markets.

As a result of the state administrative organization, the RS and FBiH have distinct approaches to promotion and organization of tourism. In the RS, the RS Tourism Organization (TORS) is in charge of the promotion and marketing of RS tourism on the international market under a common brand. On the other hand, FBiH does not have a separate tourism organization. Tourism marketing and promotion are therefore organized through ten cantonal tourist boards and ministries of economy that are in charge of tourism promotion. Some municipalities have their own local tourism departments.

The analysis of the keywords on Google<sup>105</sup>, which was conducted to identify the availability of online information about BiH's adventure tourism, showed that there are fewer results for the keyword "holiday Bosnia" (keywords were selected based on a research). compared to competitive destinations (i.e. Croatia, Slovenia, Italy, and Austria) in both the English and German language. Based on the keywords in English and German and related to each of the three primary adventure tourism products (hiking, rafting, and cycling), the analysis of the top three results on Google revealed that the pages of local providers, tour operators, and businesses are not among top results on Google. As the only visible search result, Neretva Rafting was the exception. This online survey of Google search results led to the conclusion that there is a lack of information available in foreign languages.

Individual businesses and platforms took over the role of promoting individual adventure products more typically undertaken by destination marketing organizations. Some platforms that offer different adventure tourism products exist on a B2B or B2C level. An example of such a platform is Odmori u BiH, however this is only available in the local language and targeted to a specific regional audience.

An important role in the promotion of hiking as a tourism activity is played by Terra Dinarica, an NGO that both promotes and works toward the continued development of the Via Dinarica Trail. Together with hiking, Terra Dinarica offers an online booking platform for all adventure activities for the Dinarica Region; although the focus is on BiH, the website is also a navigational platform for independent travelers using the Outdoor Active platform.

There are two separate associations in charge of the development of rafting in BiH: the Association of Rafting of RS and the Kayak, Canoe and Rafting Association of the FBiH). Because of this division, promotional activities are mainly carried out by individual businesses. There is, however, a plan to establish a new national rafting association by the end of this year; this more inclusive association can eventually take over the role of the promotion and marketing of rafting within the adventure tourism offer.

Similar to hiking and rafting, there is no specialized association in charge of the promotion of BiH cycling on the domestic and international market.

#### **7.1.4 BRANDING / ANALYSIS**

At the moment, there is no umbrella brand for tourism in BiH; this is also true for adventure tourism and individual adventure tourism products. Some flagship products represent certain adventure tourism segments. Flagship products include:

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<sup>105</sup> An analysis of Google keywords was completed using Semrush, an online SaaS platform that acts as a keyword research tool and is specialized for content marketing and online visibility management. Most frequent keywords related to adventure tourism and holidays in BiH in English and German have been identified. The number of results for "keyword (+ in +) country name" has been compared for BiH, Slovenia, Croatia, Serbia, Montenegro, Italy and Austria.

- **Hiking**  
Via Dinarica – The White Via Dinarica Trail is one of the most important hiking products in BiH and has the most potential for further development and the attraction of a larger user group.
- **Cycling**  
Ćiro Trail is a thematic cycling route in BiH with the greatest recognition on the domestic and international tourism market.
- **Rafting**  
No specific flagship products have been identified for rafting in BiH. The Tara River has the largest number of companies that offer rafting activities.
- **Skiing**  
BiH skiing still adheres to the Winter Olympic Games, held in Sarajevo in 1984. Jahorina Olympic Center is the biggest, most known and best organized resort in BiH in terms of winter ski tourism.

The majority of stakeholders who participated in the workshops believe that a new national brand should be developed for promotion of adventure tourism in BiH.

## 7.2 CONCLUSIONS

### **Natural Discovery and Transformation in the Heart of the Western Balkans.**

The word often used by the media to describe tourism in BiH is “potential.” The country — perched in the Dinaric Alps within the heart of Southeastern Europe’s Western Balkans — has the potential to attract adventure travelers, cultural tourists, and those interested in gourmet experiences, history, and art. Dense with mountain peaks, primeval forests, rivers, lakes, gorges, and even an Adriatic Sea coastline, BiH is a unique combination of pristine landscapes mixed with ancient traditions, multi-ethnic heritage, and unheralded culture. The overall impression for travelers fortunate enough to visit, and according to numerous accounts from travel writers, is that BiH feels like a countrywide nature park with open air museum exhibits — in the form of remote villages — scattered across its terrain.

Rare is the travel journalist, tourist, or traveler who comes away from an experience in BiH without **feeling transformed**. Part of that transformation is based on BiH **exceeding expectations**. Though travelers are regularly told about the country’s war-torn status and they are convinced by travel media that BiH is merely an add-on destination while visiting Croatia on holiday, it is typical to find that visitors who do make the trip are amazed by and unprepared for the level of hospitality shown by BiH hosts. These visitors take to social media to show how to drink coffee like a Bosnian. They describe their new found love of burek and ćevapi — food previously unheard

of. They share panoramic photos from summits looking across picturesque villages encountered along remote hiking and cycling trails.

These travelers often become BiH champions. They tell their friends about the one-of-a-kind experience they had during their travels. People who did not know what to expect before they visited often find something they did not know they were looking for:

**A transformative experience in a country next to Europe’s most popular, well-trod travel destinations, but remote and natural enough to make visitors feel that they have discovered something on their own.**

The reason for this traveler transformation and their conversion into becoming a champion of BiH is simple. Today’s travelers want the key destination attributes BiH has without even trying: **authenticity, undiscovered nature, ancient traditions, and multi-cultural heritage.** Without knowing it, BiH follows one of today’s prime trends: **to travel like a local. All of these attributes have become adventure tourism’s most important visitor magnets.** BiH has these characteristics in abundance.

What does this mean from a branding perspective? Again, the word “potential” is critical for brand development. Solutions to the challenge of branding BiH is rooted in two layers of potential:

- 1. The potential of untapped possibilities waiting to be discovered by tourists hungry for the transformative experiences BiH offers in an organic manner.**
- 2. There is the potential BiH could have capitalized upon but *did not* for a number of reasons, ranging from a lack of resources, initiative, transparency, and competent government support.**

### **Speaking to the first layer of the potential identified above:**

For a country around the size of the state of West Virginia (U.S.) and with a population of approximately 3.3 million, BiH is brimming with an unusually high number of both cultural and natural resources that translate as possible tourism options. As will later be demonstrated in this report’s findings (listed in Section II, under Developmental Challenges), this type of tourism possesses exactly the intersection of qualities today’s experiential and authenticity-seeking visitors’ demand.

According to many post-pandemic industry experts, BiH has the desired attributes — safe cities, remote villages, mountains, active holiday possibilities, and undiscovered culture dating back millennia — that both young adults and veteran travelers are seeking, namely authentic experiences combined with natural adventures. Additionally, this type of “adventure” tourism (i.e. nature + culture + activity) is, in comparison to other forms of tourism, expected to recover more rapidly from the impact COVID-

19 has had on the travel industry. BiH tourism is not reliant on the resort holidays, large tours, and all-in-one mass-tourism destinations that have experienced the greatest downturn with the pandemic conditions and subsequent mitigation efforts. On the contrary, the small-scale, intimate, and customizable experiences representative of BiH's tourism industry are precisely what makes the country a more sustainable tourism destination even during the pandemic context.

Leaning into this first potential seems not only like the clear path for BiH, but it also signals a fortunate opening since the current trends align in favor of BiH's natural strengths.

### **Speaking to the second layer of the potential identified above:**

BiH's second layer of potential is more complicated and arguably more important because it speaks to **potential unrealized**. From a branding perspective, this is the more challenging of the two because it necessitates the presence of quality and effective development to make good on the promise that **BiH offers a genuine option for travelers looking for tourism that combines affordability, adventure, and culture**.

According to Bloom Consulting, the Country Brand Ranking Report ranks BiH 38<sup>th</sup> of 42 countries in Europe (Bloom Consulting, 2020)<sup>106</sup>. **The report states:**

Although much can be done at this time to develop and improve the presence of the BiH brand in the digital sphere, both private and public sector stakeholders acknowledge that the tourism sector is weak and fragmented due to absence of a national tourist board, lack of capacity at management and operational levels in many governments and private sector organizations, and poor access to finance. The industry experiences several constraints to growth, including fragmented offerings, a lack of qualified human resources, inadequate infrastructure - especially air transport, inefficient transportation, and poor international promotion. One persistent issue is an international image that struggles to escape a troubled past manifested by insufficient and weak communication with the international markets.

The lack of branding for outdoor activities is not for lack of trying by some sectors of BiH's tourism community. Multiple products have been created, developed, and successfully shared with the international travel market. The Via Dinarica, a hiking trail that links the eight countries of the Western Balkans — Slovenia, Croatia, Bosnia and

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<sup>106</sup> Bloom Consulting (2020). Country Brand Ranking Report 2019/20. [https://www.bloom-consulting.com/en/pdf/rankings/Bloom\\_Consulting\\_Country\\_Brand\\_Ranking\\_Tourism.pdf](https://www.bloom-consulting.com/en/pdf/rankings/Bloom_Consulting_Country_Brand_Ranking_Tourism.pdf). The data for Europe includes Russia.

Herzegovina, Montenegro, Albania, Serbia, Kosovo<sup>107\*</sup>, and North Macedonia — had its theoretical beginnings in BiH. The trail itself has had considerable branding success. Due to a lack of proper product development and a lack of an Adventure or Outdoor tourism brand presence, BiH's ability to capitalize on the Via Dinarica's presence has been negligible at worst and compromised at best.

Similar trajectories can be observed with other products that were created using BiH's early "potential," only to see possibilities fade because of BiH's "unrealized potential." The Trans Dinarica Trail, the cycling version of the Via Dinarica, had early success in BiH with travel media placement in both *Lonely Planet* and *National Geographic*, but momentum dissipated when the international project supporting its development ended. One can also point to the unrealized possibilities on the Ćiro Cycling Trail in Herzegovina as well as the EuroVelo 8 Cycling Trail, which has crossed BiH borders in the past — along the Adriatic coast — and may (hopefully) do so again in the future.

In BiH's case, international brand sticking power is due to multiple conspiring forces. For the sake of simplicity and to keep a focus on overcoming realistic challenges, two key issues — which are appropriate to the discussion of BiH Adventure Tourism branding — are:

- 1. The lack of centralized support for the tourism industry as a whole and, by extension, limitations placed on BiH's natural strength as an Adventure Tourism hub**
- 2. The inability of the destination to promote itself due to a lack of story creation and ultimately, because of the lack of an Adventure Tourism brand**

The necessity that the following Brand Strategy focuses upon is the relationship between those two challenges described above (lack of support and promotional failures) — and the possible direction a future marketing and branding firm or organization might take to set the country on a more productive branding course.

Addressing both of the challenges described above in an integrated manner (rather than individually) would work to strengthen the outcome of such efforts. Without the collective ability of people from BiH to share their stories with the world as the key purveyors of their own narrative, then the Adventure Brand, which seeks to portray BiH as an ancient mountain culture dense with tradition, has little depth. Without the power of a centralized brand, those local stories have no place to build momentum, are rarely heard, and certainly will not be heard without the amplifying power a successful brand can wield.

BiH has an opportunity to usher in a new post COVID-19 era as a successful international example of providing this era's travelers with exactly what they seek and

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<sup>107</sup> Recognition of Kosovo follows UNSCR 1244 guidance and the ICJ Opinion on the Kosovo declaration of independence.



exactly at a time when BiH is lucky enough to unwittingly possess the traits necessary to succeed. The question is whether the country will be forward-thinking enough to convert its potential into success.

### 7.3 GOAL AND VISION OF MARKETING STRATEGY

#### 7.3.1 VISION

BiH Adventure Tourism will become a “must” experience for travelers seeking less known, exciting, pristine, and unforgettable destinations through well established and promoted key adventure tourism products (e.g. hiking, cycling, rafting, and skiing).

#### 7.3.2 MARKETING MISSION

Position BiH as THE next destination for Adventure Travel with the focus on hiking, cycling, rafting, and skiing.

#### 7.3.3 GOALS

Based on conclusions drawn here, we can classify three areas in which actions for establishing marketing of adventure travel in BiH should be classified:

AREA	CHALLENGES	GOALS
<b>Management</b>	<ul style="list-style-type: none"> <li>• Lack of cooperation and joint promotion on all levels: country, destinations, entities, private sector actors and product level</li> <li>• Promotional and sales activities of Adventure BiH and key products are in the hands of some destinations and tourism providers. They are not connected or coordinated on higher level</li> </ul>	<ul style="list-style-type: none"> <li>• Starting the cooperation of product clusters through joint marketing activities</li> <li>• Build cooperation within each product cluster on marketing activities</li> <li>• Build cooperation amongst entities to harmonize communication and collaborate in joint actions</li> </ul>
<b>Positioning and Branding</b>	<ul style="list-style-type: none"> <li>• No clear or joint vision, no unified message, story, or brand for Adventure Tourism BiH or key products</li> <li>• Security and safety are tourists’ key concerns regarding travel to BiH</li> </ul>	<ul style="list-style-type: none"> <li>• Differentiate Adventure BiH from competing destinations</li> <li>• Reinforce (or change) the image of BiH as a safe adventure tourism destination</li> </ul>
<b>Promotion and Sales</b>	<ul style="list-style-type: none"> <li>• Due to weak promotion, awareness of BiH as a destination for tourists (and specifically adventure tourists) is low or limited.</li> <li>• There is no national platform for adventure tourism that would offer adventure tourism products on the international market.</li> <li>• Lack of environmental awareness and support for the development of</li> </ul>	<ul style="list-style-type: none"> <li>• Increase the visibility and recognition of BiH as an adventure tourism destination through key products</li> <li>• Increase the cooperation of and sales by international B2B market</li> <li>• Increase overall media presence</li> </ul>

	<p>adventure tourism among the local population and stakeholders</p> <ul style="list-style-type: none"> <li>• Lack of available information in foreign languages, which may be a burden when aiming to attract international tourists</li> </ul>	<ul style="list-style-type: none"> <li>• Build internal communication and raise awareness of the BiH brand</li> <li>• Set up joint key communication media (web page) for Adventure BiH</li> <li>• Understand and follow the demand of target groups</li> </ul>
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## 7.4 ORGANIZATION AND MANAGEMENT

As elaborated in the management and product development sections, one of the main activities of product clusters is to initiate cooperation both within the product clusters and on the level of BiH Adventure Tourism. The aim of cooperation is also to set up joint marketing activities to position both key products as well as BiH Adventure Tourism on the international market, gain recognition, and increase sales.

LEVEL	GOALS	ACTIONS
<b>Adventure BiH</b>	<ul style="list-style-type: none"> <li>• Initiate cooperation within product clusters through joint marketing activities</li> <li>• Build cooperation amongst the entities to harmonize communication and collaborate in joint actions</li> </ul>	<ul style="list-style-type: none"> <li>• MoU for marketing activities (see Management section)</li> <li>• Joint yearly marketing plan for Adventure BiH (internal and external)</li> </ul>
<b>Product Clusters</b>	<ul style="list-style-type: none"> <li>• Build cooperation within each product cluster for marketing activities</li> </ul>	<ul style="list-style-type: none"> <li>• Joint yearly marketing plan for each cluster (internal and external)</li> </ul>

## 7.5 POSITIONING AND BRANDING STRATEGY OF BIH ADVENTURE TOURISM

In order to position Adventure BiH and its key products on the international market and reinforce the image of BiH as a safe adventure destination, brand development is of critical importance. Branding needs to work on all levels. Each key product needs its own product brand that communicates the affiliated values and stories of each product. Product brands connect under the joint brand of Adventure BiH and simultaneously support entity level branding.

Joint branding will provide BiH Adventure Tourism and its key products the opportunity to determine a unified messages which to communicate through all marketing channels. Only consistent communication dispersing a streamlined marketing message through all channels will have the capacity to influence traveler perception and establish the intended vision for the brand.

LEVEL	GOALS	ACTIONS
<b>Adventure BiH</b>	<ul style="list-style-type: none"> <li>• Differentiate Adventure BiH from competing destinations</li> <li>• Reinforce (or change) the image of BiH as a safe and green adventure destination</li> </ul>	<ul style="list-style-type: none"> <li>• Develop Adventure BiH brand representing joint adventure tourism narrative, thereby connecting key products and all entities</li> <li>• Set up communication strategy for the brand</li> </ul>
<b>Product Clusters</b>	<ul style="list-style-type: none"> <li>• Position key products in BiH to select target groups with attention to the differentiation of the destination from main competitors</li> </ul>	<ul style="list-style-type: none"> <li>• Develop Cycling BiH, Hiking BiH, Rafting BiH, and Skiing BiH brands</li> </ul>

### 7.5.1 ADVENTURE TOURISM BIH BRANDING RECOMMENDATIONS

- Key messages communicated by **BiH Adventure Tourism**: Cycling, Hiking, Rafting, and Skiing
- Recommendations and suggestions related to Values, Mission, Message, Personality, Story, Promise, and Unique Selling Proposition (USP).

#### **Brand Values:**

The brand values for **BiH Adventure Tourism** (the aspects of the destination that are most important to BiH) should focus on the place where BiH’s strengths (land and culture) intersect with what travelers are looking for (safety and authenticity). Some examples of possible brand values and explanations are below. The wording for the brand values uses **BiH** instead of the word “to be,” which itself has branding potential.

- **BiH Safe:**  
The enjoyment of BiH’s incredible outdoor offers are only as valuable as they are safe. Although there are areas of the country where landmines are present, these are clearly marked. BiH Adventure Tourism strives to ensure the presence of landmines does not affect any visitor or their adventure experience. Every company included under the Adventure Tourism umbrella considers their visitors’ health and safety as their greatest responsibility.
- **BiH Authentic:**  
Among BiH Adventure Tourism’s most significant strengths is the extraordinary and authentic cultures found in cities, towns, villages, and countryside. The aim is to always protect the traditions that make BiH special.
- **BiH Honest:**  
As a group, BiH Adventure Tourism aims to treat both local members and their guests with the only respect that matters: honesty. BiH Adventure Tourism pledges to remain transparent in our actions — from working on behalf of our tourism operators to reporting the state of our industry.
- **BiH True:**

The adventure tourism sector of BiH is only as strong as the people who live and work in the country. BiH Adventure Tourism will always make decisions that keep our community-based industry healthy.

- **BiH Respectful:**

Adventure tourism is a combination of respecting traditions and the environment in which they exist. BiH Adventure Tourism will always prioritize the preservation of our landscape and our traditions over short-term “success.”

**Mission Statement:**

The mission statement for **BiH Adventure Tourism** (what BiH pledges for its adventure travelers) should make it clear that the association understands the value of the treasure it is guarding – the land, culture, and people - and how it is presented to guests. Below is one such example:

BiH is a rare combination of pristine European landscapes, multi-ethnic and deeply rooted cultures, and remote experiences. BiH Adventure Tourism takes these strengths and goes further by also paying respect to our country’s people and the local communities they represent. The result of this process should allow citizens, farmers, shepherds, and entrepreneurs the very real option of remaining in their villages and sharing their traditions and lifeways with visitors, thereby continuing BiH’s reputation for authenticity in tourism. BiH Adventure Tourism’s purpose is to create a tourism environment in which every part of the process — from visitors and operators to the land they both enjoy — are handled with care to create a sustainable and healthy circle of success.

**Brand Message:**

The brand message for **BiH Adventure Tourism** (i.e. how the brand and its enjoyment is defined to visitors) should combine a sense of “being in place” that is new and represents an accomplishment, even for an experienced traveler. It should also make others desire the same type of experience during their own travels. The message should be that a visitor has been “transformed” through a sense of nature, safety, and warmth in this adventurous corner of Europe — the Western Balkans.

The Western Balkans has, in the last decade, taken large strides in the adventure tourism market. More and more travelers have started to associate this region with wholesome food, beautiful landscapes, and affordable prices. BiH is the centerpiece of this region.

Possible Brand Message:

Bosnia and Herzegovina: Natural Discovery and Transformative Travel in the Heart of the Western Balkans

**Brand Personality:**

The brand personality of **BiH Adventure Tourism** (its personification to customers) should encourage people to become the type of traveler they find the most magnetic and compelling. The personality combines the brave discovery of a place that had not been thought of before. It should make them feel as if they are great adventurers taking part in the type of experience that is yearned for by other travelers, friends, and family. It should also make them feel like they chose the ideal place to learn about food, culture, and history. Some of BiH's possible personality traits are below:

- Authentic
- Daring
- Adventurous
- Charming
- Outdoorsy

### **Brand Story:**

The brand story of **BiH Adventure Tourism** (or, the explanation of how this Balkan country became a model for adventurous travelers) should embrace its status as an overlooked underdog while challenging visitors to take their adventurous spirits to a destination that holds more possibility than they could have ever imagined. The story should touch on BiH's complex history but also make clear that BiH will provide world-class adventure — with excellent culture, cycling, and trekking routes — to travelers in Europe and do so with safety and at a fraction of value for money.

Since 1992, when BiH declared independence, adventure travel has slowly become more widespread. In BiH, however, adventure and culture have always been woven together. Over the years, the country has grown in the number of offers it provides to travelers — for example, rafting the Tara River, traversing the Via Dinarica Hiking Trail, and exploring the Trans Dinarica Cycling Route — but it has always remained committed to continually improving two of its most important values: safety conditions (from personal health and adventure activities to landscape usage) and hospitality.

### **Promise of the Brand:**

BiH has, despite its challenges, much more to give to visitors than is currently promoted. To a large degree, this is because the country and its adventure sector have never worked as a unit to define its offerings, personality, or focus. The aspects of adventure tourism that BiH can faithfully guarantee include:

- **A one-of-a-kind experience:** It is rare to find a traveler who has fully explored this country, its culture, and its unique landscape.
- **A commitment to safety:** BiH is committed to continually striving for better safety conditions and honest communication. This includes safety related to health, guide quality, and considerations of landscape.
- **An offer focused on sustainability:** BiH's certificate program, which emphasizes safety standards and better-educated-and-trained tourism and

specialty guides, continues to raise the country's level of professionalism in support of authentic travel.

- **A place where visitors travel like locals:** This is not just a trend in authentic travel; this is the way BiH operates.
- **A good product at a fair price:** BiH is a reasonably priced European destination. When the quality of its adventure offerings are factored in, BiH can be viewed as one of the continent's best values.
- **Genuine hospitality:** The country's remote villages contain citizens who openly welcome travelers.
- **A vast array of excellent adventure possibilities in every corner of the country:** Every part of BiH has excellent outdoor activities that compare favorably with nearly any country in Europe.

**Promise:** BiH Adventure Tourism promises travelers bragging rights among their friends while providing those travelers with one-of-a-kind, affordable, safe, and friendly experiences in some of the Europe's most unheralded, yet world-class, adventure settings.

#### **Unique Selling Proposition (USP):**

An upside of branding **BiH Adventure Tourism** is that the entire concept represents an USP. BiH is unique in its combination of world-class outdoor activities (e.g. hiking, cycling, rafting, and skiing), remote Balkan culture, farm to table slow food, locally produced wine, affordability, proximity to Western Europe, and its ability to transform visitors. Phrases that promote this USP could be:

- *BiH Adventure Tourism: Beyond your wildest dreams ... and just around the corner*
- *BiH Unique enough to go your own way — Choose your path with BiH Adventure Tourism*

#### **7.5.2 BRAND DEVELOPMENT**

In order to properly brand BiH Adventure Tourism, the strategy must first be open and clear about the challenges and strengths BiH possesses. The assumptions and misperceptions must be addressed in an honest and neutral manner; the best route to future success begins with an informed, inclusive understanding of the context.

Once an informed assessment has been made, the potential of adventure tourism in BiH needs to be reconsidered and its place made within the new global conceptualization of tourism presently in development. The mistake should not be made of adapting BiH to a now outdated tourism model that measures success based purely on overnight stays and numbers of border crossings. BiH's new reality — and the truth behind and key to its brand — is based on understanding what it has to offer and where that innovation fits on the spectrum of travelers who actively seek BiH's style of tourism.

In short, the BiH Adventure Tourism sector, and the people who brand it moving forward, must trust that BiH has a unique place in the industry, create a structure that benefits BiH, and stop merely defining the country’s success based on the rules of other countries. **It is time for BiH to define its own niche.**

Be brave enough to go your own way — Choose your path with BiH Adventure Tourism.

**Brand Architecture:**

In order to move forward, it is imperative that BiH organize its adventure tourism offer so that visitors/customers/travelers understand how to identify BiH with what it is they desire in a travel destination. An association of operators, tourism organizations, media, and DMOs has to be organized before branding can be initiated.

Following the establishments of this association, the country’s **Brand Architecture** can be constructed. This report proposes that the architecture should start with a national adventure association (perhaps BiH Adventure Tourism), which will encompass biking, hiking, rafting, and skiing. Each of the divisions of adventure could have its own brand under the umbrella (see Figure 11 below).

Because BiH does not yet possess a national tourism brand, defining BiH Adventure Tourism’s relationship with a larger “national tourism” entity is both easier and more difficult. Because BiH Adventure Tourism would be able to work independent from any oversight, the choices made will be their own and based on what is best for the adventure travel industry. Because there is no model with which to work, however, the process for branding becomes much more difficult.

Figure 11: Proposed brand architecture of Adventure tourism BiH



**7.5.3 BIH ADVENTURE TOURISM (NATIONAL BRAND)**

**BiH Hiking:**

**USP:** BiH Hiking provides visitors with an opportunity to walk in the Dinaric Alps, meet locals, and discover remote villages in some of the most pristine areas of Europe.

- **Promise:** BiH Hiking promises an opportunity for trekkers and adventurous travelers to hike in beautiful, pristine areas where sustainability and safety are of utmost importance to experience providers.

### **BiH Cycling:**

**USP:** BiH Cycling gives cyclists the opportunity to be the first of their friends to investigate great mixed-surface cycling through the Dinaric Alps to incredible villages on routes that stretch from one end of the country to the other.

**USP:** BiH Cycling offers an extensive network of forest roads that are appropriate for serious and casual gravel and mountain bikers looking for transformative experiences while tackling unparalleled landscapes.

- **Promise:** BiH Cycling promises great cycling, safety-conscious guides, and truly unique routes that combine delicious local meals, challenging trails, and transformative travel experiences.

### **BiH Rafting:**

**USP:** BiH Rafting puts whitewater aficionados in one of the best river countries in Europe. BiH is crisscrossed by exceptional rafting and kayaking through the Dinaric Alps, national parks, and the Tara River Gorge, the second deepest gorge in the world.

**USP:** BiH Rafting makes it easy for families and soft adventurers to connect multiple activities — hiking, cycling, and culture tours — and enjoy several mountain rivers during a week of rafting.

- **Promise:** BiH Rafting promises clean rivers, safe guides, and rafting and kayaking expeditions that combine ancient cultures, mountains, and the chance for visitors to be among the most adventurous travelers in their circle.

### **BiH Skiing:**

**USP:** BiH Skiing gives skiers and boarders of all skill levels an opportunity to experience world-class adventure across BiH. There are ample possibilities for backcountry and free skiing as well as twenty ski areas in total around the country. The most famous are the resorts that hosted the 1984 Winter Olympic Games: Jahorina, Bjelašnica, and Igman Mountains.

- **Promise:** BiH Skiing promises excellent skiing and boarding supported by international-level safety measures practiced by its resorts, guides, and equipment suppliers. Such assurances and safety guidelines enable winter-sports lovers to focus entirely on the aspects that make BiH such a special country: the warmth of the people, the indulgent food, the unforgettable landscapes, and an immersive



experience within a deeply rooted local culture that is still unknown to many visitors.

## 7.6 COMMUNICATION STRATEGY TO TARGET MARKETS

The target group can be broken down into two categories, each of which require a distinct communication approach for effective marketing:

- Travelers choosing a specific active travel product (biking, hiking, rafting, or skiing) and making it the primary impetus for visiting BiH
- Travelers who may choose a specific activity for their itinerary (as described above), but who may also choose BiH as a travel destination for secondary reasons, including additional outdoor experiences

However, when addressing any traveler, their motivations need to be understood as well as their expectations, habits, and limitations. BiH Adventure Tourism is confident that BiH’s capacity as a tourism destination can respond to varied motivations and offer the appropriate individualized experience to guests. Appropriately informed, BiH Adventure Tourism can develop a communication and messaging strategy with a broad reach. In the following chapters we will mostly focus on niche travelers since the management structure is linked largely to key products.

### 7.6.1 ADVENTURE TRAVELLER

As established previously, the adventure tourism market is one of the fastest growing and is attracting travelers who are willing to pay more for exciting, authentic experiences. They are looking for nature-based and outdoor products, local stays, lack of crowds, and destinations they can reach by car. They seek soft adventure, travel as couples, and are interested in visiting **undiscovered destinations**.

Adventure Travel Facts 2019 (ATTA, 2020)	
<u>Guest type:</u> 45-64 years old, most frequently couples	Top adventure activities in 2019 were: 1. Hiking/Trekking/Walking 2. Cycling 3. Safaris/Wildlife viewing 4. Cultural 5. Culinary 6. Expedition cruising 7. Kayaking/sea/water 8. Multisport 9. Rafting
<u>Trip length:</u> 8.8 days (world average), 8.2 (European average)	
<u>Average Retail Trip Price (USD):</u> \$3,000 per trip/\$341 per day (world average) \$1,586 per trip/\$193 per day (European average)	
<u>Top distribution channels:</u> direct bookings (61 percent world average, 64 percent European average)	
<u>Top marketing and sales tactics:</u> word of mouth	
<u>Direct marketing:</u> social media as the most popular way to reach customers	

Destinations are often chosen through social media and the recommendation of friends; travelers book directly with local tourism providers and like to be independent when traveling and exploring.

Adventure travel in BiH has potential to attract a modern adventure traveler and offer the most sought-after experiences. As already elaborated in previous chapters, new investments are needed to support an increase in quality of the tourism offer and associated services. Although it is recognized that BiH requires improvement at the infrastructural and industry level, the fundamentals are already present; because the country is located at the doorstep of the EU markets and possesses exceptional natural and cultural attractions, the country is well-poised to rise within international markets as a top (adventure) tourism destination.

The results of the Google keyword analysis showed that the most frequently asked question about adventure tourism in BiH is concerning the issue of safety in relation to existing minefields. Travelers seeking to explore rural or undeveloped areas or hiking on mountain trails are aware of the potential dangers that the landmines present, but their understanding of the topic may be either limited or misinformed. In response to these relevant questions and concerns, potential visitors need reliable information and guests require access to knowledgeable, trained guides. BiH Adventure Tourism must strive for transparency, presenting honest, reliable, and accurate information about the history of mining in BiH, the current threat of minefields, and the slow process of their removal. The association must communicate where and how to travel in the country and be willing to answer all the questions a traveler might have on this topic.

The established promise of the brand is therefore directly addressing the expectations and needs of modern adventure travelers:

**BiH Adventure Tourism promises travelers bragging rights among their friends while providing those travelers with one-of-a-kind, affordable, safe, and friendly experiences in some of the Europe's most unheralded, yet world-class, adventure settings.**

#### **7.6.2 MARKET SEGMENTATIONS**

According to the ATTA (ATTA, 2020), BiH's primary source markets are North America, Germany, and the UK. By UNWTO estimations, 19 percent of the world's adventure travel tourists originate from the UK, making it the largest adventure tourism market in Europe. Within Europe itself, European tourists are accountable for almost 60 percent of its adventure traveler subset. According to ATTA's Adventure Travel Snapshot for 2020 (ATTA, 2021), the Mediterranean region ranks in second place (behind the United States) on the list of the most desirable destinations.

Table 9: Primary and potential source markets according to ATTA compared to countries of origin and desirable source markets for BiH adventure tourism

PRIMARY SOURCE MARKETS (ATTA)	COUNTRY OF ORIGIN (before COVID-19)	MOST DESIRABLE COUNTRIES (SURVEY)	POTENTIAL AND DIRECTION										
North America Germany UK France Spain Italy Netherlands	Croatia Serbia Germany Slovenia Austria Italy Poland Switzerland Sweden North America	Germany Croatia Slovenia Serbia Austria North America Sweden UK Italy France	1. <b>Regional markets:</b> Croatia Slovenia Serbia Montenegro 2. <b>European markets:</b> <table border="1"> <thead> <tr> <th>traditional</th> <th>potential</th> </tr> </thead> <tbody> <tr> <td>Germany</td> <td>UK</td> </tr> <tr> <td>Austria</td> <td>Poland</td> </tr> <tr> <td>Italy</td> <td>Sweden</td> </tr> <tr> <td></td> <td>France</td> </tr> </tbody> </table> 3. <b>North America</b>	traditional	potential	Germany	UK	Austria	Poland	Italy	Sweden		France
traditional	potential												
Germany	UK												
Austria	Poland												
Italy	Sweden												
	France												

**Regional markets** have proven to be an essential segment of the tourism market and have contributed to a stable demand for adventure tourism products in BiH. Despite the steep global decline in the tourism industry as a result of COVID-19, regional demand has persisted for BiH tourism. The present uncertainty surrounding travel has encouraged travelers to shift their attention to destinations closer to home and accessible by car. The regional markets most familiar with the BiH tourism offer are typically comfortable with BiH culture and may even speak the local languages. As a result, regional interest in visiting BiH may be distinct from other international visitors that arrive from further afield. The proximity to and familiarity with BiH in this case acts as a further catalyst for travel to BiH and has caused greater regional recognition of BiH as a desirable travel destination. Regional markets also hold a specific emotional bond and a memory to a shared history. They come independently, traveling by personal car and usually with a specific goal for their visit, including an activity or location.

**Regional markets should be addressed as a primary market with steady growth and potential.**

The European market can be divided into two categories. The first category comprises the **established markets** from which there is a reliable tourist presence in BiH, including Germany, Austria, and Italy. The second category refers to the **new potential markets**, such as the UK, Poland, Sweden, Czech and France.

**Germany** is considered an essential market for the BiH tourism industry. Because German tourists represent a strong market with high purchasing power and are aware of and interested in adventure tourism, they are highly desirable clients for local

businesses. According to trends in adventure travel (CBI, 2021), Germany has one of the greatest potential markets with ten million of the country's population identified as hikers. German tourists stay longer at the destination and are described as undemanding, loyal guests who act responsibly towards the environment. They arrive by car, desire good value for money, and often have specific interests. Similar characteristics apply to the guests traveling from Austria.

The **UK** on the other hand is poorly represented in BiH even though all trends show that the UK market holds substantial potential for adventure tourism. The market conditions of **France, Spain, and the Netherlands** are similar. On the other hand, we see those markets like **Poland** – although already well represented – show the potential for continued growth. Considering the Slovenian tourism industry as a point of comparison, particularly in terms of rafting attractions, there is a substantial opportunity for market growth. This is especially true for the increasing presence of the **Czech and Hungarian** tourist demographic in Slovenia.

**The US** market represents an important potential for the BiH tourism industry, but the numbers are not as high as suppliers in BiH would expect or like to see (see the table above: Country of origin). The U.S. is also the market most heavily affected by Covid-19 restrictions and will require time to recover. Because of this, promotional activities aimed toward the U.S. market will not be a top priority at present.

The analysis of the keywords on Google showed that German speaking markets researching and planning for holidays in BiH most often search cycling, hiking and rafting. English speaking markets most often seek information on river rafting, water rafting and cycle tourism. When we compare these results to competitive markets, it is clear that the only products that are competitive to other regions are focused on rafting. Rafting in BiH is the best-known segment of adventure tourism on the international market which is a result of planned and systematic promotion on the international market.

This conclusion suggests that adventure tourism in BiH is not positioned on the market, and it is specific products such as rafting that are most visible to and are of most interest to potential consumers. **For this reason, BiH should use PUSH marketing strategy when promoting Adventure Tourism BiH in order to position it on the market and PULL marketing strategy when promoting specific products, including rafting.** This approach will help to raise the interest of the traveler with the goal of securing and increasing actual bookings.

## 7.6.3 PRODUCT SEGMENTATION AND COMMUNICATION

### 7.6.3.1 Hiking

**USP:** BiH Hiking provides visitors with an opportunity to explore the Dinaric Alps, meet locals, and discover remote villages in some of the most pristine natural areas in Europe.

**COMPETITION:** The neighboring countries of Croatia, Slovenia, Serbia, Montenegro, and Austria have similar landscape characteristics as BiH and are therefore its biggest competitors in the field of hiking. Mountains in BiH are, on average, of a lower elevation and require less technical skill than Slovenia and Austria. As a result, the mountains of BiH tend to attract and are accessible to a broader ability level and long-distance hikers.

The analysis of the keywords on Google outlines that the online presence positions BiH behind its competitors in terms of product availability. Because German-speaking guests are very desirable guests in BiH, the availability of information in the language of this target market is crucial for increasing associated sales.

SEGMENTATION & INTEREST	BiH	POTENTIAL
<b>Easy and Joy Hiker</b> <ul style="list-style-type: none"> <li>Hiking is a main goal of holiday</li> <li>Combining hiking with cultural, culinary, and other experiences</li> <li>Educated</li> <li>Non-technical trails</li> </ul>	<ul style="list-style-type: none"> <li>BiH is a unique combination of pristine landscapes mixed with traditional practices, multi-ethnic heritage, and unheralded culture</li> <li>Mountains are suitable for long-distance hikes demanding less technical experiences</li> </ul>	Number 1  Most suitable
<b>Alpine Hiker</b> <ul style="list-style-type: none"> <li>Enjoying nature</li> <li>Outdoor enthusiast</li> <li>Interested in advanced tours</li> <li>Not necessarily high-quality accommodations</li> <li>Looking for new destinations</li> </ul>	<ul style="list-style-type: none"> <li>Untouched and uninhabited nature, rich biodiversity</li> <li>Twelve mountains are higher than 2,000 meters, suitable for advanced hikers</li> <li>Existing network of mountain huts and lodges</li> <li>Undiscovered destination</li> </ul>	Number 2  Very suitable
<b>'Ferata' Hiker</b> <ul style="list-style-type: none"> <li>Independent</li> <li>Varied group of climbers and experienced hikers</li> </ul>	<ul style="list-style-type: none"> <li>BiH offers some high mountains and difficult trails but in comparison with Alps is less demanding</li> <li>Lack of marked trails for self-guided hiking</li> </ul>	Number 3  Suitable
<b>Families</b> <ul style="list-style-type: none"> <li>Wide target public</li> <li>Need several attractions along the trail: adventure parks, zip-line, historic sites.</li> <li>Walking as a family is a memorable adventure</li> </ul>	<ul style="list-style-type: none"> <li>BiH offers opportunities to connect hiking with rafting, biking, and other activities</li> <li>Lack of infrastructure suitable for families</li> <li>Lack of information and marking of trails but an existing network of</li> </ul>	Number 4  Less suitable

	<ul style="list-style-type: none"> <li>• Information needed for planning and assurance</li> <li>• Safety is top priority</li> </ul>	<ul style="list-style-type: none"> <li>• specialized agencies offering guided hiking</li> <li>• Presence of landmines</li> </ul>	
<p><b>Promise of the brand:</b> BiH Hiking promises an opportunity for trekkers and adventurous travelers to hike in beautiful, pristine areas where sustainability and safety are the most important principles.</p>			
<p><b>Main story:</b> The BiH Hiking brand story can play on two advantages: 1. BiH’s culture, incredible mountainous landscape, and hospitality; and 2. many visitors have no idea that this country is essentially an immense natural parkland with rivers, lakes, and remote villages tucked into the mountains. BiH is the next great world-class hiking destination in Europe in the “Heart of the Western Balkans” and in the “Heart of the Dinarides”. Be the first of your hiking friends to visit this trekking haven that is central to the Via Dinarica.</p>			

### 7.6.3.2 Cycling

**USP:** BiH Cycling gives cyclists the opportunity to be the first of their friends to investigate great mixed-surface rides through the Dinaric Alps, reaching remote villages on routes that stretch from one end of the country to the other.

**USP:** BiH Cycling offers a massive network of forest roads that are appropriate for serious and casual gravel and mountain bikers looking for transformative experiences while tackling beautiful and untouched landscapes.

**COMPETITION:** With the exception of Austria and Italy, BiH’s competitors (Croatia, Slovenia, Montenegro and Serbia) are similar in size and geographic features. Access to on-line GPS tracks is of key importance to the cycling community, but in BiH, we can see the lack of availability of GPS track on the most heavily used on-line platforms. In general, there is lack of online information about cycling, especially in the German language. This hinders the competitiveness on German-speaking target markets, which has been defined as one of the most desirable target markets for adventure tourism in BiH.

Cyclists are not a homogeneous target group but have a range of specific wishes and needs which is largely dependent on their activity interest. When discussing cycling we need to keep a specific cycling group in mind. Because cyclists are increasingly participating in multiple cycling disciplines rather than specialize in one, it can be difficult to categorize them. Cyclists were segmented on the basis of their primary or predominant mode of cycling.

The motivations and interests of cycling tourists may include: physical activity and health, proximity to nature, escapism, experiential education, cultural and community immersion, visitation of heritage sites, rest and relaxation, and low environmental impact.

SEGMENTATION AND INTEREST		BiH	POTENTIAL
<b>Touring and Gavel Cyclists</b>	<ul style="list-style-type: none"> <li>• Uses a cross country or all mountain bike</li> <li>• Rides on existing forest, field, and hiking trails</li> <li>• Uses single trails for descents</li> <li>• Gravel cyclists use gravel bikes and prefer forest, macadams, and routes that are “off the beaten path”</li> <li>• Enjoy nature</li> <li>• Highly educated</li> <li>• Takes on average 2.3 bike holidays annually</li> <li>• Looking for new bike destinations</li> <li>• Adventurous, independent</li> <li>• Number increasing rapidly</li> <li>• Majority identify as male</li> </ul>	<ul style="list-style-type: none"> <li>• Untouched forests, primeval forests</li> <li>• Large network of forest paths suitable for gravel cycling</li> <li>• Mountains are suitable for long-distance mountain biking</li> <li>• Lack of infrastructure for accommodation</li> <li>• Restaurants near small villages en route, and urban centers are close to cycling routes</li> <li>• BiH is still little and explored, offering cycling off of the usual beaten path</li> <li>• Lack of marked trail requires self-navigation</li> </ul>	<p>Number 1</p> <p>Most suitable</p>
<b>Cyclist – Traveler</b>	<ul style="list-style-type: none"> <li>• Uses trekking bicycles, rides on asphalt roads and macadams</li> <li>• Long distance dedicated infrastructure (cycling routes) like EuroVelo route</li> <li>• Cheaper accommodations, camping</li> <li>• Technical information required</li> <li>• Self-navigation</li> </ul>	<ul style="list-style-type: none"> <li>• Massive network of forest roads that are appropriate for needs</li> <li>• Serious and casual gravel and mountain bikers</li> <li>• Lack of infrastructure for accommodation</li> <li>• Restaurants near small villages en route and urban centers are close to cycling routes</li> <li>• Lack of self-navigation options and marked trails</li> </ul>	<p>Number 2</p> <p>Very suitable</p>
<b>Easy and Joy Cyclist</b>	<ul style="list-style-type: none"> <li>• Mostly mountain bikers</li> <li>• Combined with wellness, culture, and culinary interests</li> <li>• Highly educated</li> <li>• Lower technical biking skills</li> </ul>	<ul style="list-style-type: none"> <li>• Short distances from natural areas to urban centers allow for development of a range of activities</li> <li>• Good opportunity to connect different activities integrating natural and cultural heritage</li> </ul>	<p>Number 3</p> <p>Very suitable</p>
<b>Gravity Cyclist</b>	<ul style="list-style-type: none"> <li>• Bike downhill, infrastructure needed</li> <li>• Shuttle services available</li> <li>• Bike shops in surroundings</li> <li>• Younger population</li> <li>• Cheaper accommodations</li> <li>• Shorter stay in destination</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of infrastructure and offer</li> <li>• Potential in Sarajevo with surroundings (Trebević, Igman, Jahorina, Bjelašnica) can become future center for cycling</li> </ul>	<p>Number 4</p> <p>Suitable</p>

		<ul style="list-style-type: none"> <li>• Interest for diversifying ski resorts</li> </ul>	
<b>Road Cyclist</b>	<ul style="list-style-type: none"> <li>• Uses a road bike on the existing road network with a good (paved) asphalt surface</li> <li>• Little traffic</li> </ul>	<ul style="list-style-type: none"> <li>• Asphalt roads are high traffic areas</li> </ul>	Number 5  Less suitable
<b>Family cyclist</b>	<ul style="list-style-type: none"> <li>• Rides with their family and children</li> <li>• Dedicated infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of suitable infrastructure</li> </ul>	Number 6  Less suitable
<p><b>Promise of the brand:</b> BiH Cycling promises great cycling, safe guides, and truly unique routes that combine food, challenging riding, and transformative travel experiences.</p>			
<p><b>Main story:</b> BiH Cycling's brand story should promote the opportunity BiH gives travelers of all abilities to see this up-and-coming adventure travel paradise on mountain bike trails, touring itineraries, and routes for gravel cyclists. By exploring the country on a bicycle, visitors will be the first to experience remote villages, but they will also cycle to vineyards, the Adriatic Sea, and protected natural reserves. Cycling also encourages the appropriate sustainable tourism agenda, which will be the centerpiece of BiH tourism moving forward. Cycling BiH enables a slower speed of travelling experience, providing a truly immersive experience.</p>			

### 7.6.3.3 Rafting

**USP:** BiH Rafting puts whitewater aficionados in one of the best river countries in Europe. BiH is crisscrossed by exceptional rafting and kayaking through the Dinaric Alps, national parks, and the Tara River Gorge – the second deepest gorge in the world.

**USP:** BiH Rafting makes it easy for families and soft adventurers to connect multiple activities — hiking, cycling, and culture tours — and enjoy several mountain rivers during a week of rafting.

**COMPETITION:** Slovenia, Croatia, and Montenegro can be treated as BiH's biggest competitors in rafting and water sports; these countries offer comparatively similar rafting environments and options to BiH. The analysis of Google keyword research showed that the most popular keywords in English relate to rafting; however, the lower availability of information about BiH rafting in BiH in the English language poses a threat to its regional competitiveness.

The natural characteristics – the abundance of wild rivers and mountain lakes – place BiH seventh in all of Europe for its water reservoirs (MOFTER, 2018). The rivers are not torrential and demanding and are therefore suitable for a wider target group, including inexperienced individuals and families. Rafting is possible on several rivers in BiH, including the Tara, Una, Neretva, Drina and Vrbas River.



At the moment, clients participating in rafting tours in BiH are diverse, originating from locations all over the world. The Una and Tara Rivers are especially popular because they are well connected to tourism flows in both Montenegro and Croatia.

SEGMENTATION AND INTEREST	BiH	POTENTIAL
<b>Easy/Joy</b>	<ul style="list-style-type: none"> <li>● Unskilled, recreational rafters</li> <li>● Rafting can be main or side activity</li> <li>● Small groups of friends seeking fun</li> <li>● Men of younger middle age</li> </ul>	<ul style="list-style-type: none"> <li>● Abundance of wild rivers and mountain lakes</li> <li>● Rivers are not torrential or demanding</li> <li>● Enjoy several mountain rivers during a week of rafting</li> <li>● Opportunities to connect rafting with culinary experiences, relaxation, and fun</li> </ul>
<b>Families</b>	<ul style="list-style-type: none"> <li>● Unskilled, recreational rafters</li> <li>● Risk free rafting</li> <li>● Part of their main holidays (rafting as an activity)</li> <li>● Safety is of key importance</li> <li>● Appreciate nature and clean rivers</li> </ul>	<ul style="list-style-type: none"> <li>● Clean and beautiful rivers</li> <li>● Rivers are not torrential or demanding</li> <li>● Options to connect multiple activities — hiking, cycling, and culture tours</li> <li>● Skills are not required</li> <li>● Proximity to tourist centers (e.g. Dubrovnik, Mostar)</li> <li>● Suitable mostly in Summer when waters are low</li> </ul>
<b>Adventurers</b>	<ul style="list-style-type: none"> <li>● Skilled and experienced</li> <li>● Adrenaline and risk seeking</li> <li>● Main focus is the challenge and experience</li> <li>● Satisfied with basic accommodation</li> <li>● Desire interaction with other people</li> <li>● Male middle-aged and younger demographic</li> </ul>	<ul style="list-style-type: none"> <li>● Some riverways in BiH are suitable especially during high water (Spring)</li> <li>● Enjoy several mountain rivers during a week of rafting</li> <li>● Opportunities to connect with locals</li> </ul>
<p><b>Promise of the brand:</b> BiH Rafting promises clean rivers, safe guides, and rafting/kayaking expeditions that combine ancient cultures, mountains, and the chance for visitors to be among the most adventurous travelers in their circle.</p>		

**Main story:** The brand story of BiH Rafting should make travelers understand they are in a country overflowing with great rivers to kayak, raft, or just relax on the banks. Great experiences wait for all skill levels along rivers that include ones that have hosted the World and European Rafting Championships (Vrbas, Pliva lake)), flow to the sea (Neretva), take travelers through national Parks (Una), or are cradled by the second deepest gorge in the world (Tara River Gorge). The story should touch on Bosnia and Herzegovina's complex history but also makes it clear that BiH wants to provide world-class rafting at a fraction of the price of other LESSER European spots.

#### 7.6.3.4 Skiing

**USP:** BiH Skiing gives skiers and snow boarders of all skill levels a chance to experience world-class winter sports across BiH. There are ample opportunities for backcountry and free skiing as well as twenty ski areas in total around the country. The most famous are the resorts that hosted the 1984 Winter Olympic Games: Jahorina, Bjelašnica, and Igman Mountains.

**COMPETITION:** Compared to countries like Austria and Italy, the ski resorts in BiH are smaller and on average less physically demanding. BiH is especially known for hosting the Winter Olympic Games in Sarajevo in 1984, which is still used in communication to guests and serves as part of the attraction. Most foreign visitors come from regional countries, which are at the same time their biggest competitors: Serbia, Slovenia, Croatia, and Montenegro. The statistics show that Bjelašnica and Jahorina are the cheapest ski resorts in Europe.

Skiers can be divided into two segments:

- Alpine skiing and snowboarding requiring the basic infrastructure of ski lifts and groomed runs as well as backcountry areas where specific infrastructure is not needed (although alternative transport may be necessary)
- Cross country skiing

In addition, we can include activities like snowshoeing and sledding among popular winter activities, but in most cases, they would serve as an additional offer and not as a primary reason for visit.

SEGMENTATION AND INTEREST	BiH	POTENTIAL
<b>Easy and Joy</b> <ul style="list-style-type: none"> <li>• Less skilled and less demanding regarding the technical expectations</li> <li>• Ski resort offering entertainment and local cuisine</li> <li>• Looking for additional activities</li> <li>• Group of friends</li> </ul>	<ul style="list-style-type: none"> <li>• BiH ski resort are suitable for undemanding skiers in terms of quantity of ski slopes</li> <li>• Combining skiing with other products like culture and gastronomy</li> <li>• Urban centers are near to ski resorts (Sarajevo)</li> </ul>	Number 1  Most suitable
<b>Families</b> <ul style="list-style-type: none"> <li>• Choosing a ski resort according to experience level</li> </ul>	<ul style="list-style-type: none"> <li>• One of the most reasonably priced ski resorts in Europe</li> </ul>	Number 2  Very suitable

	<ul style="list-style-type: none"> <li>Interested in ski schools</li> <li>Looking for additional activities (e.g. pools, sledding, skating, tubing)</li> <li>Price sensitive</li> </ul>	<ul style="list-style-type: none"> <li>Suitable for undemanding skiers</li> <li>Urban centers are near to ski resorts (Sarajevo)</li> </ul>	
<b>Demanding skier</b>	<ul style="list-style-type: none"> <li>Seeking bigger resorts with better infrastructure</li> <li>More demanding with greater experience</li> </ul>	<ul style="list-style-type: none"> <li>BiH has less to offer since the ski resorts are smaller and less physically demanding</li> </ul>	Number 3 Less suitable
<p><b>Promise of the brand:</b> BiH Skiing promises excellent skiing and boarding supported by international-level safety measures practiced by its resorts, guides, and equipment suppliers. Assurance and safety allow winter-sports lovers to pay attention to the aspects that make this such a special country: the warmth of the people, the excellent food, the incredible landscapes, and the opportunity to experience a deeply rooted culture that is still new for many visitors.</p>			
<p><b>Main story:</b> The brand story of BiH Skiing puts travelers in the middle of an up-and-coming adventure-tourism star, but the real branding opportunity here is that visitors will ski where Olympians have soared. BiH is a destination that always exceeds expectations. The skiing-adventure story should lean into this diverse, welcoming, but often remote culture with the modern addition of skiing on slopes that hosted the 1984 Olympic Games.</p>			

## 7.7 PROMOTION AND SALES

In marketing plan activities, we refer to two levels of promotion and sales:

- Promotion of BiH Adventure Tourism,
- Promotion of key products

In relation to the main target groups, actions can be divided into two areas:

- Internal communication within the BiH stakeholder group and general population of BiH with the aim to raise internal awareness and reinforce cooperation
- External communication to the international market which can be B2B and B2C.

LEVEL	GOALS	ACTIONS
<b>BiH Adventure Tourism</b>	<ul style="list-style-type: none"> <li>Increase the visibility and recognition of BiH as an adventure tourism destination</li> <li>Increase the cooperation and sales with international B2B market</li> <li>Increase media presence</li> <li>Build internal communication and raise awareness (economic and sustainable)</li> <li>Set up joint key communication media (web page) for BiH Adventure Tourism</li> </ul>	<ul style="list-style-type: none"> <li>BiH Adventure Tourism web page and social media communication plan</li> <li>Internal awareness-raising campaign (study trips, communication platform, promotional events)</li> <li>External awareness-raising campaign (BiH as safe destination)</li> <li>B2B BiH Adventure Tourism event</li> <li>Fairs and B2B events</li> <li>Media hub</li> <li>Memberships in international networks (e.g.</li> </ul>

		ATTA, Transformational Council)
<b>Product Clusters</b>	<ul style="list-style-type: none"> <li>• Increasing the visibility of featured BiH tourism products in critical markets;</li> <li>• Target existing tourists to stay in destination longer, extend the season</li> <li>• Increase the cooperation and sales with international B2B market</li> <li>• Promote sustainable, environmentally friendly products</li> <li>• Understand and follow the demand of target groups</li> </ul>	<ul style="list-style-type: none"> <li>• Social media campaigns at the product level (providing content to BiH Adventure Tourism)</li> <li>• Study trips for media</li> <li>• Study trips for B2B</li> <li>• Roadshows</li> <li>• PR activities</li> <li>• Development of promotion material</li> <li>• Research on target groups, surveys</li> <li>• Organizing sport events (as a marketing tool)</li> </ul>

### 7.7.1 INTERNAL COMMUNICATION

One of the main challenges communicated during interviews and on-line surveys with key stakeholders is the lack of cooperation between stakeholders (destinations and service providers) in BiH. Setting up product clusters and building internal cooperation is therefore an essential step forward. In an effort to encourage the development of adventure tourism, a wider net of communication that actively involves local communities is required. Adventure tourism can become an important economic force, especially in remote areas where other means of income are limited. On the other hand, a lack of awareness about sustainability and its principles was stressed. A failure to apply sustainable measures to current and future developments is at odds with the main USP describing BiH as being pristine and green.

Internal communication aims to:

- Connect the stakeholders and build long-lasting cooperation.
- Promote adventure tourism as a compelling economic opportunity that will benefit local communities and policy makers.
- Educate locals and raise awareness about the preservation of BiH's natural resources and the environment as well as the tenets of sustainability.

Internal communication should take place mainly on the level of BiH Adventure Tourism but also on the level of different products when specific messages connected to product development and promotion are at stake. In order to build efficient internal communication, certain communication channels and support activities need to be established.

### 7.7.2 PUSH AND PULL STRATEGY

**BiH Adventure Tourism** is not an established or internationally recognized brand. At present, the brand idea is still in the conceptualization phase. Once established,

PUSH marketing will be used to launch the brand. PUSH marketing is used when launching a new product on the market and “pushing” advertising to end users, building brand loyalty, and creating demand. Push marketing is powered by promoting offers to the end target group by way of specific marketing channels and activities. Most of the marketing activities employed for a PUSH strategy focus on advertising and direct marketing and sales. In order to push BiH as an adventure travel destination in the startup phase, marketing activities should include the development of a BiH Adventure Tourism web page, building B2B cooperation through joint B2B events, and internal and external awareness-raising campaigns.

As the keywords Google research showed, some of the **key products** on offer in BiH are already recognized on the international market. For that reason, a PULL marketing strategy will also be employed. Pull marketing is best applied when there is a need to draw consumers to a product. The goal is to create loyal customers by providing marketing materials that showcase the sought-after product. Pull marketing starts internally and is focused on building a brand to new and existing customers. The most efficient pull marketing tool is social media marketing. The focus of pull marketing campaigns will be on flagship products and newly developed experiences as described in the product development section. These marketing activities must prioritize the promotion of suppliers who follow regulations and are certified for the activities they sell.

Push and pull marketing strategies best work together. Customers need a push in order for demand to be created and a pull to then satisfy that demand. For that reason, the BiH Adventure Tourism marketing strategy will push the BiH onto international markets as a premiere adventure tourism destination and pull in the traveler to key products which have already established their position in the market and comply with all standards.

### **7.7.3 B2B AND B2C COMMUNICATION**

#### **7.7.3.1 B2B communication**

B2B communication refers to BUSINESS PARTNERS (buyers); these are most often tour operators and travel agencies. In the B2B segment in tourism, personal contact is essential. To a certain extent, B2B employs the same messages as in B2C communication, however, the way buyers are approached is distinct. When communicating on B2B level it's important to be well organized, flexible and persistent. B2B communication is also highlighted when attending various tourism fairs and trade shows. In tourism, a considerable proportion of the marketing budget, averaging as much as a third or more of the total, is devoted to B2B events.

One of the most successful B2B marketing tools is local study trips and B2B virtual platforms and events. These provide international buyers the possibility to experience the destination in person and meet with representatives of the local tourism supply

chain. Such events are also necessary for facilitating internal communication, serve as networking platforms, and can be used for educational purposes.

For building a long-lasting and successful B2B communication, further research on the dominant interests of international tour operators and their clients' demand is required. Market research creates a solid foundation for effective marketing activities.

Attending select tourism fairs, virtual B2B platforms and trade shows organized both in the region and globally is another channel to successful marketing. Representatives of the destination should attend and promote their business and tourism products at such events.

#### **7.7.3.2 B2C communication**

Communication with end users/visitors/tourists must be consistent in visual and content-based messages. The first step is to set up BiH Adventure Tourism communication channels like web pages and social media accounts. In order to build the BiH Adventure Tourism brand, a web portal integrating all of the key tourism products available throughout the **entire** country must be established. This can be done as a new web page or in cooperation with an existing one. Each successful tourism brand acts as a media company with its own portal, publications, and social networks.

The goal is to impress the end user with a product story, but this is not sufficient to sell the destination and its products. The user needs access to as much concrete information as they require (this varies according to the target group to which the user belongs) and as well as the capacity to interact directly with the business throughout the entire purchasing process. In the daydreaming stage of the purchasing process, the consumer needs to be inspired by the story with insight into the experiences and quality visuals that represent the story and the tourism products. At the stages of decision-making and comparison with similar destinations, consumers need strong reasons to choose BiH. While the booking stage must be technically perfect, it should also be comfortable for the user. A completed purchase does not signal the end of communication; the purchasing process can be continued through a survey after the visit, direct marketing, and regular communications.

To make B2C communication successful, the right communication mix needs to be established combining on-line and off-line actions addressing selected target groups. Constant market research and an up-to-date understanding of the target group is crucial. The main on-line activities will focus on web design, SEO, and social media communication. While off-line activities include advertising, presentations at fairs, and promotional material. All communication needs to be prepared in more languages including at least English and German in order to ensure accessibility of the information provided.

### 7.7.3.3 Media communication

Media is one of the most important stakeholders in the promotional process. Media communication and media plan relations can be built with events, study trips, support material, and direct communication. Study trips and events result in free editorial space and prove to be one of the most efficient promotional tools. Such content is seen as most credible among the public. PR campaigns including press conferences are another means to present tourism experiences to the media. Communication with journalists should be similar to that with end-customers; journalists are susceptible to the same impulses as visitors and have a much larger influence.

## 7.8 MARKETING ACTION PLAN

Based on the challenges and goals identified here, an action plan outlining key activities has been developed. The marketing action plan is divided into three sections:

- C 1: Management
- C 2: Positioning and Branding
- C 3: Promotion and Sales

<b>C 1: Management</b>	C 1.1 Annual marketing plan for BiH Adventure Tourism C 1.2 Membership in International Associations C 1.3 Annual marketing plan for each product cluster
<b>C 2: Positioning and Branding</b>	C 2.1 Development of BiH Adventure Tourism brand C 2.2 Development of Cycling BiH, Hiking BiH, Rafting BiH, Skiing BiH Brands C 2.3 Establish communication strategy C 2.4 Brand merging
<b>C 3: Promotion and Sales</b>	C 3.1 BiH Adventure Tourism web page C 3.2 Social media campaign and social media communication plan C 3.3 Direct marketing C 3.4 International navigation platforms C 3.5 Internal awareness-raising campaign: study trips, communication platform, promotional events C 3.6 External awareness-raising campaign (BiH as safe destination) C 3.7 B2B cooperation: Fairs and B2B workshops, study trips, roadshows C 3.8 B2B BiH Adventure Tourism event C 3.9 Media cooperation: media hub, study trips for media, PR activities C 3.10 Development of promotional material C 3.11 Research on target groups, surveys C 3.12 Organizing sport events (as a marketing tool)

Through the **Management section** the following challenges are being addressed:

- Lack of cooperation and joint promotion on all levels: destinations, entities, product, and country level.
- Promotional and sales activities of BiH Adventure Tourism and key products are in hands of some destinations and tourism providers. They are not connected or coordinated on a higher level.

<b>C I Management</b>	
<b>C I.1</b>	<b>Annual Marketing Plan for BiH Adventure Tourism</b>
<b>Relevant for:</b>	<b>BiH Adventure Tourism</b>
<p>Management section <i>M.2.1 Cooperation among product clusters</i> explained that established product clusters must build cooperation through a MoU which defines the roles and responsibilities of each. The first set of joint activities identified in the MoU are based on marketing and aim to build a joint BiH Adventure Tourism brand, connect marketing activities, and achieve stronger international recognition. For that purpose, representatives (<i>leaders</i>) of the clusters agree each year on an annual marketing plan that defines:</p> <ul style="list-style-type: none"> <li>• An available budget provided both by clusters and external sources (e.g. projects, donors, and public funds)</li> <li>• List of joint marketing activities</li> <li>• Delegation of roles and responsibilities</li> </ul> <p>One of the most important sections of the marketing plan is the connection between the product clusters and entities (RS, FBiH, BD) and their planned marketing activities. Marketing originating from these various stakeholders should be synchronized and work toward the same goals.</p> <p>A joint marketing plan should be confirmed by all product clusters.</p> <p><b>Time:</b> The MoU should be formed in Y1-Y2, followed by annual marketing plans.</p>	
<b>C I.2</b>	<b>Membership to International Associations</b>
<b>Relevant for:</b>	<b>BiH Adventure Tourism</b>
<p>Building an international network is key to gaining a visible position on the adventure travel market. It provides a community through which knowledge and experiences is shared and connections to potential buyers, donors and media is built. It is therefore recommended that BiH Adventure Tourism becomes a member of the top international associations for adventure tourism such as ATTA, which offers its members both knowledge and business opportunities.<sup>108</sup> Another interesting association is the Transformational Travel Council with a strong link to an international journal society and latest trends.<sup>109</sup></p> <p>Agreements about memberships are included in the marketing plan and confirmed by all product clusters. In cases when an organization is already a member of a global adventure travel association, the membership can be transferred to the BiH Adventure Tourism level.</p> <p><b>Time:</b> Agreements to membership will become a part of marketing plan Y1 – Y2.</p>	
<b>C I.3</b>	<b>Annual Marketing Plan for Each Product Cluster</b>
<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
<p>Each of the clusters should prepare their own yearly marketing plan as part of the annual operational plan. Product cluster marketing plans need to align with the strategy, brand guidance, and BiH Adventure Tourism marketing plan and should be linked to entity-level activities.</p> <p>The implementation of the plan is in the domain of all cluster members and activities are coordinated by the cluster leader.</p> <p><b>Time:</b> Yearly marketing plans can be prepared in Y2 after product clusters are formed.</p>	

<sup>108</sup>ATTA, Adventure Travel Trade Association, last accessed October, 13 2021, <https://www.adventuretravel.biz>.

<sup>109</sup>Transformational Travel Council, last accessed October 13, 2021, <https://www.transformational.travel>



Through the **Positioning and Branding** the following challenges are being addressed:

- Lack of a clear vision with no joint message, story, or brand for BiH Adventure Tourism or its key products.
- Safety and security are the main issues with which tourists are concerned regarding BiH.

<b>C 2 Positioning and Branding</b>	
<b>C 2.1</b>	<b>Development of BiH Adventure Tourism</b>
<b>Relevant for:</b>	<b>BiH Adventure Tourism</b>
<p>Development of the BiH Adventure Tourism brand is the first and most important task of the MoU between all product clusters. Only a strong branding can successfully communicate the appropriate messages for positioning BiH's adventure tourism offer on the international market. BiH Adventure Tourism needs to establish the architecture of the brand and build relations to all key products.</p> <p>The content on brand development can serve as a preliminary branding strategy. Following the strategy's guidance on brand development, a call for brand development (logo, slogan, ...) to marketing agencies will be prepared.</p> <p><b>Time:</b> Brand development needs to be part of the YI marketing plan.</p>	
<b>C 2.2</b>	<b>Development of Cycling BiH, Hiking BiH, Rafting BiH, Skiing BiH Brands</b>
<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
<p>Each of the key products need its own brand to build a position on the international market and communicate its values to end users. Product brands form a relationship to the BiH Adventure Tourism brand and the links between this network serves as part of the overall branding strategy. It is recommended that product brands are developed in conjunction with the BiH Adventure Tourism brand in order to streamline the process. Product clusters need to be part of the branding development process and a final solution needs to be confirmed by the management of each of the product clusters.</p> <p><b>Time:</b> Product brand development is carried out simultaneously with development of BiH Adventure Tourism brand.</p>	
<b>C 2.3</b>	<b>Establish Communication Strategy for Brand</b>
<b>Relevant for:</b>	<b>BiH Adventure Tourism: Hiking, Cycling, Rafting, Skiing</b>
<p>Following brand development, a communication strategy will be required to provide guidelines for all communications, including communication style and key channels. The communication strategy will provide the structure of messages and link existing promotional activities on all levels: state, entities, destinations, business. Through the communication strategy, BiH Adventure Tourism can further reinforce the brand and key messages.</p> <p>Through the support of the brand and communication strategy, BiH Adventure Tourism has the opportunity to address the most frequently asked questions about safety and security and establish itself as a trusted brand on the international market.</p> <p><b>Time:</b> The BiH Adventure Tourism communication strategy is usually developed together with the brand.</p>	
<b>C 2.4</b>	<b>Brand Merging</b>

<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
<p>The destination can upgrade its image by merging its own brand with the brands of established manufacturers and distributors of equipment (for example hiking equipment) or other well-established brands. Brand merging activities are diverse and can include, for example, the testing of a partner manufacturer at the destination or the sponsorship of trail development and maintenance (adoption of trails).</p> <p>Once BiH Adventure Tourism is an established and well communicated brand, such merging can reinforce the brand and use the synergies to attract new target groups.</p> <p><b>Time:</b> Brand merging will occur in Y3 – Y5.</p>	

The following challenges in **Promotion and Sales must be addressed:**

- Due to weak promotion, awareness of BiH as a tourist and adventure destination is low or limited.
- There is no national platform for adventure tourism that offers adventure tourism products on the international market.
- There is a lack of environmental awareness and support for the development of adventure tourism among the stakeholders including the local population.
- The availability of information in foreign languages is limited, which may be an impediment to attracting international tourists.

<b>C 3 Promotion and Sales</b>	
<b>C 3.1</b>	<b>BiH Adventure Tourism Web Site</b>
<b>Relevant for:</b>	<b>BiH Adventure Tourism, Hiking, Cycling, Rafting, Skiing</b>
<p>Most visitors are looking online for information that will help them make smarter, more informed booking decisions. In fact, according to the e-Commerce Foundation, 88 percent of visitors will research product information before they make a purchase online or in the store. This buying behavior emphasizes the importance of professional website for today's businesses.</p> <p>The importance of a website for marketing extends to every aspect of digital marketing strategy. As the backbone of an online presence, every type of communication, piece of content, or advertisement online will drive the consumer to the website. As such, it is important that the website gives visitors a clear idea of what the BiH Adventure Tourism brand is about and what products represent the BiH Adventure Tourism offer.</p> <p>Web page development is one of the most important tasks in the process of building strong connections between stakeholders and promotion on international markets. But web development can be costly and very time consuming. Besides the option of developing the web page from scratch a partnership approach can be introduced. Such an approach was one of the key recommendations from the research (interviews, on-line survey and workshops). It is advisable to partner with an existing platform and upgrade it to the needs of BiH Adventure Tourism and its flagship products. This approach saves time and resources, and more importantly, the platform is already established with a management and editorial board. One of the existing platform options under consideration is <b>Odmori u BiH</b>.<sup>110</sup> To establish such cooperation, an MoU needs to be prepared and signed. This will determine:</p>	

<sup>110</sup> Odmori u BiH. Pronađi najbolju ponudu i odmori u Bosni i Hercegovini. Last accessed 14 October 2021. <https://odmoriubih.ba/>.

- Relations between web page and stakeholders (business and clusters)
- Approach to content sharing (by business and clusters)
- Manner of promotion and content creation of both web page and social media
- Conditions for sales by partner web page provider, including agreement on division of sales provisions

It is important to understand the pros and cons for such an approach. It brings benefits in costs and needed resources but it also leads in to smaller influence to content and development.

Important guidance for BiH Adventure Tourism website:

- To be used for internal communication — a site where all the relevant information and content is placed, through which business and clusters can build a networking platform
- To be used for external communication – a place where visitors can find all information for both BiH Adventure Tourism and its key products
- Multimedia content should be created and uploaded on the website
- Centralized booking center for tourism offers available on website

The website should be translated into multiple languages, including English, German, and Italian, with the capacity for adding more in the future.

**Time:** The website is one of the first activities to be realized during Y1 – Y2.

<b>C 3.2</b>	<b>Social media campaign &amp; social media communication plan</b>
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<b>Relevant for:</b>	<b>BiH Adventure Tourism</b>
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Social media is one of the most important communication channels through which a destination and product builds its visibility and credibility. These channels are cost-effective tools for global and targeted marketing, communication, and consumer engagement. To use social media efficiently, a communication plan needs to be prepared.

To build an effective social media communications plan for BiH Adventure Tourism, distinct roles and responsibilities need to be established. In the case of building a partnership with one of the existing web platforms, it is advised to transfer the management of social media channels associated with BiH Adventure Tourism to the partner responsible for the entirety of web management. Content provided by clusters should be integrated into the overarching social media communication strategy of BiH Adventure Tourism in order to build a joint presence on the market.

Communication should be prepared in the English language.

**Time:** A social media presence for the brand is one of the first activities to be undertaken during Y1 – Y2.

<b>C 3.3</b>	<b>Direct Marketing</b>
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<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
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Newsletters are an important ongoing communication channel between a destination and its available products and its existing and potential consumers. The first task is to attract loyal subscribers to the brand's newsletters. The development of a web site, sweepstakes or raffles on social media, events, and fairs can be used to increase subscriber numbers. Subscriber segmentation enables providers to send personalized messages to their specific interest groups. For distribution, we recommend using specialized tools such as Activecampaign, Mail Chimp, and others.

The task of newsletter development, production, and distribution should be included in the agreement made with the partner providing the brand's web platform. The content needs to be provided according to clusters and individual business. In addition to increasing visibility, the

purpose of the newsletter is to communicate about offers, campaigns, and upcoming events. At most, newsletters should be sent monthly, except before significant events and sales periods when the frequency can be increased. The performance of individual campaigns can be measured by visitor engagement (i.e. clicks), increased sales numbers, and retention and growth of subscribers.

There should be two types of e-news:

- For external communication in which the goal is to promote BiH Adventure Tourism and key products
- For internal communication in which all stakeholders should be included, the goal of which is to communicate all relevant information about BiH Adventure Tourism and cluster members and spread awareness of the BiH Adventure Tourism brand

**Time:** Newsletter development and dissemination will occur during Y3 – Y5.

<b>C 3.4</b>	<b>International Navigation Platforms</b>
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<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
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As established in PD 2.2, digital marking of all routes, trails, or paths should be prepared and later included on the main international navigational platforms like Strava<sup>111</sup>, Outdoor Active<sup>112</sup> and Komoot<sup>113</sup>. International adventure travelers are accustomed to using such applications for travel research and planning. Research of the presence of BiH on mentioned platforms showed that BiH's offer within these segments of adventure tourism is poorly represented. Integration of digital routes and trails in mentioned platforms should become one of the on-going activities of product clusters.

**Time:** Ongoing activity to begin in Y2.

<b>C 3.5</b>	<b>Internal Awareness-raising Campaign: Study Trips, Communication Platform, and Promotional Events</b>
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<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
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Internal communication is divided into three main areas, each with a set of organized activities. Activities will be carried out mainly within product clusters.

Connecting stakeholders and building long-lasting cooperation:

- Joint communication platform on BiH Adventure Tourism Web Site
- Organization of study trips to learn from best practice and facilitate networking
- Promotional and networking events

Promote adventure tourism as an interesting economic opportunity both to local communities and to decision makers:

- Communication of monitoring results carried out by each product cluster (see Product Development) to local communities, decision-makers at all levels, and donors, highlighting economic benefits of adventure tourism
- Direct communication and both local and countrywide promotional events

Educate locals and raise awareness about the importance of nature preservation and sustainability:

- Targeted media campaigns
- Local promotional events
- Involvement in destination certification programs for sustainable tourism

**Time:** On-going activity to start in Y2.

<sup>111</sup> Strava. <https://www.strava.com/>

<sup>112</sup> Outdoor Active. <https://www.outdooractive.com/en/>

<sup>113</sup> Komoot. <https://www.komoot.com>

<b>C 3.6</b>	<b>External Awareness-raising Campaign (BiH as a Safe Destination)</b>
<b>Relevant for:</b>	<b>BiH Adventure Tourism</b>
<p>In order to PUSH BiH Adventure Tourism onto international marketing channels, an awareness-raising campaign mostly focused on digital marketing is needed. The aim of the campaign is:</p> <ul style="list-style-type: none"> <li>● Raise awareness of newly established BiH Adventure Tourism brand and its values</li> <li>● Positioning BiH as an adventure destination on international market</li> <li>● Promote key products supporting BiH Adventure Tourism brand</li> <li>● Promoting flagship products and experiences, certified suppliers, and drive demand and booking</li> <li>● Communicate key messages in response to the most frequently asked questions about safety</li> </ul> <p>Digital marketing for an awareness-raising campaign needs a targeted approach with activities addressing key goals. In addition to banner ads on websites, multimedia content and reports must be provided to achieve greater impact. Such multimedia initiatives must be consistent with the overall communication agenda and approach. Advertising in specialized print media is only appropriate when it supplements a report or an article about an adventure experience.</p> <p><b>Time:</b> Y3 – Y5.</p>	
<b>C 3.7</b>	<b>B2B Cooperation: Fairs and B2B Workshops, Study Trips, and Roadshows</b>
<b>Relevant for:</b>	<b>BiH Adventure Tourism: Hiking, Cycling, Rafting, Skiing</b>
<p>For successful sales promotion, specialized travel agencies and tour operators must be carefully selected and willing to invest in long-term cooperation. The result will be a new partnership between domestic and foreign business which will result in higher income for the product supply chain.</p> <p>Successful sales promotion can be achieved through different activities:</p> <ul style="list-style-type: none"> <li>● Study tours during which an agency's representatives may experience an offer firsthand, representatives can meet local service providers and check the suitability of the offer</li> <li>● Long-term support for B2B communications with local service providers, including access to quality multimedia content and detailed information</li> <li>● Organizing road shows on the main markets: German, Benelux, French, Scandinavian, UK, Eastern European and potentially overseas (North American). Road Shows can be organized on a B2B level (to foreign TAs and TOs) and on the B2C level (cycling and hiking clubs)</li> <li>● Participation at B2B fairs and workshops</li> </ul> <p>B2B activities should be both carried out at both levels:</p> <ul style="list-style-type: none"> <li>● BiH Adventure Tourism: join presentations at international fairs with participation by product clusters, joint roadshows</li> <li>● Product Clusters: most of the study trips could be carried out on the level of the key products for specialized TO/TA</li> </ul> <p>Identified Fairs:</p> <p><b>GERMAN MARKET</b></p> <ul style="list-style-type: none"> <li>○ CMT Stuttgart, <a href="https://www.messe-stuttgart.de/cmt/en/">https://www.messe-stuttgart.de/cmt/en/</a></li> <li>○ F.R.E.E. Munchen, <a href="https://www.free-muenchen.de/">https://www.free-muenchen.de/</a></li> <li>○ TourNatur, Dusseldorf, <a href="https://www.tournatur.com/">https://www.tournatur.com/</a></li> <li>○ Bika Festival Lago di Garda, <a href="https://riva.bike-festival.de/en">https://riva.bike-festival.de/en</a></li> <li>○ EUROBIKE, <a href="https://www.eurobike.com">https://www.eurobike.com</a></li> </ul> <p><b>BENELUX MARKET</b></p> <ul style="list-style-type: none"> <li>○ Fiets en Wandelbeurs Gent, <a href="http://www.fietsenwandelbeurs.be">http://www.fietsenwandelbeurs.be</a></li> </ul>	

- Fiets en Wandelbeurs Utrecht, [www.fietsenwandelbeurs.nl](http://www.fietsenwandelbeurs.nl)
- FRENCH MARKET**
- Salone Destinations Nature, Paris, <https://www.destinations-nature.com/>
  - Randonnee, Lyon, <https://www.randonnee.org/>
- UK MARKET**
- Adventure Travel Show, <https://www.adventureshow.com/>
  - WTM London, <https://london.wtm.com/>
- NORTH AMERICAN MARKET**
- ATTA events, <https://www.adventuretravel.biz/>
- EAST EUROPEAN MARKET**
- TTWarsaw, Warsaw, <http://ttwarsaw.pl/en/>
  - Holiday world & region world, Prague, <http://holidayworld.cz/index/chyba>
  - GO - International Travel Trade Fair, REGIONTOUR - International Fair of Regional Tourism, Brno, <https://www.bvv.cz/en/go-regiontour/>
- SCANDINAVIAN MARKET**
- GOEXPO, Helsinki, <https://goexpo.messukeskus.com/>
  - REISELIVSMESSEN, Oslo, <https://reiselivsmessen.no/>
  - FERIE FOR ALLE (Danish Travel Show), Herning, <http://www.danishtravelshow.com/>
  - EXPLORE, Stockholm, <https://www.exploreoutdoors.se/>
- VIRTUAL TRAVEL EVENTS<sup>114</sup>**
- Time:** In Y3 – Y5.

<b>C 3.8</b>	<b>B2B BiH Adventure Tourism Event</b>
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<b>Relevant for:</b>	<b>BiH Adventure Tourism</b>
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The organization of an annual leading event for and by BiH Adventure Tourism would enable suppliers to meet potential buyers. The Hosted Buyers Programme would be specifically designed for travel agencies, tour operators, and other organizations specializing in active leisure activities, adventure programs experience, as well as representatives of interested associations and specialized media. During this event, suppliers represent key products and both internal and external communication goals can be met. For an example, see: <https://www.green-outdoor.com/>

**External:**

- One on one meeting between buyers and suppliers
- Media connection – suppliers meeting media representatives
- Study tours before and after event
- Networking events for buyers and suppliers

**Internal:**

- Donor meetings
- Educational event during which BiH stakeholders can be exposed to new trends in green and adventure tourism
- Networking events between adventure stakeholders from BiH

**Time:** During Y3 – Y5.

<b>C 3.9</b>	<b>Media Cooperation: Media hub, Study Trips for Media, PR Activities</b>
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<b>Relevant for:</b>	<b>BiH Adventure Tourism, Hiking, Cycling, Rafting, Skiing</b>
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<sup>114</sup> Virtual fairs 365. <https://www.virtualfairs365.com/virtual-tourism-and-travel-fair/>

Just as promotional activities build relationships between travel agencies, PR activities address journalists and the media, particularly those with specialized interest. Credible and affordable presentation in the selected media will help to increase the visibility of BiH Adventure Tourism on the international market (external communication) and build awareness of the brand and its products among stakeholders (internal communication).

Media Cooperation can be achieved through:

- Designing a media hub on the brand website that provides information and multimedia content for journalists; content including information, logos, photographs, and audio-visual material will be accessible.
- Organization of press conferences at important events and publishing press releases.
- Organization of study tours for domestic and foreign journalists specialized in adventure tourism and key social media influencers related to flagship products both independently and in cooperation with select service providers. Material should be prepared in several languages including English, German, and Italian.

**Time:** During Y3 – Y5.

<b>C 3.10</b>	<b>Development of Promotional Materials and Guide Material</b>
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<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
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Promotional materials in various pop-up forms often provide basic information for a quality experience. One of the most important promotional materials is quality digital and printed informational material such as guidebooks. Promotional and informational material should be created for fairs, trade shows, study tours, and road shows but also on site for guests at a destination. Promotional material should be prepared in multiple languages including English, German, and Italian.

In addition to print material, it is necessary to establish a media video library. For that, a criterion should be developed regarding copyright and mandated quality. Media needs to be available for journalists and TOs when promoting the region. For all partners representing BiH Adventure Tourism at fairs and events, a joint power-point presentation could be developed with a promotional video.

**Time:** During Y3 – Y5.

<b>C 3.11</b>	<b>Research on Target Groups, Surveys</b>
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<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
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For marketing activities to be effective, it is of utmost importance to understand the end user – their motivations and needs. This requires constant research on key markets and target groups.

Research on target groups requires the following:

- Research through international TO/TAs about the demand for adventure tourism and its key products
- Results of monitoring research completed by each product cluster (see Product Development)

**Time:** During Y3 – Y5.

<b>C 3.12</b>	<b>Organizing Sporting Events (as a Marketing Tool)</b>
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<b>Relevant for:</b>	<b>Hiking, Cycling, Rafting, Skiing</b>
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Event organization can have a positive impact on the destination's presence on the market. Events should be designed and selected to align with communication and strategic goals as well as the demands of target groups. High-profile international events and competitions increase visibility and credibility, while local events are primarily aimed at connecting and motivating local stakeholders.

Events are an opportunity to increase the number of tourists overnights in a destination for the duration of the event, but they also serve as an important marketing tool. For that reason, it is important to organize sporting events drawing upon activities with a greater potential in BiH (e.g. hiking and cycling) and which have developed tourism products.

In BiH, a number of sporting events are already taking place (e.g. road cycling competition like ALÉ Gran Fondo Istočno Sarajevo 2021<sup>115</sup>), but they are not capitalized upon because developed products associated with road biking are generally lacking in BiH because of the unsuitable infrastructure. Therefore, when organizing international sporting events, it is important to:

- Organize sporting events for products with high potential (e.g. hiking, touring, rafting, and skiing)
- Organize events that take advantage and highlight developed tourism products (e.g. Via Dinarica)

**Time:** During Y3 – Y5.

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<sup>115</sup> ALÉ Gran Fondo Istočno Sarajevo 2021. <https://www.afsport.org/classes/granfondo-bl-world-series-2021/>



# 8 ACTION PLAN

	Y1	Y2	Y3	Y4	Y5
<b>MANAGEMENT</b>					
<b>M 1 Product Clusters</b>					
M 1.1 Establishment of product clusters					
M 1.2 Internal management of clusters					
M 1.3 Annual operational plans					
M 1.4 Business model					
M 1.5 BiH Adventure Tourism association					
<b>M 2 Cooperation</b>					
M 2.1 Cooperation among product clusters					
M 2.2 Cooperation with public institutions (state - entity - canton)					
M 2.3 Cooperation with donors					
<b>M 3 Improving Quality and Safety</b>					
M 3.1 Operational and safety standard guide					
M 3.2 Regulatory compliance					
M 3.3 Public registers					
M 3.4 Sustainability standards					
<b>M 4 Strategy Evaluation</b>					
M 4.1 Monitoring and Evaluation					

	Y1	Y2	Y3	Y4	Y5
<b>PRODUCT DEVELOPMENT</b>					
<b>P.D 1 Identification and Categorization of Existing and Future Infrastructure</b>					
P.D 1.1 Identification and categorization of existing infrastructure					
P.D 1.2 Infrastructural priority list					
P.D 1.3 Minefield mapping					
P.D 1.4 Transformation of tourist offer and new accommodations facilities					
P.D 1.5 Lobbying against hydropower plants					
<b>P.D 2 Infrastructure Marking and Monitoring</b>					
P.D 2.1 Uniform marking of routes and trails					
P.D 2.2 Digital marking					
P.D 2.3 Guidebooks and maps					
P.D 2.4 Infrastructure monitoring					
<b>P.D 3 Development of Guidelines</b>					
P.D 3.1 Guidelines for products and experiences					
P.D 3.2 Pricing					
<b>P.D 4 Development of Products and Experiences</b>					
P.D 4.1 Flagship products					
P.D 4.2 Transversals					
P.D 4.3 Experiences					
P.D 4.4 Culture and culinary					
P.D 4.5 Climate change impact analysis					
P.D 4.6 De-seasonalization of ski resorts					
P.D 4.7 Sporting events					
P.D 4.8 Classification and certification of routes					

<b>P.D 5 Creation and Specialization of Supply Chain</b>					
P.D 5.1 Specialization of the supply chain					
P.D 5.2 Establishment of National Coordination Center and Coordinator					
P.D 5.3 Hike and Bike-friendly accommodations					
P.D 5.4 Specialized white water rafting operators					

	Y1	Y2	Y3	Y4	Y5
<b>HUMAN RESOURCES</b>					
<b>HR 1 Adventure Guide Training and Licensing</b>					
HR 1.1 Adventure Travel Guide Standard					
HR 1.2 Cycling guides					
HR 1.3 Hiking guides					
HR 1.4 Rafting guides					
HR 1.5 Ski instructors					
<b>HR 2 Capacity Building</b>					
HR 2.1 Sustainability					
HR 2.2 Cluster Leaders					
HR 2.3 Academy for adventure tourism					

	Y1	Y2	Y3	Y4	Y5
<b>MARKETING</b>					
<b>C 1 Management</b>					
C 1.1 Annual marketing plan for BiH Adventure Tourism					
C 1.2 Memberships in international associations					
C 1.3 Annual marketing plan for each of the product clusters					
<b>C 2 Positioning and Branding</b>					
C 2.1 Development of BiH Adventure Tourism brand					
C 2.2 Development of Cycling BiH, Hiking BiH, Rafting BiH, Skiing BiH brands					
C 2.3 Set up Communication strategy					
C 2.4 Brand merging					
<b>C 3 Promotion and Sales</b>					
C 3.1 BiH Adventure Tourism website					
C 3.2 Social media campaign and social media communication plan					
C 3.3 Direct marketing					
C 3.4 International navigation platforms					
C 3.5 Internal awareness-raising campaign: study trips, communication platform, promotional events					
C 3.6 External awareness-raising campaign (BiH as safe destination)					
C 3.7 B2B Cooperation: fairs and B2B workshops, study trips, roadshows					
C 3.8 B2B BiH Adventure Tourism event					
C 3.9 Media Cooperation: media hub, study trips for media, PR activities					
C 3.10 Development of promotional material					
C 3.11 Research on target groups, surveys					
C 3.12 Organizing sporting events (as a marketing tool)					

# ANNEX

## LOCAL LAWS RELEVANT TO ADVENTURE TOURISM

The most critical local laws illustrating the complexity of the regulatory framework related to various aspects of adventure tourism<sup>116</sup>.

- **Law on Tourist Boards and the Promotion of Tourism in the Federation of Bosnia and Herzegovina** ("Official Gazette of the Federation of BiH", Nos. 19/96 and 28/03)
- **Law on Tourism of Republika Srpska** (45/17)
- **Law on Tourism Boards and Promotion of Tourism in Federation BiH** (Official Gazette of FBiH, 19/96 and 28/03)
- **Law on Environmental Protection** ("OG of the FBiH," Nos. 33/03 and 38/09; OG of RS", No. 28/07; "OG of the BD", Nos, 24/04, 1/05, 19/07 and 9/09)) - emphasizes and regulates the importance and principles of environmental protection and sustainable development, as well the ways in which environmental protection and sustainable development will be implemented
- **Law on Nature Protection** ("OG of the FBiH," No. 66/13; "OG of RS, No. 50/02"; "OG of the BD", 24/04, 1/05, 19/07 and 9/09) - regulates the system of protection and complete preservation of nature and all its parts
- **Law on Air Protection** ("OG of the FBiH," Nos. 33/03 and 4/10; "OG of RS", No. 53/02): "OG of the BD Nos., 25/04, 1/05,19/07 and 9/09) - prescribes all necessary standards and specific technical and administrative rules and requirements governing measures aimed to protect the air on the territory of the FBiH, RS, and BD
- **Law on Water Protection** ("OG of the FBiH", No. 33/03; "OG of the RS", No. 50/06; "OG of the BD", 24/04, 1/05, and 19/07) - regulates water management and related activities within the territory of the FBiH, RS, and BD, including various specific administrative provisions, technical and operational requirements and standards, data collection and monitoring, inspection, and competent authorities' policies and responsibilities
- **Law on Spatial Planning and Land Utilization** ("Official Gazette of the FBiH," Nos. 02/06, 72/07, 32/08, 4/10, 13/10 and 45/10; "OG of the RS, Nos. 40/13, 106/15 and 3/16; " OG of the BD", No. 29/08) - regulates land use planning in FBiH, RS, and BD by development and adoption of the spatial planning documents and their implementation, type and content of the spatial planning documents, land use, monitoring of the implementation of the spatial planning documents of importance, monitoring of the enforcement of this Law, as well as penalties for legal and natural persons
- **Law on Waste Management** ("OG of the FBiH," Nos. 33/03 and 72/09; "OG of RS", No. 53/02; OG BD", Nos. 25/04, 1/05, 19/07, 2/08 and 9/09) - lays down the general principles for the prevention of the production of waste, waste recycling, processing and re-using of waste, extraction of secondary raw materials from the waste, and safe waste disposal
- **Law on the Protection of Properties Designated as National Monuments of Bosnia and Herzegovina** by Decision of the Commission to Preserve National Monuments - stipulates the protection and rehabilitation measures applicable to properties designated as national monuments of BiH by the decision of the Commission to Preserve National Monuments, established according to Annex 8 of the General Framework Agreement for Peace in Bosnia and Herzegovina
- **Law on Public Ski Resorts** ("Official Gazette of the Republika Srpska," number: 15/10, 33/16) - industrial processing), also planning the mandatory air protection duties and tasks, and air quality rules and standards

<sup>116</sup> Federalna uprava za inspeksijske poslove. Inspektorat tržišno-turističke inspekcije. (Federalno ministarstvo okoliša i turizma). Zakoni. <http://www.fuzip.gov.ba/stranica/61/pregled>.

- **Law on Hunting** (Official Gazette, 60/09, FBiH 04/06, 8/10 and 81/14)
- **Law on fishing** (Official Gazette of FBiH, 64/04)
- **Law on Concessions**
- **Law on Sport of Republika Srpska**
- **Law on Sport in Bosnia and Herzegovina and Laws on Cantonal Levels.** According to the law, sport associations can be founded by both physical persons as well as companies but cannot make profit; many organizations, registered in accordance with this law, very often get involved with tourism trips and event organization.

## **ANNEX: PROCEDURE FOR OBTAINING A TOUR GUIDE LICENSE IN FBiH AND RS**

### **Procedure for obtaining a tour guide license in the Federation of Bosnia and Herzegovina**

1. The application for the tourist guide exam is organized by the Federal Ministry of Environment and Tourism; the conditions for applying to sit the examination include secondary education qualification/diploma and minimum knowledge of one foreign language. The exam consists of 4 tests: 3 written and 1 oral. There are no training courses, but each candidate receives a manual to prepare for the exam.
2. The certificate issued by the Federal Ministry of Environment and Tourism is not a license to work. The certificate is only proof that the person is qualified and trained to work in the field as a tour guide.
3. In the municipality of residence, the certified tour guide needs to start the procedure to register a business (activity tourist guide under code 79.90, other reservation services, subtype: tourist guide).
4. Upon receipt of approval to establish a business, it is necessary to collect the required documentation in order for the activity to become effective: application for an ID number, state ID number, application to the municipal tax administration, bookkeeping contract, rental contract for the location of the business (if it is not under personal ownership), declaration of a fiscal cash register, business bank account.
5. After collecting the complete documentation, it needs to be submitted together with an application form for the issuance of a travel guide license to the Ministry of Economy of relevant canton.
6. Monthly contributions and insurances include approximately BAM 390, the cost of bookkeeping services, and rental costs. Annual income tax is 10 percent of the earnings. The business is listed as a "legal entity".
7. The activity of a tour guide is a primary occupation according to the law on tourism of the FBiH and cannot be seasonal or supplementary. This means that a guide must work independently. A guide cannot be employed by another company and must establish a legal entity to operate as a licensed legal guide.

### **Procedure for obtaining a tour guide license in Republika Srpska**

The Ministry of Trade and Tourism organizes trainings and certifies tour guides. The training is focused on lessons in history, constitutional set up of BiH, English language, and general knowledge. Certified tour guides are then required to pass a specialized program in local communities which have tourism as integral development element in their workplans. Only upon completion of the programs can they become tour guides for the specific destination.

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