

TWINNING CONTRACT

**Support to the State and Entity Statistical
Institutions, phase V**

Bosnia-Herzegovina



MISSION REPORT


on

Tourism Statistics

Component no. 1.5, 3rd activity

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June 19th – June 22nd, 2012
Version: Final

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Table of contents

Executive Summary	3
1. General comments.....	5
2. Assessment and results.....	6
3. Conclusions and recommendations.....	11
Annex 1. Terms of Reference	13
Annex 2. Participants	16
Annex 3. Agenda.....	17

List of Abbreviations

BiH	Bosnia-Herzegovina
BHAS	Agency for Statistics of Bosnia and Herzegovina
FIS	Institute for Statistics of Federation of Bosnia and Herzegovina
KAU	Kind of Activity Unit
LKAU	Local Kind of Activity Unit
RS	Republika Srpska
RSIS	Institute for Statistics of Republika Srpska
SBR	Statistical Business Register
ToR	Terms of Reference

Executive Summary

One of the main topics of this mission was to draft activity plans for a demand side pilot survey and for the revision of the accommodation statistics. An additional objective of the mission was to discuss and revise draft questionnaires for the accommodation statistics as well as develop a new draft questionnaire for the demand side pilot survey.

Currently, FIS, RSIS and Brcko collect monthly data on tourism establishments and disseminate the aggregated data to the state level BHAS. There is a need for a harmonization of the questionnaires used in order to secure a national standardized form. Furthermore, the questionnaires need to comply with the NACE Rev. 2-classification and the EU-Regulation.

There is currently no collection of demand side data. In order to comply with the EU-regulation a plan for a pilot survey on demand side tourism data has been initiated. Furthermore, a draft questionnaire has been developed.

The following was discussed and elaborated on during the mission:

- **SUPPLY SIDE:**
 - The draft questionnaires from the entities were discussed. There were some minor changes in regards to simplifying the questionnaires as much as possible. The objective is to cover the legal requirements from the EU-Regulation but at the same time have a questionnaire that is simple and minimizes the response burden

for the accommodation enterprises. As a result, it was agreed to draft a standardized questionnaire with some simplifications. The expert from DK will draft a standardized questionnaire that in principle could be used by all the entities.

- The statistical agencies agreed upon user-testing the drafted questionnaire in order to get as much feed-back as possible. Furthermore, the draft will be forwarded to the relevant stakeholders in order to get their input.
 - The drafted revisions to a NACE Rev. 2-classification were adopted.
 - The statistical agencies would like to have a more intensified co-operation with the stakeholders; for instance in order to validate administrative data from the different registers. Hence, it was decided that a co-operation agreement should be drafted. The agreement should stipulate the expectations of the stakeholders and the statistical agencies as well as facilitate the recurrence of co-operation meetings.
 - We met with the stakeholders Dusica Trifunovic from the Ministry of Trade and Tourism in RS and Milijana Glamocic from National Tourism Organization in RS.
- DEMAND SIDE:
 - It still needs to be examined whether a pilot survey on the demand side of tourism could be integrated into the Household Budget Survey. This survey is currently conducted triennially in BiH. The inclusion depends on the budget and will be clarified before the 4th mission.
 - The sample design and estimation procedures will probably be similar to already existing procedures in the statistical units. The specific sample design depends on whether the pilot survey is to be integrated into the HBS or carried out separately.
 - The interview method for the pilot survey will probably be face-to-face interviews based on the drafted questionnaire. Again, this issue depends on the budgetary situation and will be clarified further before the 4th mission.
 - A draft questionnaire for the pilot survey was developed on the basis of the previously selected variables from the Regulation in the 1st mission.
 - The representative of the Central Bank has suggested including the outbound same-day visits into the pilot survey. He emphasized the importance of this variable for the Balance of Payments statistics. The outbound same-day visits are currently not included in the pilot survey due to budgetary reasons. It will be examined whether The Balance of Payments can finance an additional module containing same-day visits to the demand side survey. Outbound same-day visits will be mandatory in the Regulation from 2014. Inbound same-day visits will be mandatory in the Regulation from 2015 (triennial transmission). The same-day visits will be included at a later stage.

- It still needs to be clarified how a pilot survey can be financed. The statistical agencies will discuss this subject further and have a suggestion ready for the 4th mission.

Stakeholders from the National Tourism Organization in RS and the Ministry of Trade and Tourism in RS participated in the mission. They expressed a need for co-operation with the statistical agencies. Consequently, it was agreed upon that the statistical agencies will make a draft agreement for co-operation with the stakeholders regarding the demand and supply side statistics for the 4th mission. An already developed template will be used for this purpose. Furthermore, the stakeholders will be involved in the process of developing and revising the questionnaires for the pilot survey and the accommodation statistics. BHAS will invite relevant stakeholders again for a meeting during the 4th mission.

It was reported that in April 2013 a National Census is planned. The grossing up-procedures for the demand side statistics require precise information on the size of the full population in BiH. This issue has to be clarified further in the future missions.

It was suggested that the next mission will take place in the second week of October. The date still needs to be verified.

1. General comments

This mission report was prepared within the Twinning Project „Support to the State and Entity Statistical Institutions, phase V”. It was the third mission within subcomponent 1.5 on tourism statistics of the project. This mission was aimed at drafting a plan and a questionnaire for a pilot survey for the demand side statistics. In the area of tourism the only statistical survey in BiH currently is the accommodation statistics. For the time being neither a demand side survey nor information from a boarder statistics are available. Concerning the accommodation statistics there are minor adjustments needed in order to make the statistics compliant with the legal requirements from the EU-regulation. As regards statistical information on national tourism (participation in tourism or information on tourism trips and visitors making these trips) there is currently no statistical source available in BiH. The intention here is therefore to draft a plan for a pilot survey that is able to fulfill the legal requirements from the EU-regulation.

The concrete objectives of the mission were:

- Discussing and agreeing upon a revised list of NACE rev. 2
- Discussing a revision and standardization of the questionnaire for the accommodation statistics
- Drafting activity plans for the accommodation statistics and the pilot survey on the side statistics
- Meeting with stakeholders; i.e. The national Tourism Organization and the Ministry of Tourism in order to discuss changes needed and furthermore in order to establish a more formalized co-operation between the statistical agencies and the stakeholders

- Discussing the possibilities of using the Household Budget Survey as a way of collecting data on the demand side survey
- Discussing and drafting a questionnaire for the pilot survey on the demand side statistics
- Preparation of activities to be done before next mission(s)
- List of activities for next mission

The consultant would like to express thanks to all officials and individuals met for the kind support and valuable information which I received during the stay in Bosnia-Herzegovina, and which highly facilitated the work of the consultant.

The views and observations stated in this report are those of the consultants and do not necessarily correspond to the views of EU, BHAS / FIS / RSIS or Destatis/Statistics Denmark.

2. Assessment and results

The main focus of this mission was to draft activity plans for the accommodation statistics and the pilot survey for the demand statistics. Furthermore, the main focus was on developing a draft questionnaire for the pilot survey.

The following things were achieved in the third mission:

- A further elaboration on a standardized questionnaire for the accommodation statistics
- An agreement on the revised NACE rev. 2-list made in the 2nd mission
- A draft questionnaire for the pilot survey on the demand side statistics was developed
- The form and content of the demand side statistics was discussed as well as possible financing and methodology
- Activity plans for both statistics were discussed. More detailed plans for both statistics will be made on the 4th mission.
- It was agreed that the statistical agencies user-test the drafted pilot survey questionnaire in order to be able to discuss and perhaps revise the questionnaire in the 4th mission
- A meeting with stakeholders was held and it was subsequently agreed upon that there is a need for a more formalized co-operation between the statistical agencies and the stakeholders. Therefore, a written co-operation agreement will be drafted for the 4th mission.

2.1 Pilot survey on the demand side of tourism

The EU-regulation on tourism statistics consists of two pillars which are specified in the two annexes of this legal act. Annex I deals with “Internal Tourism”. The data specified there are usually collected in the framework of accommodation statistics. The situation of this statistics in BiH has been described above.

The second pillar is data on the demand side of tourism as specified in annex II. They provide information on the participation in tourism for personal purposes (section 1), on tourism trips and visitors making these trips (section 2) as well as on same-day visits (section 3). These data are usually collected on the basis of a household survey. As far as cross-border trips are concerned information can also be obtained from a border survey.

For the time being information on the demand side of tourism is not provided in BiH. Thus, it was concluded that the pilot survey which was foreseen in subcomponent 1.5 on tourism statistics should be devoted to the data collection on the travel behaviour of the BiH population describing the demand side of the national tourism.

It was also concluded that this first pilot survey should not yet cover all variables specified in annex II. Variables on participation in tourism for personal purposes as listed in section 1 should be excluded in the first round. The variables related to tourism trips and the visitors making these trips were discussed intensively with the aim to select those which deemed to be the most important for the national use. As a result of the discussion the following preliminary list of variables was agreed upon:

- Month of departure	+
- Duration of the trip in number of nights	+
- Number of nights spent on the domestic territory	–
- Main country of destination	+
- Main purpose of the trip	+
- Type of destination, with multiple answer possibilities	(+)
- Participation of children in the travel party	(+)
- Main means of transport	+
- Main means of accommodation	+
- 5 different variables on the mode of booking	–
- Expenditure of the individual tourist during the trip on transport	+
- Expenditure of the individual tourist during the trip on accommodation	+
- Expenditure of the individual tourist during the trip on food and drinks in cafés and restaurants	+
- Other expenditure of the individual tourist during the trip; to be reported separately: durables and valuable goods	+
- Gender	+
- Age, in completed years	+
- Visitor's country of residence	+
- Educational level of the visitor	(–)
- Employment situation of the visitor	(–)
- Visitor's household income	(–)

Variables to which a “+” is attributed should be included in the pilot survey, those with a “–” will not be included in the first pilot. The decision on variables with (+) and (–) from the first

mission was reviewed once again in the third mission and a draft questionnaire as seen below was made.

All the variables listed above are part of section 2 of annex II of the EU-regulation. The representative of the Central Bank strongly recommended also including information on same-day visits into this pilot survey. Due to the fact that data collection on same-day visits is the most difficult from a methodological point of view the final decision on this issue was left open. Furthermore, it has to be clarified whether the Balance of Payments are willing to finance a module on same-day visits. It was agreed that the statistical agencies prior to the 4th mission in October examine whether there is a possibility for Balance of Payments to finance the module.

Draft Questionnaire – Ver. 1

In the following the draft questionnaire on the Demand Side Survey on Tourism is listed:

1) Gender? (Retrieved from Population List)

0=Male

1=Female

2) Age? (Retrieved from Population List)

Date of birth (MMDDYY)

3) What is your Country of Residence?

NOT nationality, but the country you are residing in. Use country list from Eurostat Manual

4) Did you make any trips with at least 1 overnight stay in the last 12 months?

0=Yes

1=No

5) If YES to question 4, how many trips with at least 1 overnight stay did you make in the last 12 months?

Numeric variable

6) If YES to question 4, how many trips with at least 1 overnight stay did you make in the last 3 months?

Numeric variable

The pilot survey will cover whether 12 months is too long a time span. The risk of memory loss of the respondents plus respondent burden is high. Perhaps the outcome will be 3 months + a 12 months question as in the Danish Case.

Ask about the specific trips made – a maximum of trips to ask about will be established when the pilot has been conducted. The most frequent number of trips will be the maximum.

FOR EACH TRIP THE FOLLOWING NEEDS TO BE ASKED

7) What was the month of departure?

MM (Character variable)

8) How many nights did you spend?

Numeric variable

9) What was the main country of destination?

Use country list from the Eurostat manual. The answer can be as well domestic as outbound

9a) If it was a DOMESTIC trip, what was the main city/region of destination?

Use list of main cities/regions in BiH (NUTS 2)

10) What was the main purpose with the trip?

1=Personal: leisure, recreation and holidays

2=Personal: visiting family and friends

3=Personal: other (e.g. pilgrimage, health treatment

4=Professional/business

11) If the main purpose (question 10) was PERSONAL, what was the type of destination?

1=City

2=Seaside

3=Countryside (including lakeside, river)

4=Cruise ship

5=Mountains

5=Other

12) If the main purpose (question 10) was personal, did any children participate?

0=Yes

1=No

13) What was your main means of transport?

1=Air

2=Waterway

3=Railway

4=Bus, coach

5=Motor vehicle (private or rented)

6=Other, e.g. bicycle

14) What was your main means of accommodation?

1=Rented: Hotels or similar

2=Rented: Camp sites or similar

3=Rented: Other, e.g. spas, youth hostels, marinas etc.

4=Non-rented: Own holiday home

5=Non-rented: Family and friends

6=Other non-rented

15) Did you book the main means of transport for the trip via tour operator/travel agent?

0=Yes

1=No

(If you were on business trip and had someone in the company do the booking for you try to estimate the question)

16) Did you book the main means of accommodation for the trip via tour operator/travel agent?

0=Yes

1=No

(If you were on business trip and had someone in the company do the booking for you try to estimate the question)

17) If NO to question 15 or 16: How did you book the trip?

0=Services booked directly with the service provider, e.g. hotel or airline

1=No booking was needed

18) Was the trip a package trip?

0=Yes

1=No

19) Did you book the main means of transport via the Internet?

0=Yes

1=No

20) Did you book the main means of accommodation via the Internet? 0=Yes

1=No

21) What was your individual expenditure on transport DURING the trip?

Numeric variable

(NOT prepaid plane tickets etc., but instead taxi and sightseeing costs in the destination country)

22) What was your individual expenditure on accommodation DURING the trip?

Numeric variable

(Hotel expenses are to be mentioned if you paid them upon check-in or check-out. If the expense was prepaid it has to be left out – often case with package trips)

23) What was your individual expenditure on food and drinks DURING the trip?

Numeric variable

24) What was your other individual expenditure DURING the trip?

Numeric variable

24a) Individual expenditure on valuables and durable goods such as computers, jewellery etc. has to be reported separately

Numeric variable

3. Conclusions and recommendations

The statistical agencies will have to examine whether the Balance of Payments can finance a module on same-day visits in the demand side statistics. Furthermore, it needs to be clarified how the pilot survey on the demand side statistics will be financed. Hence, the statistical agencies will have to agree upon a budget for the pilot survey prior to the 4th mission in October. On the more long-term scale, the statistical agencies need to agree upon whether the Demand side survey should be integrated into the Household Budget Survey as a module or be carried out as an independent survey.

It was reported that in 2013 a National Census is planned. The grossing up-procedures for the demand side statistics require clear information on the size of the full population in BiH. This issue still has to be clarified further in the future missions.

Actions needed for preparing and conducting the next mission or future missions

Action	Deadline	Responsible person/institution
The expert from DK will finalize the drafted version of the pilot survey questionnaire and forward it to the RTA who will disseminate it to the statistical agencies.	End of June 2012	Experts RTA
The expert from DK will forward the activity plans for the demand side and the supply side.	End of June 2012	Experts
The statistical agencies will examine whether the Balance of Payments can finance a module on same-day visits in the demand side statistics.	Before 4 th mission	BHAS
The statistical agencies will upon receiving the draft questionnaire for the pilot survey send it to the stakeholders involved; e.g. the relevant ministries, The Balance of Payments and the National Tourism Organizations in order to get their feed-back.	Before 4 th mission	BHAS (BD), FIS, RSIS
Furthermore the statistical agencies will test the draft questionnaire for the pilot survey amongst them; e.g. get some colleagues to comment on it and try to answer it.	Before 4 th mission	BHAS (BD), FIS, RSIS
The expert from DK will make a draft standardized version of the questionnaire for the accommodation statistics. RTA will disseminate it to the statistical agencies.	End of July 2012	Experts RTA
The statistical agencies need to agree upon a budget for the pilot survey prior to the 4 th mission.	Before 4 th mission	BHAS (BD), FIS, RSIS
The expert from DK will forward a translated Danish questionnaire for camp sites and hotels to the RTA. Furthermore, a demand side publication will be forwarded.	End of June 2012	Experts RTA
The statistical agencies will upon receiving the standardized draft questionnaire for the accommodation statistics send it to the stakeholders involved; e.g. the relevant Ministries and the National Tourism Organizations in order to get their feed-back.	Before 4 th mission	BHAS (BD), FIS, RSIS
Furthermore the statistical agencies will test the standardized draft questionnaire for the accommodation statistics amongst them; e.g. get some accommodation enterprises to comment on it and try to answer it.	Before 4 th mission	BHAS (BD), FIS, RSIS
The statistical agencies will on the basis of an already existing template draft a written co-operation agreement with the stakeholders (Ministry and National Tourism Organisation). The agreement should cover both the supply and the demand side.	Before 4 th mission	BHAS (BD), FIS, RSIS

Topics for the next meeting, action 1.5.4

1. The demand side pilot survey
 - a. A detailed plan for the demand side pilot survey
 - b. Discussion on the feed-back on the pilot questionnaire
 - c. Agreeing upon a final version of the pilot questionnaire
 - d. The sample frame and design
 - e. Budget
2. The supply side statistics
 - a. A detailed plan on the supply side statistics
 - b. Discussion on the feed-back on the revised and standardized questionnaire
 - c. Agreeing upon a final revised version of the questionnaire
3. Meeting with stakeholders
 - a. Current situation of tourism statistics in BiH
 - b. Information needs as expressed by the stakeholders
 - c. Feed-back on questionnaires
 - d. Discussion of draft co-operation agreement between stakeholders and statistical agencies
4. Specification of future work plan
5. Planning of future missions

Annex 1. Terms of Reference

Tourism Statistics
19th - 22th June 2012
Terms of Reference - Activity 1.5.3
EU Twinning Project BA 08-IB-FI-03
Institute for Statistics of Republika Srpska
Veljka Mladenovića 12d, Banja Luka

Component 1 Business Statistics

- 1.1. Statistical Business Register
- 1.2. Structural Business Statistics
- 1.3. Construction Statistics
- 1.4. Retail Trade Statistics

1.5. Tourism Statistics

Component 2 Extended Household Budget Survey

Component 3 Institutional Capacity

- 3.1. Long term strategy
- 3.2. Metadata and classification system development
- 3.3. Promotion of dissemination

Benchmarks
A) Plan for pilot survey on tourism statistics developed by the 2nd project quarter (March 2012). Not completed yet
B) Plan for modification of existing survey on tourism statistics developed by the 2nd project quarter (March 2012). Not completed yet
C) Detailed plan and preparation for regular production of tourism statistics by 4th project quarter (September 2012).
D) Pilot survey on tourism statistics conducted and existing surveys on tourism statistics modified by the 6th project quarter (March 2013).
E) Relevant results analysed and plans for regular surveys in force by 8th project quarter (September 2013).
F) Methodologies developed and documented by 8th project quarter

1.5.3. Activity

Improve existing tourism survey (modified)
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Expected activities:

1. Review of homework

2. Demand side survey:

- Presentation of the Danish demand side survey
- Overview of different methods used by EU countries
- Additional information on the demand side survey in Germany

3. Preparation of the pilot survey on travel behaviour in BiH

- Organisational structure (Separate survey or inclusion in an existing EHBS survey)
- Sample design
- Number of waves of data collection
- Timing
- Decision on the list of variables
- Discussion of availability and possibility to use of administrative data (Travel Agency, National Tourist Organization, State Border Services,...)
- Plan for conducting the pilot demand side survey

4. Supply side survey:

- Experience of data collection in German accommodation statistics
- Experience from Danish and German accommodation statistics
- Discussion of the revised data collection programme
- Discussion of the revised questionnaire (variables for occupancy, list of countries of origin, correspondence table linking the national classification with the NACE classification,..)
- Discussion of availability and possibility use of administrative data (Travel Agency, National Tourist Organization, State Border Services,...)
- Discussion of availability and possibility use of administrative data (Travel Agency, border records,..)
- Plan for modification of the existing survey in accommodation statistics

5. Preparation for the next mission

- Future project activities
- Topics for the next mission
- Activities to be done before the next mission

Expected output

- A. Participants trained on implementing demand side survey
- B. Developed plan for conducting the pilot demand side survey
- C. Defined questionnaires and other material in use for monthly accommodation statistics
- D. Developed plan for modification of the existing survey in accommodation statistics
- E. Mission reports – summarized and detailed version
- F. Defined homework and draft ToR for the next mission.

Explanation of the Expected output

It is expected that experts give their proposals for production of pilot survey as well as all phases of the production processes (sampling, coverage, questionnaire).

Detailed analysis of draft version of questionnaires for monthly surveys on tourism and all other material is to be done. Expected proposals for developing Plan for modification of existing surveys on tourism accommodation statistics.

Annex 2. Participants

Agency for Statistics of BiH

Jasmina Omić Senior Adviser in Service Statistics
Edin Šabanović Assistant Director, Sector for Statistical Methodology, Standards,
Planning, Quality and Coordination
Alen Bajramović Senior Adviser in Service Statistics

Institute for Statistics of Federation of BiH (FIS)

Sanja Ambrožić Head of Service Statistics and foreign trade Unit
Dževahira Bušatlija Senior Adviser for Tourism statistics

Institute for Statistics of Republika Srpska (RSIS)

Jelena Glamočika Head of the Service Statistics Department
Miroslav Ilić Senior statistician, Hotels and Restaurants statistics

Central Bank of BiH

Vedran Milisav Central Bank of BiH

Experts

Else-Marie Rasmussen Denmark

Twinning Project Administration 00 (387) 33/911-992

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Interpreter

Haris Imamović Interpreter

Annex 3. Agenda

19 June (Tuesday) – 22 June (Friday)

Time	Event	Purpose / detail
19 June, 09:00	Review of homework	<ul style="list-style-type: none"> • (Else-Marie Rasmussen, BC participants)
	Demand side survey	<ul style="list-style-type: none"> • Presentation of the Danish demand side survey (Else-Marie Rasmussen) • Overview of different methods used by EU countries (Else-Marie Rasmussen)
	Preparation of the pilot survey on travel behaviour in BiH	<ul style="list-style-type: none"> • Organisational structure (Separate survey or inclusion in an existing EHBS survey) • Sample design • Number of waves of data collection • Timing • Decision on the list of variables • Discussion of availability and possibility to use of administrative data (Travel Agency, National Tourist Organization, State Border Services,...) • Plan for conducting the pilot demand side survey (Else-Marie Rasmussen, BC participants)
	Supply side survey (Accommodation statistics)	<ul style="list-style-type: none"> • Experience of data collection in Danish and German accommodation statistics • Discussion of the revised questionnaire (variables for occupancy, list of countries of origin, correspondence table linking the national classification with the NACE classification,..) • Discussion of availability and possibility use of administrative data (Travel Agency, National Tourist Organization, State Border Services,...) • Discussion of availability and possibility use of administrative data (Travel Agency, border records,..) • Meeting stakeholders • Plan for modification of the existing survey in accommodation statistics (Else-Marie Rasmussen, BC participants)
	Preparation for the next mission	<ul style="list-style-type: none"> • Future project activities • Topics for the next mission

		<ul style="list-style-type: none"> • Activities to be done before the next mission • (Else-Marie Rasmussen, BC Participants)
22 June, 12:00	Debriefing	<ul style="list-style-type: none"> • Evaluation and approval of the Summary Mission Report • (Else-Marie Rasmussen, BC participants)