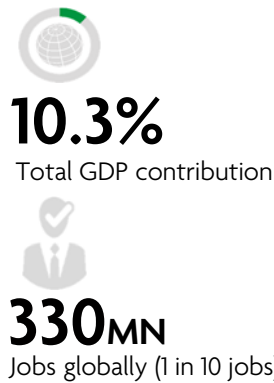


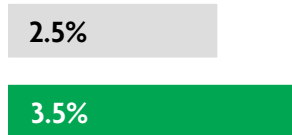
BOSNIA-HERZEGOVINA

2020 ANNUAL RESEARCH: KEY HIGHLIGHTS¹

GLOBAL DATA 2019



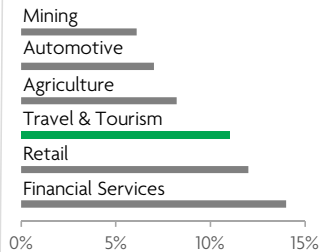
While the global economy grew by 2.5%,
Travel & Tourism grew significantly more at 3.5%



1 in 4 net new jobs were created by Travel & Tourism over the last five years



Global GDP impact by sector (2018 data). Share of total economy GDP



BOSNIA-HERZEGOVINA 2019 KEY DATA



CONTRIBUTION OF TRAVEL & TOURISM TO GDP

9.3% OF TOTAL ECONOMY

Total T&T GDP = BAM3,179.6MN (USD1,820.0MN)

+6.9%

2019 Travel & Tourism GDP growth vs **-0.1%** real economy GDP growth



CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

79.1 JOBS (000's)

(9.6% of total employment)

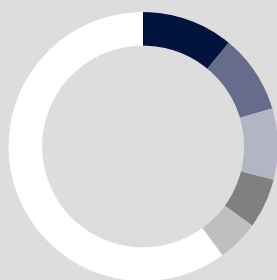


INTERNATIONAL VISITOR IMPACT

BAM1,826.2_{MN}

in visitor spend (**13.0%** of total exports) (USD1,045.3MN)

INBOUND ARRIVALS



- 1. CROATIA 11%
- 2. TURKEY 9%
- 3. SERBIA 9%
- 4. SLOVENIA 6%
- 5. SOUTH KOREA 5%
- REST OF WORLD 60%

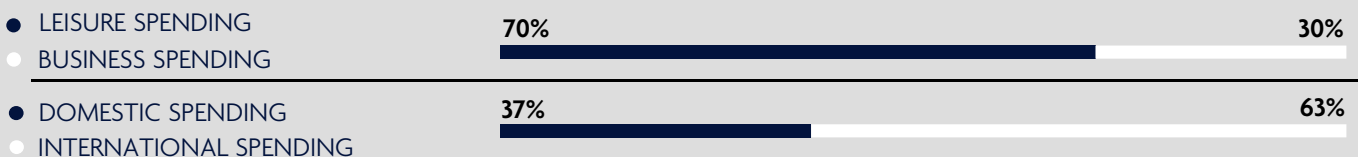
OUTBOUND DEPARTURES



- 1. CROATIA 37%
- 2. MONTENEGRO 19%
- 3. SERBIA 11%
- 4. TURKEY 10%
- 5. BULGARIA 6%
- REST OF WORLD 17%

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)



¹All values are in constant 2019 prices & exchange rates
As reported in March 2020