

The Experience of Tourists in Northern and Southern Montenegro



A survey is conducted by the Centre for Sustainable Tourism Initiatives (CSTI) and the Center for Entrepreneurship and Economic Development (CEED) with support from the United States Agency for International Development (USAID) through the CHF International CRDA-E program

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Centre for Sustainable Tourism Initiatives

CENTRE FOR SUSTAINABLE TOURISM INITIATIVES (CSTI)

SURVEY:

The Experience of Tourists in Northern and Southern Montenegro

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INTRODUCTORY REMARKS

Under the initiative of the Centre for Sustainable Tourism Initiative (CSTI Montenegro) the survey on **The Experiences of Tourists in Northern and Southern Montenegro** was realized in cooperation with the Centre for Entrepreneurship and Economic Development (CEED Montenegro), in August 2007.

The main purpose of the project was to collect information on the experiences of visitors and their suggestions for improvements to the quality of tourism assets and services throughout the country. The research provided insight into the unique demands of foreign visitors resulting in the improved ability of CSTI and other tourism businesses and organizations to meet the expectations of these visitors.

For the purpose of carrying out the project task, CEED engaged 18 surveyors from each of the targeted tourist destinations. In order to make contacts with respondents, CEED prepared accreditations and authorizations for all surveyors providing verification of their affiliation with CEED. In addition, with CEED signed contracts with each surveyor, in which rights and obligations of both parties were clearly defined, guaranteeing the fulfilment of data collection and the validity of results.

The final version of the questionnaire had 35 questions for Northern and 32 questions for Southern Montenegro related to the demographic characteristics of the visitors, reasons for visiting, sources of information, evaluation of the tourist assets and services and suggestions for improvement. Sample of the questionnaire is given in the Appendix.

Under the close guidance of CSTI, CEED's analysts conducted data analyses and developed conclusions. The final results will be used for evaluation and improving tourist offer all over Montenegro. We owe our gratitude to our colleagues from CSTI Montenegro and CHF International, Slavica Vukčević, Vildana Jahić, Svetlana Vujičić and Kelli Brown who have been answering on all our questions and providing us with constructive suggestions in all research phases.

In addition, we extend our thanks to the tourists who answered on questionnaire. They provided us with the necessary information to process this report.

Radević
Podgorica, December 2007

Dragana
CEO of CEED

The Experience of Tourists in Northern and Southern Montenegro

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INTRODUCTION

In August and September 2007, the Centre for Sustainable Tourism Initiatives (CSTI) together with the Center for Entrepreneurship and Economic Development (CEED) conducted two surveys on tourists' perceptions of services and products in northern Montenegro. The surveys collected information on the profile of visitors, their recent experiences traveling in Montenegro and their interest in destinations in the north. The CSTI Northern Montenegro survey interviewed 503 tourists at 7 common tourist sites in northern Montenegro, and the Southern/Central Montenegro survey interviewed 507 tourists at 6 common tourist sites in southern and central Montenegro.

CSTI is a non-governmental, locally-based organization that aims to be the driving force for the development of the tourism products of northern Montenegro following the principles of responsible and sustainable tourism. In doing so, CSTI cooperates with and mobilizes the resources of citizens, NGOs, government institutions and regional and international organizations. CSTI is implementing tourism development projects in 13 municipalities in northern and central Montenegro including: Andrijevica, Berane, Bijelo Polje, Danilovgrad, Kolašin, Mojkovac, Nikšić, Plav, Pljevlja, Plužine, Rožaje, Šavnik and Žabljak.

The purpose of the survey is to better understand the typical profile of tourists, their reasons for choosing Montenegro, their opinions on available tourism products and services and suggestions they may have for improvements. CSTI plans to use the information collected from the survey to inform tourism stakeholders in all 13 municipalities of northern and central Montenegro about the current profile of tourists and key areas for tourism product and service development.

SURVEY METHODOLOGY

Together with CEED, CSTI developed a survey tool and conducted personal interviews with tourists. The surveys were conducted in English, Montenegrin/Serbian and Albanian. All surveyors attended survey training and were provided the same detailed instructions on how to identify respondents and conduct interviews. Final survey respondents were identified at key tourism sites in the north, center and south and randomly selected from among all visitors to those sites.¹ CSTI conducted simultaneous surveys in northern Montenegro and in southern/central Montenegro to better understand the profile of tourists who chose to visit these distinct destinations.

Respondents from the north survey have the following characteristics:

- 39.8% were from Serbia, 39.2% from countries of the European Union, 5.4% from neighboring countries (Bosnia and Herzegovina, Croatia, Macedonia and Albania) and 15% from other countries – of these 91% were from Russia;
- Among EU visitors, 38.6% were from the Czech Republic, 13.2% from France, 11.7% from Germany and the remainder from other countries;
- 31.1% were between the ages of 20-29, 29.5% between 30-39 and 21.8% between 40-49;
- 53% of respondents were women and 47% were men;
- The majority, 86.7%, were traveling with others, usually a spouse or partner and additional friends or family members;
- Most tourists, 56.9%, had previously visited Montenegro and 82% were visiting this time for recreation or holiday;
- 69.6% were visiting only Montenegro on this trip; of the respondents from the EU 56% were visiting only Montenegro while the remaining 44% planned to visit other countries, typically Croatia and Serbia.

¹ Basic parameters for respondent selection included: 1) Only visitors to Montenegro (no Montenegrin citizens); 2) No more than 40% of respondents could be from Serbia; 3) Approximately 50% men and 50% women.

KEY RESULTS

Results from the north survey present a detailed picture of tourists' perceptions providing some important insights into the typical profile of tourists and their opinions on the tourism products and services in northern Montenegro. Tourists to northern Montenegro:

- Found information on northern Montenegro through friends/relatives, travel agencies, from a previous visit or via the internet. Visitors from Other Countries category, including Russia, were most likely to use the internet as a main information source;
- Organized their travel arrangements themselves. A significant number of visitors from the European Union also received assistance from a Montenegrin Travel Agency when organizing travel to and within Montenegro;
- Traveled to Montenegro by car, though an increasing number also travel by airplane, public bus and tour operator bus;
- Visited national parks, with the most popular destinations listed as National Park Durmitor and Zabljak, followed by National Park Biogradska Gora and Kolasin;
- Enjoyed frequenting restaurants, cafes and bars in addition to cultural sites. Among recreational activities, rafting and swimming are the most popular;
- Rented private accommodation or stay in 1-3 star hotels. A greater number of visitors from Other Countries category, including Russia, chose 4-5 star accommodation and visitors from the European Union often chose camping;
- Described their stay in northern Montenegro as "very good" and a majority said they were likely to return in the next five years;
- Rated the quality of National Parks and Cultural/Historic Sites positively while giving lower marks to transportation and shopping;
- Perceived the hospitality of the local population to be a positive aspect of the tourism environment in northern Montenegro while the quality of infrastructure and outdoor cleanliness were seen more negatively.

The results of the survey varied based on the respondent's country of origin. For example, respondents from the European Union had a more negative view of outdoor cleanliness, while respondents from neighboring countries (Bosnia and Herzegovina, Croatia, Macedonia and Albania) rated the infrastructure more harshly. For more detailed comparisons by country of origin please refer to the full report.

A. Tourism Environment

One central goal of the research was to learn more about the environment for tourism through the eyes of visitors. The survey defined tourism environment as different aspects of safety, convenience and hospitality which contribute to the overall tourism experience in northern Montenegro. Respondents were also asked to rate different aspects of the tourism environment on a scale of 1-5, with one indicating "poor" and 5 indicating "very good". Based on these responses indicators were calculated. The final indicators are listed in the table below:

	Rate indicator
Montenegrin hospitality	4.22
Cleanliness (inside)	4.00
Customer Service	3.77
Information on Tourist Sites and Services	3.73
Signage and Directions	3.50
Protection and Emergency Services	3.51
Employees' Knowledge of Foreign Languages	3.35
Cleanliness (outdoor)	3.18
Infrastructure (roads, water, etc.)	2.75

The components of the tourism environment receiving the lowest ratings were infrastructure (2.75) and outdoor cleanliness (3.18). Similarly when asked the open-ended question, "what could have made your trip more enjoyable?" the top three answers were: improved road infrastructure (31.8%), better water supply (11.5%) and cleanliness (9.4%).

The growth of tourism in the north is dependent both on the maintaining perceptions of Montenegro's scenic national parks and remote mountain communities as untouched wilderness while simultaneously improving basic road, water and sewage infrastructure to safely and efficiently meet the expectations of tourists. These are both areas where local and national government can work together with entrepreneurs and community leaders to make significant improvements. In March of 2007, the government adopted a National Sustainable Development Strategy for Montenegro which includes broad responsibilities for all stakeholders, including those in the tourism industry, to safeguard the environment. Initiatives already underway include the "Keep it Clean" campaign aimed at educating citizens on pollution and adequate waste disposal in addition to "Eco-Patrols" formed in 40 primary schools throughout Montenegro to educate youth on ecology and cleanliness. Investments in infrastructure may prove a greater obstacle, although the national government has proposed construction of a new highway connecting the northern municipalities with Podgorica and the south, limited progress has been made.

A professional, well-managed workforce is another essential factor to the success of a tourism business or destination. The survey shows clear room for improvement in the tourism workforce, although tourists rated customer service generally positive (3.77), when asked to rate the more specific area of foreign language skills, the responses were less positive (3.35). These ratings demonstrate a need for specialized client-centred tourism courses especially in the area of foreign languages. For Montenegro, language training should emphasize both English – as the common language of tourism worldwide – in addition to Russian an important source market for Montenegrin visitors. To achieve the greatest success, it will be important for the government to coordinate closely with training and educational institutions and the tourism industry to develop courses which respond to the immediate needs of tourism businesses. By improving access to quality training for Montenegrins, the government may be able to resolve the current shortage of qualified local applicants for positions which is currently being met by guest workers from neighbouring countries such as Serbia.

Overall the ratings of the tourism environment in northern Montenegro reflect the common challenges of an emerging tourism destination, with issues related to government services receiving lower scores, while those related to customer service and general hospitality received higher scores. To create the best tourist experience in northern Montenegro, there must be concerted efforts to improve in all of these areas.

B. Product and Service Development

According to the Ministry of Tourism and Environmental Protection² during the 2007 summer tourist season an increasing number of tourists expressed interest in visiting the mountainous region of Montenegro, and particularly the National Parks. The CSTI survey sought to collect more detailed information on tourists' perceptions of the National Parks and other key products available in northern Montenegro. Respondents were asked to rate the quality of each product on a scale of 1-5, with one indicating "poor" and 5 indicating "very good". Based on these responses indicators were calculated. The final indicators are listed in the table below:

	Rate indicator
National Parks	4.63
Cultural/Historical Monuments	4.27
Accommodation	4.21
Restaurant/bar/café	4.16
Recreation Activities	4.12
Beaches	4.11
Tour operator/Tourist Agency	3.80
Souvenirs/Handicrafts	3.80
Guide Services	3.68
Shopping	3.50
Local Transport	3.30

National Parks received the highest rating (4.63) followed by cultural/historic monuments (4.27). These were also the most visited sites in the north, with most tourists visiting at least one park. Despite its small size, northern Montenegro has abundant natural and cultural/historic assets which provide a strong foundation for tourism development. The excellent rating of the two National Parks, Durmitor and Biogradska Gora, and the cultural/historic sites including Moraca and Ostrog Monasteries demonstrates the clear potential of tourism in this region. Developing the tourist industry around these assets is an opportunity to both preserve the culture of the region and create economic opportunities for the surrounding communities. Local and national government, together with tourism entrepreneurs, are increasingly investing in the areas surrounding the National Parks and cultural/historic sites. It is critical that the public and private sectors take care to protect these unique natural and historic attractions.

Tourists expressed their general satisfaction with available accommodation in the municipalities of northern and central Montenegro. Many tourists from Serbia and other neighboring countries continue to stay in rented private accommodation, while tourists from the European Union are more likely to choose simpler 1-3 star hotels or camping. The overall high ratings reflect both the type of tourists attracted to Montenegro and their level of expectations. Current strategies for tourism development are centered on adventure and agro-tourism – areas best served by small bed and breakfasts, campsites and other rural accommodation. Continued investment into these types of accommodation will contribute to maintaining the socio-cultural authenticity of host communities, by helping them preserve their cultural heritage and traditional values, and by ensuring them viable long-term economic prosperity, that comprises stable employment and more income earning opportunities.

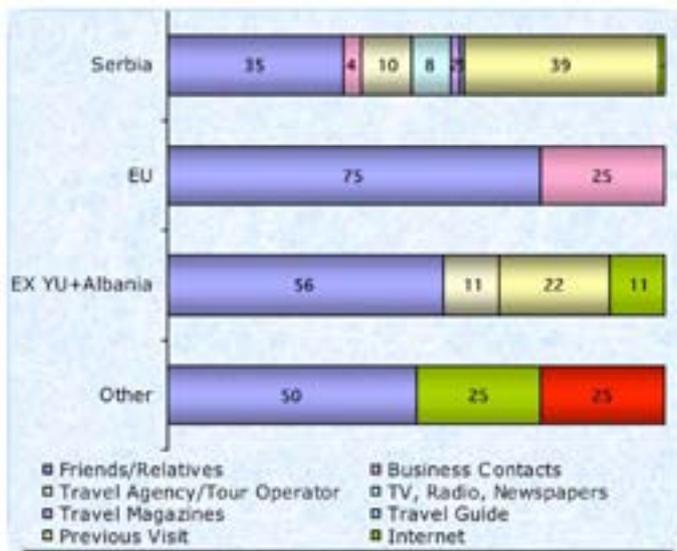
In contrast to the high rating of accommodation, local transport received a very poor rating (3.30). In addition to poor road infrastructure throughout the north, other transportation problems include: limited or no public bus service between key tourist destinations, variable timetables for existing bus routes, poor sign-posting along roads and within municipal centers, lack of available taxi services and no standardization of pricing for transportation resulting in price-gauging. To improve the overall experience of tourists in the northern and central region, it will be critical to improve both transportation infrastructure and the supply of reliable, cost-effective options.

² Reference: "Information on the work of the Ministry of Tourism and Environmental Protection and 2007 season data"

C. Marketing and Promotion

With detailed knowledge of tourists' perceptions of northern Montenegro, together with a better understanding of their expectations, the survey additionally sought to learn more about the typical profile of tourists visiting the region and how to best promote tourism products. A majority of tourists visiting northern Montenegro were traveling for leisure/recreation and the factors which distinguished Montenegro from the main competitor destinations (Croatia, Serbia and Greece) were unique Montenegrin attractions and their curiosity about a new destination. These answers were in stark contrast to the responses among tourists in the south who highlighted price and accessibility. These responses clearly delineate the different type of tourists, and potential tourist markets from which the northern Montenegro draws.

Main source of information on Montenegro



When asked about their main source of information on northern Montenegro, the most common response was friends and relatives (28.4%). Among respondents from the European Union this percentage was 75%.

These numbers show the powerful effects of “word of mouth marketing” which is more credible than advertising, and some tourism analysts believe it brings results more quickly. On the other hand, “word of mouth marketing” can also have very negative effects, another reason why an emerging destination such as northern Montenegro must continually strive to make a positive impression on all visitors.

Tourists from Other Countries category, including Russia, were more likely to highlight the Internet as a source of information and those from neighboring countries in addition to previous visit, also noted travel agencies/tour operators as a key source. To maximize marketing effect, tourism entrepreneurs can use this information to design promotional campaigns and identify target groups – including traditional markets such as Serbia and other neighboring countries, but also emerging/reemerging markets such as the Czech Republic, France and Germany.

CONCLUSION

The findings of the Tourism Survey provide important insights into the current profiles of tourists visiting the north and south, their reasons for choosing Montenegro and their opinions of tourism products and services. The survey reinforced common beliefs about the needs for additional investments into transportation and infrastructure, while providing new insights into the types of tourists choosing to visit the north and how to best meet their expectations. The Centre for Sustainable Tourism Initiatives plans to work closely with the Ministry of Tourism and Environmental Protection, the National Tourism Organization, Local Tourism Organizations and private sector partners to promote tourism in northern Montenegro while simultaneously working to improve tourism products and services.

SAMPLE AND METHODOLOGY

The survey on **The Experiences of Tourists in Northern and Southern Montenegro** began in August 2007 when the questionnaire, developed by CSTI, was finalized in coordination with CEED. The questionnaire was designed to capture information on the needs and experiences of visitors to key tourist destinations in the north and south. Although the survey was conducted in both northern and southern Montenegro, the overall goal was to gauge the interest in and experience of tourists to the underdeveloped tourist market in northern Montenegro. As a result two versions of the questionnaire were designed to accommodate the unique situation of tourists in each location. To meet the needs of tourists from a variety of origin countries, the surveys were designed in English and translated into Albanian and the local language (Montenegrin/Serbian/Croatian). The surveys offered both open and closed questions along with Likert type evaluation.

For the purposes of this survey, only "foreign tourists" whose permanent residence is not in Montenegro, were interviewed. All tourists staying in Montenegro for more than three months for business or any other reasons and Montenegrin residents were excluded from the survey. To best understand the potential source markets for tourists in northern Montenegro, CSTI suggested that research include a maximum of 30%-40% of tourists from Serbia. Likewise, CSTI defined approximate quotas for other origin countries. The final sample structure is presented in the following table.

Table 1. Sample structure

Location		No.	%
1.	Tara Canyon	50	9.9
2.	Kolasin	50	9.9
3.	Moraca Monastery	50	9.9
4.	Ostrog Monastery	75	14.9
5.	National Park Biogradska Gora	126	25.1
6.	National Park Durmitor	127	25.3
7.	Plavsko Lake	25	5.0
Total North		503	100.0
8.	Budva	104	20.5
9.	Cetinje	51	10.1
10.	Herceg Novi	99	19.5
11.	Kotor	102	20.1
12.	Skadar Lake	50	9.9
13.	Ulcinj	101	19.9
Total South		507	100.0

Data collection was carried out through direct interviews with the visitors to key tourist destinations in Montenegro. For the purpose of providing the representative sample, visitors were randomly chosen. CEED hired experienced surveyors to conduct the fieldwork and each surveyor attended one day training on the purpose of the questionnaire, its content and the final deadlines for data collection. Since the research involved interviews with foreign tourists, all surveyors were required to have working knowledge of the English language.

Data entry was completed in Microsoft Excel and data processing with necessary logic controls was conducted in the Statistical Package for Social Sciences (SPSS) program. The final data base contains all information from the questionnaire (in the questionnaire form that has been used). SPSS is a software

program for managing data and analysis. It can be used for market research, company and government interviewing, educational institution research, etc.

Taking into consideration the sample design and survey methodology, we are of the opinion that the presented data can be observed as valid and representative of visitors' satisfaction with the tourism assets and services in Montenegro. We hope that the results will be used for a greater understanding of the potentials for tourism in northern and southern Montenegro.

PART I

VISITORS OF NORTHERN MONTENEGRO

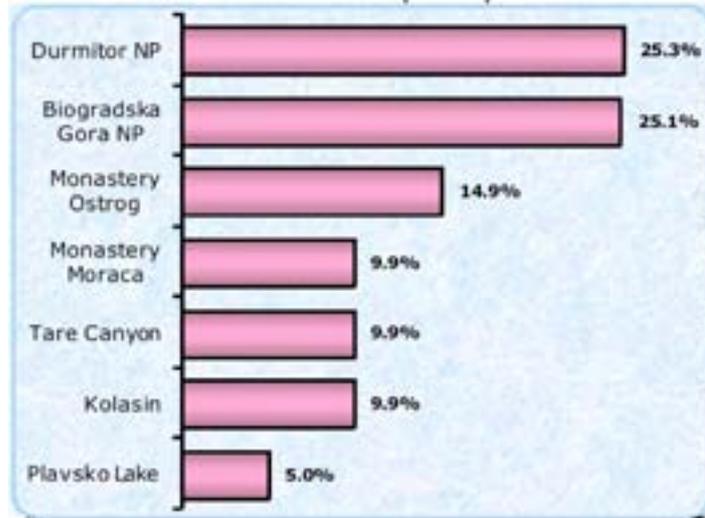
1. DEMOGRAPHIC PROFILE OF VISITORS

1. Region

The majority of respondents were interviewed at National park Durmitor (25.3%) and National park Biogradska Gora (25.1%).

Graphic 1.1 Locations included in the survey on the North

Base n= 503 (100%)

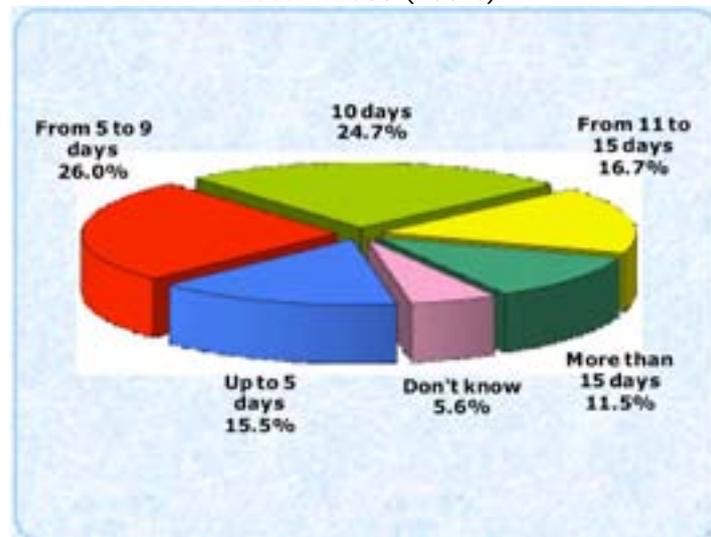


2. On this trip, how long do you plan to stay in Montenegro?

From data presented below we can state that 50.7% respondents planned to stay between 5 to 10 days.

Graphic 2.1 Planned duration of stay in Montenegro?

Base n= 503 (100%)

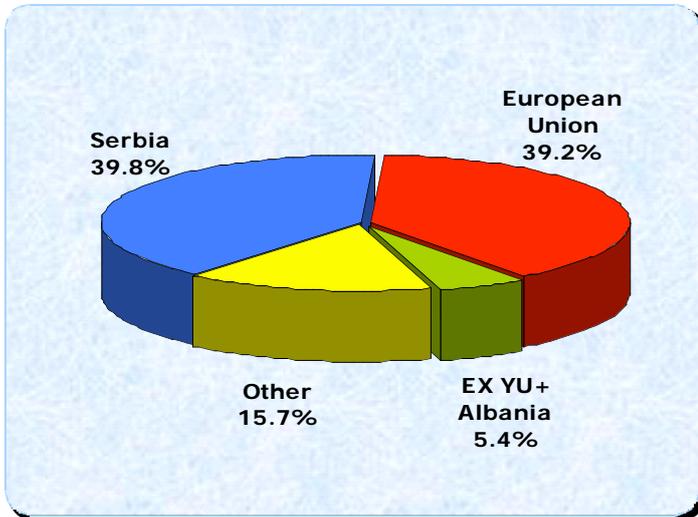


3. Where is your permanent residence?

Of the visitors surveyed, 39.8% were from Serbia and 39.2% the EU. Of the EU countries the greatest number of tourists were from the Czech Republic (38.6%), France (13.2%), and Germany (11.7%). Of visitors from Other Countries category 91.1% were from Russia.

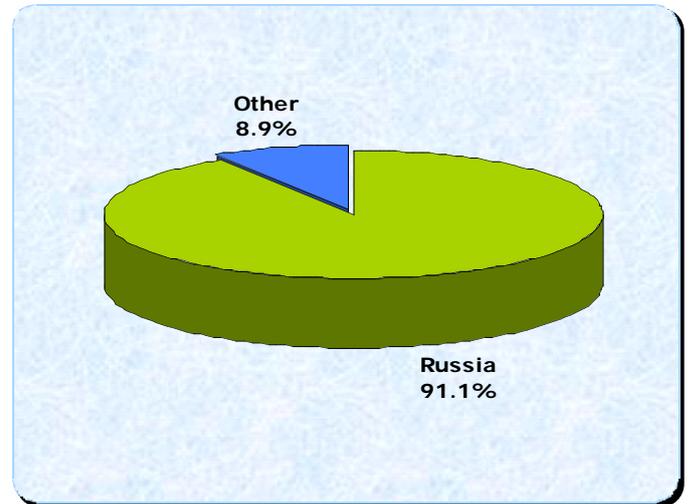
Graphic 3.1 Place of permanent residence

Base n=503 (100%)



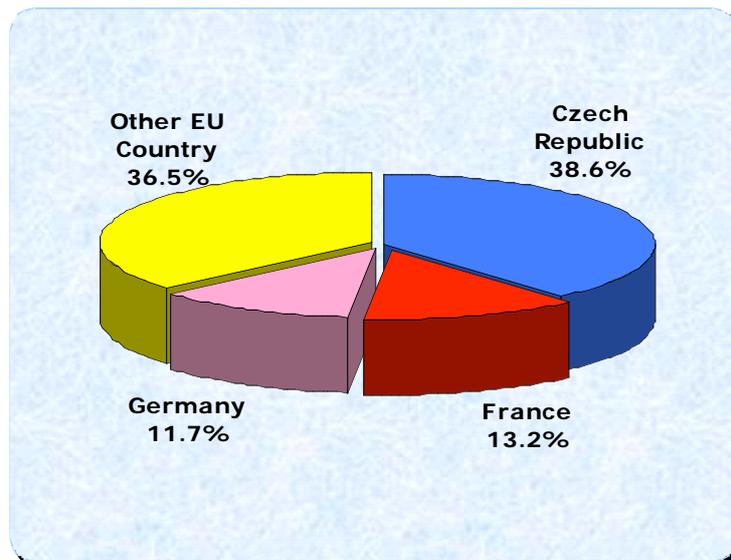
Graphic 3.2 Other countries

Base n= 79 (100.0%)



Graphic 3.3 EU countries

Base n=197 (100.0%)

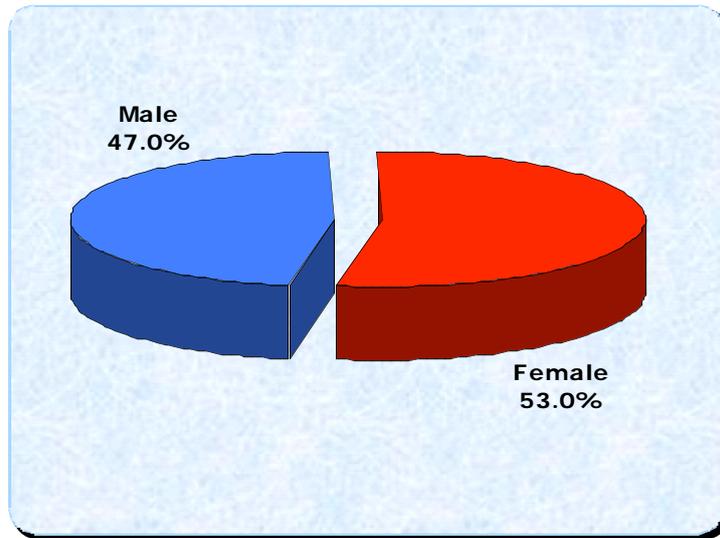


4.1 Gender structure

Women (53%) slightly outnumbered men (47%) as respondents to the survey in northern Montenegro.

Graphic 4.1 Gender of respondents

Base n=503 (100.0%)

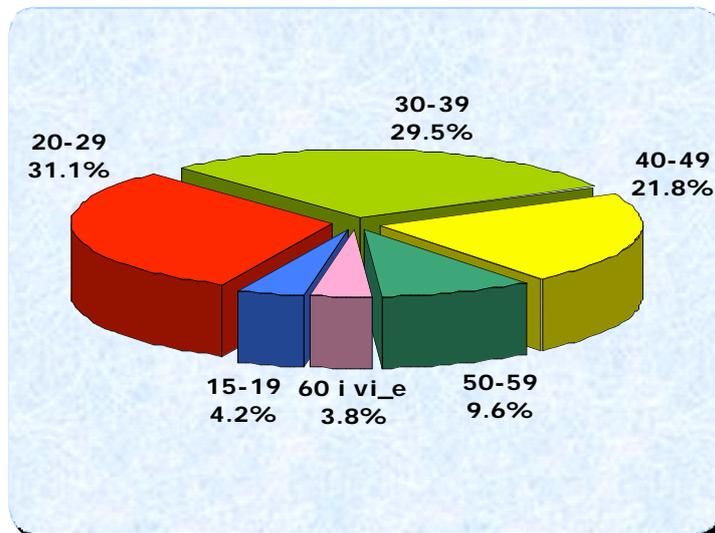


4.2 Tourists age

More than three fifths of visitors (64.8%) are under the age of 40. Tourists coming from Serbia and from EU countries above average are between age of 20 and 29 (33.2% and 34.0%, respectively).

Graphic 4.2 Age of respondents

Base n=501 (99.6%)

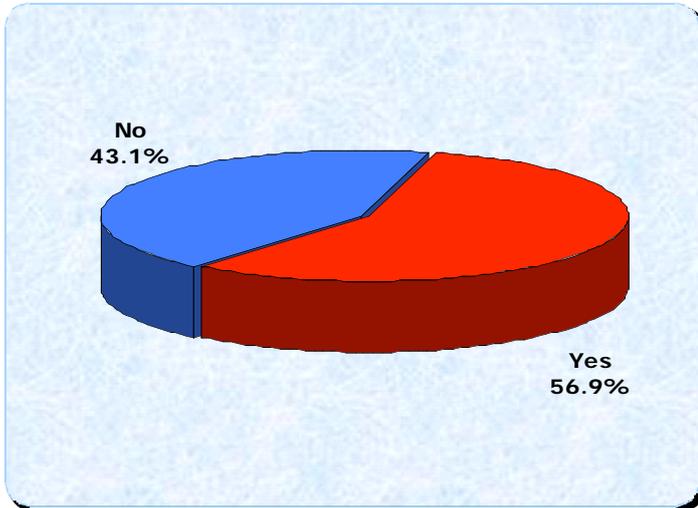


2. MAIN MOTIVES FOR COMING TO MONTENEGRO AND INFORMATION SOURCES

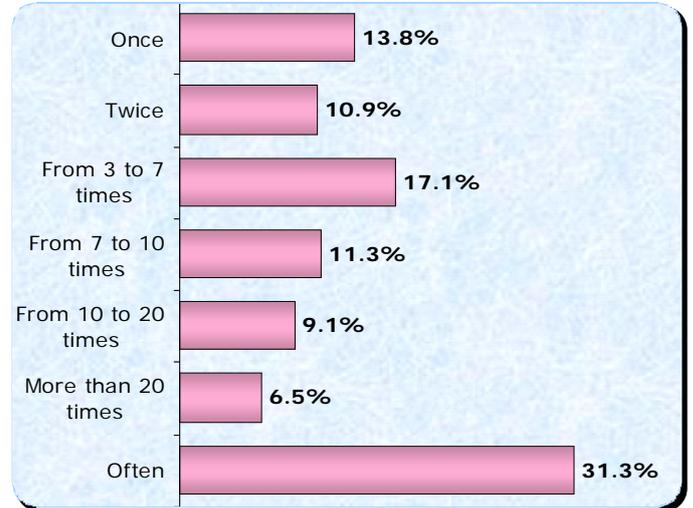
5. Have you visited Montenegro before?

More than a half of the respondents (56.9%) had previously visited Montenegro.

Graphic 5.1 Previous visit to Montenegro
Base n=503 (100%)



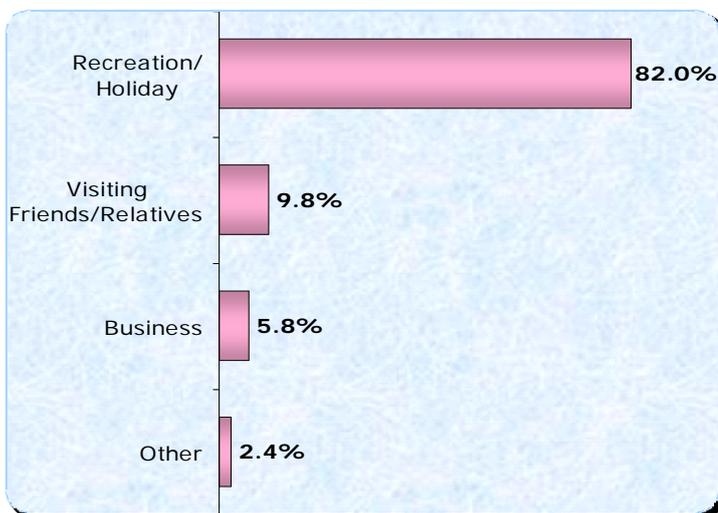
Graphic 5.2 How many times
Base n=275 (96.2%)



6. What was your main purpose in visiting Montenegro?

For more than four fifths of inquired people (82.0%) the main motive of coming to Montenegro is recreation or holiday.

Graphic 6.1 Main reasons for coming to Montenegro
Base n=500 (99.4%)



Graphic 6.2 Main reasons for coming/Countries of origin (%)

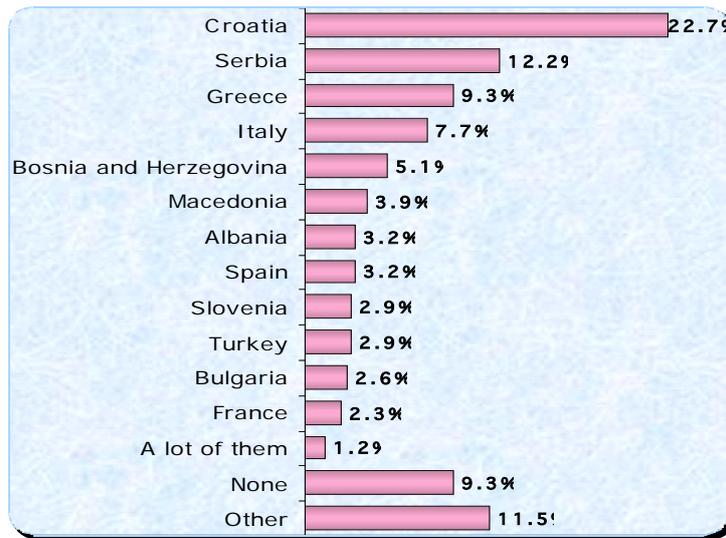


7. What other countries did you consider visiting for this holiday?

Besides Montenegro, the greatest percentage of respondents (46.8%) considered visiting other countries of the former Yugoslavia. Greece (9.3%) and Italy (7.7%) were also considered. According to our results, these countries appear to be the main competitors for northern Montenegro.

Graphic 7.1 Tourist competitors of Montenegro

Base n=204 (40.6%)

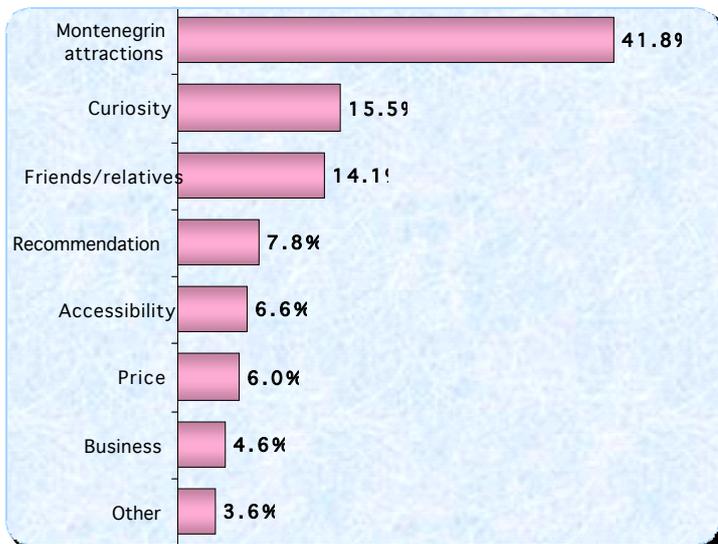


8. What was the main factor that distinguished Montenegro from other destinations?

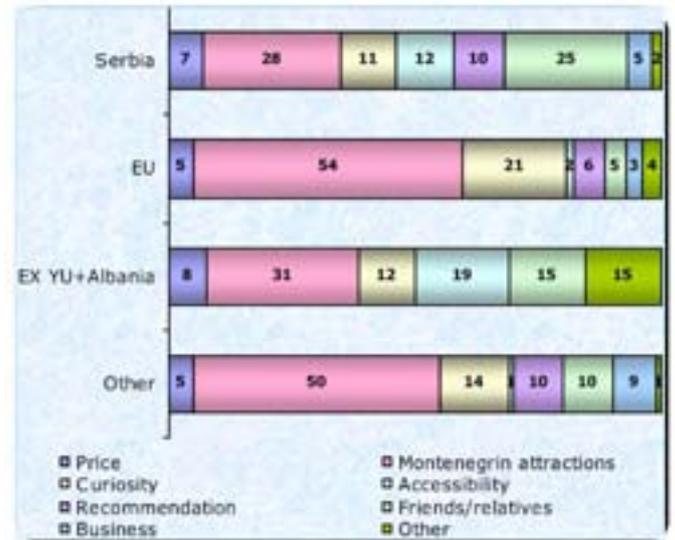
Two fifths of respondents or 41.8% were interested in Montenegrin tourist attractions and curiosity was a distinguishing factor for 15.5% of visitors. For visitors from the EU, an even greater number indicated interest in Montenegrin tourist attractions (54.3%).

Graphic 8.1 The main factor that distinguished Montenegro from other destinations

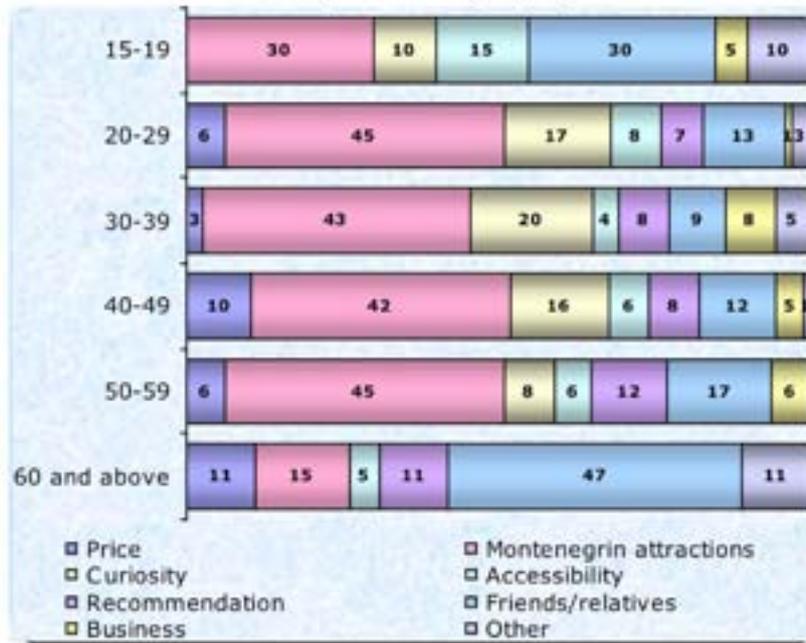
Base n=502 (99.8%)



Graphic 8.2 The main factor that distinguished Montenegro from other destinations /Countries of origin (%)



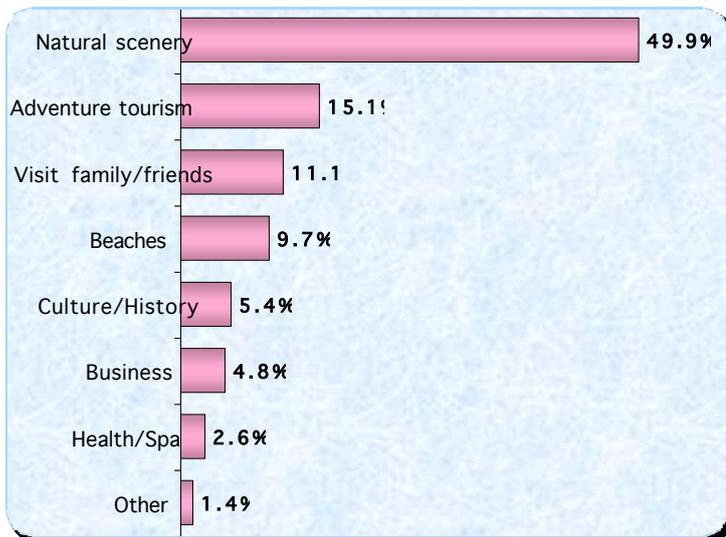
Graphic 8.3 The main factor that distinguished Montenegro from other destinations / Respondents age (%)



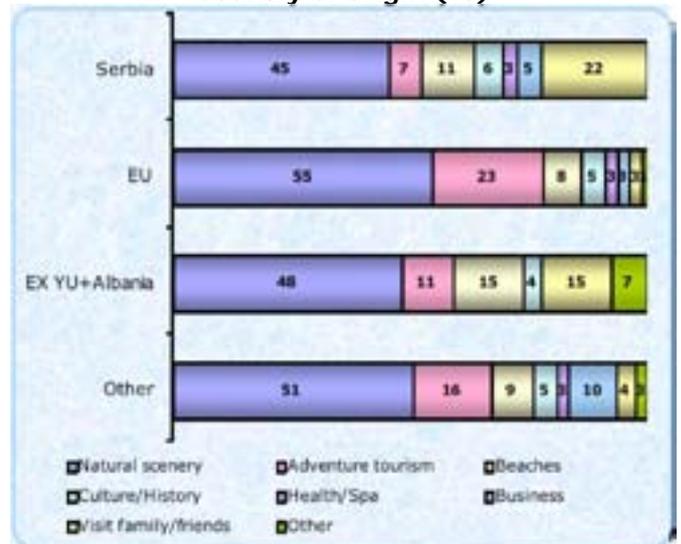
9. What was your main attraction to Montenegro?

Every second tourist (49.9%) indicated that natural beauty was their main attraction to northern Montenegro. For visitors from Serbia and surrounding countries, family and friends were more significant attractions (22.4% and 14.8%), while tourists from the EU were interested both in the natural beauty (55%) and adventure tourism (23.4%). For younger respondents, from 15 to 19 years, Montenegro was seen as an attractive destination for visiting family and friend (30%) and for adventure tourism (26%).

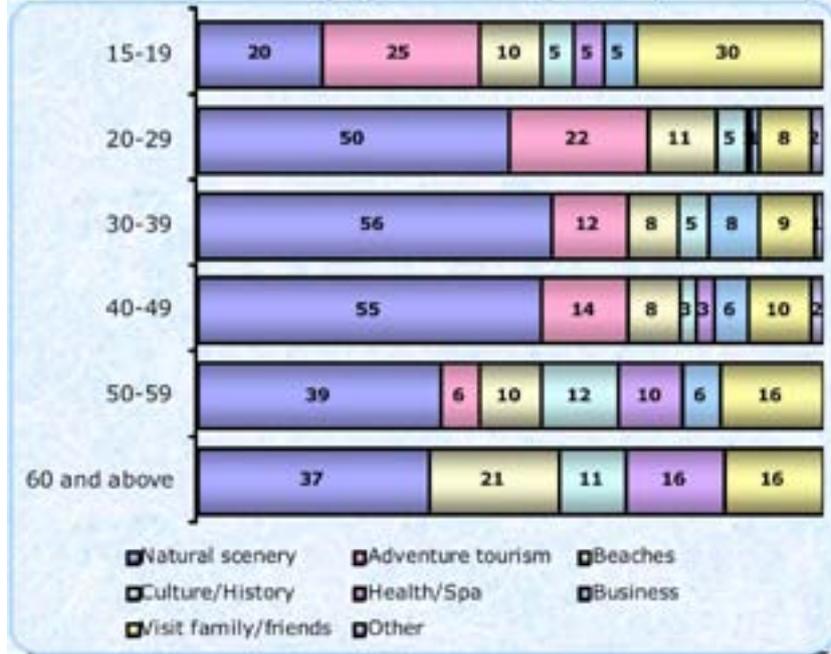
Graphic 9.1 Reasons for staying in Montenegro
Base n=503 (100%)



Graphic 9.2 Reasons for staying in Montenegro / Country of origin (%)



Graphic 9.3 Reasons for staying in Montenegro/Respondents age (%)

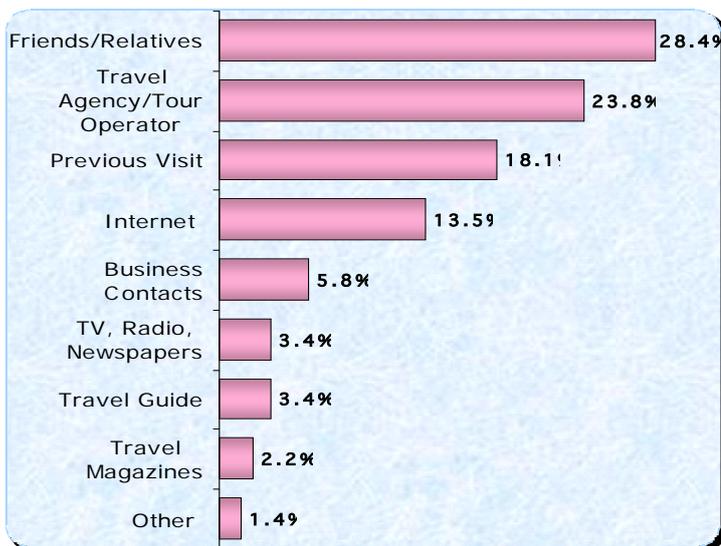


10. What was your main source of information on Montenegro?

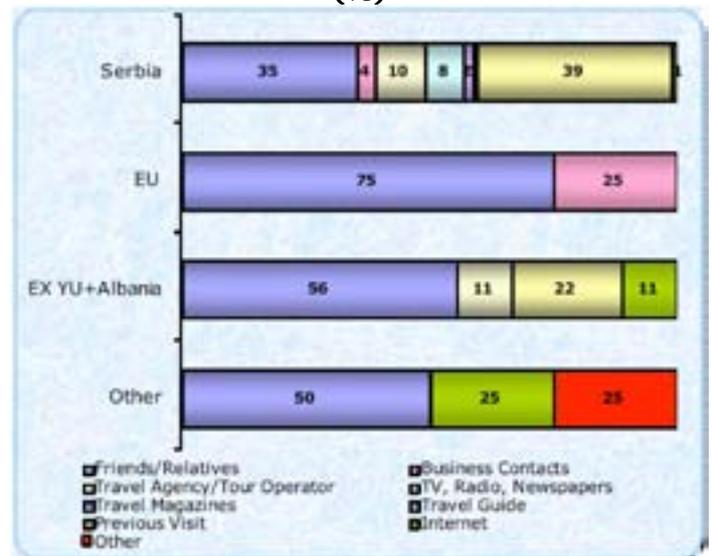
Less than one third of enquiries (28.4%) named as main source of information on Montenegro - family and friends. The travel agency and tour operators are crucial source of information for 23.8%, and latter visits for 18.1% of tourists. Because of stronger Montenegrin tourist offer by Internet 13.5% of interviewed get information of Montenegro right from this source. Based on results of research we can state that for tourists who visited northern Montenegro, the most effective source of information are references. Interesting information is that people from EU used the most two source of information: Friends/family and business contacts.

Graphic 10.1 The main source of information about Montenegro

Base n=503 (100%)



Graphic 10.2 The main source of information about Montenegro/Countries of origin (%)



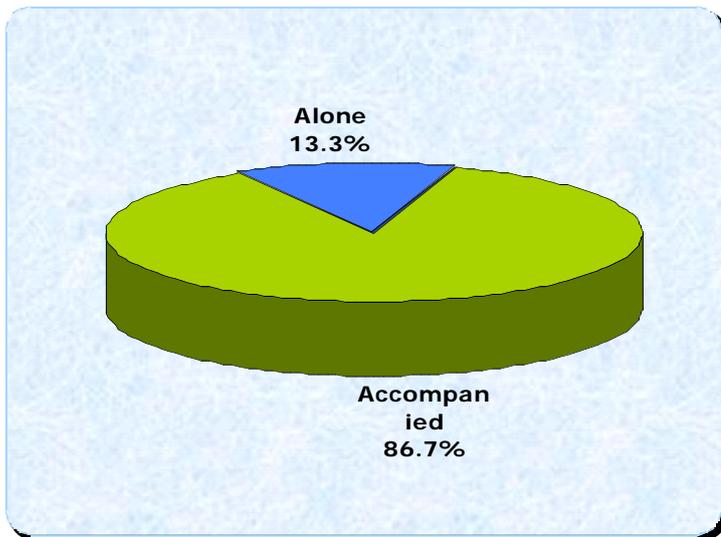
10.1 Internet site

The visitors who got information's of Montenegro by Internet (61.5%) used GOOGLE, 30.8% visit site www.visit-montenegro.com. It is interesting to mention that 7.7% of respondents used tourist web sites of the agencies from Poland.

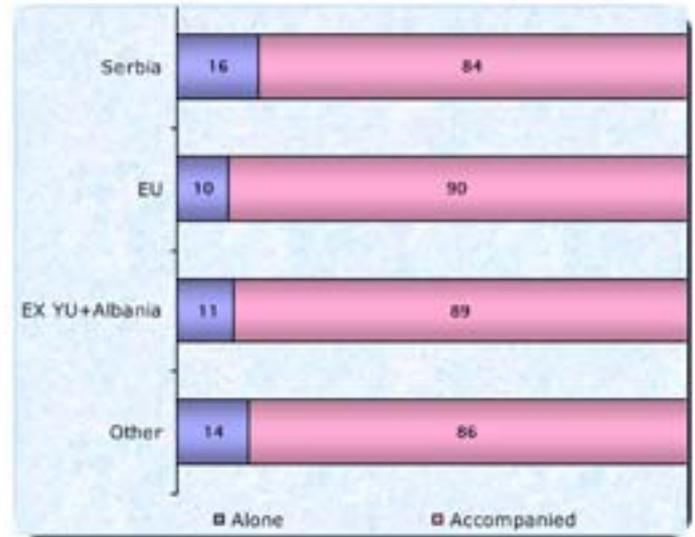
11. Are you traveling alone or accompanied?

Of all those interviewed that visited northern Montenegro, 86.7% traveled accompanied, and 13.3% traveled alone.

Graphic 11.1 Are you traveling alone or accompanied
Base n=503 (100%)



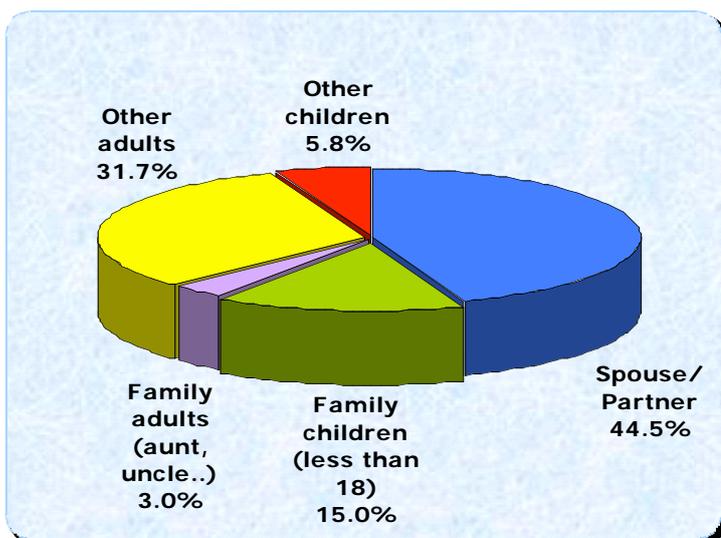
Graphic 11.2 Are you traveling alone or accompanied /Countries of origin (%)



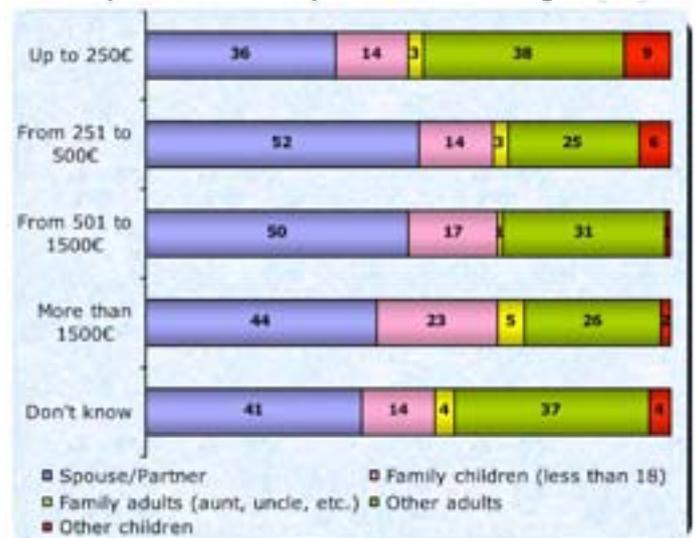
12.a If accompanied, who else is traveling with you?

More then two fifths of interviewed (44.5%) travels with partner or spouse, with other adults 31.7% and with 18 years old children travels 15.0% tourists. Tourists that are expecting to spend from 251 to 500€ every other (51.7%) travels with partner or spouse. For what was considered the number for children (until the age 18) the greatest number of interviewed (44.2%) came to Montenegro with two children.

Graphic 12.1 Co-passengers during the journey
Base n=431 (98.9%)



Graphic 12.2 Co-passengers during the journey /Expected consumption in Montenegro (%)

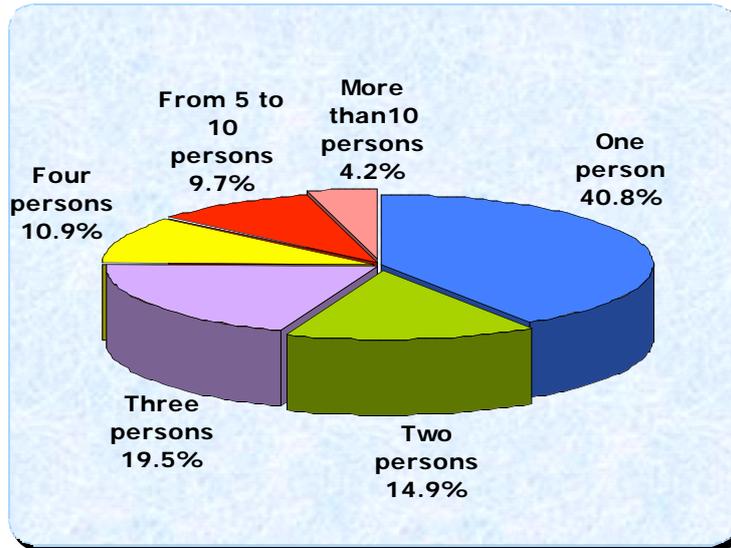


12.b Total number of persons on trip

More than two fifths (40.8%) of respondents are accompanied by one person and every fifth person is accompanied with other three persons.

12.3 Total number of persons on the journey

Base n=431 (98.9%)

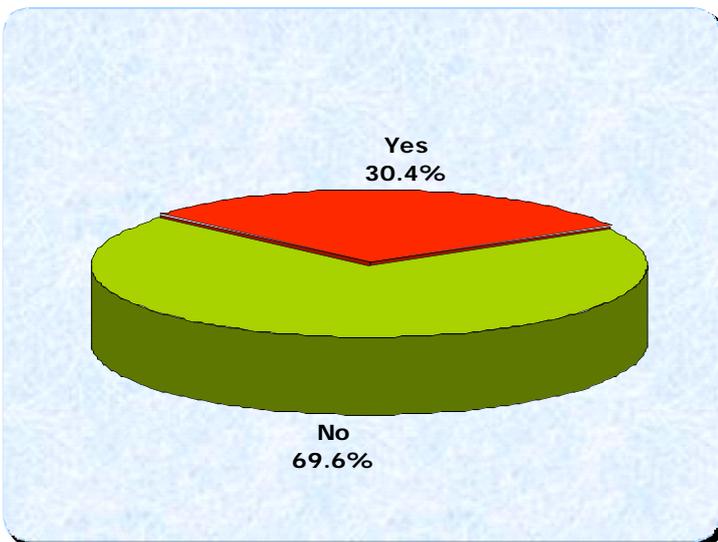


13. Apart from Montenegro are you visiting other countries on this trip?

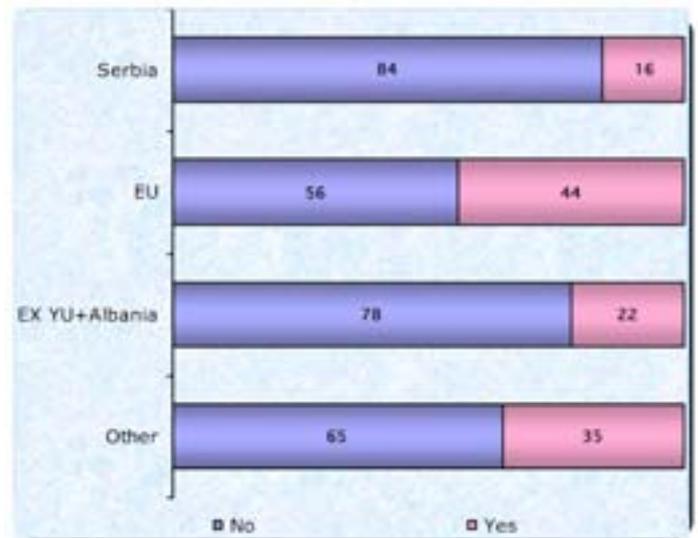
Of all respondents staying in northern Montenegro, 69.6% expect to ONLY visit Montenegro. This is especially true for tourists from Serbia and surrounding countries (Bosnia and Herzegovina, Macedonia, Croatia, and Albania). Also, it is interesting to tell that more than half of EU respondent (55.8%) do not plan to visit another destination on this trip.

Graphic 13.1 Are you visiting any other destinations

Base n=503 (100.0%)



Graphic 13.2 Are you visiting any other destinations/Countries of origin (%)



14. If yes, which countries tourists are visiting besides Montenegro?

Of those that are visiting other destinations, the majority plan to visit other countries in south and southeast Europe including Croatia (31.3%), Serbia (17.9%), Greece (7.9%) and Italy (7.5%). This data again highlights potential competitors for the tourism market in northern Montenegro.

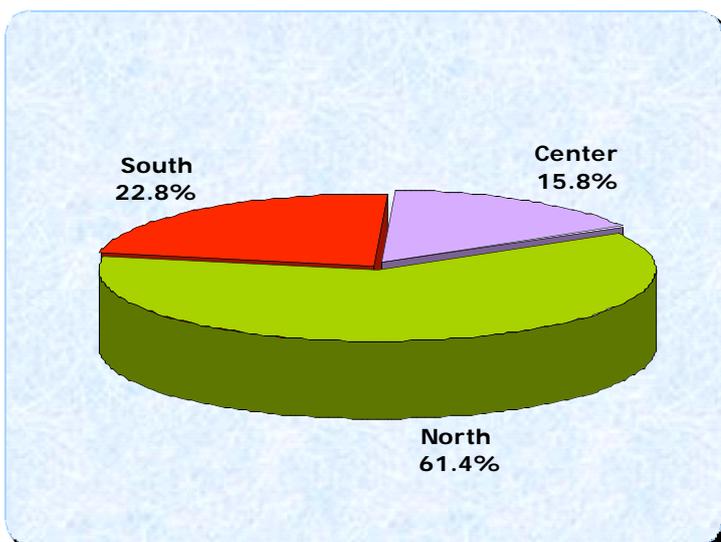
Graphic 14.1 Other destinations
Base n=151 (98.7%)



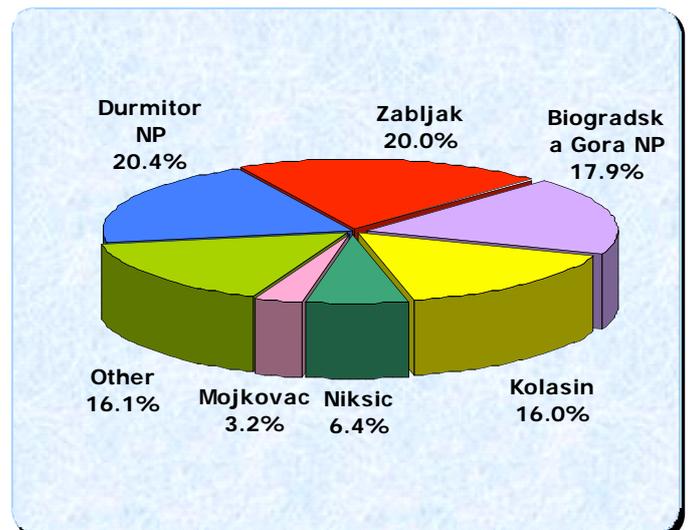
15. Which of the following places did you visit during this visit to Montenegro?

It is interesting to note the variety of destinations of tourists to northern Montenegro, most indicating visiting more than one location in the north in addition to sites in the center and south. The most popular destinations in the north were National Park Durmitor (20.4%) and Zabljak (20%), and National Park Biogradska Gora (17.9%) and Kolasin (16.0%). Of destinations in the south, the Adriatic Coast and Skadar Lake were highlighted, and in the Center Podgorica and Cetinje/Lovcen/Njegusi.

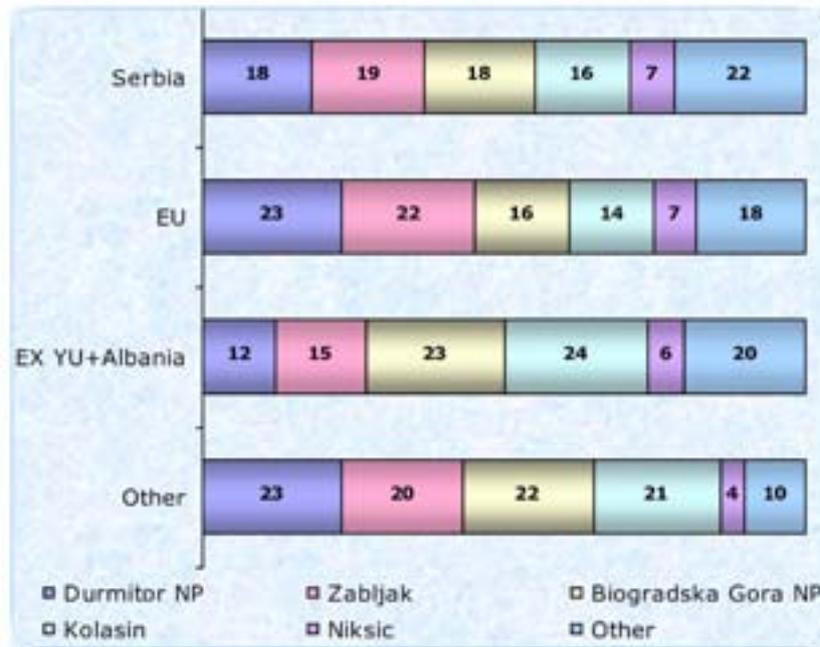
Graphic 15.1 Tourist destinations in Montenegro-region
Base n=501 (99.6%)



Graphic 15.2 Tourist destinations on the North
Base n=483 (100.0%)



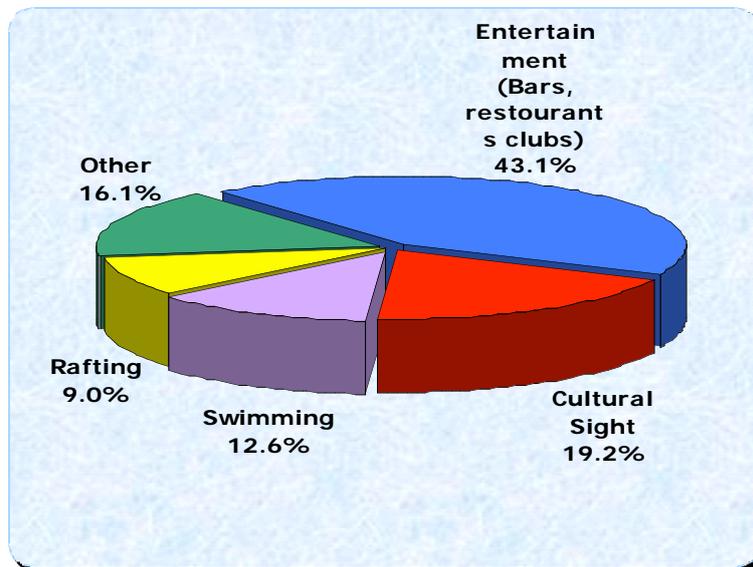
Graphic 15.3 Tourist destinations on the North /Countries of origin (%)



16. What type of activities did you do during your visit?

Data from this survey shows that tourists to northern Montenegro enjoy bars, restaurants, rafting, mountaineering etc. Namely, more than two fifths of interviewed (43.1%) during vacation like to spend time hiking, diving, making photography, fishing, hunting etc.

Graphic 16.1 The most frequent activities on the North of Montenegro
Base n=499 (99.2%)



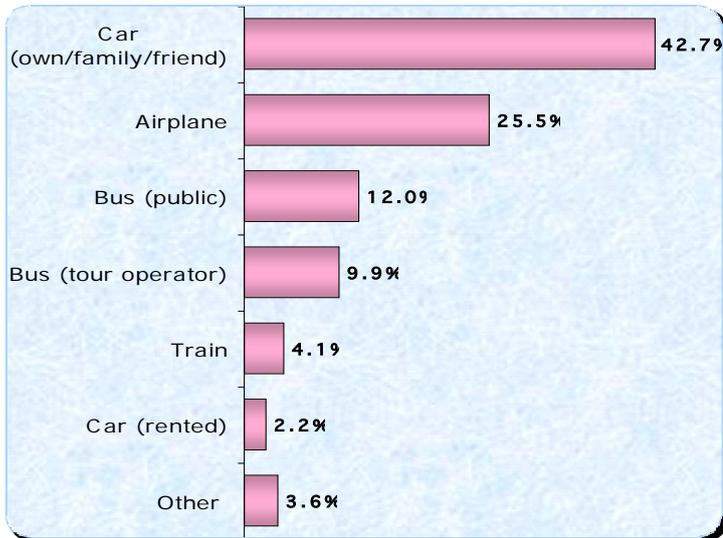
3. ORGANIZATION OF TRAVEL AND ACCOMMODATION

17.a What type of transportation did you use to get to Montenegro?

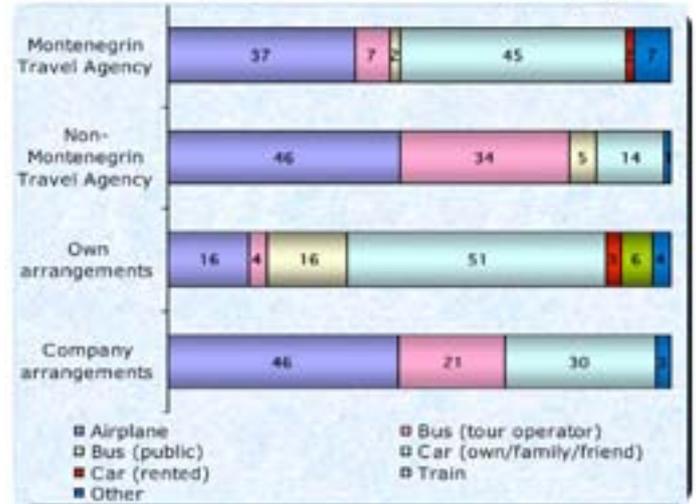
Most tourists used private cars (42.7%) or air transportation (25.5%) to travel to Montenegro. Among those tourists whose travel was organized by Montenegrin travel agencies 44.6% used private cars while 37.5% arrived by airplane.

Graphic 17.1 Form of transport to Montenegro

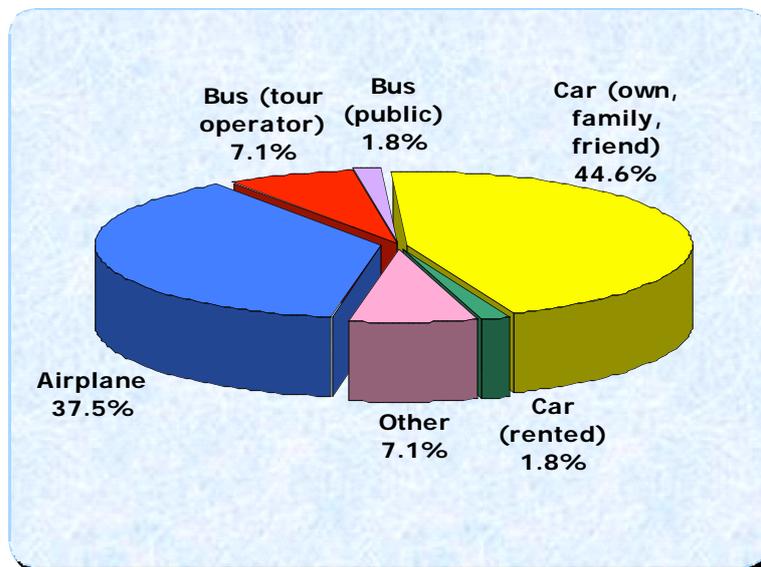
Base n=500 (99.4%)



Graphic 17.2 Form of transport to Montenegro / Journey organizer to Montenegro (%)



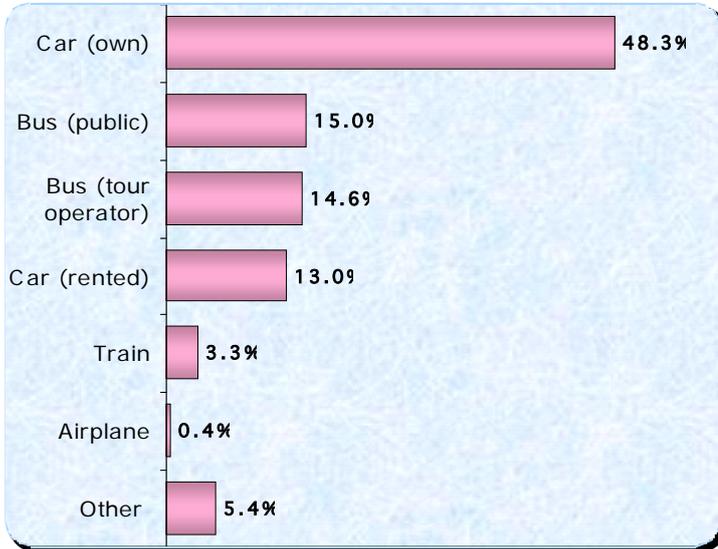
Graphic 17.3 Form of transport to Montenegro / Journey organizer to Montenegro – Montenegrin Tourist Agencies (%)



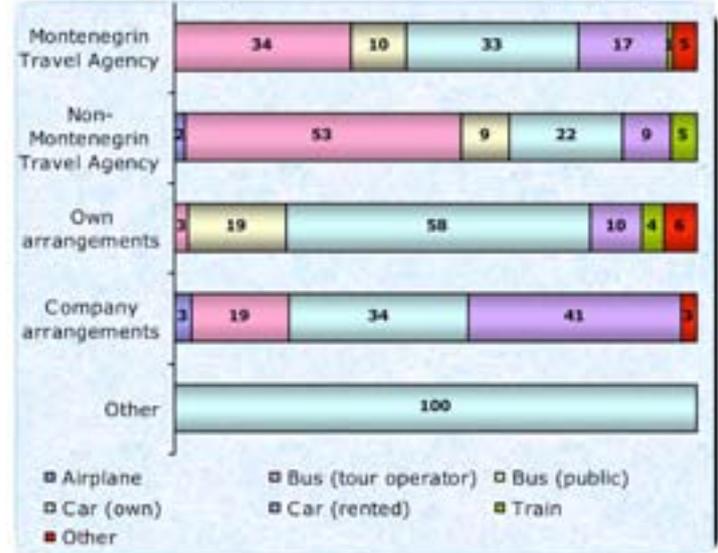
17.b What type of transportation did you use within Montenegro?

While traveling within Montenegro, tourists most often used their private car for transportation (48.3%), public buses (15.0%), tour operator buses (14.6%), or rented cars (13.0%). Among those tourists whose travel was organized by Montenegrin travel agencies a greater number used tour operator buses (34%) or rental cars (17%).

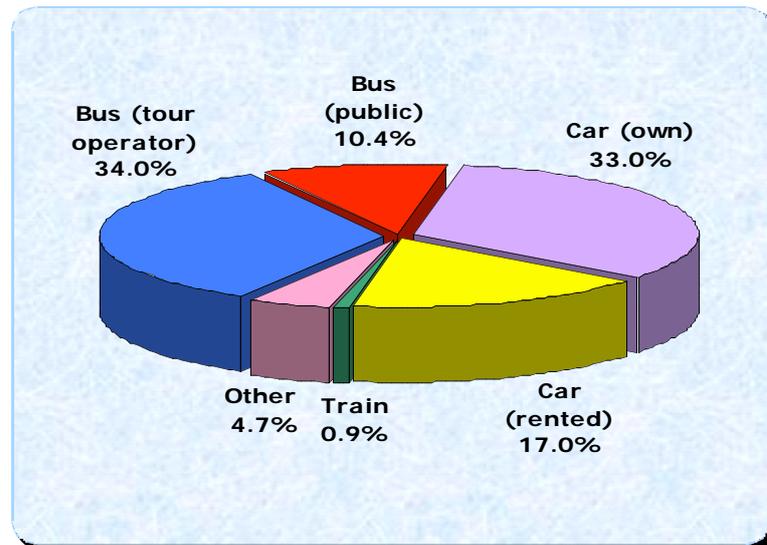
Graphic 17.4 Form of transport inside Montenegro
Base n=495 (98.4%)



Graphic 17.5 Form of transport inside Montenegro / Journey organizer inside Montenegro (%)



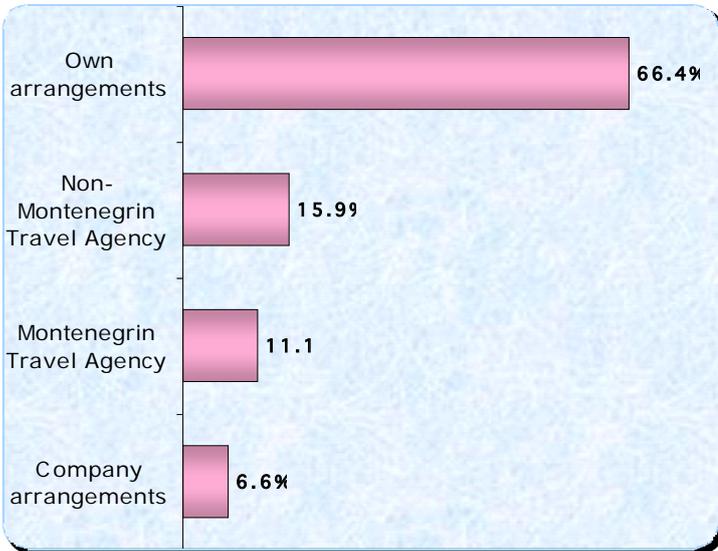
Graphic 17.6 Form of transport inside Montenegro / Journey organizer inside Montenegro - Montenegrin Tourist Agencies (%)



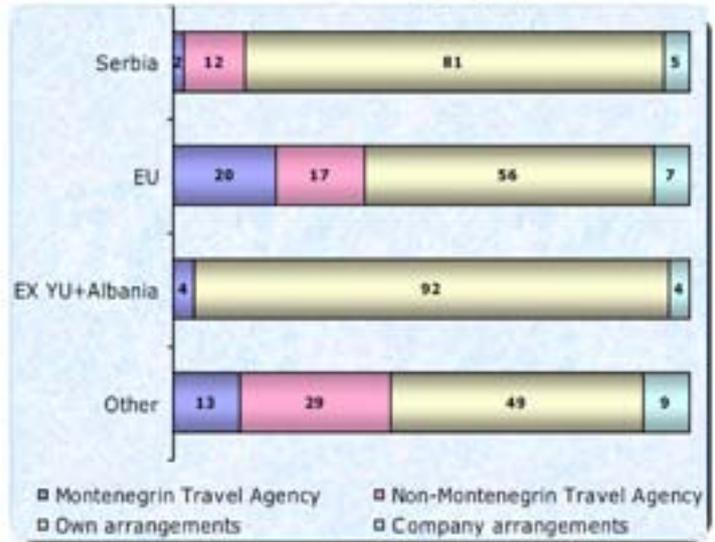
18.a Who organized your travel arrangements to Montenegro?

Most respondents organized their own travel arrangements (66.4%), although a significant number of tourists from the EU used a Montenegrin Travel Agency (20.3%).

Graphic 18.1 Arrangement organizer for Montenegro
Base n=503 (100.0%)



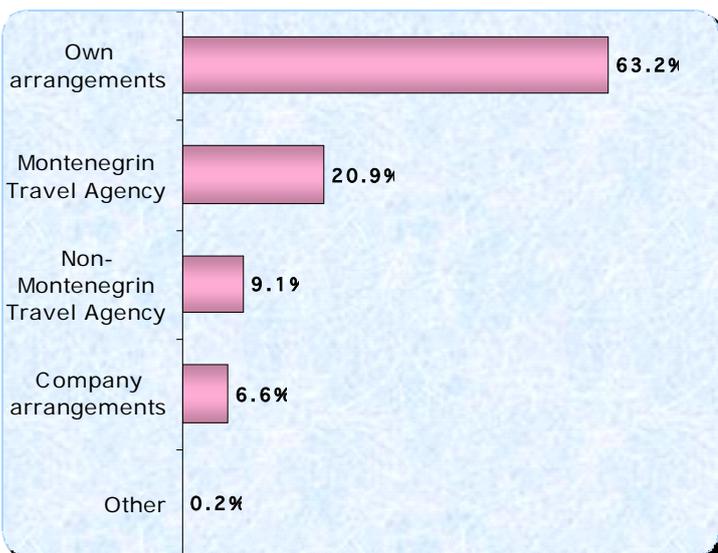
Graphic 18.2 Arrangement organizer for Montenegro /Countries of origin (%)



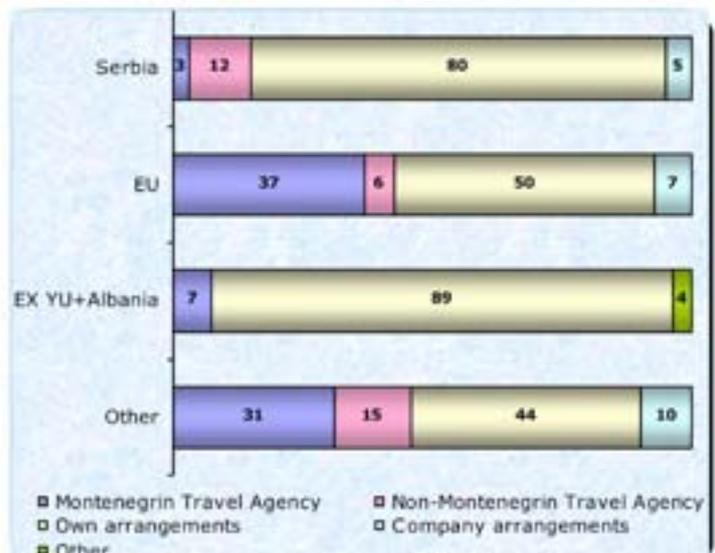
18.b Who organized your arrangements within Montenegro?

Most tourists also made their own arrangements while traveling within Montenegro (63.2%). An even greater number of tourists from the EU sought assistance from Montenegrin Travel Agencies while traveling within Montenegro (37%), and tourists from other countries, largely Russia, also utilized Montenegrin Travel Agencies (30%). These numbers show significant opportunities for Montenegrin Travel Agencies to increase their products and services targeted at EU and Russian tourists.

Graphic 18.3 Arrangement organizer inside Montenegro
Base n=503 (100.0%)



Graphic 18.4 Arrangement organizer inside Montenegro /Countries of origin (%)

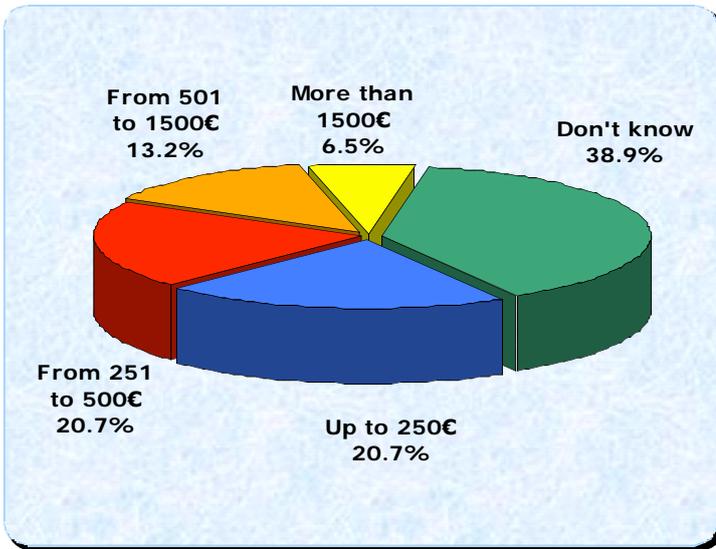


19. Approximately how much do you and your traveling companions expect to pay for your holiday in Montenegro?

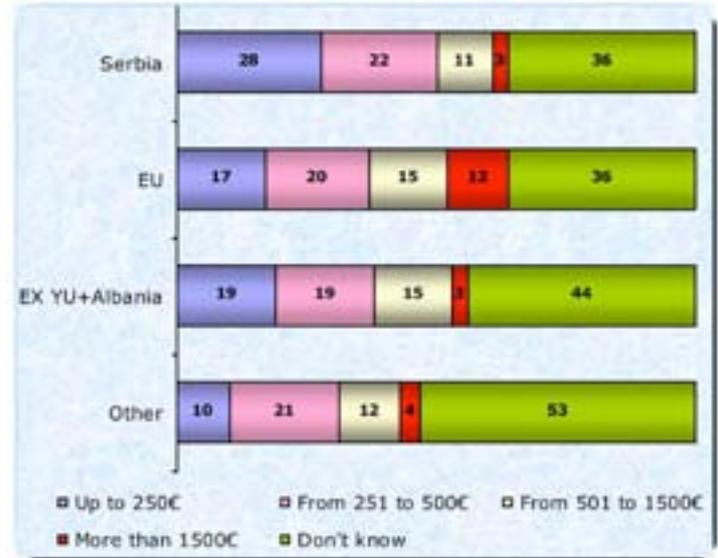
Many respondents were unable or unwilling to estimate the amount of money they anticipated spending while traveling in northern Montenegro. Of those who did respond, an equal number (20%) expected to spend up to 250€ and between 251€ and 500€. A greater number of tourists from Serbia anticipated spending less money, compared with tourists from the EU among whom 15% expected to spend 501-1500€ and 11% more than 1500€. These results provide some insight into the target markets for different types of accommodation and service providers in the north.

Graphic 19.1 Expected money consumption

Base n=478 (95.0%)



Graphic 19.2 Expected money consumption/Countries of origin (%)

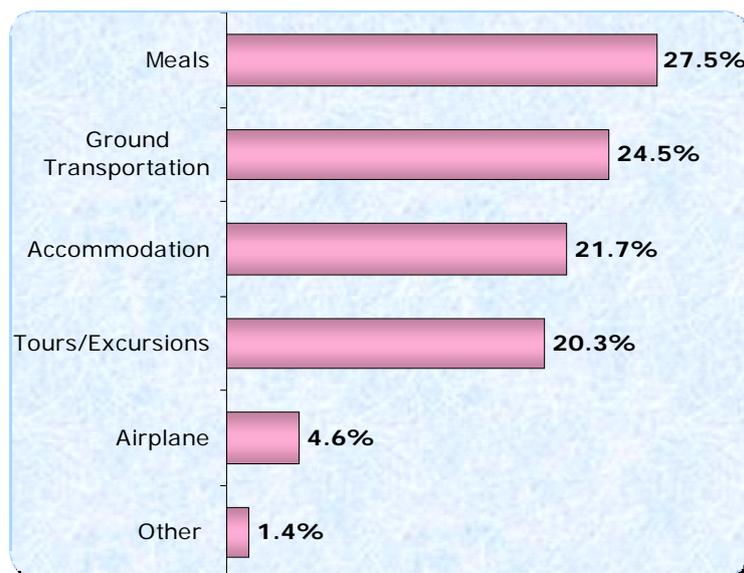


20. What do these costs include?

The greatest expenses for travelers to northern Montenegro are meals (27.5%) and transport (24.5%) followed closely by accommodation (21.7%) and tours/excursions (20.3%).

Graphic 20.1 Type of costs

Base n=301 (59.8%)

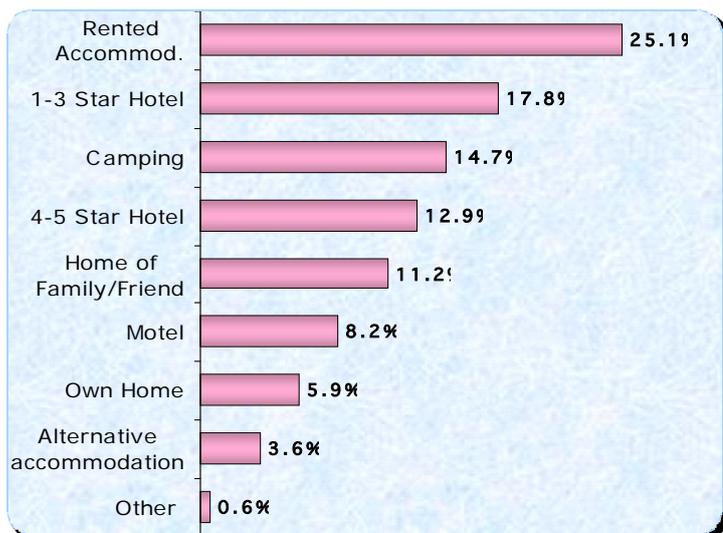


21. What type of accommodation did you choose during your stay in Montenegro?

The research has shown that every fourth respondent (25.1%) chose private accommodation and 17.8% have chosen the 1-3 star hotels. Fewer visitors opted for camping (14.7%), 4-5 star hotels (12.9%), and family or friend houses (11.2%). These numbers are consistent with the current supply of accommodation in northern Montenegro, most hotels range from 1-3 stars and many private accommodation providers have traditionally served the tourist market. Among those tourists whose travel was organized by a Montenegrin Travel Agency, more than 24% stayed in 4-5 star hotels, 28% in 1-3 star hotels and 28% in motels demonstrating both that these customers demand a higher quality of service and comfort and that Montenegrin tourist agencies are more likely to work with formal businesses than with informal or alternative accommodation providers.

Graphic 21.1 Accommodation type

Base n= 501 (99.6%)



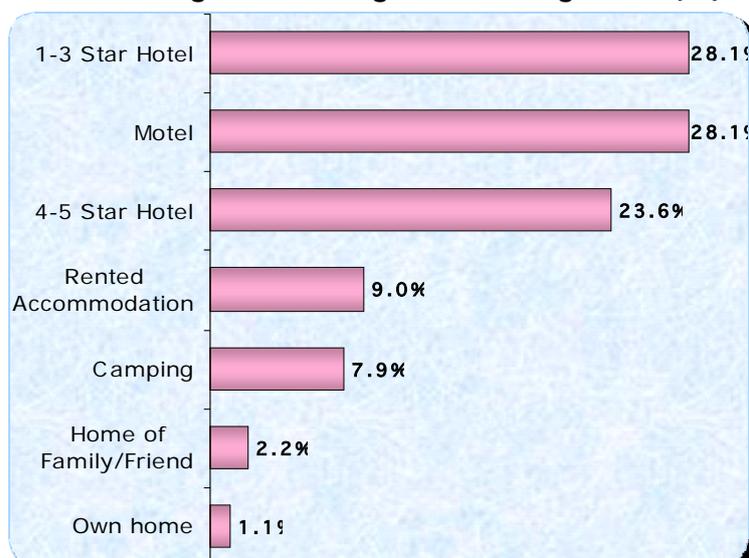
Graphic 21.2 Accommodation type/Country of origin (%)



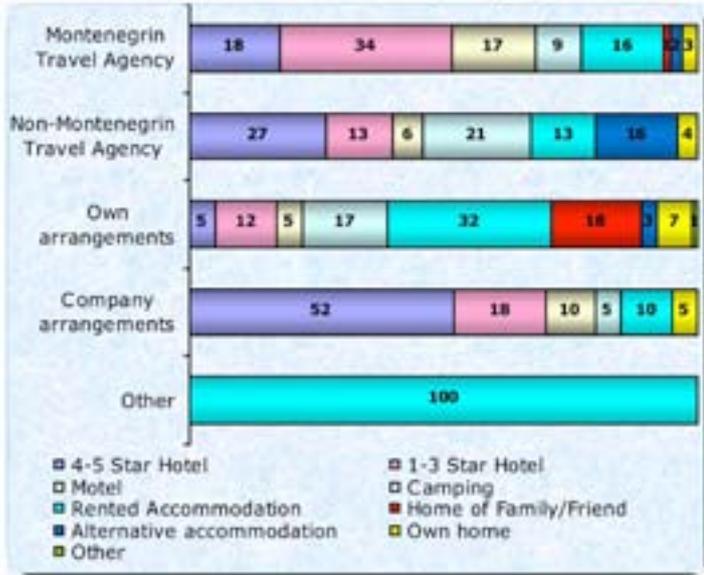
Graphic 21.3 Accommodation type /Organizer of trip to Montenegro (%)



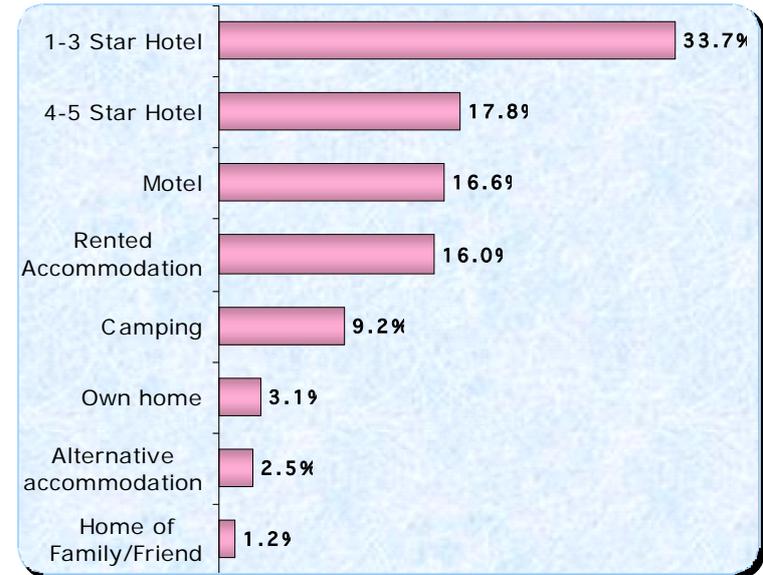
Graphic 21.4 Accommodation type/Organizer of the trip to Montenegro- Montenegrin Tourist Agencies (%)



Graphic 21.5 Accommodation type/Organizer of the trip inside Montenegro (%)



Graphic 21.6 Accommodation type/Organizer of the trip inside Montenegro- Montenegrin Tourist Agencies (%)



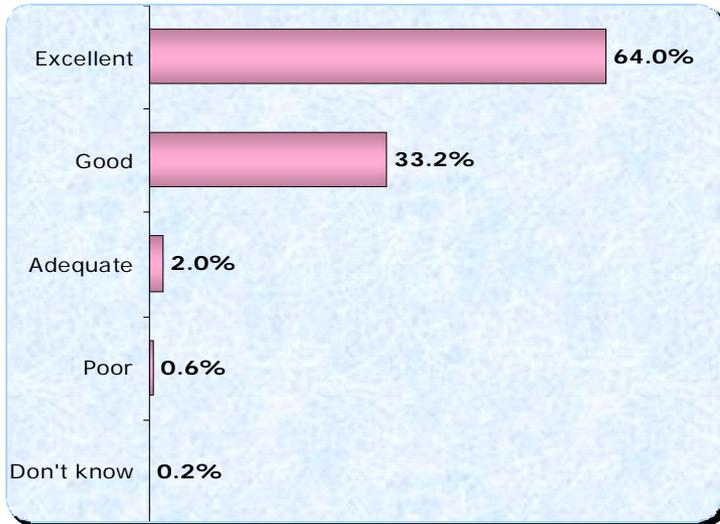
4. TOURIST OFFER QUALITY EVALUATION

22. Overall, how would you rate your stay in Montenegro?

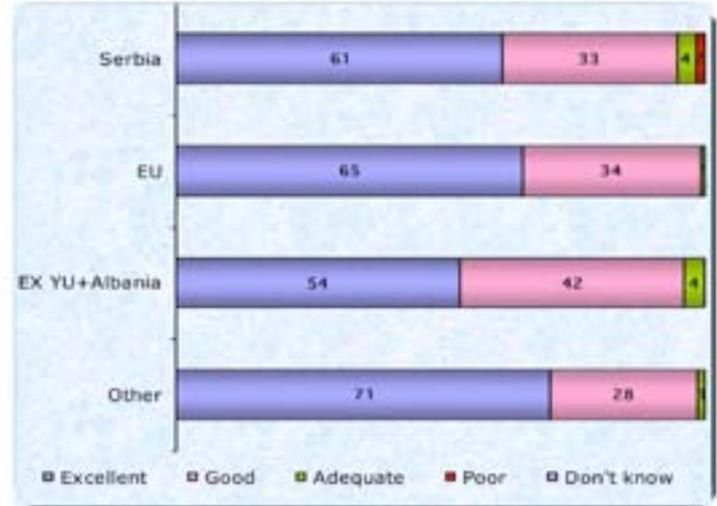
Most visitors appear very satisfied with their visits to northern Montenegro, with nearly two thirds of respondents (64.0%) evaluating their stay as "excellent" and an additional 33% rating their experience as "good".

Graphic 22.1 Evaluation of stay in Montenegro

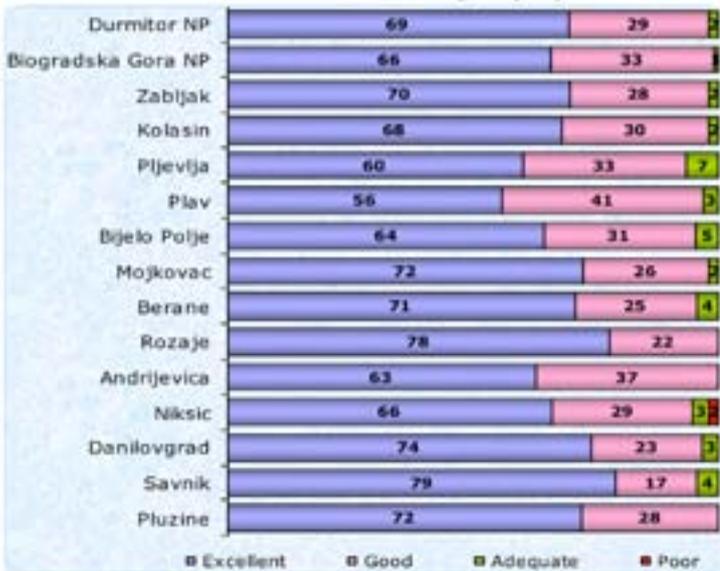
Base n= 503 (100.0%)



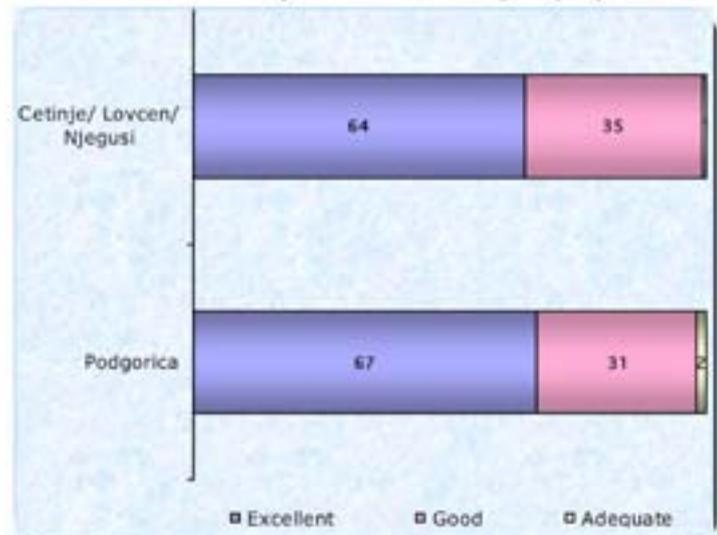
Graphic 22.2 Evaluation of stay/Country of origin (%)



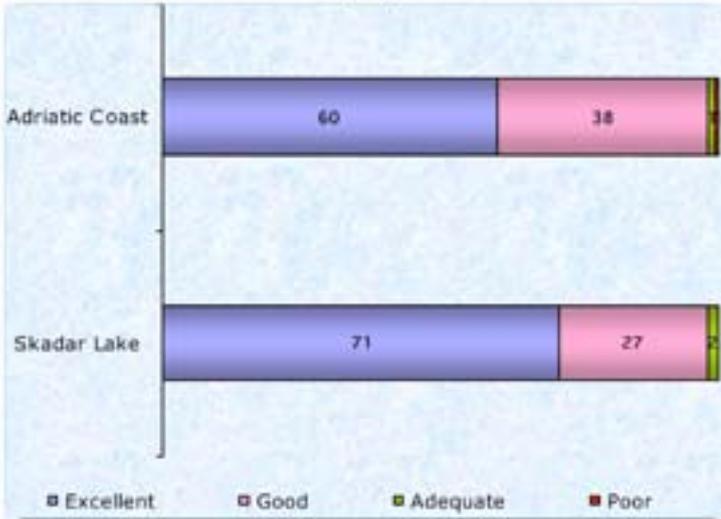
Graphic 22.3 Evaluation of stay/Place you visited in the north of Montenegro (%)



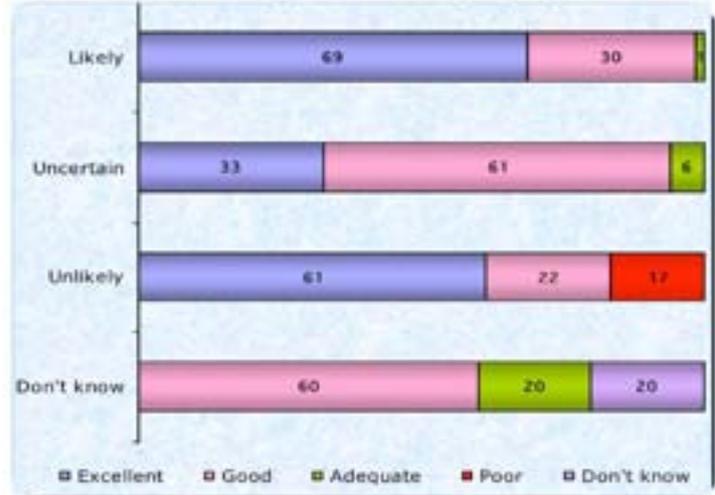
Graphic 22.4 Evaluation of stay/Place you visited in the central part of Montenegro (%)



Graphic 22.5 Evaluation of stay/Place you visited (%)



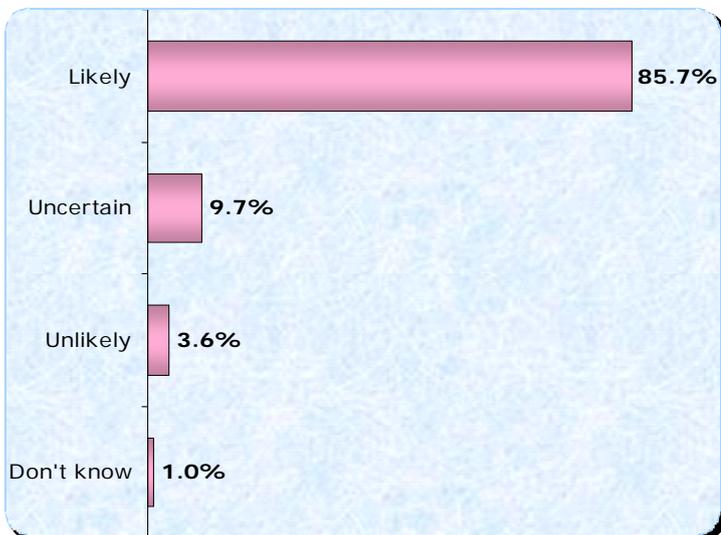
Graphic 22.6 Evaluation of Stay/ Possibility of returning to Montenegro (%)



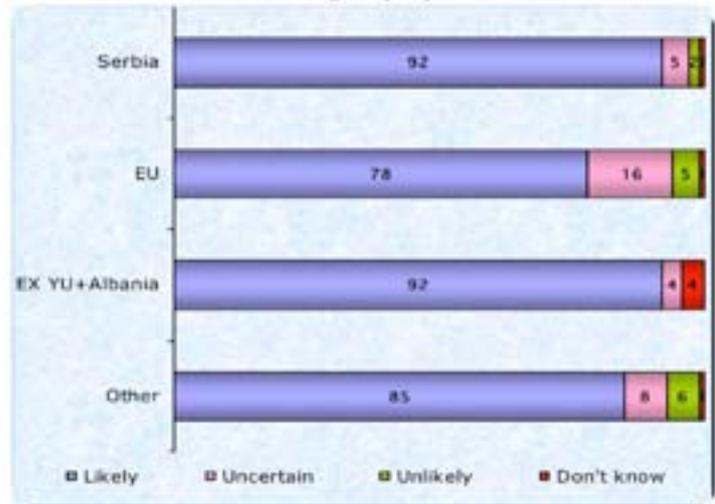
23. How likely is it that you will return to Montenegro for a tourist visit during the next five years?

Considering the fact that most interviewed tourists were satisfied with their stay in Montenegro, it is not surprising the 85.7% also responded that they will revisit Montenegro, and only 9.7% responded that they are not sure whether they will return again or not. Although the highest percentages of anticipated return visits were among tourists from Serbia and other countries in the region, respondents from the EU also showed significant interest with 78% indicating a likelihood of returning in the next five years.

Graphic 23.1 Revisit to Montenegro
Base n= 503 (100.0%)



Graphic 23.2 Revisit to Montenegro /Countries of origin (%)

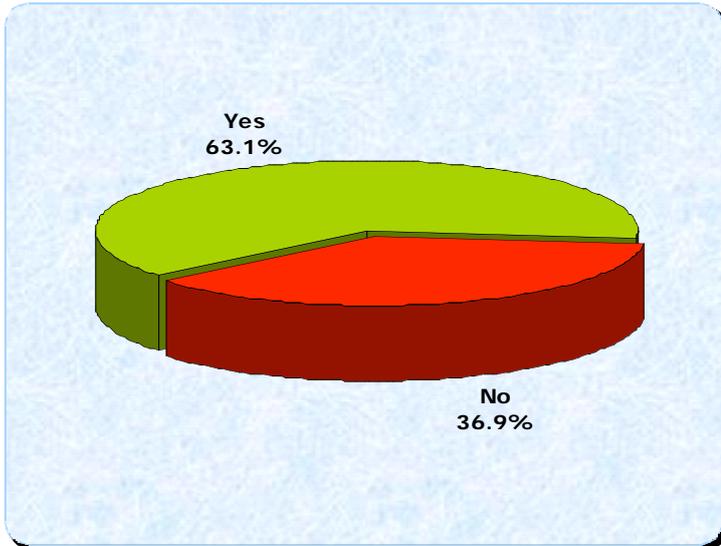


24. Would you like to visit Montenegro during the winter season?

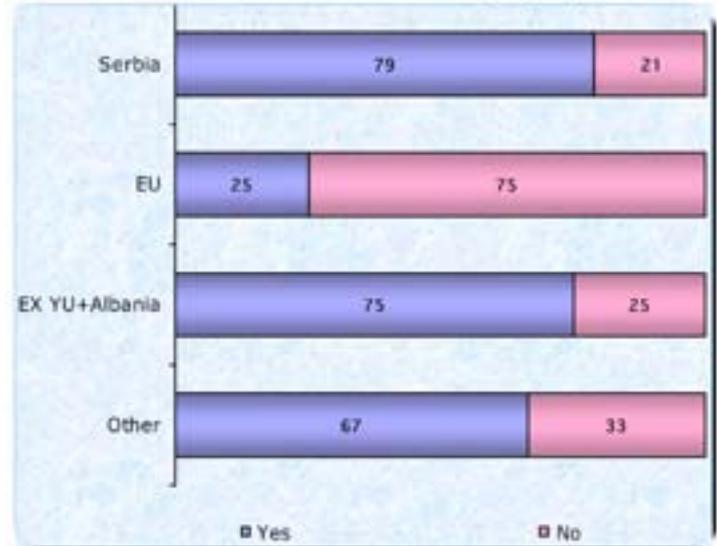
63.1% of respondents visiting northern Montenegro in August expressed a willingness to return during the winter season, while 36.9% of them answered that they are not interested in visiting Montenegro during the winter season. Visitors from the EU were an exception, with 75% indicating they were not interested in visiting Montenegro during the winter season. When compared by age, young visitors between the ages of 15-19 expressed the most interest (85%) in returning during the winter season.

Graphic 24.1 Visit during the winter season

Base n=496 (98.6%)



Graphic 24.2 Visit during the winter season/Countries of origin(%)

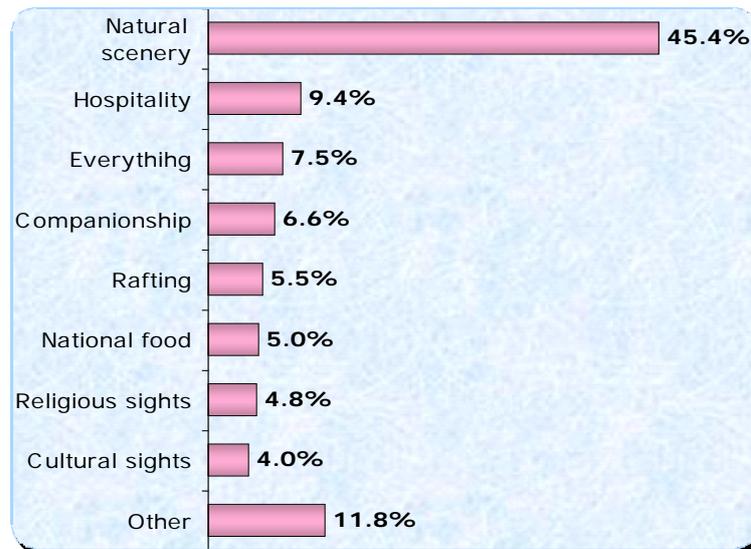


25. When you leave, what you will take as your best memory of Montenegro?

When asked to describe their best memory of northern Montenegro, an overwhelming 45.4% of respondents indicated natural scenery followed by hospitality (9.4%).

Graphic 25.1 what will you take as your best memory of Montenegro

Base n=448 (89.1%)

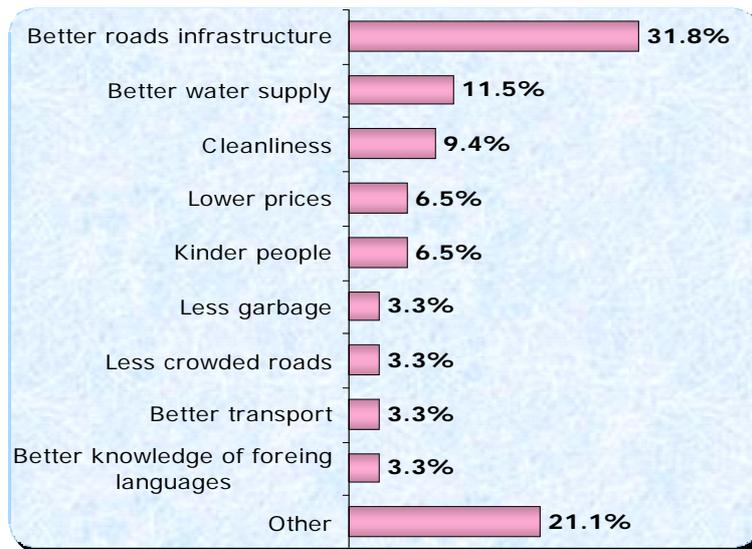


26. What could have made your trip more enjoyable?

Respondents were also asked to suggest areas for improvement; unsurprisingly the top response was road infrastructure (31.8%), followed by water supply (11.5%), cleanliness (9.4%), and hospitality of employees (6.5%). Prices levels (6.5%), transportation (3.3%), knowledge of foreign languages (3.3%) were also seen as negative while 3.3% of them evaluated roadside litter as needing improvement.

Graphic 26.1 What could have made your trip more enjoyable

Base n=235 (46.7%)



27. How would you rate the quality of the following Montenegrin tourist services in the North of Montenegro?

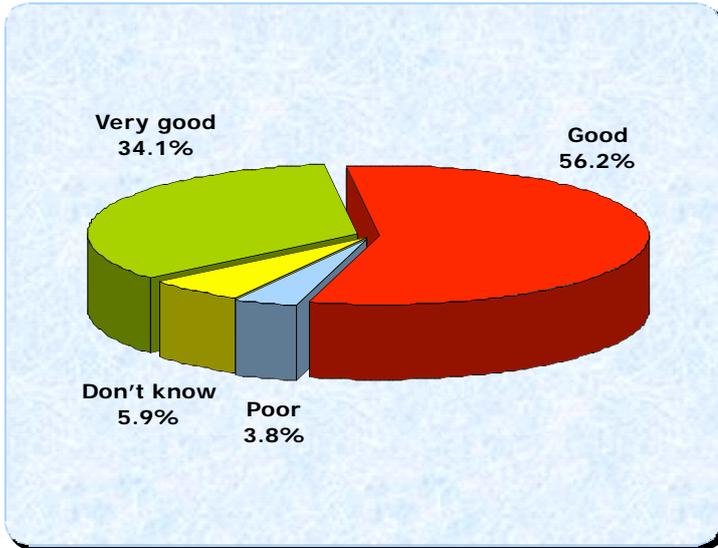
Respondents were asked to rate a series of tourist services on a scale of 1-5, with one indicating poor and 5 indicating very good. Overall respondents rated tourist services in northern Montenegro well. Respondents gave National Parks the highest rating of 4.63, followed by cultural and historic monuments (4.27) and accommodation (4.21). In contrast local transportation fared poorly with a rating of only 3.30. The following table provides the complete results:

	Rate indicator
National parks	4.63
Cultural-historical monuments	4.27
Accommodation	4.21
Restaurant/bar/café	4.16
Recreation activities	4.12
Beaches	4.11
Tour operator/Tourist agent	3.80
Souvenir/similar items	3.80
Guide services	3.68
Shopping	3.50
Local transport	3.30

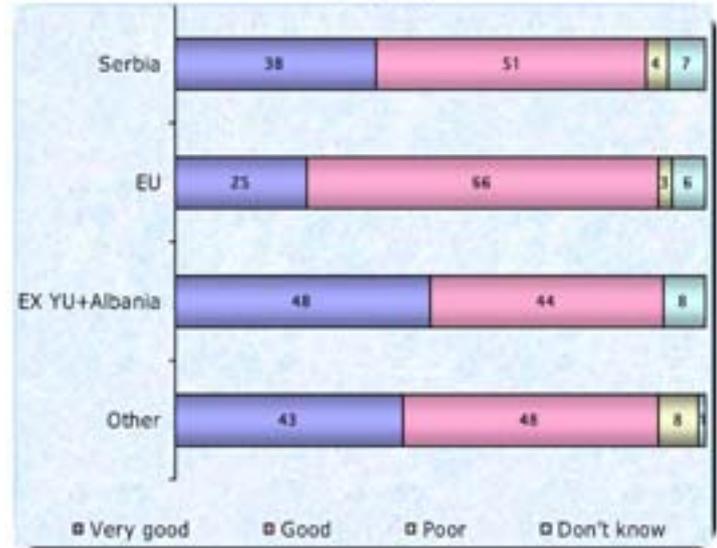
When observing specific services and assets in more detail, it is interesting to note that respondents from the EU were less likely to rate accommodation as “very good” (26%) compared with respondents from Serbia (38%) and Ex-Yugoslavia and Albania (48%). This may indicate both different types of accommodation choice and a different level of expectation on behalf of European visitors who may be accustomed to a higher level of service and quality. When asked about Montenegrin Tourist Agencies, visitors from the EU and Ex-Yugoslavia and Albania agreed that they were “good” while those from Other Countries category, including Russia, were more likely to state that they were “very good”. These differences may indicate that tourism agencies targeting the Russian market are more successful at meeting the needs of their clients.

Graphic 27.1 Accommodation rate

Base n=495 (98.4%)

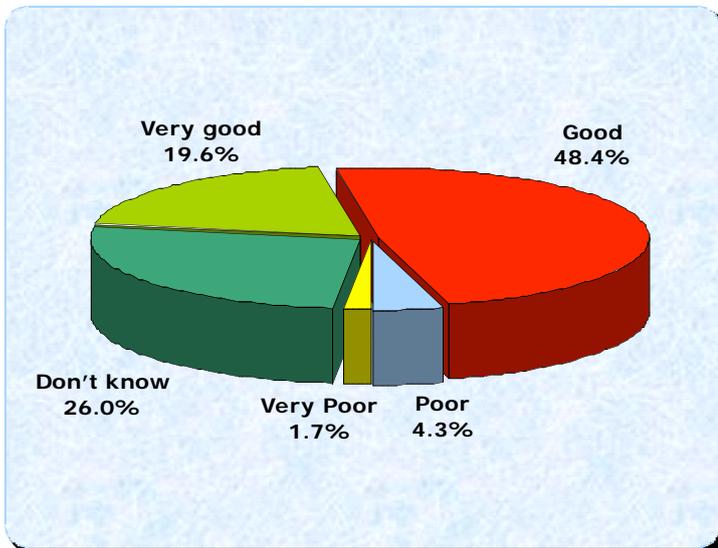


Graphic 27.2 Accommodation rate /Countries of origin (%)

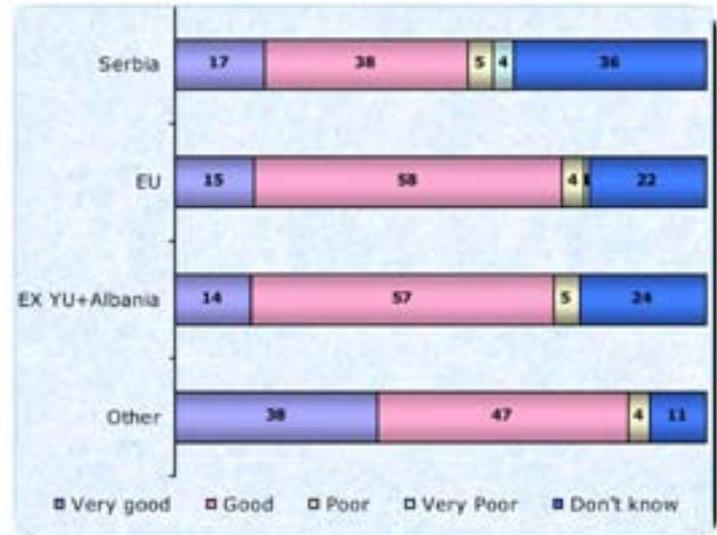


Graphic 27.3 Tour operator-travel agent

Base n=469 (93.2%)

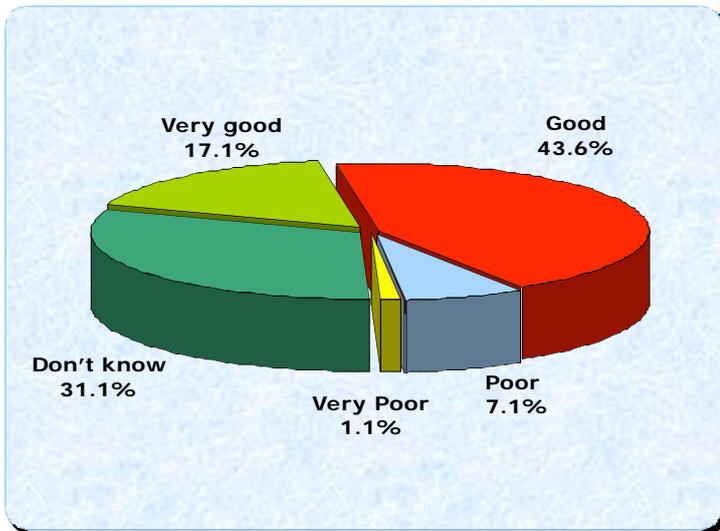


Graphic 27.4 Tour operator-travel agent /Countries of origin (%)

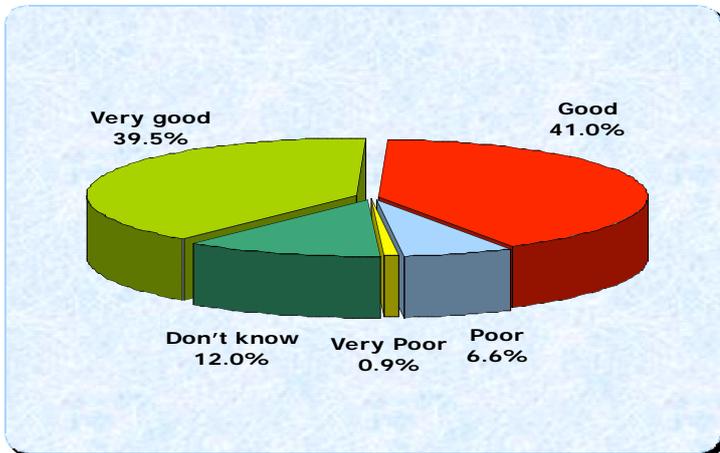


When comparing guide services, nearly half of respondents from Serbia answered “don’t know” an indication that many of these tourists are not aware of or do not use this tourism service in the north. In contrast, visitors from the European, Ex-Yugoslavia and Albania and Other Countries category generally agreed that guide services were good or very good. These responses indicate that many of these visitors are likely referring to tour guides at cultural/historic attractions or those affiliated with a tourism agency and not mountain guides – which we know to be a nascent profession in northern Montenegro. Future research will differentiate these groups for better analysis. Finally, recreational activities received very good marks with ratings of good (41%) and very good (39.5%) and similar responses among all populations.

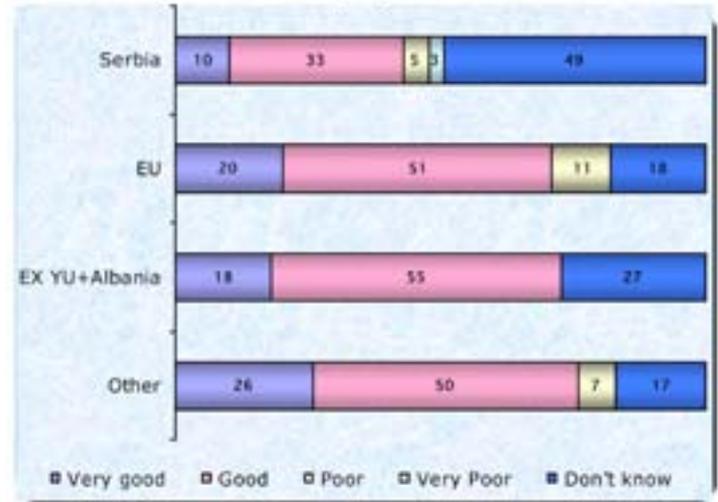
Graphic 27.5 Guide service rate
Base n=463 (92.0%)



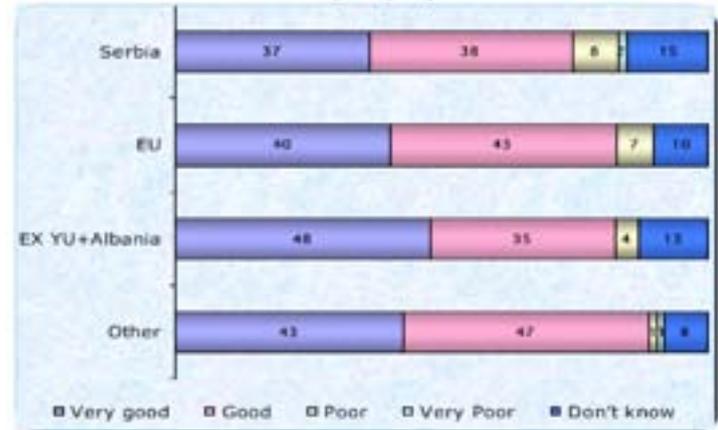
Graphic 27.7 Recreation activities rate
Base n=468 (93.0%)



Graphic 27.6 Guide service rate /Countries of origin (%)



Graphic 27.8 Recreation activities rate/Countries of origin (%)



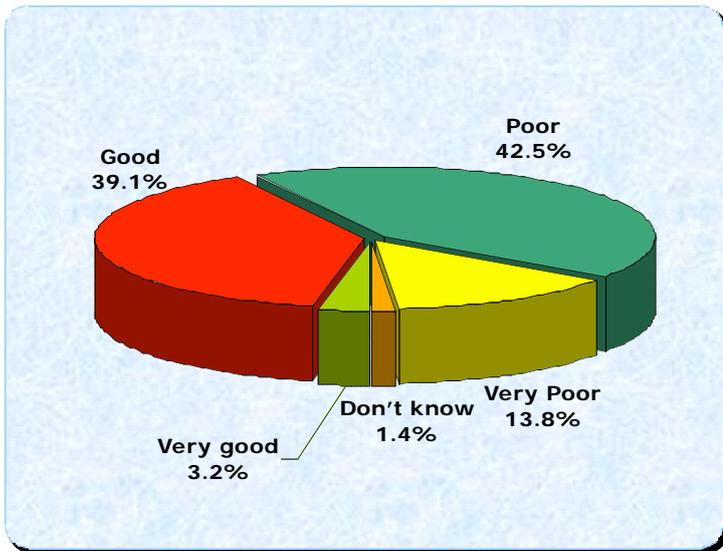
28. How would you rate the general tourism environment in Montenegro?

Respondents were also asked to rate different aspects of the tourism environment on a scale of 1-5, with one indicating "poor" and 5 indicating "very good". Overall, respondents rated the tourism environment in northern Montenegro positively. Montenegrin hospitality received the highest rating of 4.22, followed by indoor cleanliness at 4.00 and customer service at 3.77. Infrastructure received the worst rating at 2.75 followed closely by outdoor cleanliness at 3.18 – echoing previous responses. The following table provides the complete results:

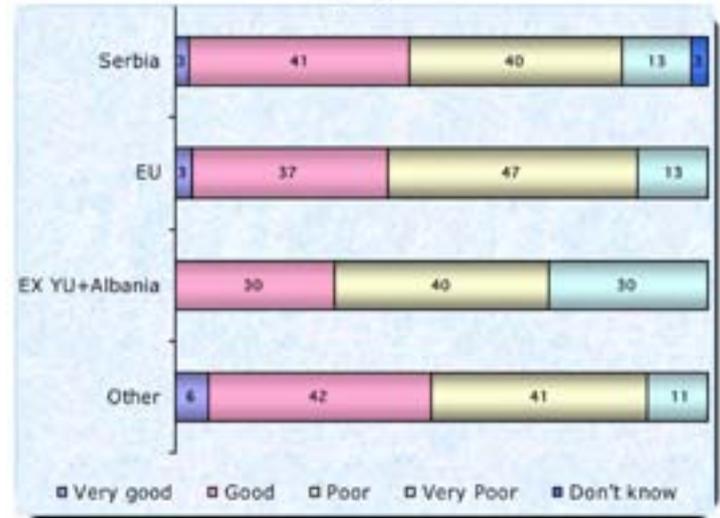
	Rate indicator
Inhabitant hospitality	4.22
Cleanliness (inside)	4.00
Employee services toward consumers	3.77
Information on tourist services	3.73
Signs and addresses/directions	3.50
Protection and emergency services	3.51
Employee's knowledge of foreign languages	3.35
Cleanliness (outside)	3.18
Infrastructure (roads, water, etc.)	2.75

Visitors to northern Montenegro gave poor marks to road and water infrastructure and outdoor cleanliness. Tourists from the EU rated these aspects of the tourism environment even more harshly with 64% stating infrastructure was poor or very poor and 49% agreeing that the outdoor cleanliness was poor or very poor.

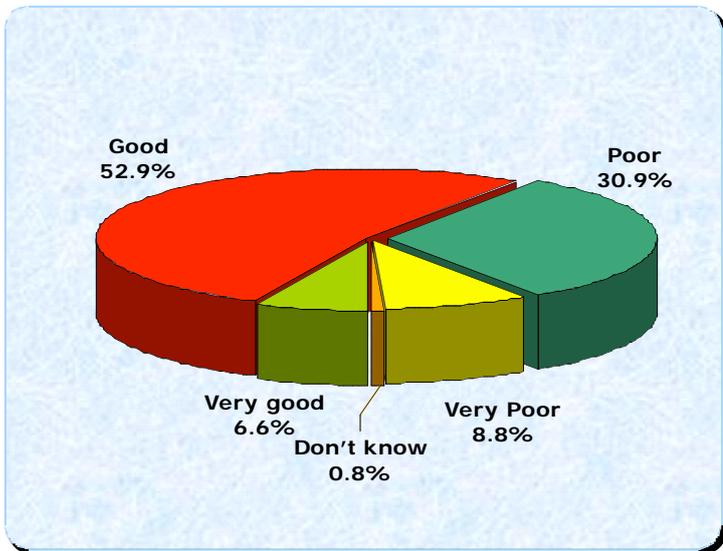
Graphic 28.1 Infrastructure rate
Base n=501 (99.6%)



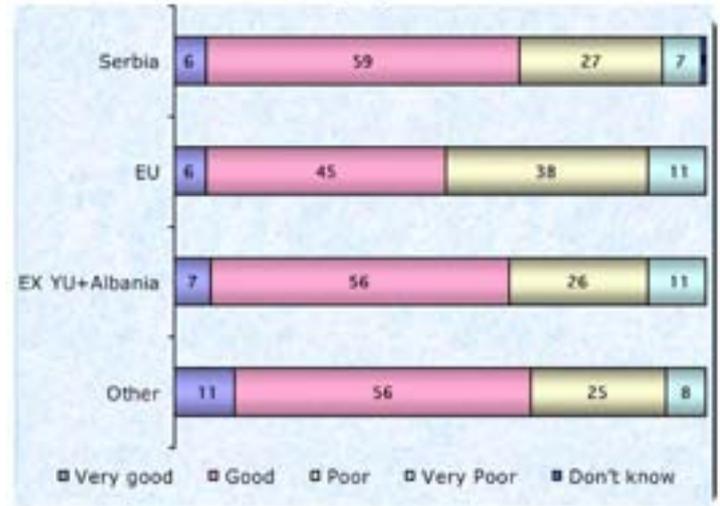
Graphic 28.2 Infrastructure rate/Countries of origin (%)



Graphic 28.3 Cleanliness rate(outside)
Base n=501 (99.6%)



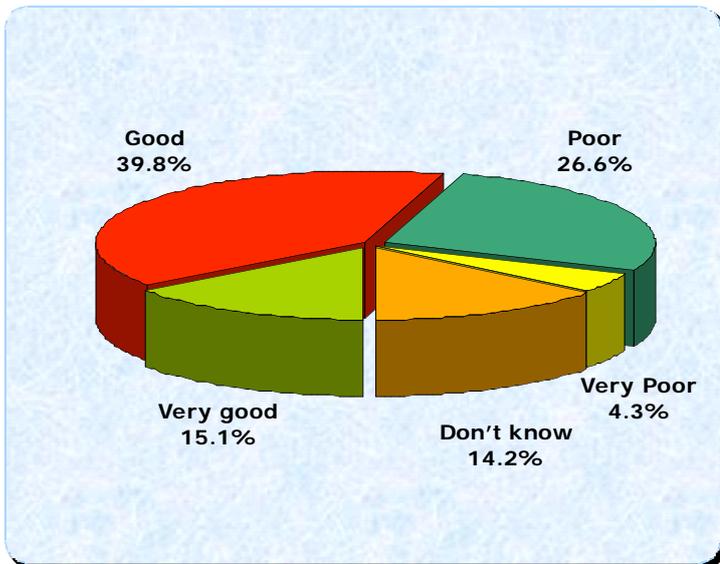
Graphic 28.4 Cleanliness rate/Countries of origin (%)



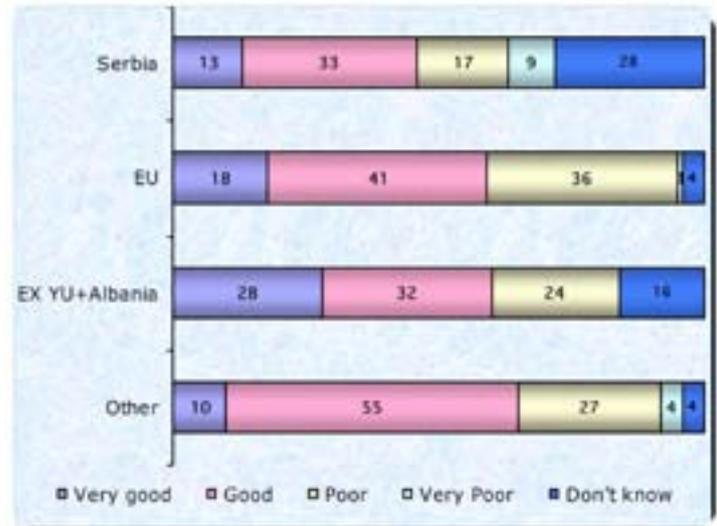
Montenegrin hospitality was given the highest rating, with 88% of respondents rating it as “good” or “very good.” Responses were similar among visitors from all countries of origin. Knowledge of foreign languages received relatively good ratings as well. When observing visitors from EU countries nearly 60% rated foreign language skills as good or very good, while only 37% gave a rating of “poor” or “very poor”. Responses were similar for visitors from Other Countries category, including Russia, who indicated satisfaction with language skills 65% of the time, and dissatisfaction only 31% of the time.

Graphic 28.5 Rate of foreign language knowledge of tourist workers

Base n=485 (96.4%)

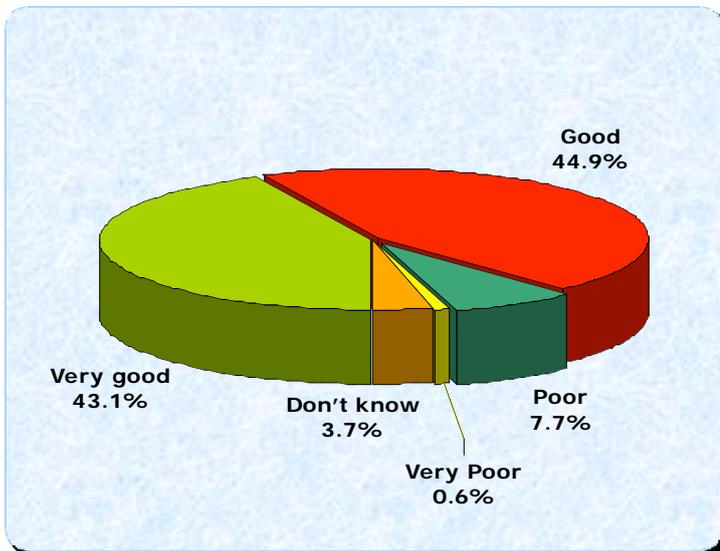


Graphic 28.6 Rate of foreign language knowledge of tourist workers/Countries of origin (%)

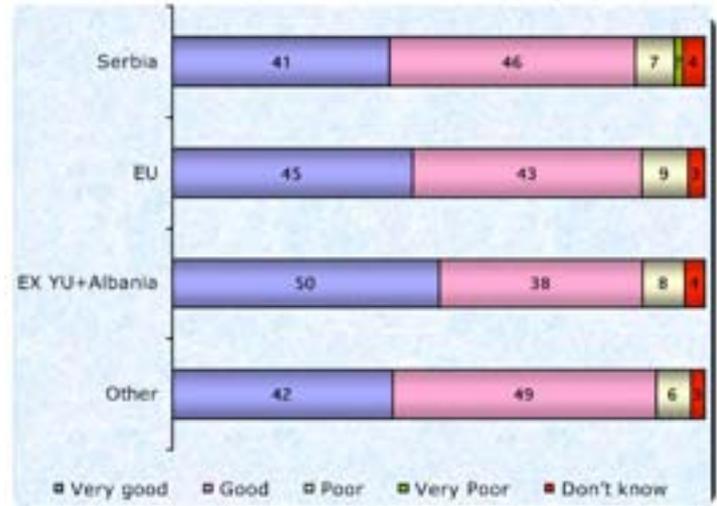


Graphic 28.7 Rate of inhabitant hospitality

Base n=483 (96.0%)



Graphic 28.8 Rate of inhabitant hospitality/Countries of origin (%)



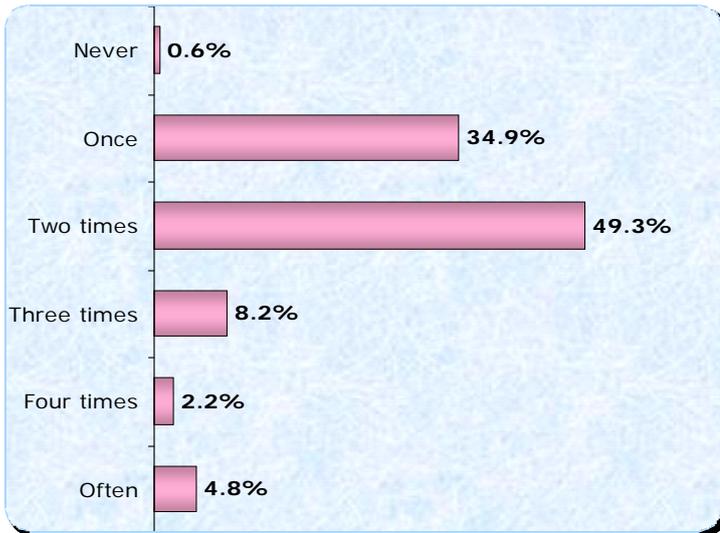
5. VISITORS' HABITS

29. On average, how many times do you travel for a holiday per a year?

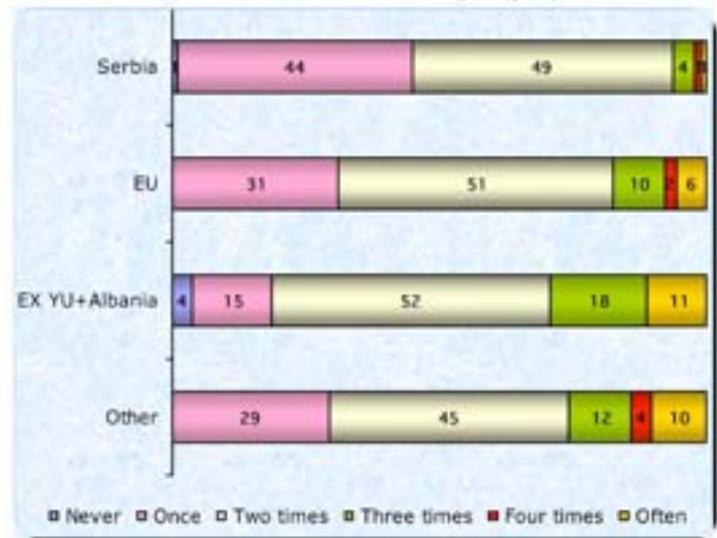
To better understand the profile of tourists in Montenegro, respondents were asked several questions about their travel habits. 49.3% of respondents travel twice per year and 34.9% typically travel only once per year. The numbers are similar among all countries of origin with tourists from Ex-Yugoslavia and Albania indicating a greater likelihood of traveling two or more times during one year.

Graphic 29.1 Average number of holidays during the year

Base n=499 (99.2%)



Graphic 29.2 Average number of holidays during the year/Countries of origin (%)

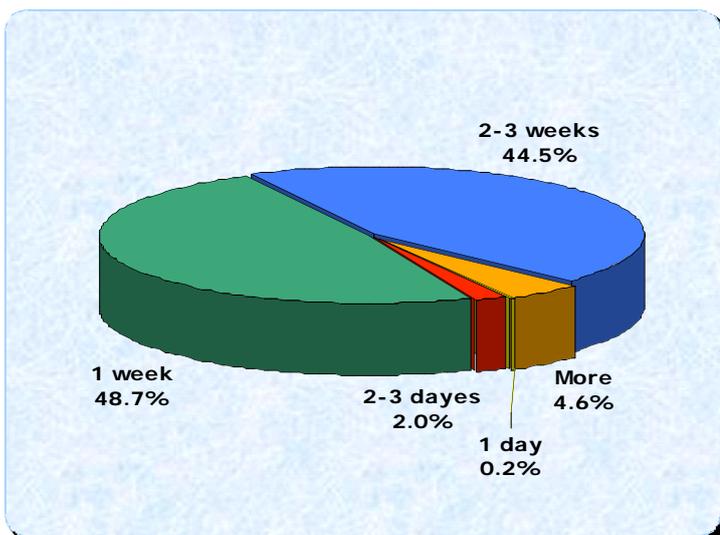


30. On average, how much time do you spend on one holiday?

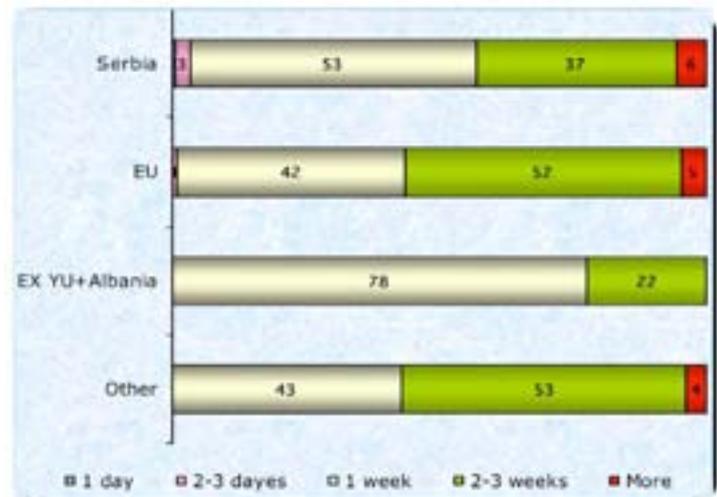
The majority of tourists, 48.7%, spend one week on vacation and 44.5% of respondents spend 2-3 weeks. Residents of the EU and Other Countries category, including Russia, are more likely to spend 2-3 weeks on holiday.

Graphic 30.1 Average time spent on one holiday

Base n=501 (99.6%)



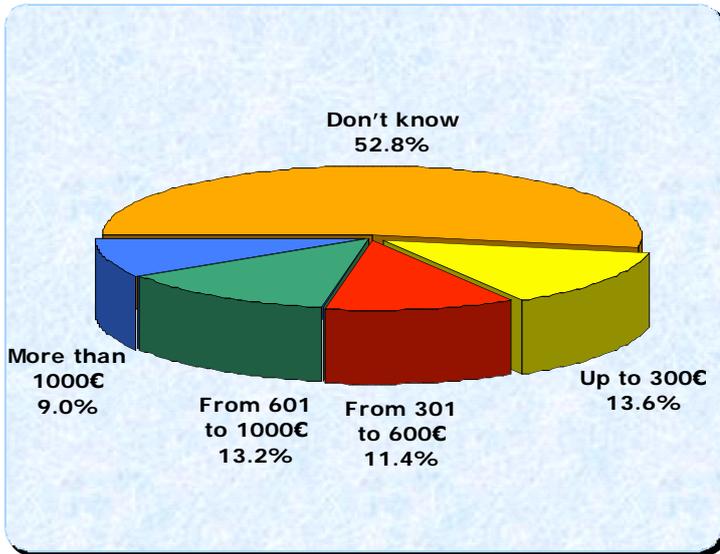
Graphic 30.2 Average time spent on one holiday /Countries of origin (%)



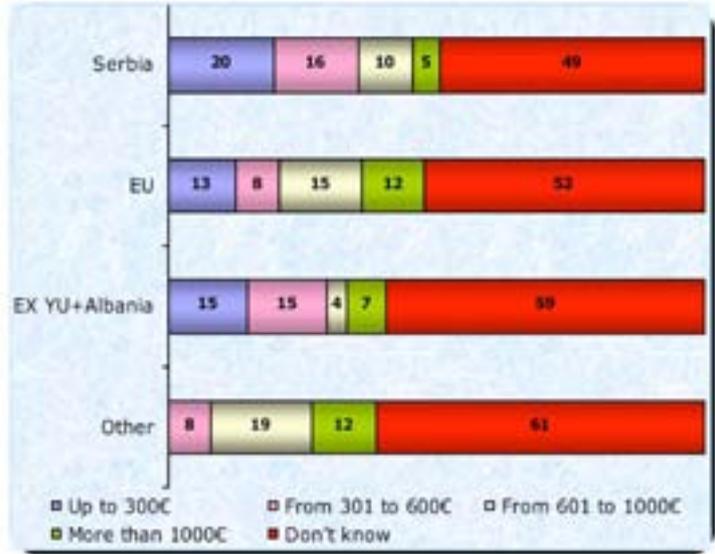
31.a At average, how much money do you spend on your holiday?

Most respondents did not know or were unwilling to share the amount of money they spend on vacations each year. However, among those who did respond the estimates were evenly split among low, middle and high amounts. When observing by country of origin, it appears that tourists from the EU and Other Countries category, including Russia, were more likely to spend more than 600€.

Graphic 31.1 Average money spending on a holiday
Base n=500 (99.4%)



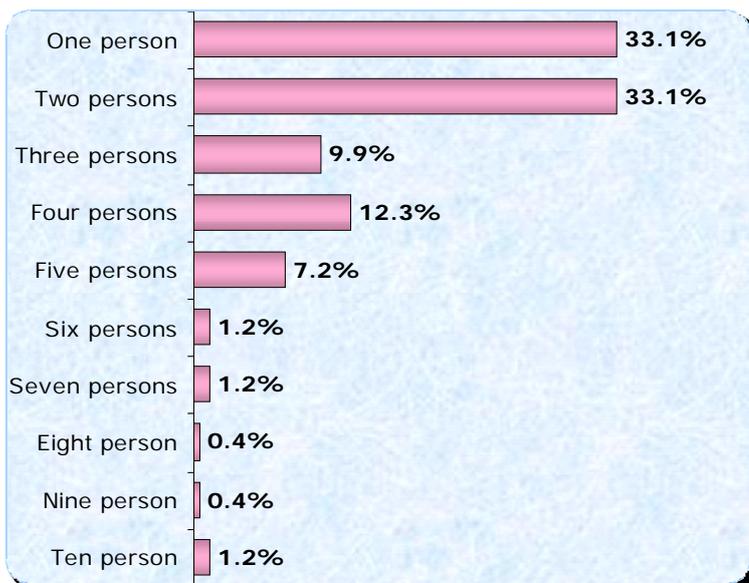
Graphic 31.2 Average money spending on a holiday /Countries of origin (%)



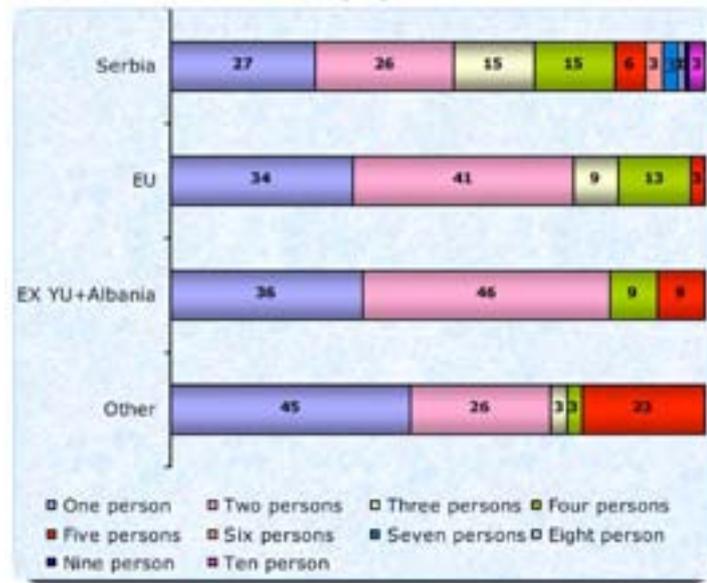
31.b Average number of persons you spend your holiday with?

The greatest number of respondents spend their holiday with one or two other persons (33.1% respectively). It appears that respondents from Serbia are more likely to travel with larger groups compared with respondents from the EU or other Ex-Yugoslav countries and Albania.

Graphic 31.3 Average number of persons you spend your holiday with
Base n=251 (49.9%)



Graphic 31.4 Average number of persons you spend your holiday with /Countries of origin (%)

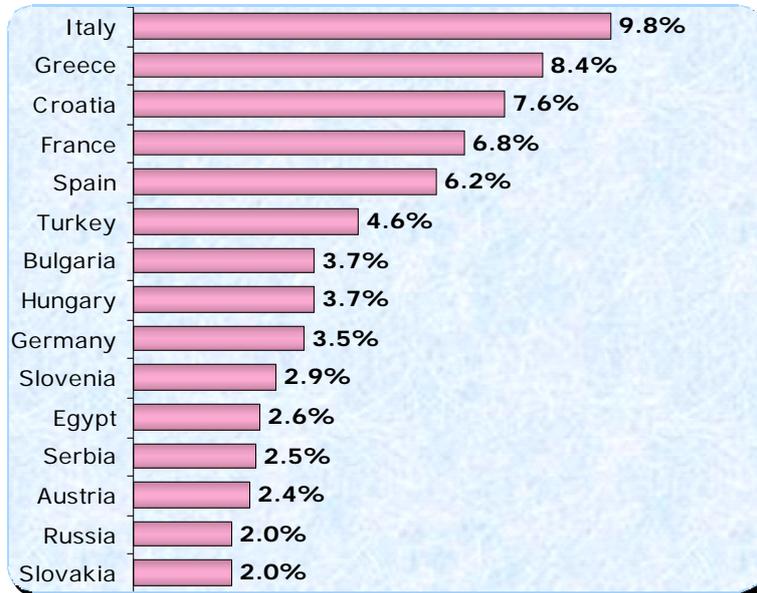


32. What other destinations have you visited in the last five years?

Respondents indicated a wide variety of different locations visited over the past five years. Among these, the most common answers were Italy (9.8%), Greece (8.4%), Croatia (7.6%), France (6.8%), Spain (6.2%) and Turkey (4.6%).

Graphic 32.1 15 most visited destinations in the last 5 years

Base n=344 (68.4%)

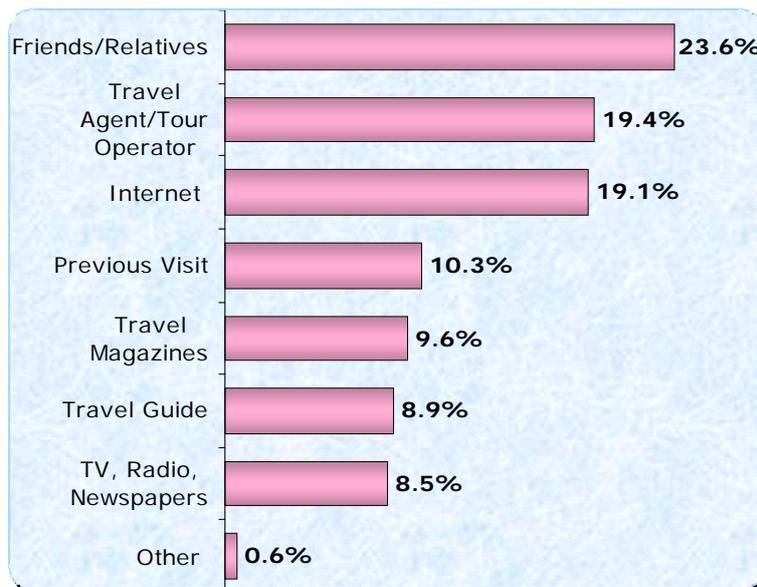


33. What are your general sources of tourist information?

A variety of information sources can be important for building a destinations image. The most frequent sources of information cited by respondents are family or friend recommendations (23.6%), tourist agencies (19.4%) and internet sites (19.1%). It is exciting to see the internet as a significant source of information on northern Montenegro, given the increasing importance of this medium of communication to the worldwide travel industry.

Graphic 33.1 The most frequent sources of information

Base n=501 (99.6%)



PART II

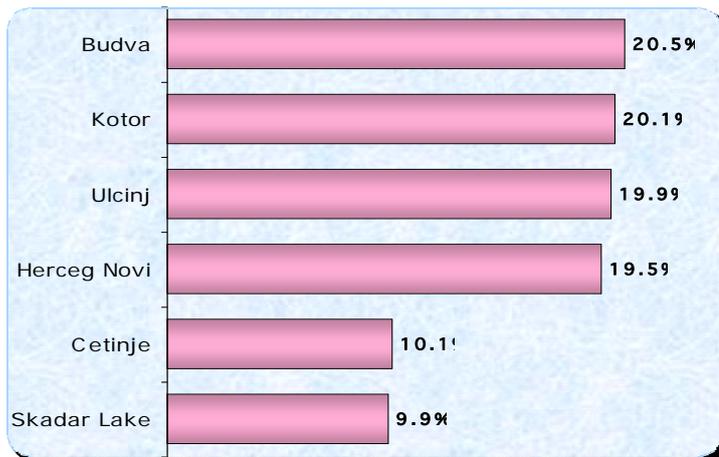
VISITORS TO THE SOUTHERN REGION OF MONTENEGRO

1. DEMOGRAPHIC PROFILE OF THE VISITORS

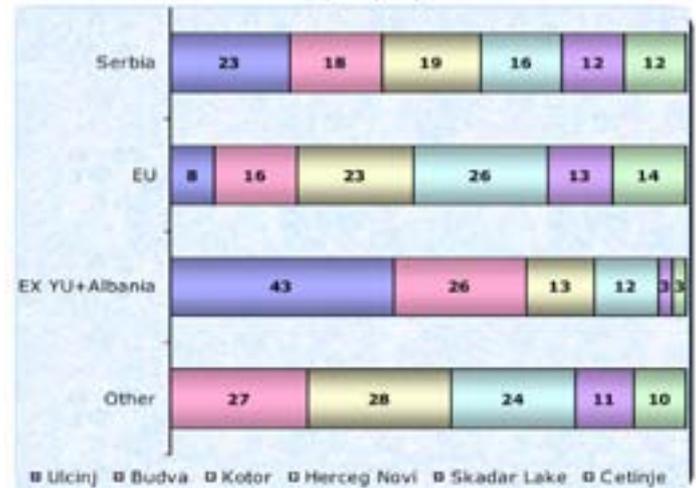
1. Location

The location of respondents was evenly divided among popular destinations in the south, including: Budva (20.5%), Kotor (20.1%), Ulcinj (19.9%) and Herceg Novi (19.5%). In addition, 10.1% were interviewed in Cetinje and 9.9% at Skadar Lake. Respondents from the EU were interviewed in all locations, with the greatest number in Kotor and Herceg Novi whereas respondents from Other Countries category, including Russia, were most often in Kotor and Budva. Respondents from Albania and other countries of Ex-Yugoslavia were least likely to be interviewed in Cetinje or at Skadar Lake.

Graphic 1.1 Location included in the survey for the Southern Region of Montenegro
Base n= 507 (100%)



Graphic 1.2 Location included in the survey for the Southern Region of Montenegro/Countries of origin (%)



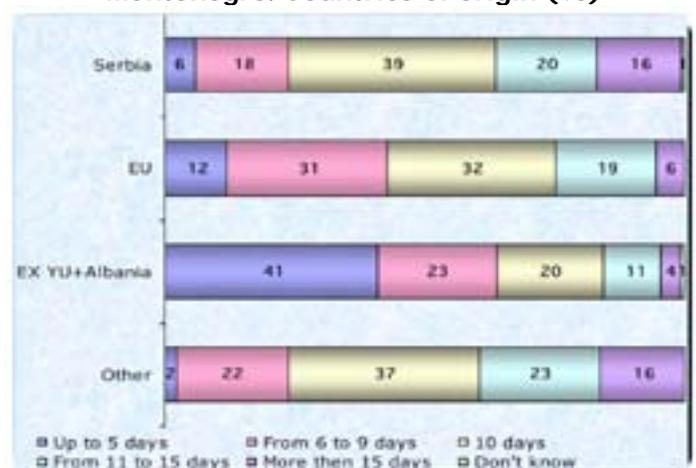
2. On this journey, how long do you plan to stay in Montenegro?

Tourists that were staying in Southern Montenegro, most often stayed for 10 days (32.7%) followed by 5 to 9 days (23.3%) and 11-15 days (18.1%). Tourists from Albania and other neighboring countries were more likely to stay less than 5 days (41%) compared with tourists from Serbia who stayed for 10 days (39%) or 11-15 days (20%).

Graphic 2.1 Planned duration of vacation in Montenegro
Base n= 507 (100%)



Graphic 2.2 Planned duration of vacation in Montenegro/Countries of origin (%)



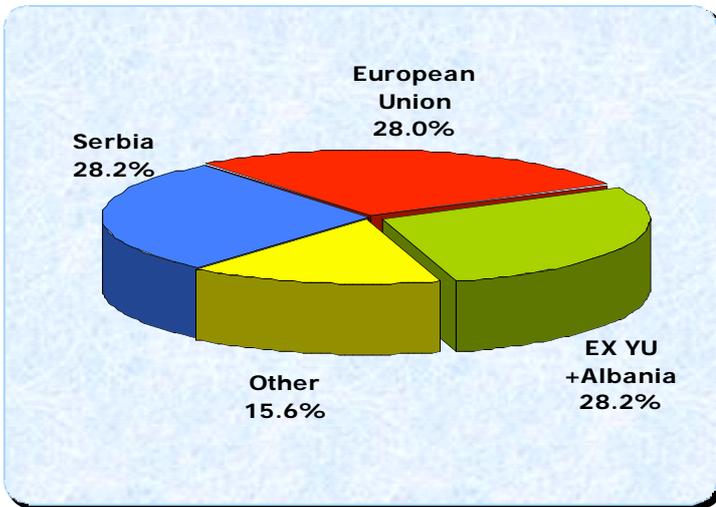
3. Where is your permanent residence?

Most respondents were from Serbia (28.2%), there were a significant number from the European Union (28.0%) with the largest percentage among that group from the Czech Republic (16.4%) followed by Austria, France and Italy each at 12.2%. Among Other Countries category we found a high number of

tourists from Russia (73.4%). It is noticeable that of the permanent residence of tourists visiting the south is similar to those visiting the Northern Region of Montenegro. The variety of countries represented among the sample shows a growing interest in Montenegro as tourist's destination.

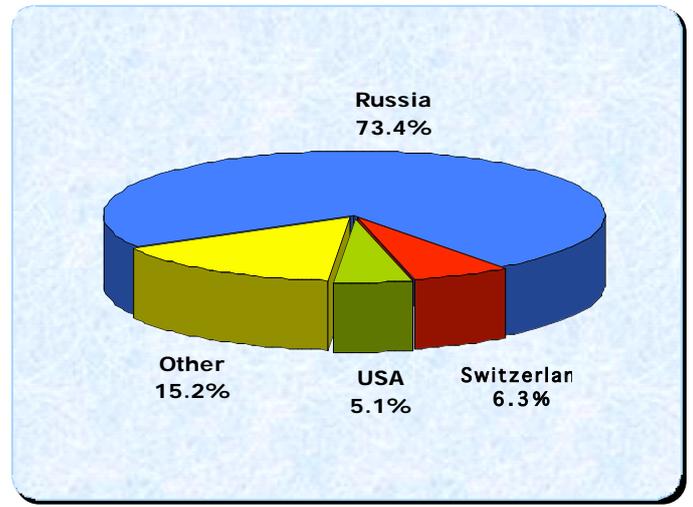
Graphic 3.1 Permanent residence

Base n= 507 (100%)



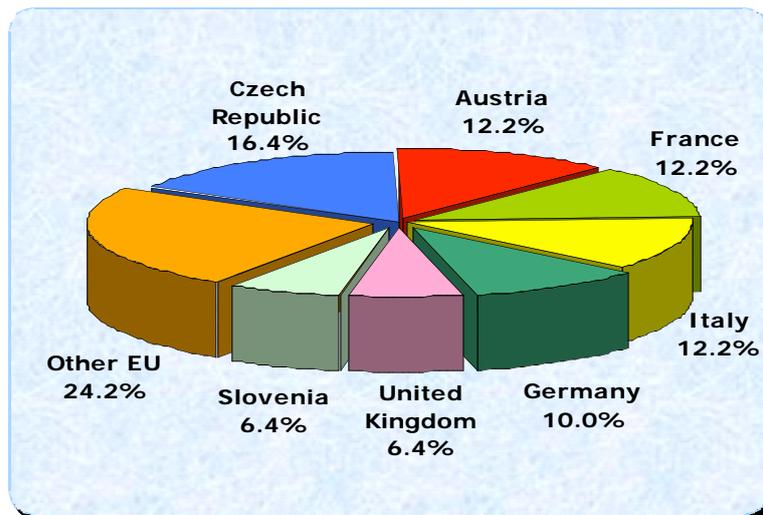
Graphic 3.2 Other countries

Base n=79 (100.0%)



Graphic 3.3. Other EU countries

Base n=140 (98.6%)

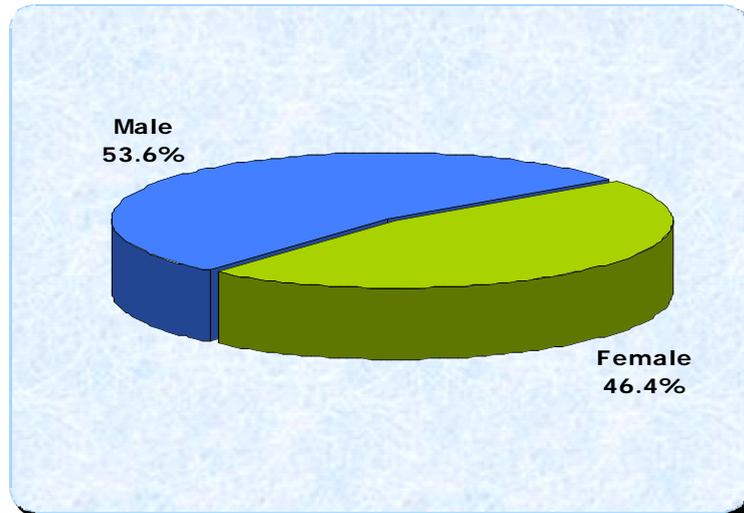


4.a Gender structure of the interviewers

There were slightly more males (53.6%) than females (46.4%) interviewed in southern Montenegro.

Graphic 4.1 Gender of interviewers

Base n= 507 (100%)

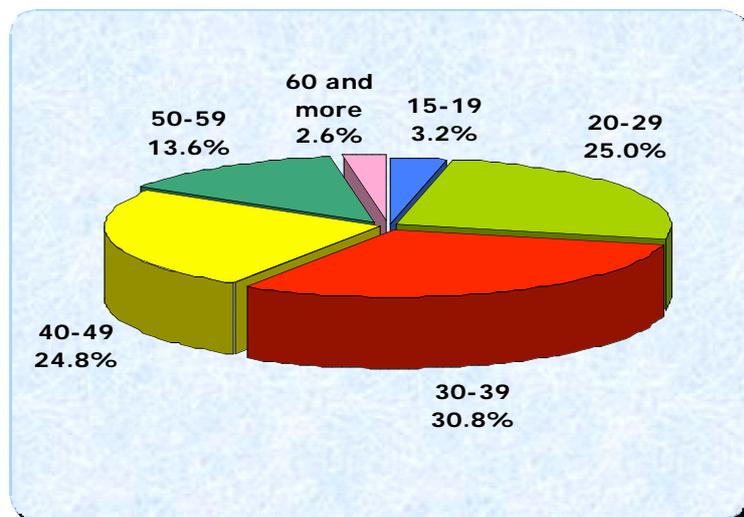


4.b Age of the interviewers

More than half of respondents were less than 40 years old (59.0%).

Graphic 4.2 Age of interviewers

Base n= 507 (100%)



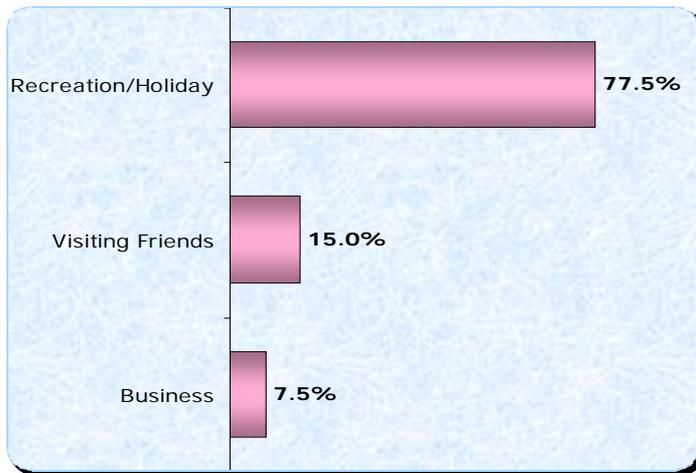
2. MAIN MOTIVES FOR COMING TO MONTENEGRO AND INFORMATION SOURCES

5. What was your main purpose for visiting Montenegro?

Most tourists visit the Southern Region of Montenegro for holiday (77.5%).

Graphic 5.1 Principal motives for coming in Montenegro

Base n=506 (99.8%)



Graphic 5.2 Principal motives for coming in Montenegro/Countries of origin (%)

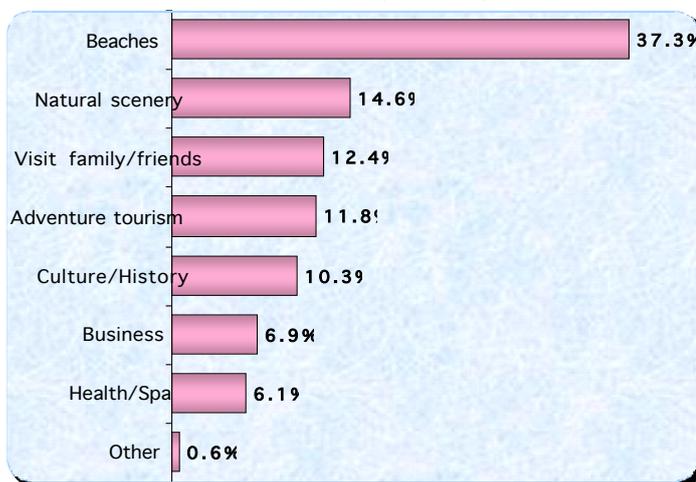


6. What was your main attraction to Montenegro?

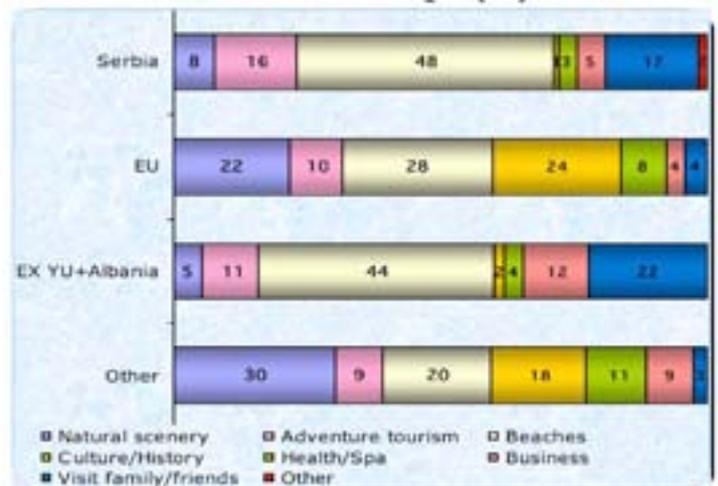
Tourists visiting the Southern Region of Montenegro were attracted by the natural surroundings. Almost two fifths of respondents (37.3%) named beaches as their main attraction to Montenegro, followed by natural scenery (14.6%), visiting family/friends (12.4%), adventure tourism (11.8%), culture/history 10.3% and business (6.9%). Tourists from Serbia and other countries in the region overwhelming named beaches as their main attraction, while tourists from the European Union named beaches (28%) followed closely by culture/history (24%) and natural scenery (22%).

Graphic 6.1 Main attraction to Montenegro

Base n=507 (100.0%)



Graphic 6.2 Main attraction to Montenegro /Countries of origin (%)



7. What was the main factor that distinguished Montenegro from other destinations?

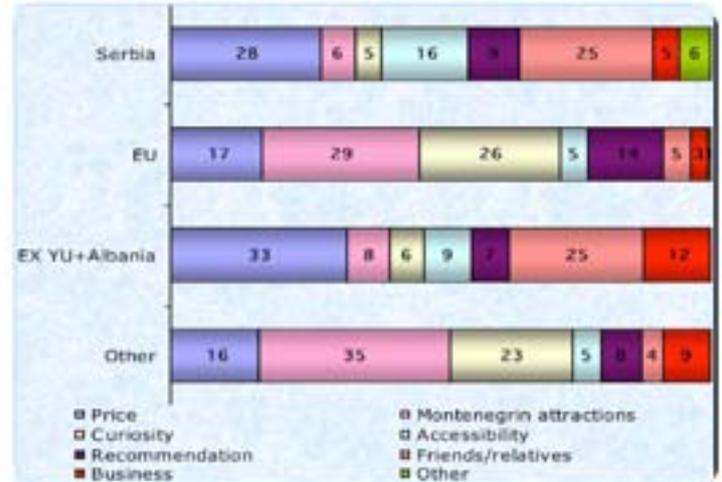
When asked which factor distinguished Montenegro from other destinations, tourists most often answered price (24.1%) and Montenegrin attractions (17.6%). Visitors coming from the EU and Other Countries category, including Russia, more often cited Montenegrin attractions and curiosity as main factors in their decision to visit Montenegro.

Graphic 7.1 The main factor that distinguished Montenegro from other destinations

Base n=507 (100.0%)



Graphic 7.2 The main factor that distinguished Montenegro from other destinations / Permanent residence (%)

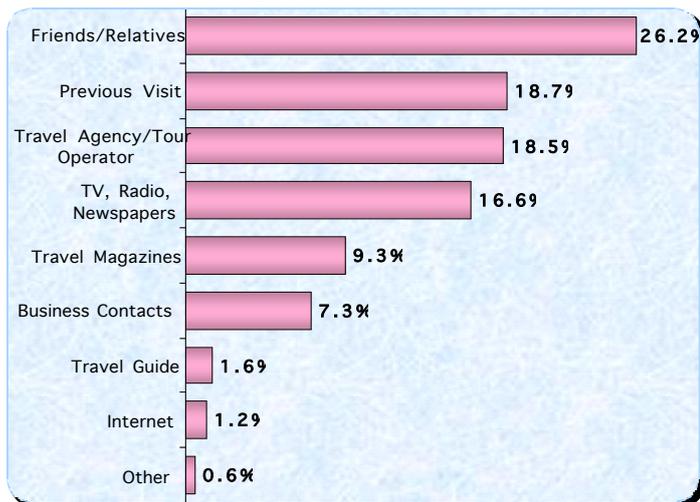


8. What was your main source of information on Montenegro?

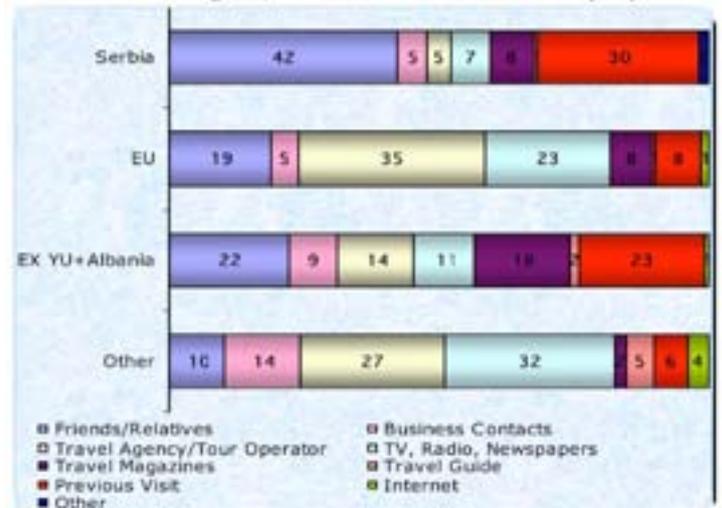
Respondents cited friends/relatives (26.2%) as their main source of information, followed by previous visits and nice experiences (18.7%), travel agencies/tour operators (18.5%) and TV, radio, newspapers 16.6% etc. For tourists in the south, the internet, tour guides and other sources are the less often a main source of information. When comparing by permanent residence, those respondents from the EU received information from travel agency/tour operator (35%) and TV, Radio, Newspaper (23%).

Graphic 8.1 Main source of information on Montenegro

Base n=507 (100.0%)



Graphic 8.2 Main source of information on Montenegro / Permanent residence (%)

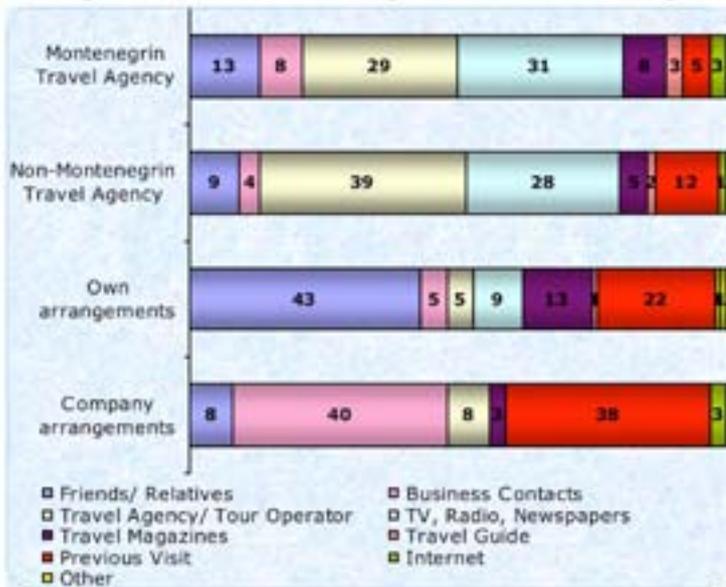


For respondents that for their travel to Montenegro opted for Montenegrin Travel Agencies most got their information on country by TV, Radio, Newspapers (31.6%) and on the second place they used their business contacts. Information gained from the internet is on the last place in this classification, with just

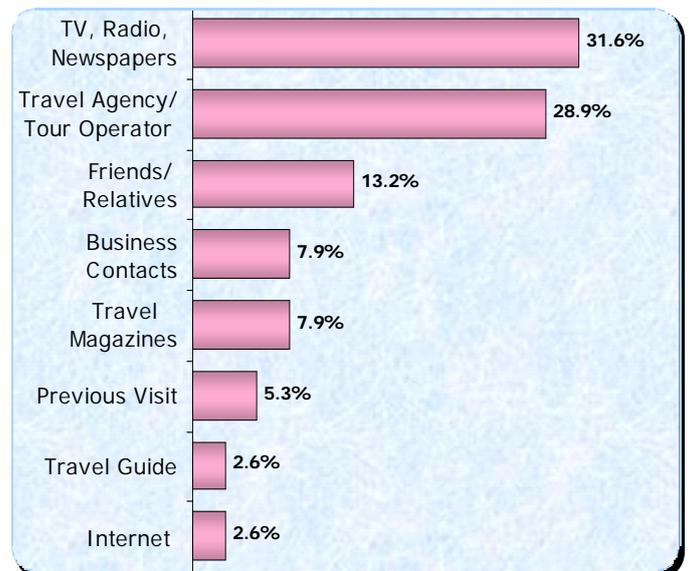
2.6%, which makes us recommend Montenegrin Travel Agencies to advertise more and use more affordable ways of marketing – like the Internet for example.

Situation of Montenegrin travel agencies looks much better if look at the answers of those respondents that for travel within Montenegro used their services. In the case of 40% of respondents, their information was gained through Montenegrin travel agencies, on the second place respondents informed themselves through various media services, friends and relatives had lower impact with 14.3%, but even here – the Internet was graded as the least consulted source of information.

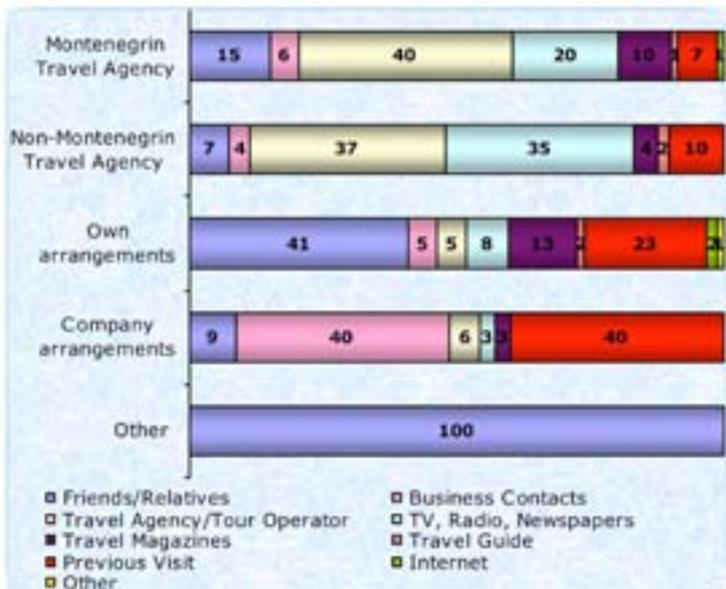
Graphic 8.3 Main source of information on Montenegro /Organizer of travel arrangements to Montenegro



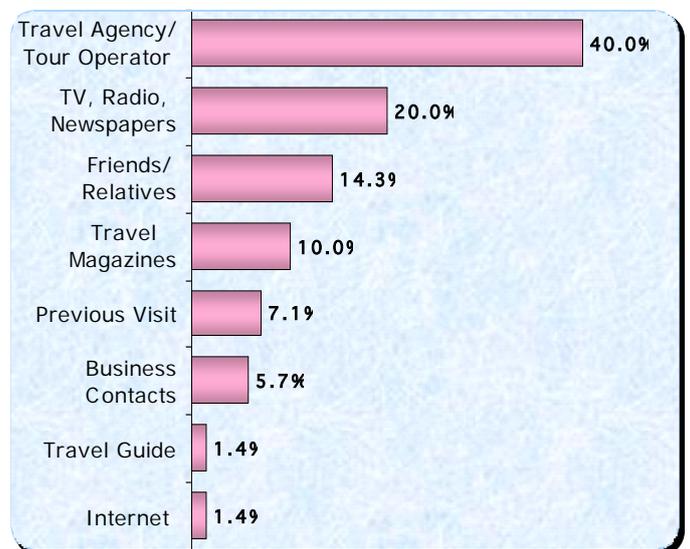
Graphic 8.4 Organizer of travel arrangements to Montenegro – Montenegrin tourist agencies



Graphic 8.5 Main source of information on Montenegro /Organizer of travel arrangements within Montenegro (%)



Graphic 8.6 Organizer of travel arrangements within Montenegro – Montenegrin tourist agencies



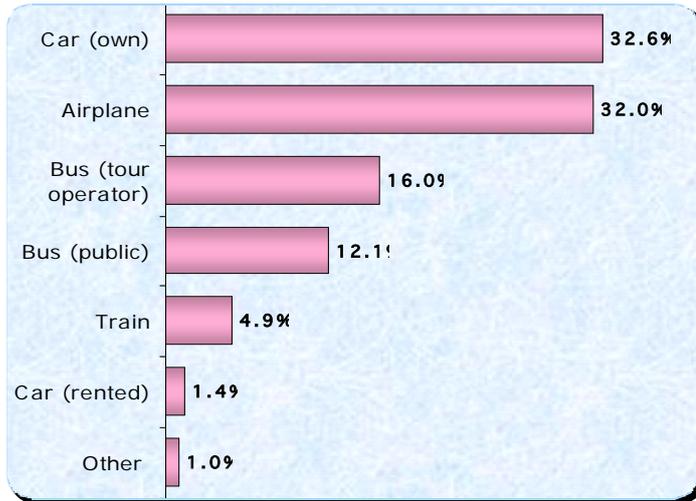
3. THE JOURNEY AND ACCOMMODATION ORGANIZATION

9.a What type of transportation did you use to get to Montenegro?

Most tourists choose (own/family/friend's) car (32.6%) for traveling to Montenegro, while the second most common is by airplane (32.0%). Respondents from EU countries in most cases chose airplane (58.7%), then bus ((both public and tour operator) (24.9%)), while visitors from surrounding countries mostly prefer to use car (own/family/friend) (Serbia 43.4%, EX-Yugoslav Republics and Albania 62.8%).

Graphic 9.1 Type of transportation to get to Montenegro

Base n=507 (100.0%)



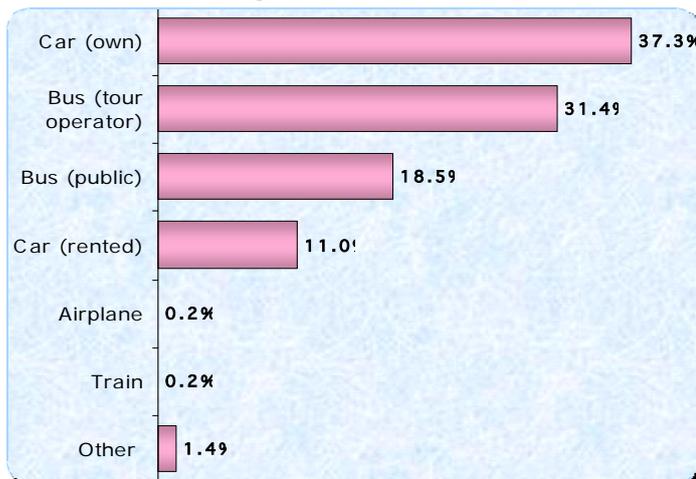
Graphic 9.2 Type of transportation to get to Montenegro/Countries of origin (%)



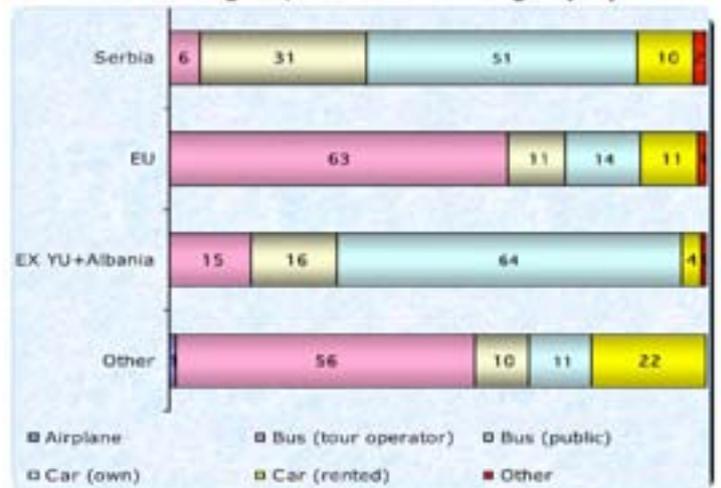
9.b What type of transportation did you use within Montenegro?

The transportation most often used within Montenegro is car (own/family/friend) (37.3%), followed by tour operator bus (31.4%) and public bus in 18.5%.

Graphic 9.3 Type of transportation within Montenegro? Base n=503 (99.2%)



Graphic 9.4 type of transportation within Montenegro?/Countries of origin (%)



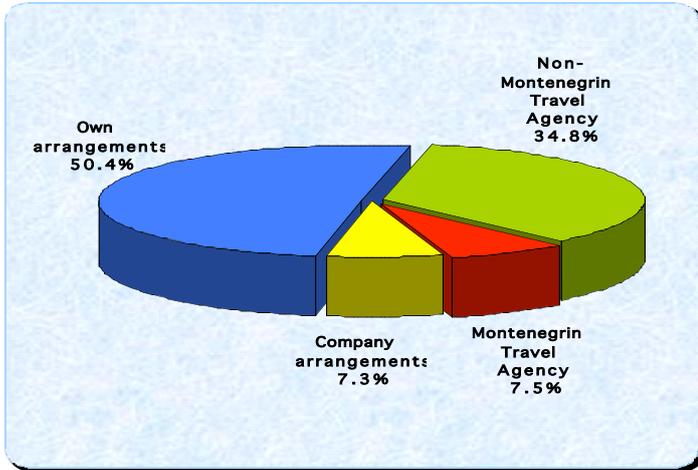
10.a Who organized your travel arrangements to Montenegro?

Most tourists make their own arrangements for traveling to Montenegro (50.4%). The next most common answers were foreign travel agencies at 34.8% and Montenegrin travel agencies at 7.5%. It is interesting to

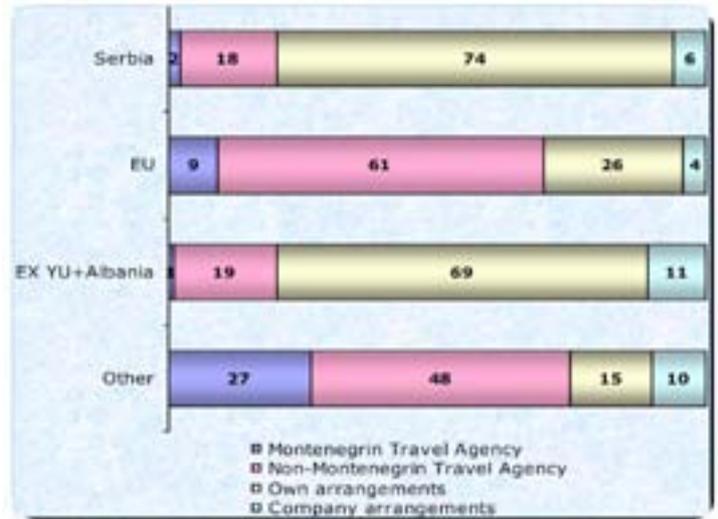
note that tourists from Other Countries category, including Russia, were most likely to use a Montenegrin Travel Agency, 27%, compared with tourists from the EU at only 9%.

Graphic 10.1 Arrangements organizer - to Montenegro

Base n=506 (99.8%)



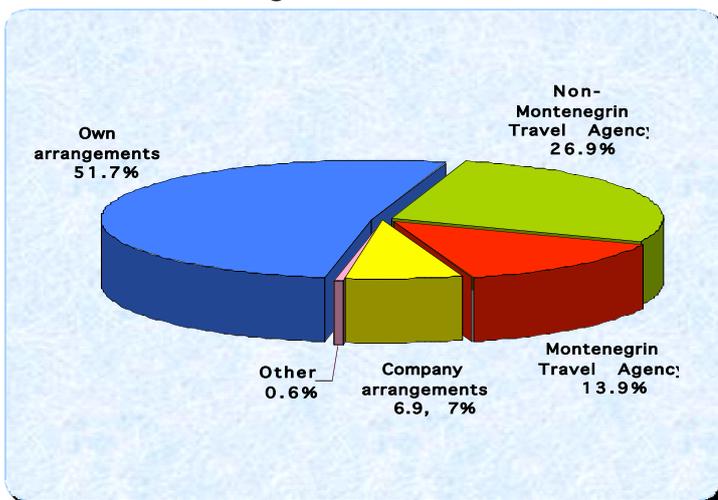
Graphic 10.2 Arrangements organizer - to Montenegro/Countries of origin (%)



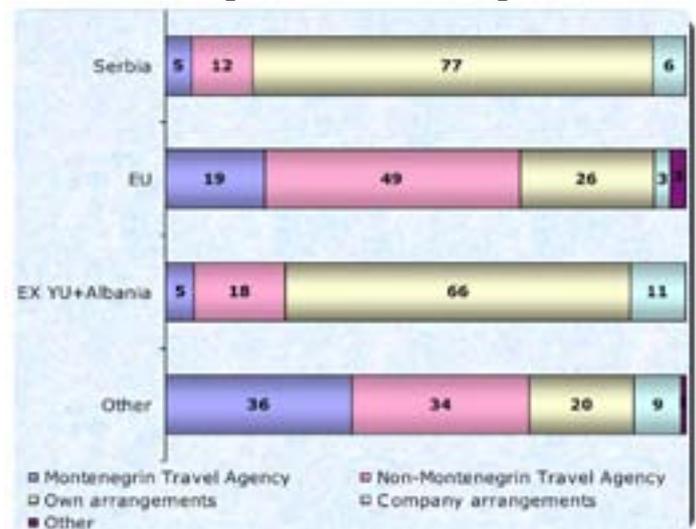
10.b Who organized your arrangements within Montenegro?

There were similar responses when tourists were asked “who organized your travel arrangements within Montenegro”. Again, the majority of tourists chose to make their own arrangements within Montenegro (51.7%), the next most common answers were-foreign travel agencies (26.9%) and Montenegrin travel agencies (13.9%). Respondents from Other Countries category, including Russia, most often identified Montenegrin travel agencies (36%) followed by those from the European Union (19%), this indicates that these tourists are increasingly looking toward Montenegrin agencies to assist with accommodation, tours and other services while they are in Montenegro.

Graphic 10.3 Arrangements organizer - within Montenegro Base n=505 (99.6%)



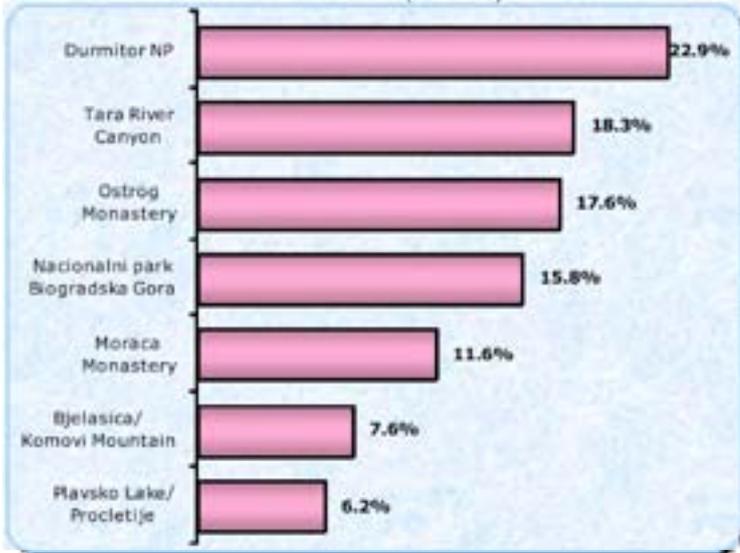
Graphic 10.4 Arrangements organizer - within Montenegro/Countries of origin (%)



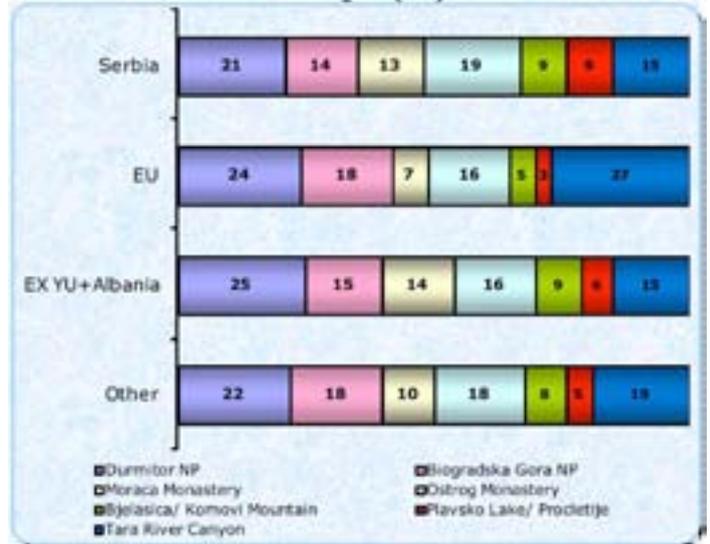
11. Which of the following places have you heard of?

The results show that most tourists in the south are familiar with many of the tourist destinations in Northern Montenegro. Namely, almost every fourth respondent (22.9%) had heard of National Park Durmitor, the Tara River Canyon is familiar to 18.3% of tourists, and 17.6% had heard of Ostrog Monastery etc. It is interesting to mention that of visitors from EU countries, the greatest number recognized the Tara River Canyon (26.7%) and National Park Durmitor (24.4%).

Graphic 11.1 Places you have heard of
Base n=506 (99.8%)



Graphic 11.2 Places you have heard of /Countries of origin (%)



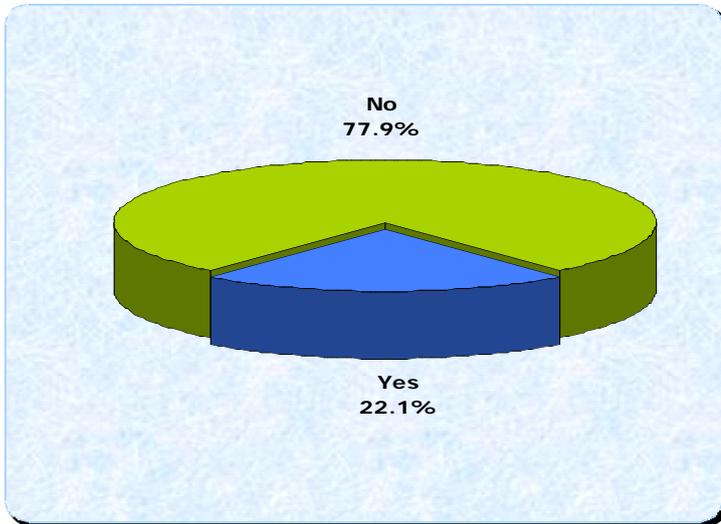
4. PERCEPTION OF POTENCIAL VISITORS TO NORTHERN MONTENEGRO

12. Have you ever visited Northern Montenegro?

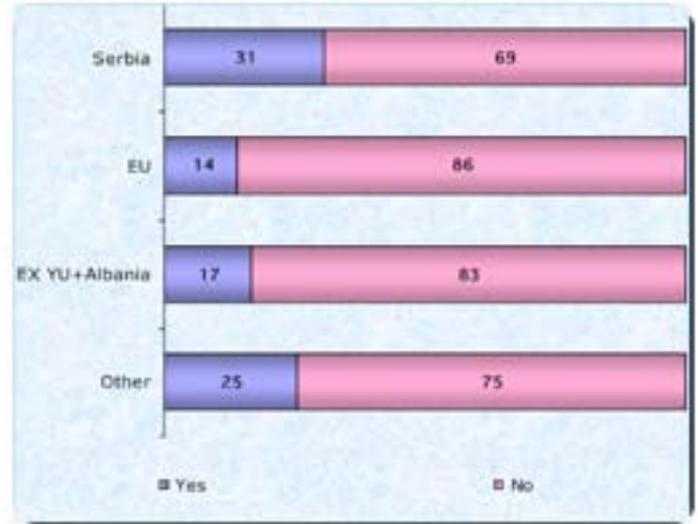
Almost every fourth respondent (22.1%) had visited Northern Montenegro, during this or previous trip and the remaining 77.9% had never visited northern Montenegro. When comparing by permanent residence, tourists from EU countries were least likely to have visited northern Montenegro (14.1%)

Graphic 12.1 Visit to Northern Montenegro

Base n=507 (100.0%)



Graphic 12.2 Visit to Northern Montenegro /Countries of origin (%)

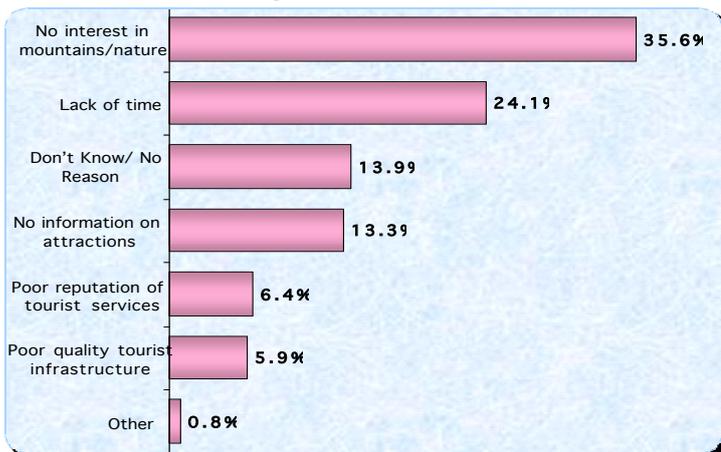


13. If no, why not?

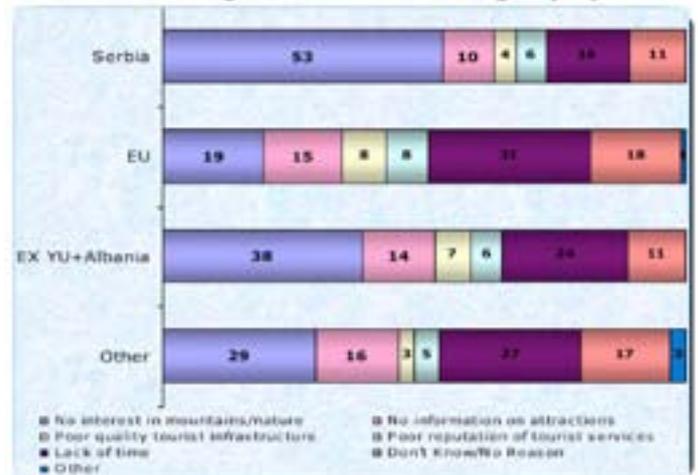
The majority of tourists that are vacationing in south of Montenegro chose the beaches as their main attraction to Montenegro, for this reason. It is not strange that 35.6% of all interviewers indicated that their reason for not visiting northern Montenegro was because they are not interested in mountains and nature. However, a significant number (24.1%) also indicated "lack of time" as a reason for not visiting the north; this is especially true of respondents from the EU (30.8%).

Graphic 13.1 Reasons for not visiting Northern Montenegro

Base n=390 (98.7%)



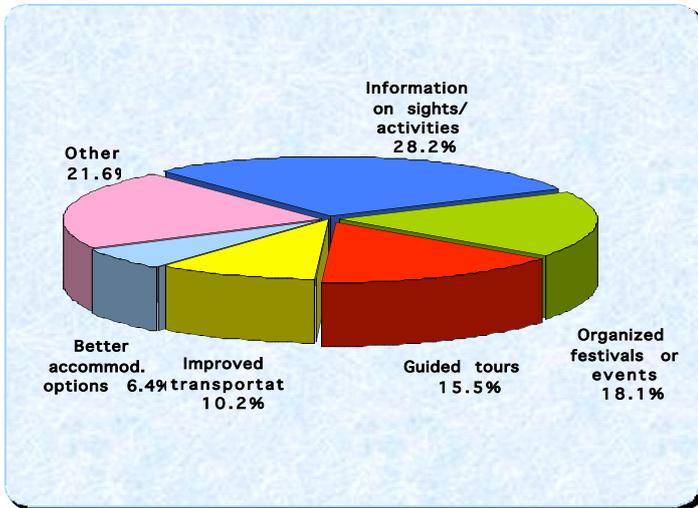
Graphic 13.2 Reasons for not visiting Northern Montenegro/Countries of origin (%)



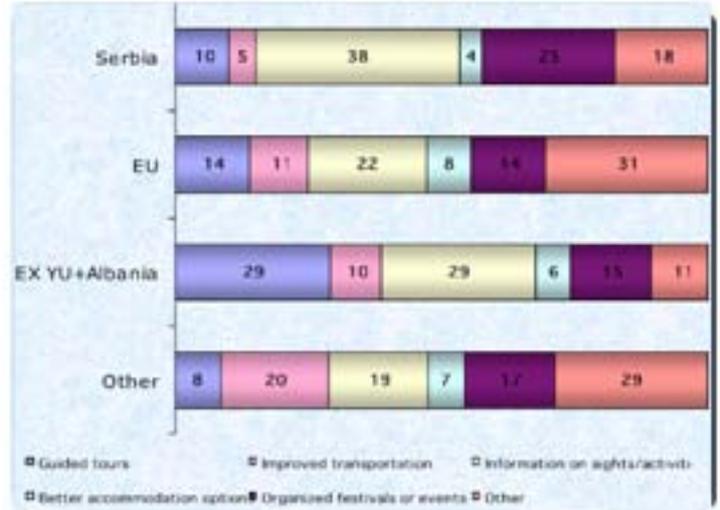
14. What tourism services would increase your interest in Northern Region of Montenegro?

In order to draw more tourists to the Northern Region of Montenegro, it is necessary to improve some key services. The greatest number of respondents indicated that information on sights and activities (28.2%), organized festivals and events (18.1%) and guided tours (15.5%) would increase their interest in visiting northern Montenegro.

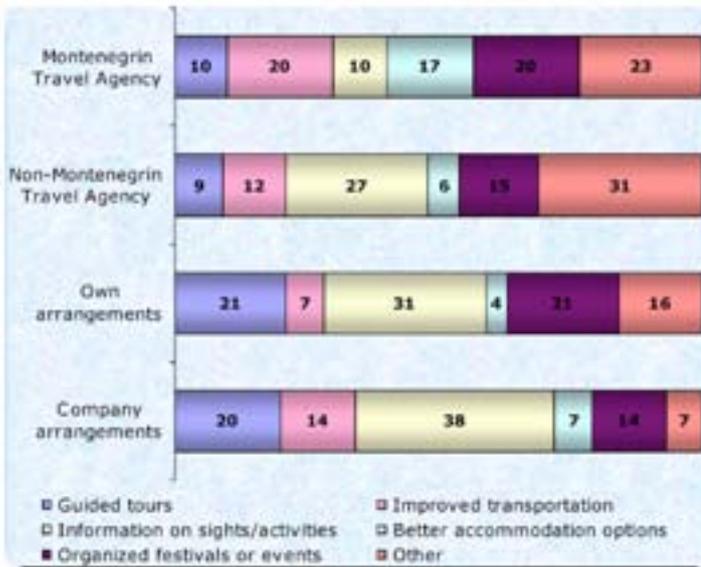
Graphic 14.1 Tourism services to be improved
Base n=393 (99.5%)



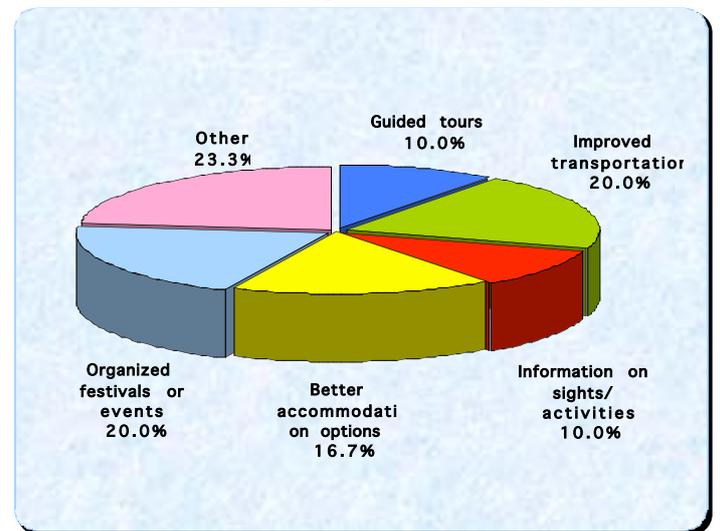
Graphic 14.2 Tourism services to be improved / Country of origin (%)



Graphic 14.3 Tourism services to be improved /Arrangement to Montenegro organizer (%)



Graphic 14.4 Tourism services to be improved / Arrangement to MN organizer - Montenegrin tourist agencies

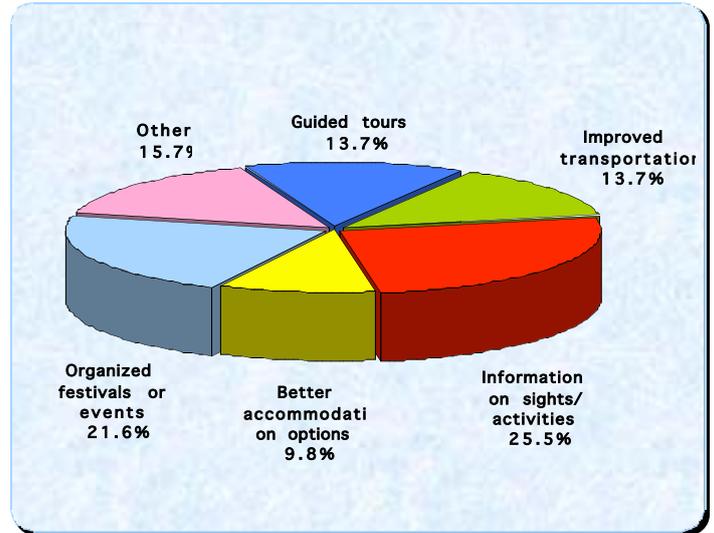


If we evaluate the crossing between tourism services that should be improved and arrangements to Montenegro made by Montenegrin Travel Agencies, we can see clearly that major reasons for tourists discontent in this sense were aspects on which Montenegrin Tourism Agencies cannot make a significant impact: to improve transport within Montenegro and to organize more events and festivals throughout season. What Montenegrin Agencies can do, and some of them are already doing that to some extent, is to help further education of guide tours and have greater number of organized tours and tour packages in their Montenegrin offer.

Graphic 14.5 Tourism services to be improved / Arrangement organizer from MN (%)



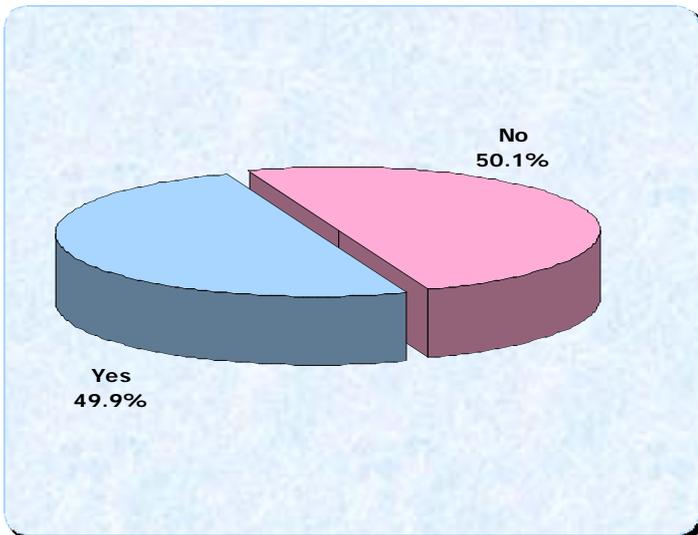
Graphic 14.6 Tourism services to be improved / Arrangement organizer from MN - Montenegrin tourist agencies



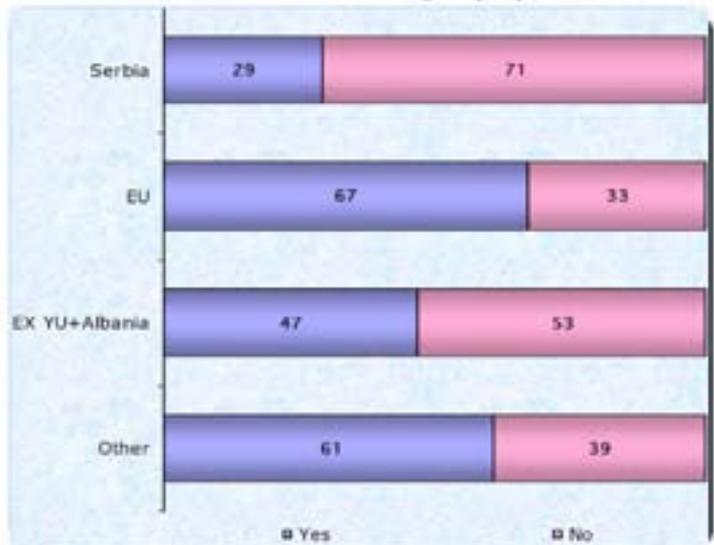
15. Would you consider visiting Northern Montenegro?

49.9% respondents indicated they would be interested in visiting northern Montenegro in the future. Among respondents from the EU countries an even greater number (67%) indicated interest in exploring Montenegro and tourists from Other Countries category, including Russia, were interested 61% of the time.

Graphic 15.1 Consideration of visiting Northern MN
Base n=395 (100.0%)



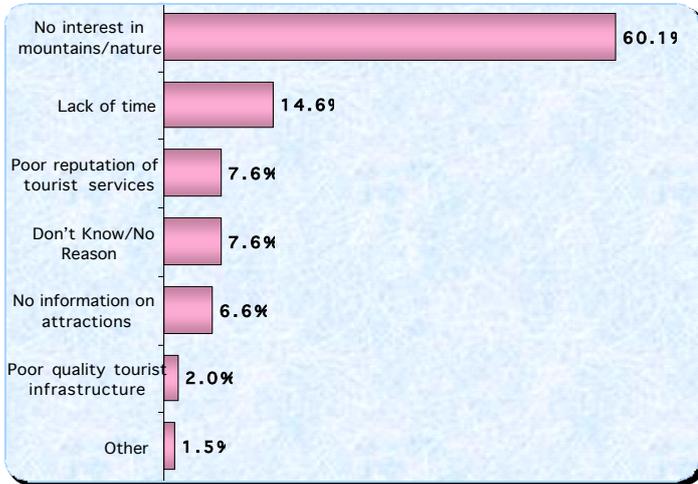
Graphic 15.2 Consideration of visiting Northern MN /Countries of origin (%)



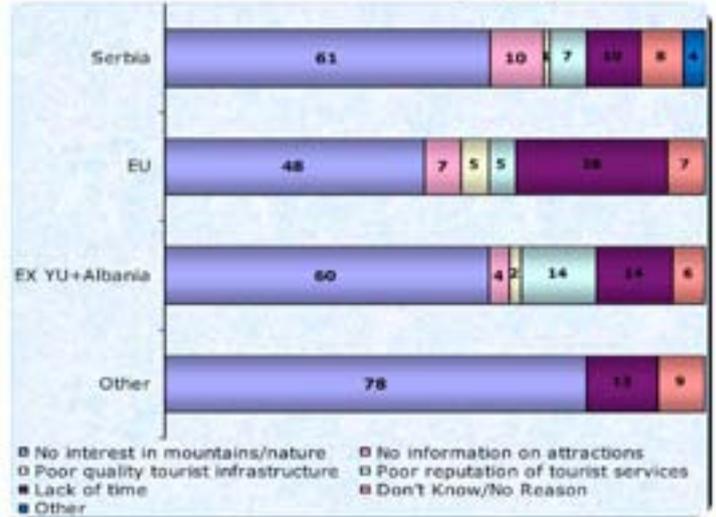
16. If not, why?

Among those respondents who are not interested in visiting northern Montenegro, the most common reason was a lack of interest in mountains (60.1%), which demonstrates that many of these tourists simply prefer swimming and sunbathing along the coast.

Graphic 16.1 Reasons for lack of interest in Northern MN Base n=198 (100.0%)



Graphic 16.2 Reasons for lack of interest in Northern MN / Countries of origin (%)



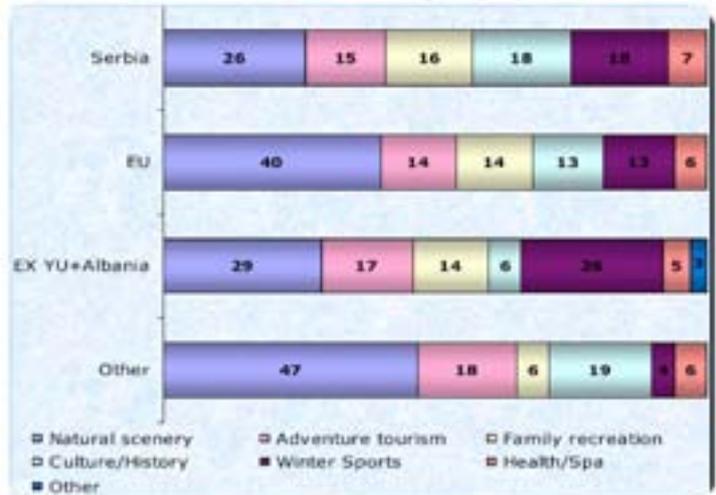
17. What would be your main attraction to Northern Montenegro?

For tourists that have already visited or are planning to visit Northern Montenegro a high number indicated that their main attractions in northern Montenegro are natural scenery (35.9%), adventure tourism (15.5%), winter sports (15.4%), Culture/History (13.4%), and family recreation (13.1%).

Graphic 17.1 The main attraction in the North of MN Base n=196 (99.5%)



Graphic 17.2 The main attraction in the North of MN / Countries of origin (%)

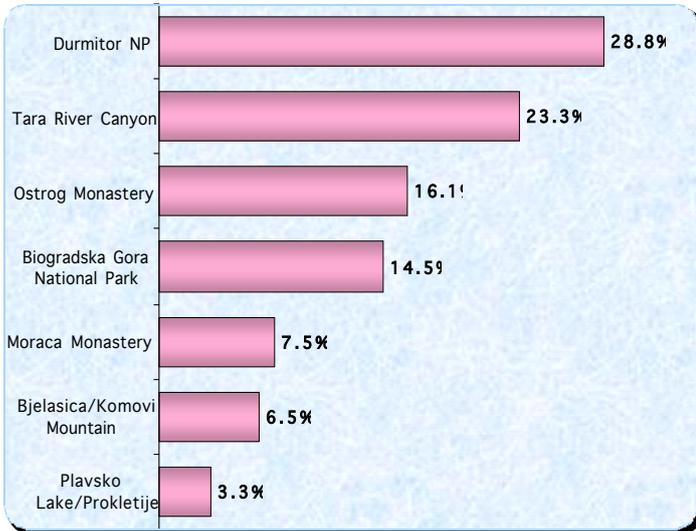


18. Which of the following places would you consider going?

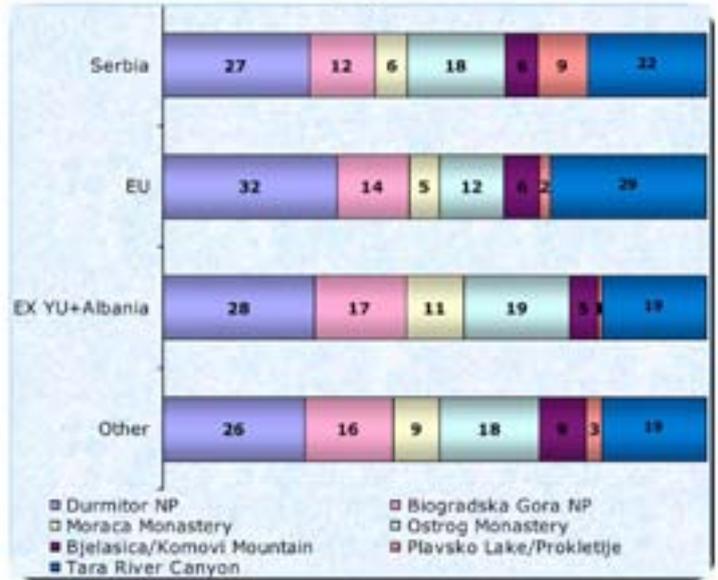
The greatest number of respondents (28.8%) would consider visiting National Park Durmitor, followed by the Tara River Canyon 23.3%, as well as Ostrog Monastery (16.1%), and the National Park Biogradska Gora (14.5%).

Graphic 18.1 Places for visit

Base n=197 (100.0%)



Graphic 18.2 Places for visit / Countries of origin (%)

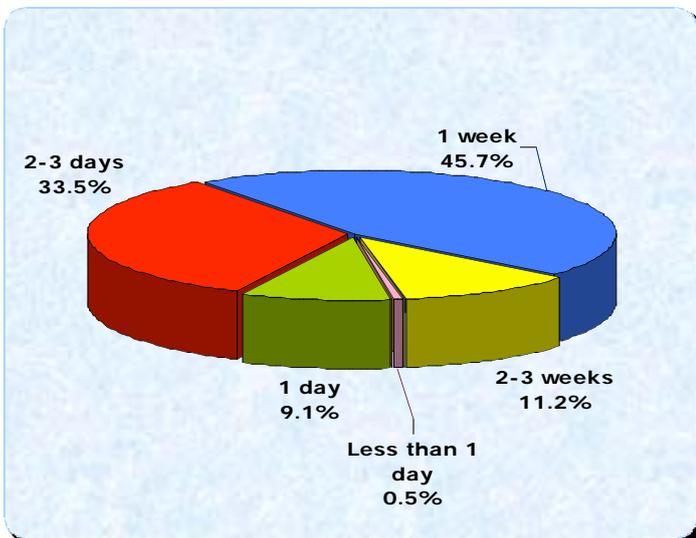


19. How many days would you visit Northern Montenegro for?

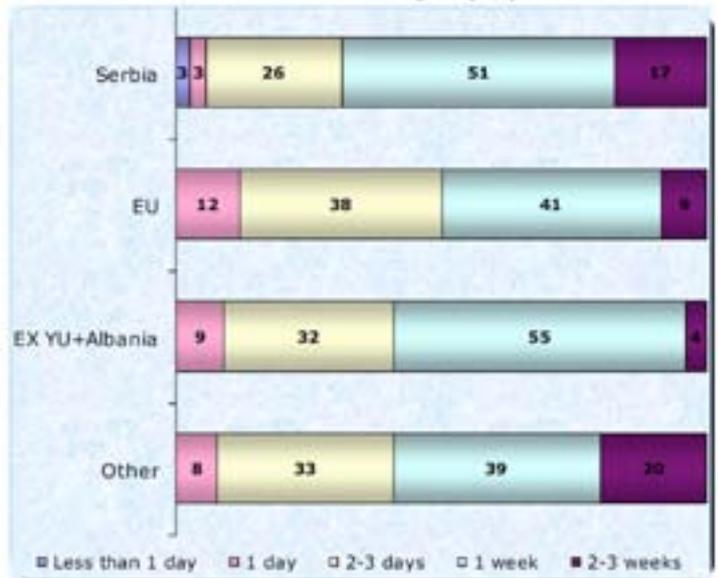
If these tourists visited the north, 45.7% would visit for one week and 33% for 2-3 days.

Graphic 19.1 No of days staying in the North of MN

Base n=197 (100.0%)



Graphic 19.2 No of days staying in the North of MN / Countries of origin (%)

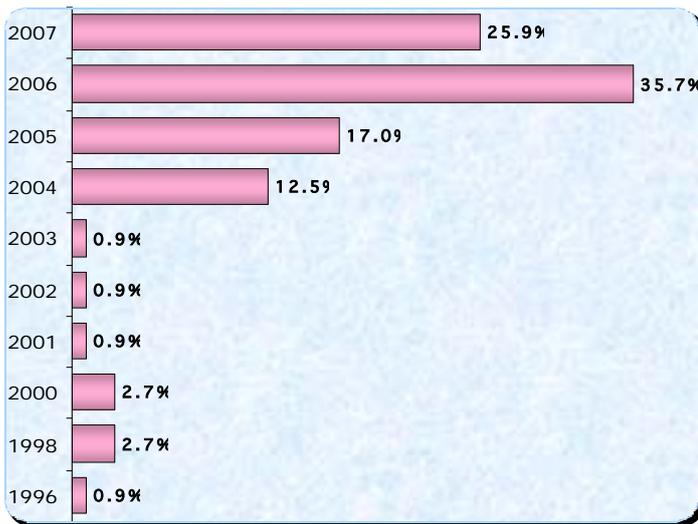


5. QUALITY EVALUATION OF TOURISTIC OFFER IN NORTHERN MONTENEGRO

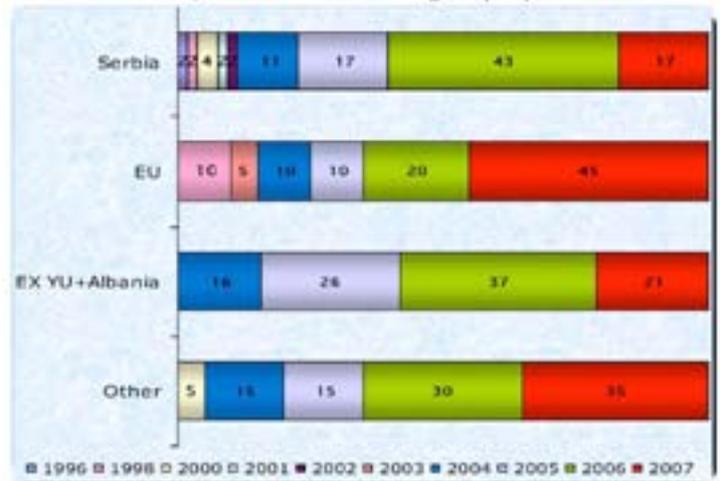
20. When was your last visit to Northern Montenegro?

Of those respondents who previously visited northern Montenegro most had visited recently, in the past 1-3 years. The greatest number of respondents had visited in 2006, followed by 2007 (the current year) indicating an increasing number of visitors to this region. Tourists from the EU were most likely to have visited northern Montenegro in 2007 (46%), followed by tourists from Other Countries category including Russia (36%).

Graphic 20.1 Last visit
Base n=112 (100.0%)



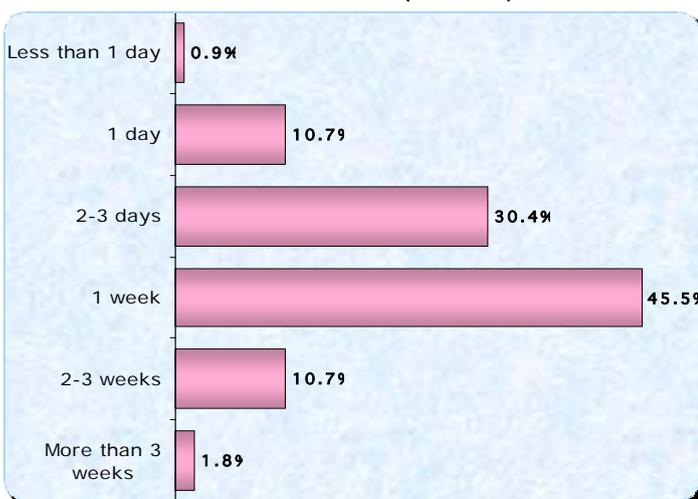
Graphic 20.2 Last visit / Countries of origin (%)



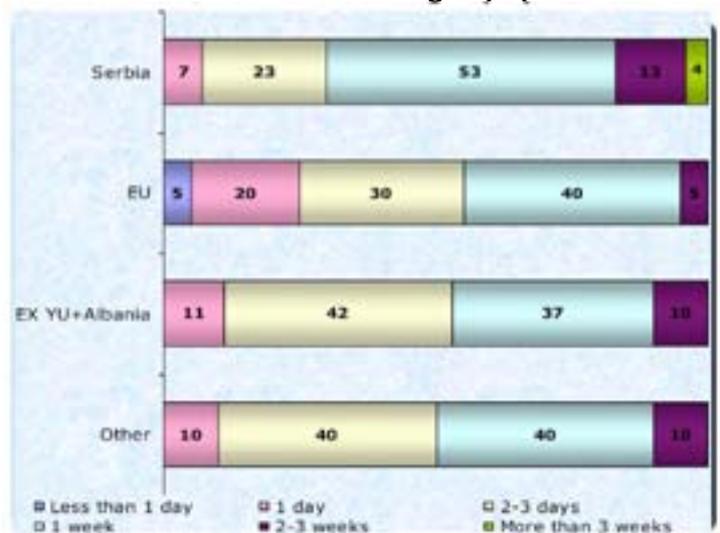
21. How many days did you spend in Northern Montenegro?

The survey results shows that the most visitors to Northern Montenegro stayed one week (45.5%), while 30.4% of them stayed 2-3 days. Tourists coming from Serbia mostly stay 7 days, while tourists coming from neighboring countries (B&H, Macedonia, Croatia and Albania) mostly spend 2-3 days in the North of Montenegro.

Graphic 21.1 Number of days staying in North of MN
Base n=112 (100.0%)



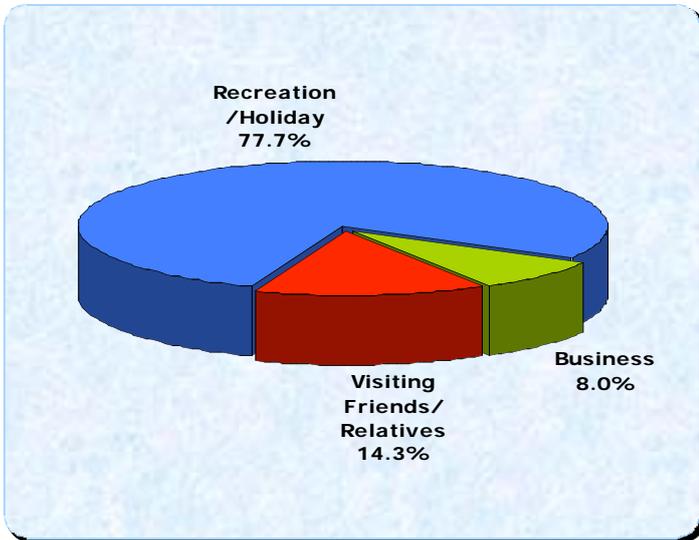
Graphic 21.2 Number of days staying in North of MN / Countries of origin (%)



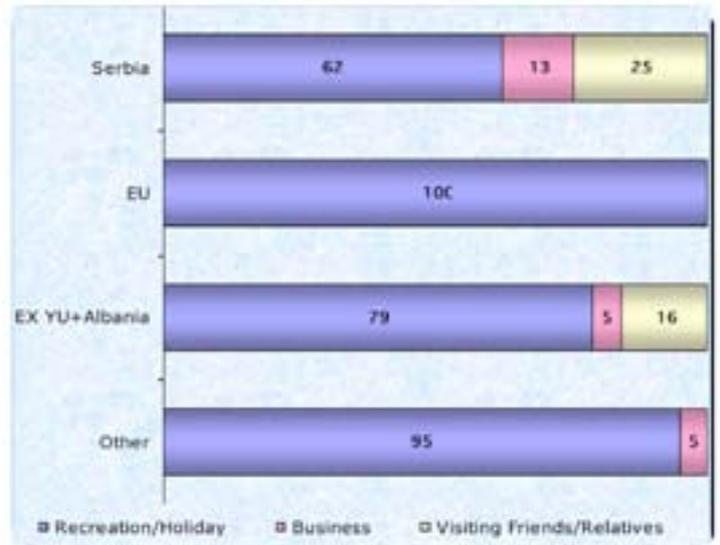
22. What was your main purpose in visiting northern Montenegro?

The northern region of Montenegro is most often visited by tourists interested in recreation and holiday. 100% of respondents from the EU cited recreation and holiday as their main purpose in visiting the north.

Graphic 22.1 The main reason for visit
Base n=112 (100.0%)



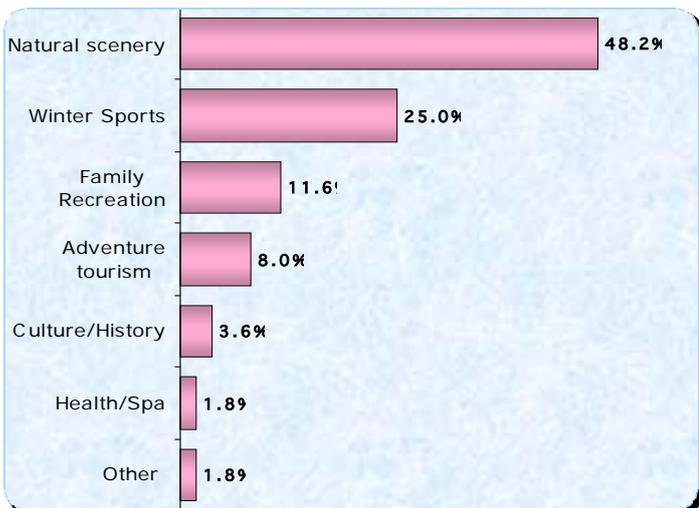
Graphic 22.2 The main reason for visit / Countries of origin (%)



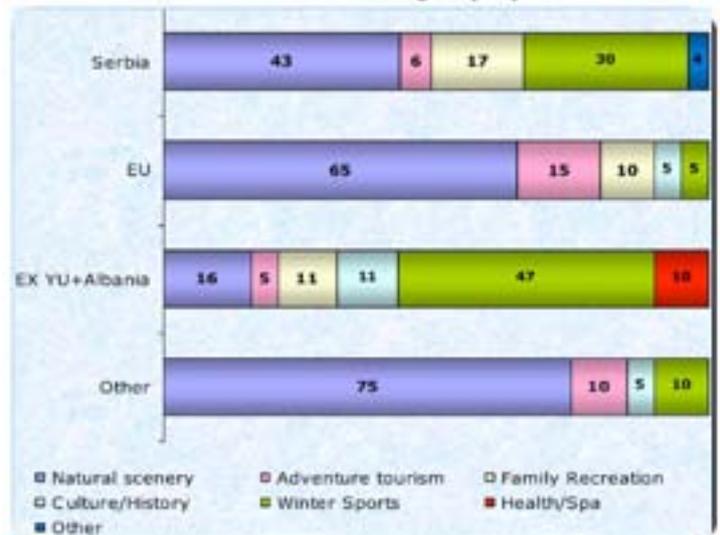
23. What was your main attraction to northern Montenegro?

Tourists currently staying in the southern region of Montenegro stated that natural scenery is their main attraction to the Northern region (48.2%), while one quarter of respondents (25.0%) find winter sports as the main attraction. It is interesting to note that while visitors from neighboring countries find north of Montenegro interesting because of winter sports, visitors from EU countries are interested primarily in nature.

Graphic 23.1 Most attractions of the North of MN
Base n=112 (100.0%)



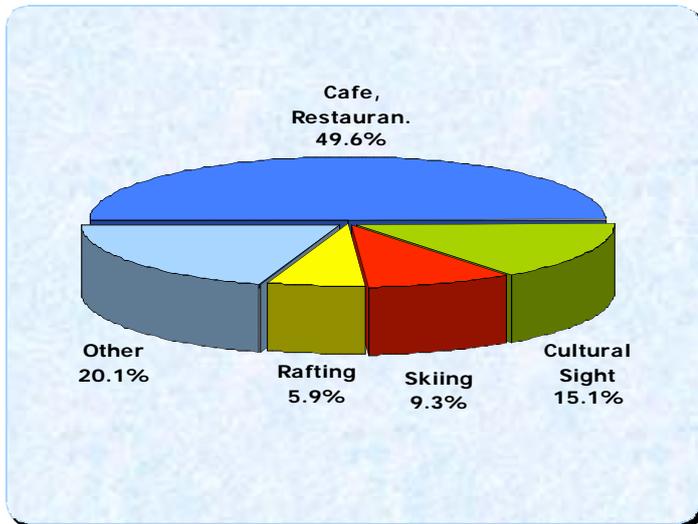
Graphic 23.2 Most attractions of the North of MN / Countries of origin (%)



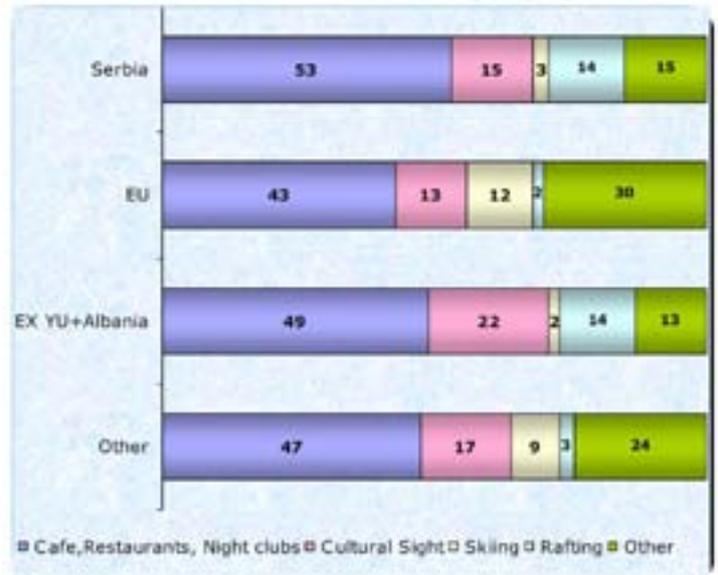
24. What type of activities did you do during your visit to northern Montenegro?

The tourist offer of the North of Montenegro includes wide range of activities for an active vacation, starting with skiing, hunting, fishing, rafting, and cycling to visiting cafes/bars and cultural places. Based on survey results, it could be stated that nearly half of respondents visited café bars (49.6%), while cultural places attracted 15.1% respondents. Rafting and skiing were the most common sporting activities with 5.9% and 9.3% respectively.

Graphic 24.1 Most attractive activities in the North of MN
Base n=112 (100.0%)



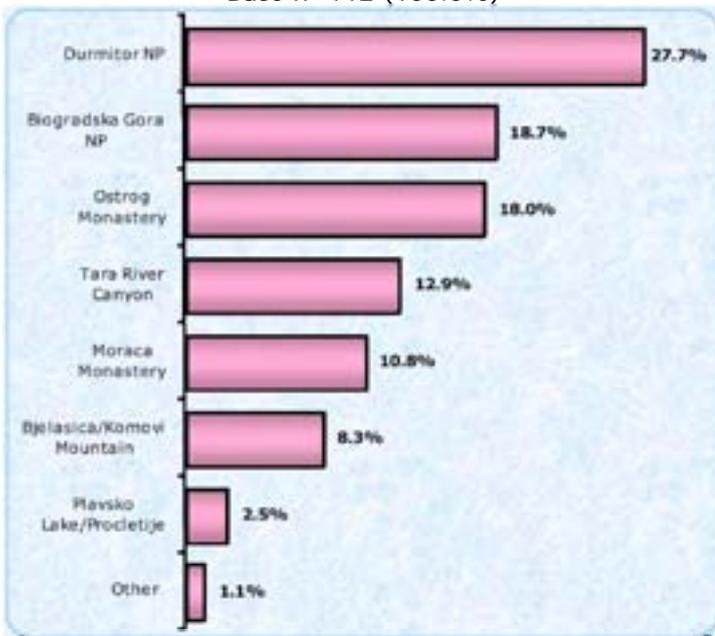
Graphic 24.2 Most attractive activities in the North of MN / Countries of origin (%)



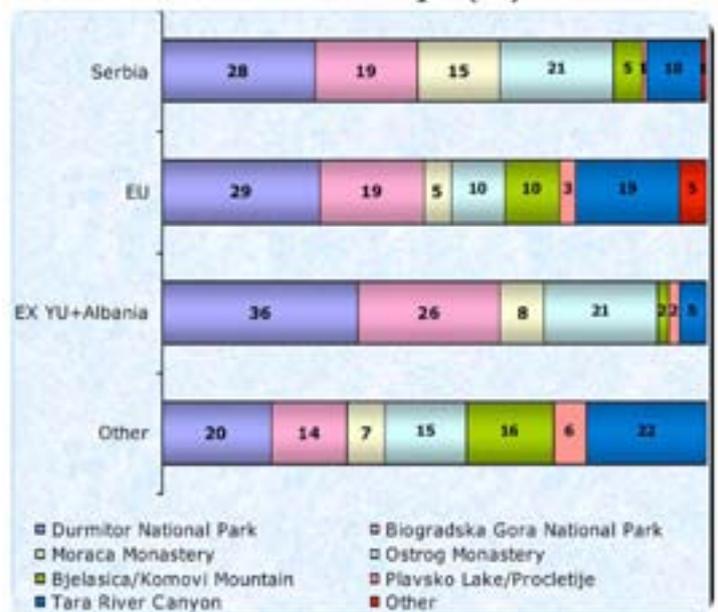
25. Which of the listed places did you visit in northern Montenegro?

Among the tourist destinations in the North of Montenegro, the most often visited were National Park Durmitor (27.7%) and National Park Biogradska Gora 18.7%, as well as Ostrog Monastery (18.0%).

Graphic 25.1 Tourist places in the North of MN
Base n=112 (100.0%)



Graphic 25.2 Tourist places in the North of MN / Countries of origin (%)



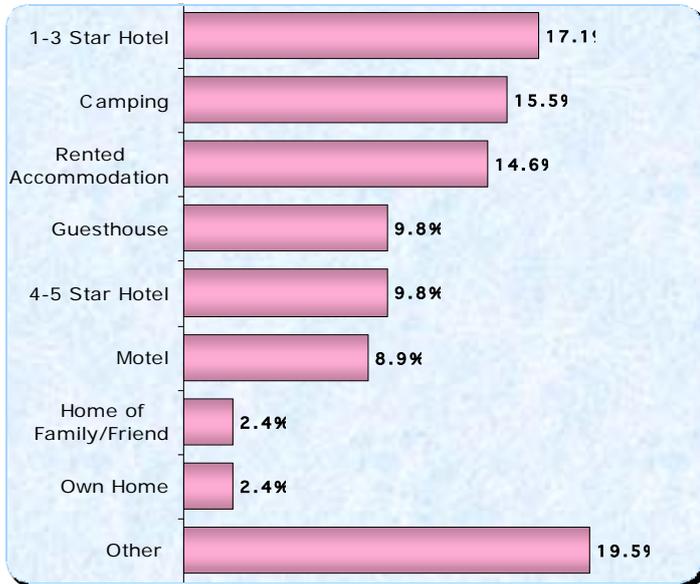
26. What type of accommodation did you choose for your visit to northern Montenegro?

The supply of accommodation in Northern Montenegro consists primarily of 1-3 star hotels and motels. As a result tourists most often chose these kinds of accommodation; 17.1% of tourists stayed in 1-3 star hotels, 15.5% in camps and 14.6% of tourists stayed in rented accommodation. There are only a few 4-5 star

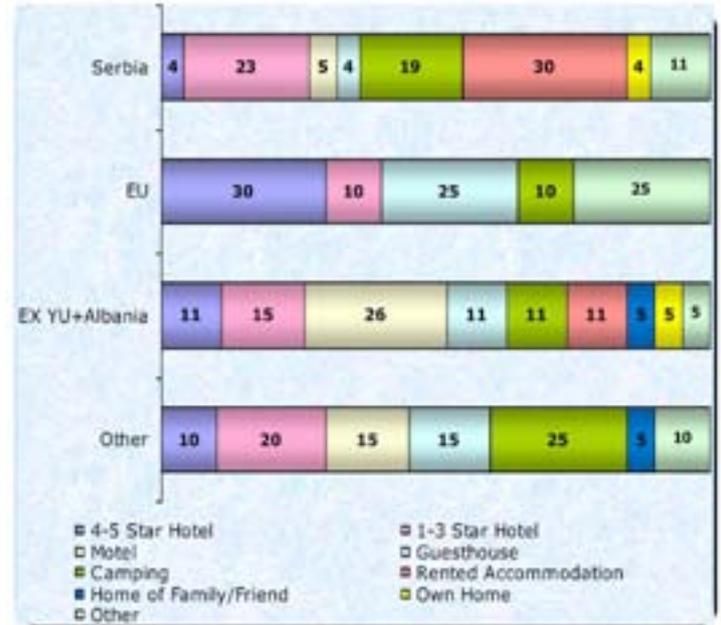
hotels in northern Montenegro but 9.8% tourists stayed in this type of accommodation. Respondents from the EU were most likely to stay in 4-5 star accommodation compared with those from other countries.

Graphic 26.1 Type of accommodation in the North of MN

Base n=112 (100.0%)



Graphic 26.2 Type of accommodation in the North of MN / Countries of origin (%)



27. How would you rate the quality of the following tourism assets and services in northern Montenegro?

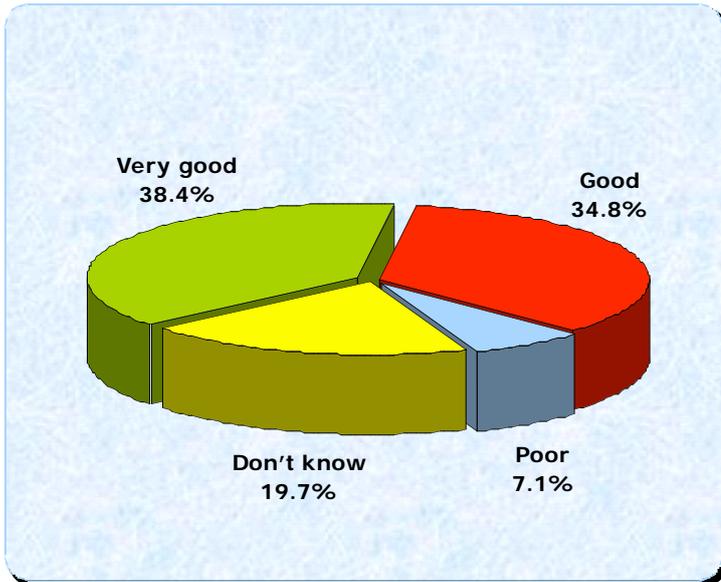
Respondents were asked to rate a series of tourist assets and services on a scale of 1-5, with one indicating poor and 5 indicating very good. Overall respondents rated tourist services in northern Montenegro well. Lakes and rivers received the highest rating (4.72) followed by National Parks (4.61), on the other hand, shopping and local transportation received poor ratings 2.75 and 2.82. The following table provides detail on the ratings of all the tourism assets and services.

	Indicator level
Lakes/rivers	4.72
National parks	4.61
Recreational activities	4.11
Restaurant/bar/café	4.08
Accommodation	4.04
Culture/historical attractions	3.93
Tour operator/travel agent	3.66
Guide services	3.59
Handicrafts/souvenirs	2.95
Local transportation	2.82
Shopping	2.75

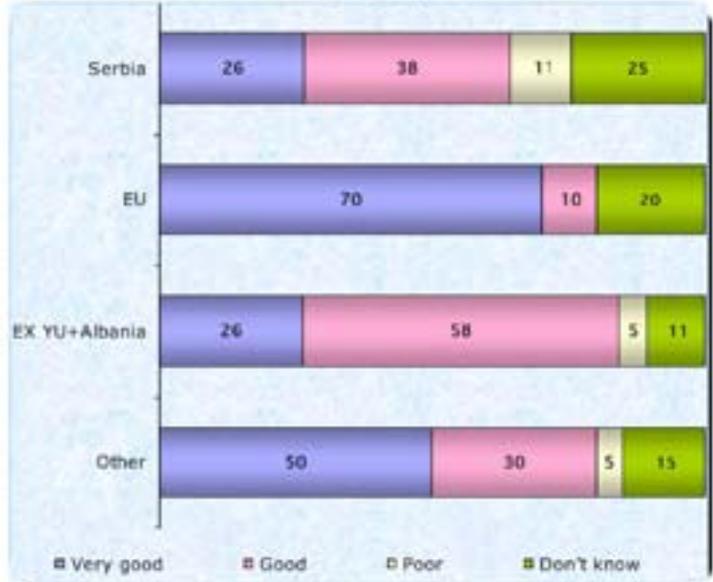
The quality of accommodation was evaluated as “very good” by almost two fifths of respondents (38.4%). Among visitors from EU countries, 70% rated accommodation as “very good”. Similarly, tour operator/travel agent was rated as “very good” by 28.2% of respondents and “good” by 27.3%. Respondents from the EU and from Other Countries category, including Russia, rated tour operators/travel agents highly 74% and 85% of the time respectively.

Graphic 27.1 Accommodation range

Base n=112 (100.0%)

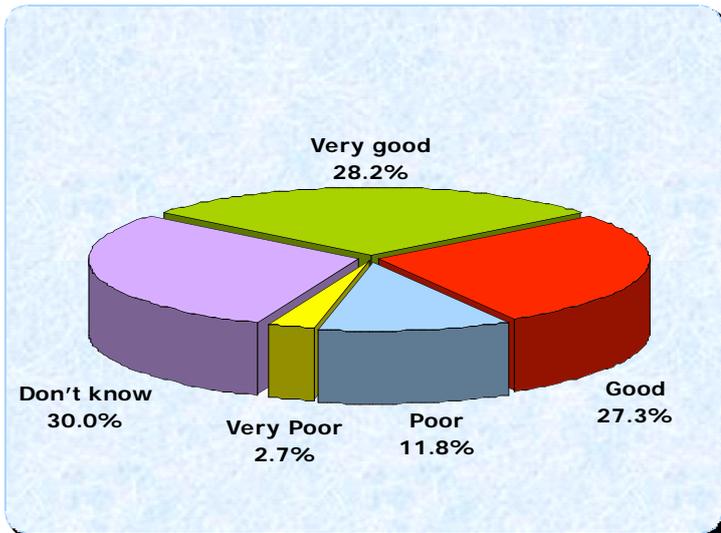


Graphic 27.2 Accommodation range / Countries of origin (%)

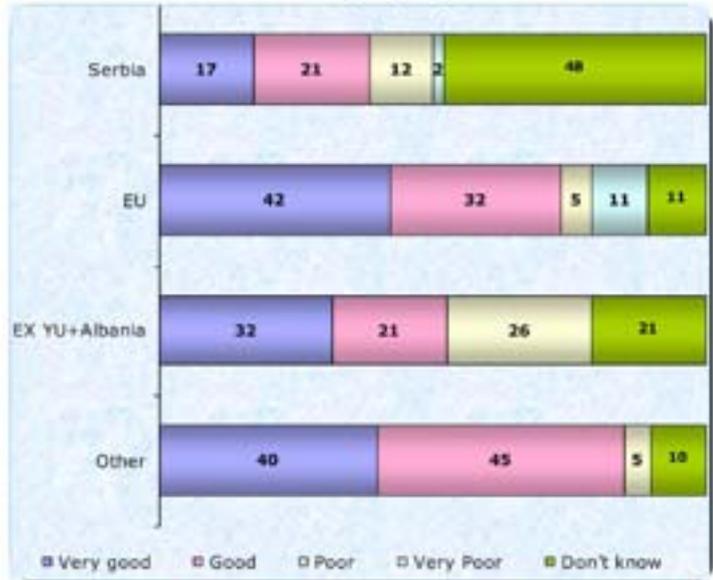


Graphic 27.3 Tour operator-travel agent

Base n=110 (98.2%)

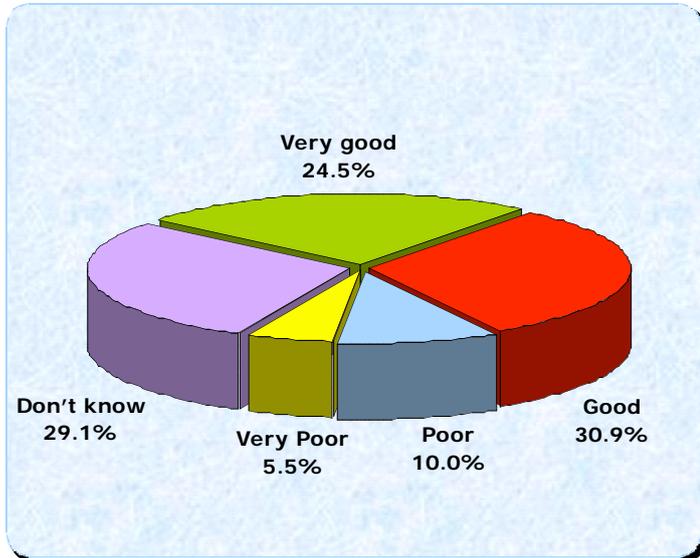


Graphic 27.4 Tour operator-travel agent / Countries of origin (%)

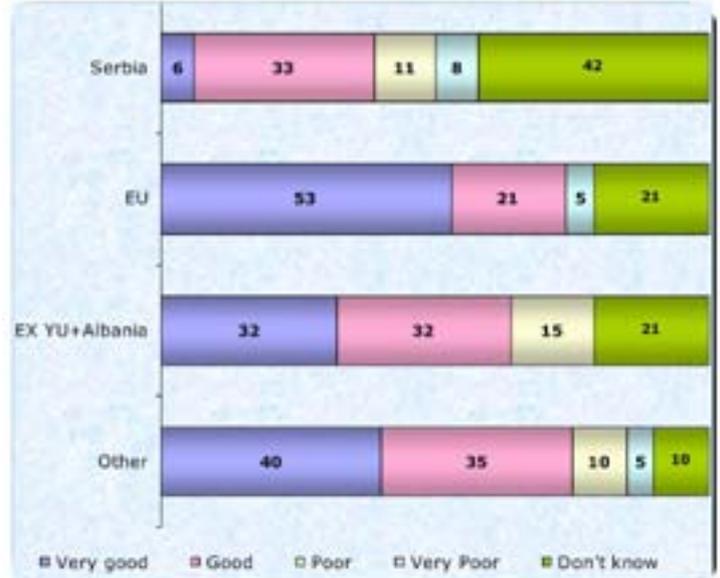


The quality of guide services was rated highly by most respondents, especially those from the EU and Other Countries category. Recreational activities also received exception marks, and were evaluated as “very good” by 45.5% of respondents.

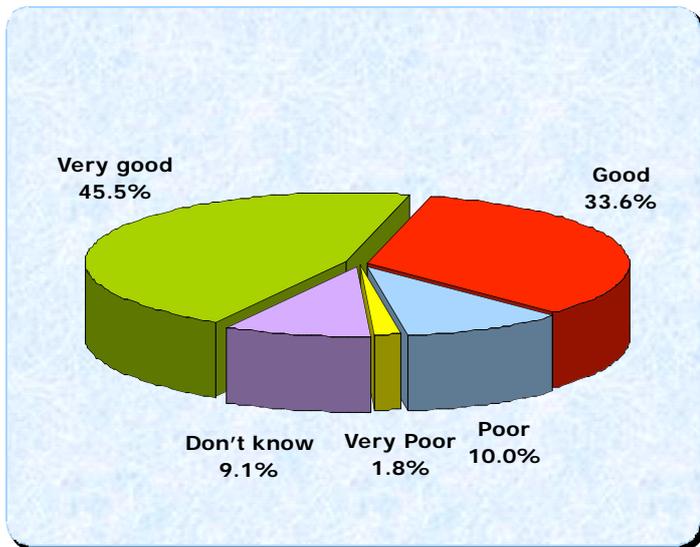
Graphic 27.5 Guide services
Base n=110 (98.2%)



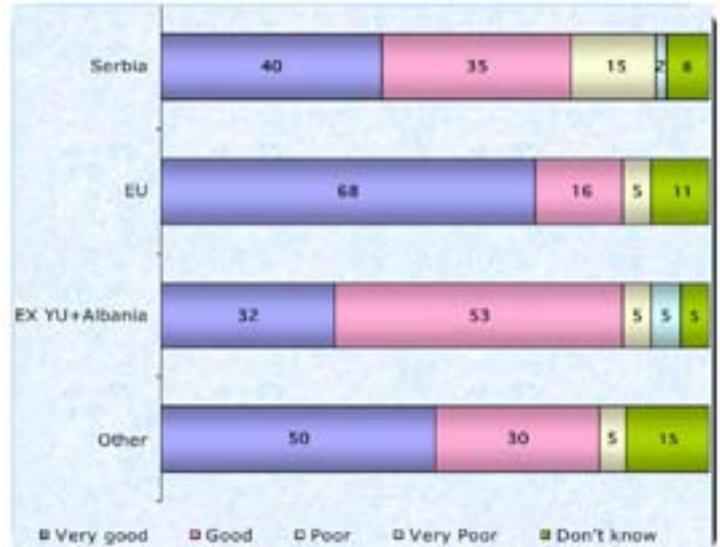
Graphic 27.6 Guide services / Countries of origin (%)



Graphic 27.7 Recreational activities
Base n=110 (98.2%)



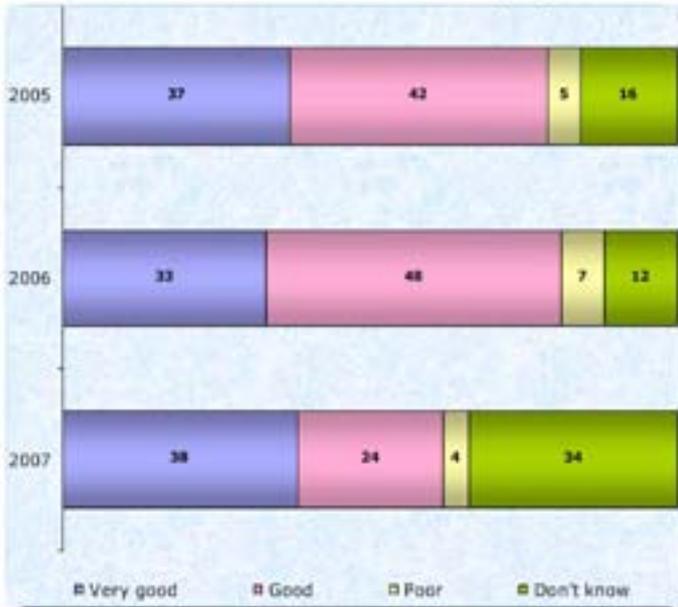
Graphic 27.8 Recreational activities /Countries of origin (%)



In order to get full overview of quality evaluation on key tourism services and assets in northern Montenegro, the survey results were assessed based on the to the date of the respondents' previous visit to

this region. The results show that the quality of accommodation, guides' services and recreational activities are continually improving.

Graphic 27.9 Accommodation/Last visit to the North of MN in 2005-2007 (%)



Graphic 27.10 Tour operator/travel agent / Last visit to the North of MN in 2005-2007 (%)



Graphic 27.11 Guide services / Last visit to the North of MN in 2005-2007 (%)



Graphic 27.12 Recreational activities / Last visit to the North of MN in 2005-2007 (%)



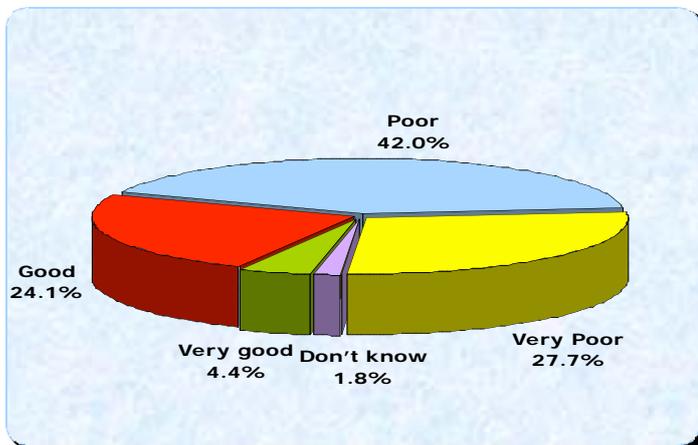
28. How would you rate the general tourism environment in northern Montenegro?

Respondents were also asked to rate different aspects of the tourism environment on a scale of 1-5, with one indicating “poor” and 5 indicating “very good”. Overall, respondents rated the tourism environment in northern Montenegro positively. The hospitality of citizens of the Northern Region of Montenegro received the highest rating of respondents (3.74), followed closely by employee customer service (3.63).

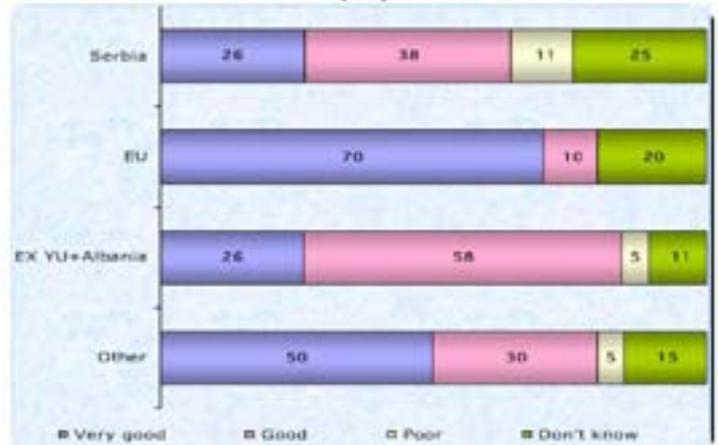
The following table illustrates indicators for tourist service segments in the North of Montenegro:

	Indicator level
Friendly attitude of citizens	3.74
Customer service of employees	3.63
Security & emergency services	3.55
Cleanliness (indoor)	3.60
Cleanliness (outdoor)	3.45
Information on tourism services	3.25
Signs and directions	3.12
Language skills of employees	2.80
Infrastructure (road, water, etc.)	2.36

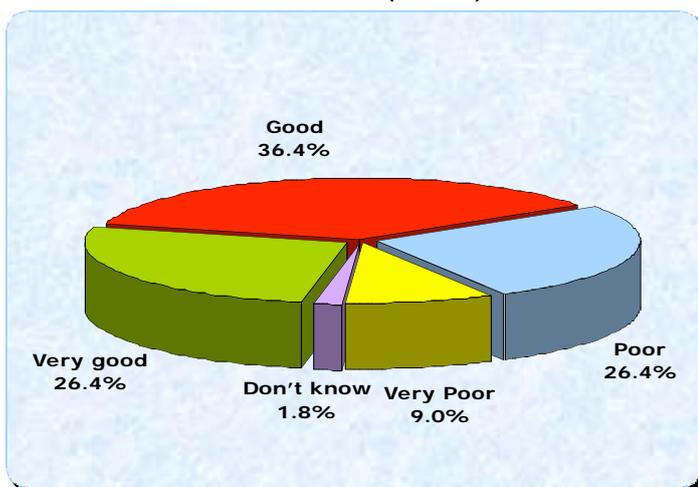
Graphic 28.1 Infrastructure
Base n=112 (100.0%)



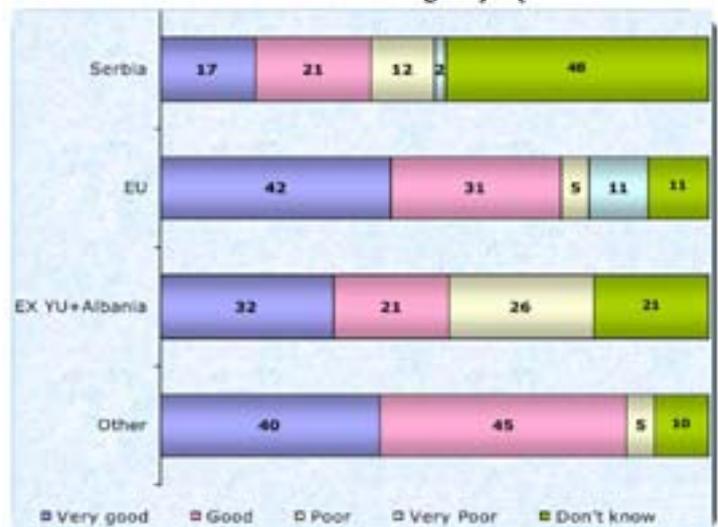
Graphic 28.2 Infrastructure /Countries of origin (%)



Graphic 28.3 Cleanliness (outdoor)
Base n=110 (98.2%)



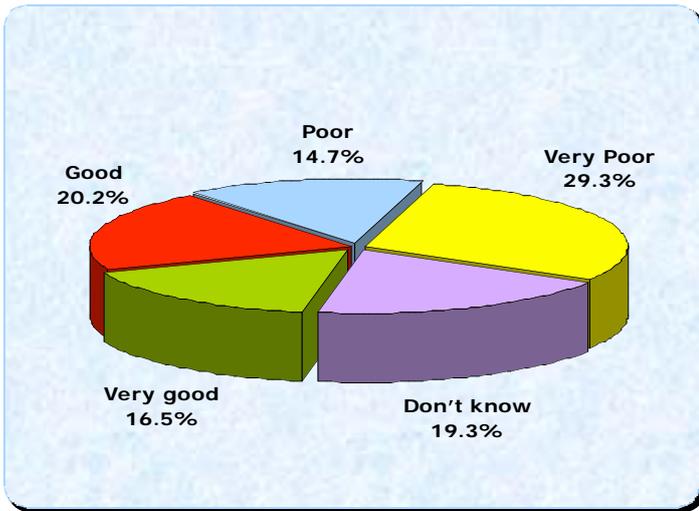
Graphic 28.4 Cleanliness (outdoor) /Countries of origin (%)



In contrast, infrastructure including roads received a poor rating (2.36), as did foreign language skills (2.8). Surprisingly, the majority of visitors from the EU rated the infrastructure as “very good”, this may reflect a differing level of expectation. The same may be true when observing “outdoor cleanliness” and “language skills” which received positive ratings from EU visitors.

Graphic 28.5 Language skills of employees

Base n=109 (97.3%)

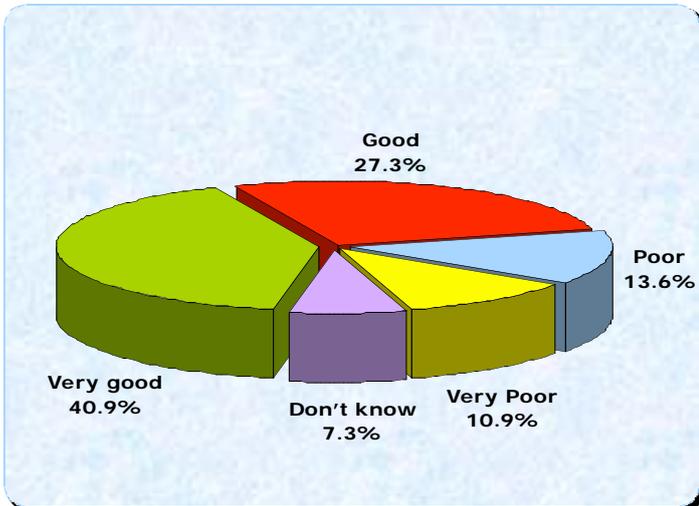


Graphic 28.6 Language skills of employees /Countries of origin (%)

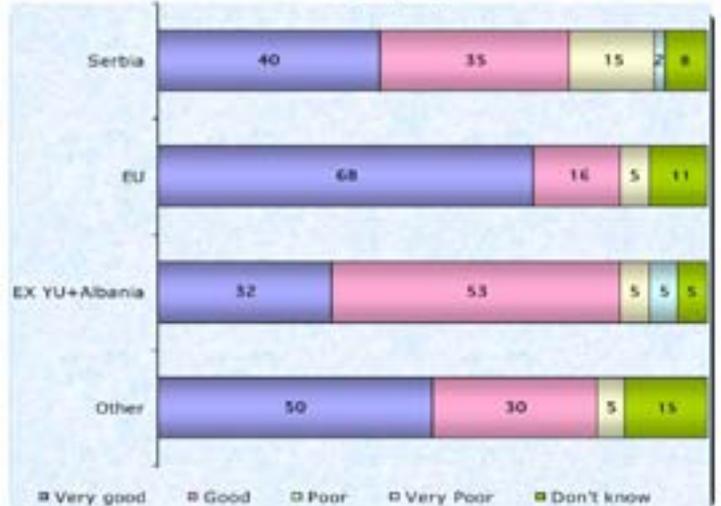


Graphic 28.7 Friendly attitude of citizens

Base n=110 (98.2%)

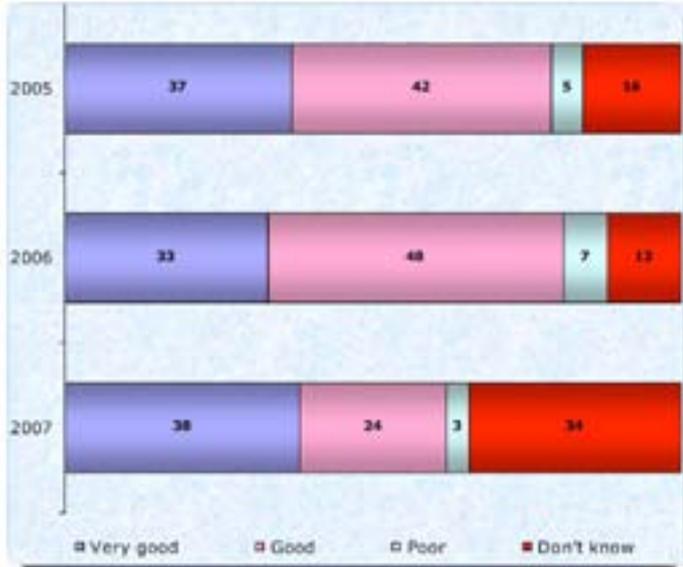


Graphic 28.8 Friendly attitude of citizens /Countries of origin (%)

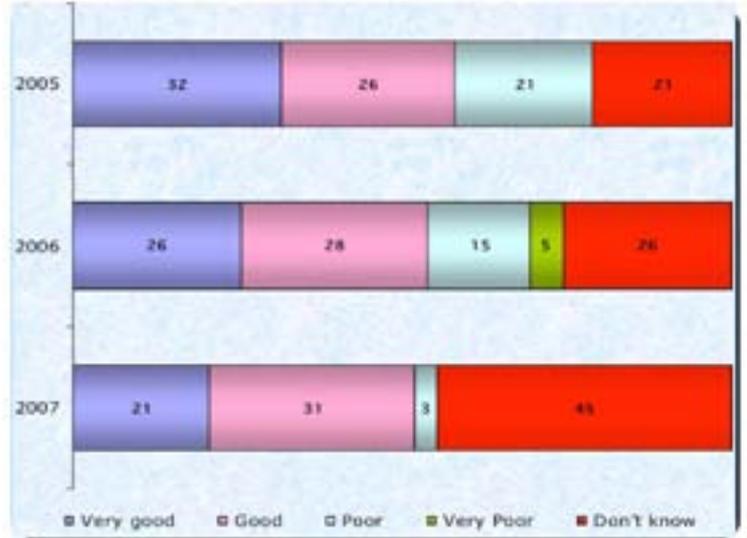


Depending when the respondents had most recently visited northern Montenegro, the assessments of tourism services and assets varied. According to the respondents' opinions, infrastructure, knowledge of foreign languages, and friendly attitude of citizens have been improving in recent years.

Graphic 28.9 Infrastructure/ Last visit to the North of MN in 2005-2007 (%)



Graphic 28.10 Cleanliness (outdoor)/ Last visit to the North of MN in 2005-2007 (%)



Graphic 28.11 Language skills of employees / Last visit to the North of MN in 2005-2007 (%)



Graphic 28.12 Friendly attitude of citizens / Last visit to the North of MN in 2005-2007 (%)

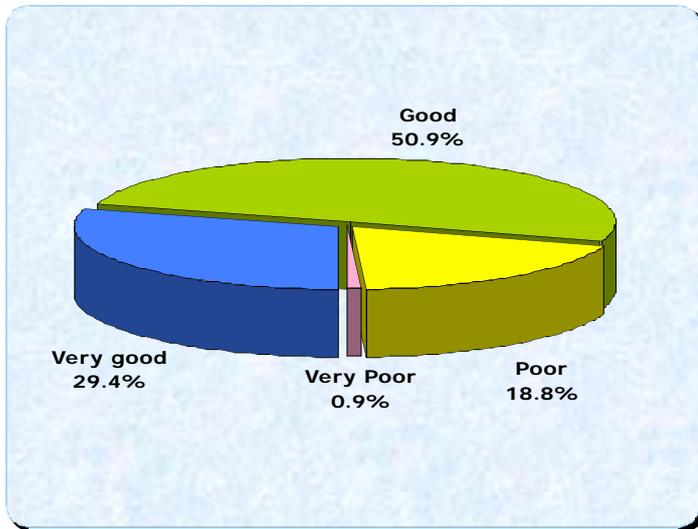


29. Overall, how would you rate your stay in northern Montenegro?

After every trip, tourists take with them lasting impressions of the destination they visited and the tourism offer. Based on our survey results, we can say that most tourists are satisfied with their travels to northern Montenegro, especially those from EU and Other Countries category, including Russia.

Graphic 29.1 Assessment of staying in the North of Montenegro

Base n=112 (100.0%)



Graphic 29.2 Assessment of staying in the North of Montenegro /Countries of origin (%)

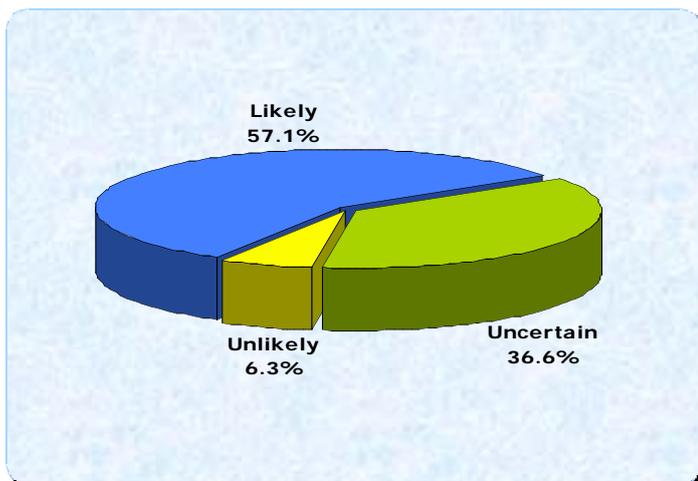


30. How likely is it that you will return to northern Montenegro for a holiday visit during the next 5 years?

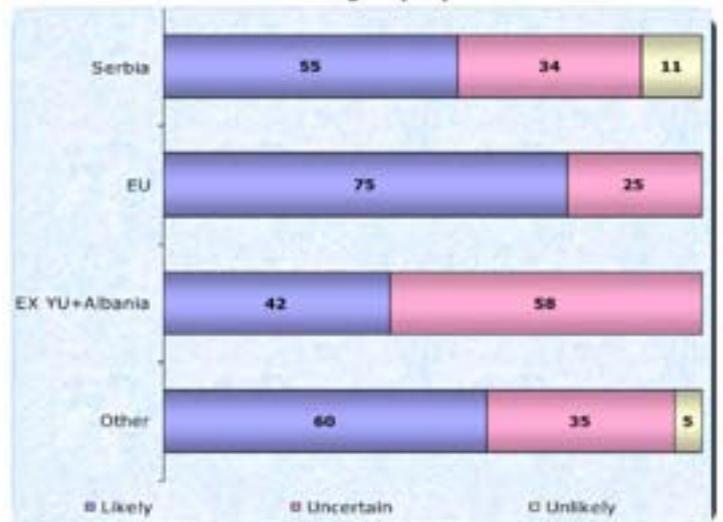
Another indicator showing the tourists' satisfaction is their interest in returning to northern Montenegro. Results of our survey are generally positive, as more than a half of tourists (57.1%) stated that they may visit northern Montenegro again in the next five years. It is interesting to note that this is most strongly expressed among tourists coming from EU countries.

Graphic 30.1 Possibility of repeated visit

Base n=112 (100.0%)



Graphic 30.2 Possibility of repeated visit/Countries of origin (%)





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CEED Consulting – The First Consulting Centre in Montenegro

About Us

CEED, the Montenegro's leading consulting company, helps clients improve their business operations, further develop and perfect both their service and product, seize opportunities, and meet the need of their customers. CEED was established in 1993 within the School of Economics at the University of Montenegro. Since 1998 operates as an independent organization. Besides the head office in Podgorica, CEED has branch office in Kotor. Through cooperation with the Centre for International Private Enterprise (CIPE, Washington DC), CEED influenced shaping up business environment in the period when critical economic reforms were taking the place in Montenegro. Today, CEED is offering a wide range of consulting services focusing on business consulting, market research and training. With more than 200 clients in Montenegro and references with international organizations, CEED developed image of reliable partner.

Our activities

CEED became leading consulting company in Montenegro capable to provide comprehensive variety of services in the area of its core business and in conjunction with its partners through outsourcing.

Business consulting - CEED's core activity is ongoing consulting followed by reorganization and company restructuring, financial analysis, due diligence, development of investment, marketing and business plans and ISO pre-certification. Gradually CEED is moving towards regional market as a member of regional network (www.ceed-global.org).

Service to foreign investors - CEED is offering representation to foreign investors and tailored made cooperation based on the specific demand as well as connections with domestic companies and institutions.

Market Researches - These services include market research, market analysis, feasibility studies and public opinion pools.

Policy analysis and Advocacy - CEED is constantly monitoring major business legislation and its implementation and offer changes that aim to improve business environment in Montenegro. CEED played important role in drafting Company Law, Accounting Law, Law on Participation of Private Sector in Public Services, reduction of grey economy in Montenegro, etc.

Publication - CEED's regular publications are widely read by the Government, private sector and donor community. Some of those publications include Montenegro Business Outlook, Barriers to Doing Business, Sectorial Analysis, etc.



Centre for Sustainable Tourism Initiatives (CSTI)

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CSTI – Centre for Sustainable Tourism Initiatives

About Us

Centre for Sustainable Tourism Initiatives is a non-government, non-profit organization working on the development of the tourism products in Montenegro, engaging the principles of responsible and sustainable tourism. Its long term goals are increased employment and increased income in tourism sector through promotion of the natural beauties, outdoor activities and existing establishments; increased public awareness and involvement of local businesses and communities in creating plans and strategies for development of the area they live and work in.

Our Vision

"The tourism industry generates prosperity and peace for Montenegro's citizens while preserving the wild beauty of its environment."

Our Mission

The Centre for Sustainable Tourism Initiatives is the driving force for the development of the tourism products in Montenegro. By following the principles of responsible and sustainable tourism, we will economically regenerate the regions, reduce poverty and attract investments.

- We provide active community leadership by supporting and coordinating local, regional and cross-border tourism development programs;
- We work with ministries, local self-governments, tourism organizations, tourism service providers, agencies, associations, international tourism and development organizations and other tourism stakeholders.
- We share and encourage the exchange of tourism know-how and foster cooperation and collaboration amongst our partners;
- Together with our partners, we implement innovative tourism initiatives that continually raise quality standards and improve the competitiveness of the industry.

CSTI is...

...always ready for cooperation. If you are interested in learning more about CSTI, please contact us, we will be happy to answer your questions.

