

INBOUND TOURISM IN MONTENEGRO

Implemented and future developments in statistics

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Inbound tourism in Montenegro

STATUS BEFORE THE PROGRAMME

- Lack of border surveys
- Few occasional surveys at tourism industry
- Lack of secondary data sources (i.e. Administrative data)

ALSO

- Good inter-institutional cooperation
- Continuous improving of the data acquisition

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FIRST STEPS

- Improving of the existing surveys:
 - Guest survey implemented by NTO
 - Annual surveys on hotel industry
 - Implementing international recommendations
- Recommendations for changing existing surveys:
 - Country of residence
 - Expenditures

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CREATING OF NTA's DATABASE

- Regular data from monthly / quarterly / annually reports (MONSTAT, Central Bank)
- Other collected administrative data :

Airports

National Carrier

Border Control

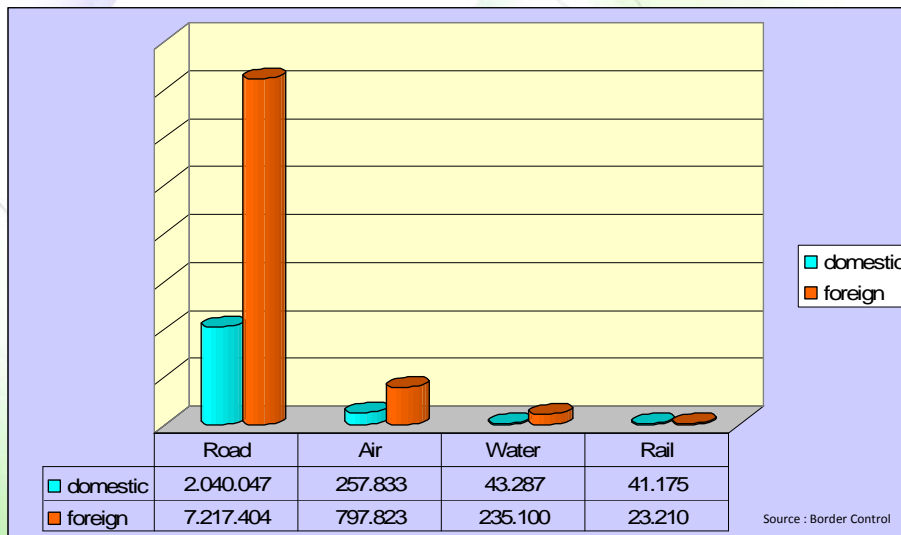
National Parks
Management

Ministry of
Finance

Other surveys
and researches
(LTOs,
stakeholders)

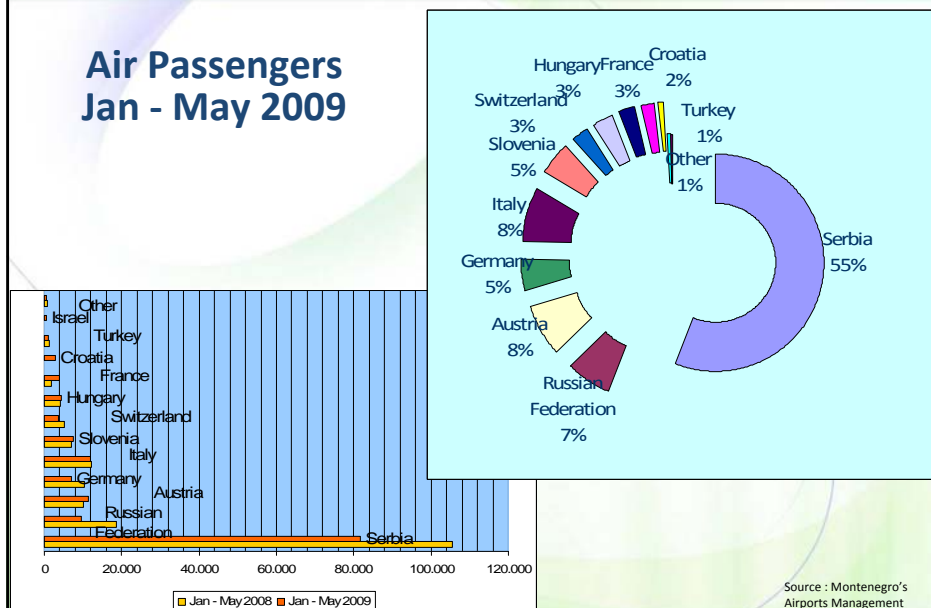
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Border Crossings 2007



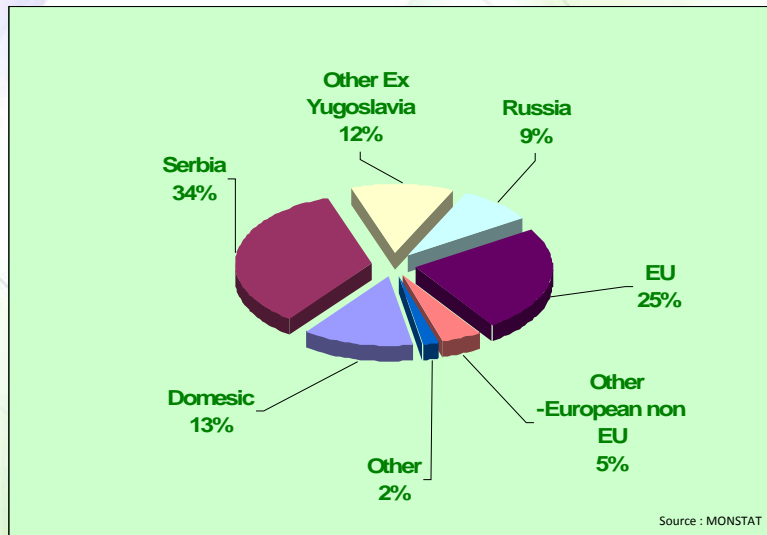
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Air Passengers Jan - May 2009



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Arrivals 2007



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Tourism Sector Economic Impact Analysis

- Ministry of tourism and GTZ - project in progress
 - **Focus:** Socio-economic benefits / impacts from different types of tourism products
 - Developing the basis to **forecast the economic, social, cultural and environmental impacts of upcoming investments** and to further the strategy for sustainable tourism development as laid down in the tourism Master plan
 - Propose a **monitoring concept** for the impact of decisions taken in the tourism sector
 - Prepare the basis to identify and introduce **software** that is able to forecast economic effects of investments in the tourism sector

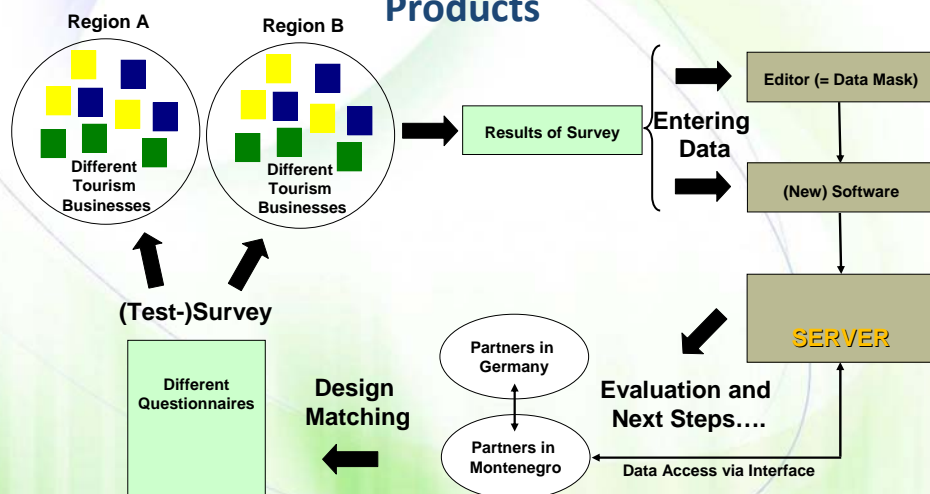
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Guiding Questions of the Analysis On Supply Side

- How much income do different types of tourism generate?
- How is this income distributed to different groups of beneficiaries and different regions in Montenegro?
- How many resources and investment do different types of tourism require for their development and in their operation?

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Analysis of the Economic Impact of Existing Tourism Products



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Total Sample

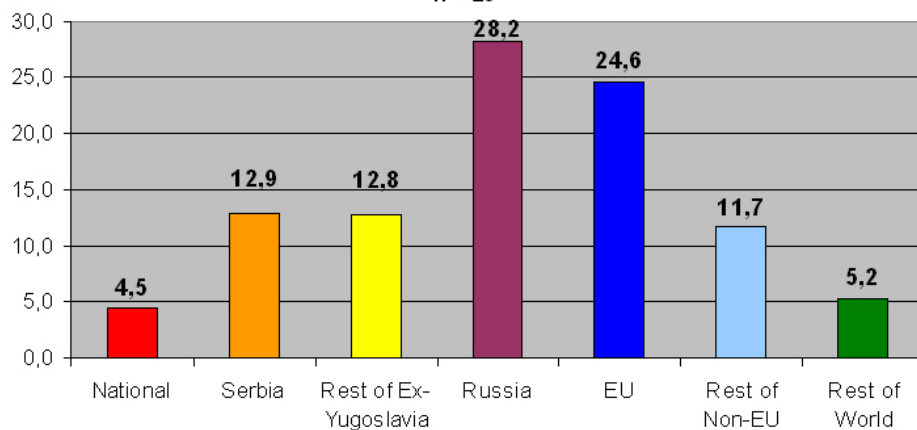
- Accommodation: 74
 - 29 Hotels (incl. Garni Hotels)
 - 40 Private Accommodation / Apartments
 - 5 Camping Sites
- Tour Operators: 25
- Restaurants: 15

114 Tourism Providers

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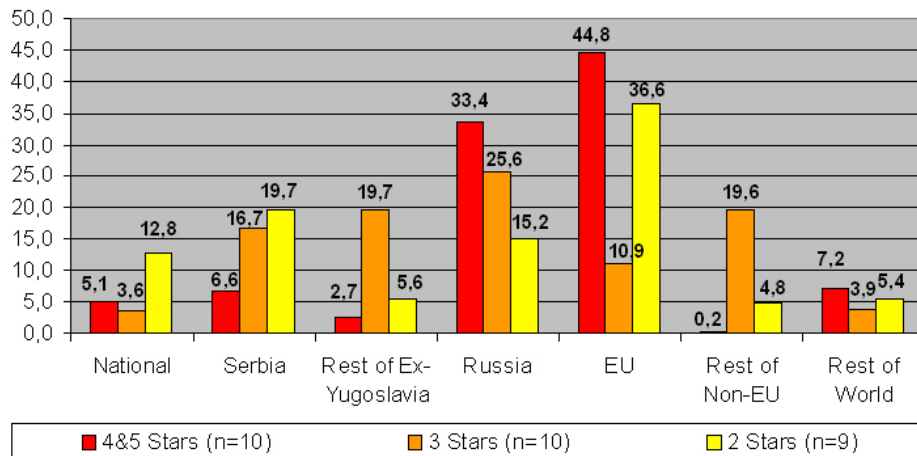
Origin of Guests 2007 (in %)

n = 29



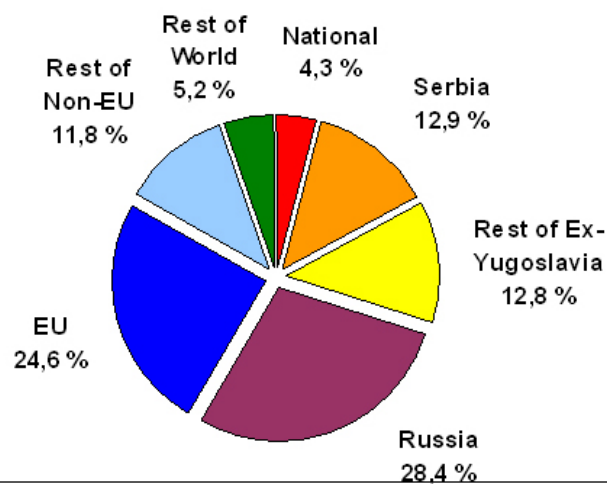
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Origin of Guests by Category 2007 (in %)



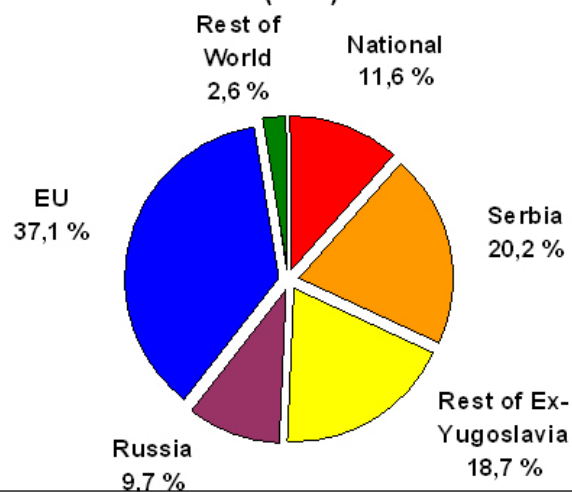
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Origin of Guests of Coastal Region Hotels 2007 (n=23)



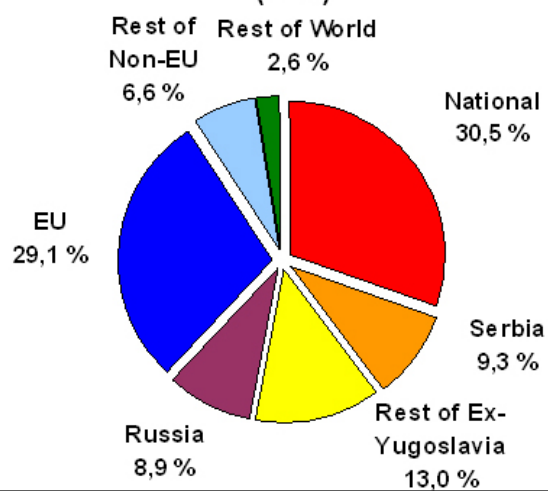
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Origin of Guests of Central Region Hotels 2007 (n=2)



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Origin of Guests of Mountain Region Hotels 2007 (n=4)



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Guest Survey 2009 (Ministry of tourism and NTO, in cooperation with GTZ and ZTS)

- **Methodology:**
 - About 1.500 interviews from May to October 2009 for visitors on holiday trips
 - Results will show interests of tourists visiting Montenegro, together with their spending habits
 - Results will be linked and also analysed with the results of the supply side researches
 - Publication of results: first quarter of 2010
 - Next research will be carried out in 3 years

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Guest Survey 2009

- **Questionnaire:**
 - Gender, age
 - Country and town of residence
 - Education, employment/occupational group
 - Monthly net income of your household (EUR)
 - How many times do you travel for holiday per year?

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Guest Survey 2009

- Number of nights in Montenegro / location
- Planning / organizing / booking trip
- Transportation to get to / use within Montenegro
- Main activities during the trip in Montenegro
- Visit to the specific places
- Overall holiday impressions / aspects in Montenegro
- Quality of the accommodation (in total and in detail)

AND

- Will you return in next 5 years?
- Would you recommend to your relatives and friends?

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Guest Survey 2009 Details on expenditures

- Spendings for holiday in Montenegro (estimated):
 - Plan
 - Already spent
 - Will be spent
- total / per person / per night
 - **Opinion:** Holiday in Montenegro is cheap / expensive

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Guest Survey 2009 Details on expenditures

- Estimation of expenditures for goods / services (total / per person / per night):
 - Accomodation
 - Food and beverages – shops/markets & restaurants
 - Shopping and souvenirs
 - Local transport (bus, train, taxi)
 - Guiding service
 - Entertainment (discotheque, bars, etc.)
 - Cultural activities (museum, theatre, etc.)
 - Sport activities (surfing, rafting, etc.)
 - Rental (boat, car, bicycle)
 - Other

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FUTURE DEVELOPMENTS

- A new server for hosting data and results of current and future researches regarding tourism, travel and their economic effects
- Creating common database for all data – official and administrative – regarding tourism, travel and their economic effects
- Including more institutions, such as Universities and private sector representative bodies, in existing working group
- Pilot Survey on expenditures for year 2010
- Introducing pilot Border survey in next 2 years
- Survey on same day visitors (locally or nationally)

THANK YOU

QUESTIONS?

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