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
FIRST STEPS

Improving of the existing surveys:
- Guest survey implemented by NTO
- Annual surveys on hotel industry
- Implementing international recommendations

Reccomendations for changing existing surveys:
- Country of residence
- Expenditures

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)
Inbound tourism in Montenegro

Border Crossings 2007

<table>
<thead>
<tr>
<th>Mode</th>
<th>Domestic</th>
<th>Foreign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road</td>
<td>2,040,047</td>
<td>7,217,404</td>
</tr>
<tr>
<td>Air</td>
<td>257,833</td>
<td>797,823</td>
</tr>
<tr>
<td>Water</td>
<td>43,287</td>
<td>235,100</td>
</tr>
<tr>
<td>Rail</td>
<td>41,175</td>
<td>23,210</td>
</tr>
</tbody>
</table>

Source: Border Control

Inbound tourism in Montenegro

Air Passengers
Jan - May 2009

Source: Montenegro's Airports Management
Inbound tourism in Montenegro

Arrivals 2007

Source: MONSTAT

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
Inbound tourism in Montenegro

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?

Analysis of the Economic Impact of Existing Tourism Products

- Enter Data
- Results of Survey
- Design Matching
- Different Questionnaires
- Region A
- Region B
- Partners in Germany
- Partners in Montenegro
- Data Access via Interface
- Editor (= Data Mask)
- (New) Software
- Server
- Partners in Montenegro
- Partners in Germany
- Evaluation and Next Steps
**Inbound tourism in Montenegro**

**Total Sample**

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

114 Tourism Providers

**Origin of Guests 2007 (in %)**

- **National:** 4.5%
- **Serbia:** 12.9%
- **Rest of Ex-Yugoslavia:** 12.8%
- **Russia:** 28.2%
- **EU:** 24.6%
- **Rest of Non-EU:** 11.7%
- **Rest of World:** 5.2%
Inbound tourism in Montenegro

Origin of Guests by Category 2007 (In %)

- National: 5.1, 12.6, 5.5, 6.6, 19.7, 2.7, 6.6, 6.6, 6.6, 6.6
- Serbia: 3.6, 6.6, 6.6, 16.7, 19.7
- Rest of Ex-Yugoslavia: 2.7, 19.7, 19.7
- Russia: 33.4
- EU: 44.8
- Rest of Non-EU: 10.9, 4.8, 7.2
- Rest of World: 3.9, 4.5, 0.4

4 & 5 Stars (n=10), 3 Stars (n=10), 2 Stars (n=9)

Inbound tourism in Montenegro

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

- EU: 24.6%
- Rest of Ex-Yugoslavia: 12.8%
- Russia: 28.4%
- Rest of Non-EU: 11.8%
- Rest of World: 5.2%
- National: 4.3%
- Serbia: 12.9%
Inbound tourism in Montenegro

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

- EU: 37.1%
- Serbia: 20.2%
- Rest of Ex-Yugoslavia: 18.7%
- Russia: 9.7%
- Rest of World: 2.6%
- National: 11.6%

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

- EU: 29.1%
- Serbia: 9.3%
- Rest of Ex-Yugoslavia: 13.0%
- Russia: 8.9%
- Rest of Non-EU: 6.6%
- Rest of World: 2.6%
- National: 35.5%
**Inbound tourism in Montenegro**

**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.

**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?
Inbound tourism in Montenegro

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?

Inbound tourism in Montenegro

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
**Inbound tourism in Montenegro**

**Guest Survey 2009**

**Details on expenditures**

Estimation of expenditures for goods / services (total / per person / per night):
- Accommodation
- 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

**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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