



Bjelasica & Komovi region Guest Survey Summer 2005

Background

During the summer season 2005 a guest survey about the satisfaction of visitors with the regional tourism offer in the Bjelasica and Komovi region (municipalities of Kolašin, Bijelo Polje, Berane, Andrijevica and Mojkovac and the NP Biogradska Gora) has been conducted.

The purpose of this survey was to obtain relevant information on the profile of visitors, to identify what elements are crucial for them in deciding to visit the region and to rate their satisfaction with the tourist offer.

The information gained by the survey is important for focused product development and marketing in tourism.

This survey has been conducted by the Austrian – Montenegrin co-operation project for the Bjelasica and Komovi region in co-operation with CEED (Center for Entrepreneurship and Economic Development)

Methodology

On ten days on weekends in July, August and September personal interviews with more than 300 persons of a representative sample have been made.

Based on available statistical data quotas for the sample have been defined: number of interviews per municipality, place of origin (Crna Gora 40%, Serbia 30%, other nationalities 30%), balanced gender distribution. Within these quotas the visitors were polled using a random sample methodology.

The questionnaire consisted of 34 questions (including demographic questions).

Survey results

Who are the guests in the Bjelasica & Komovi region

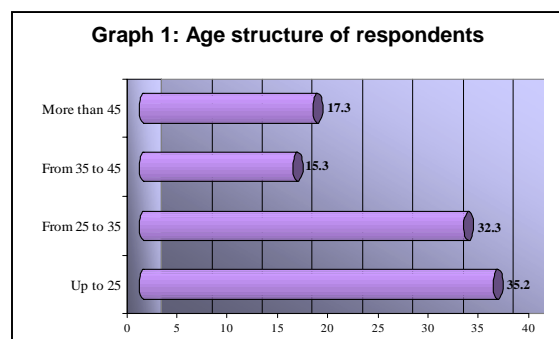
Origin of guests: The quota for the origin of the respondents was defined (CG 40%, Serbia 30%, others 30%). Among the other international visitors most were from the Czech Republic (17,3%), France and Great Britain (9,2% each), and from Denmark, Macedonia and the Ukraine (8,0% each).

Looking more closely at the Serbian and international visitors reveals that half of them have a very close relation with the region (they have a own holiday house or they stay in friend's/cousin's house during the vacation).

Age and social status: Most of the visitors were quite young (67,5% up to 35 years). On average international tourists are slightly older.

More than half of the respondents completed high school or obtained an Associates degree and most are employed (for both categories 54%).

On third of visitors come with they're with family, including kids until the age of 14 (CG 40% Serbia and others 30% each).





Why do the guests come

Source of information: Adding the first, second and third ranked source of information that tourist use to inform themselves about the B&K region it shows, that tourists do know the region very well.

When looking at the “real” international tourists¹ the source of information are (weighted values):

- 1. Information and recommendation from relatives/friends 26.8%
- 2. Travel literature/travel guide 25.3%
- 3. Internet 14.9%
- 4. Advise/Catalogue of travel agencies 13.4%
- 5. Magazines/brochures of regions 10.5%
- 6. Information at the tourism office at home 9.1%

1st, 2nd and 3rd ranked sources of information		%
1.	I already knew region	64.9
2.	Information and recommendations from relatives/friend	49.2
3.	I have holiday house	16.4
4.	Magazines/brochures of regions	10.8
5.	Travel literature/travel guide	9.5
6.	Visit of a trade show/tourism fair	7.9
7.	Advise/Catalogue of travel agencies	7.5
8.	Reports/advertising in media	4.3
9.	Internet	4.3
10.	Information at the tourism office at home	3.9
11.	Others	2.0

Reasons for coming: Most of the tourist decide to come to the B&K region because of the beauty of the region and their personal links.

1st, 2nd and 3rd ranked important reasons for coming		%
1.	Nice landscape, nature	63.0
2.	Relatives/friends are living here	52.1
3.	Clean air, healthy environment	45.2
4.	Because we came here every year	33.1
5.	National Park	32.8
6.	Good conditions for active sports	19.7
7.	Experience something new	13.4
8.	It is close to the transit route	5.9
9.	It is quite cheap	3.6
10.	Other	3.0
11.	It is quite near to my home	1.6

Nice landscape and healthy environment are most important for international visitors, while friends and relatives are key reasons for visitors from Serbia and Montenegro to come and stay in the region. The most important factor for the “real” international tourists are nice landscape, National Park and clean air. On the other hand, international tourists that know the region emphasize that friends living here and the habit to come every year are the crucial factors to come over and over again.

¹“real” international tourists: those who do not stay in an holiday house of their own or in the house of their family or friends



How long and where do tourists stay in the region

78% of the tourists stay in the region over night (22% one-day-visitors). This figure of lodging guests varies according their place of origin (Montenegrin 73%, Serbian 79% International 85%).

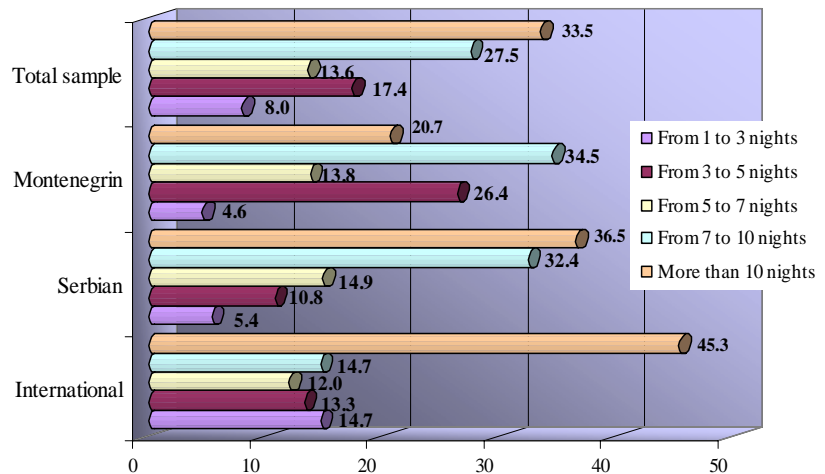
Those visitors who sleep in the region stay an average of 9,3 days.

Depending on the type of accommodation this average varies. Guests stay longer in their own house (12,1 nights) and with friends (10 nights) whereas tourists stay shorter in hotels (8,2 nights), private accommodation (7,7 nights) and in rented houses (7,4 nights).

Number of overnights by origin of guests:

Montenegrin guests stay mainly between 3 and 10 nights whereas a high proportion of Serbian and international visitors stay more than seven or even more than ten days.

Almost half of the international visitors stay more than 10 nights in the region. Differentiating this group according to the type of accommodation one notices substantial differences:



Overnights of international tourists

Number of nights	Stay in own holiday house or with family and friends (%)	Other type of accommodation (%)
1 - 3	7.5	22.8
3 - 5	5.0	22.8
5 - 7	2.5	22.8
7 - 10	22.5	5.7
10 and more	62.5	25.9

International visitors with own holiday house or staying with relatives stay substantially longer.

How satisfied are tourists with accommodation and restaurants in the B&K region?

Accommodation: In general guests are quite satisfied with all quality aspects of their accommodation (Service quality, Quality of breakfast, Leisure facilities/entertainment, Quality of rooms, Prices). 87% of guests rate accommodation quality as very good (52%) or good (35%).

Restaurants: Guests are also very satisfied with the gastronomic offer. 93% of them rate the quality of restaurants as very good (67%) or good (26%).



The “Quality of food” and “Availability of traditional domestic dishes” were valued the best (marks 4.57 and 4.55, respectively). Followed by “Quality of restaurant infrastructure” (4,42), “Quality of service” (4,30) and “Prices” (4,09)².

For improving the gastronomic offer guests proposed, “to have a broader offer of regional specialties” (especially international guests) and “lower prices” (mainly Montenegrin and Serbian visitors). Further suggestions were concerning the “hygienic conditions” and “better foreign languages of the service staff” (mainly international guests).

How do the guests like the tourist offer in the B&K region?

Tourists were asked to assess both the importance and the actual quality of the regional leisure offer³. The following table shows the results:

Assessment of importance and quality of the the tourist offer

<i>Possible activities</i>	<i>importance</i>	<i>quality</i>
1. Wellness/beauty/health	4.67	4.51
2. Offer for the public transport	4.50	3.19
3. Visitor information	4.42	3.38
4. Signalization of sites, restaurants, hotels, ski centres...	4.40	3.64
5. Condition of roads	4.38	2.61
6. Typical local restaurants	4.35	4.09
7. Visiting of cultural sights, museums, exhibitions	4.33	3.45
8. Rafting	4.26	4.14
9. Cultural events, theatre, festivals, music	4.21	3.17
10. Walking within the vicinity of the villages	4.19	3.90
11. Hiking, mountain climbing	4.17	3.94
12. Jogging, running	4.11	3.90
13. Cycling	4.04	3.59
14. Disco, bar	3.99	3.79
15. Shopping	3.98	3.69
16. Events in the evening	3.86	3.15
17. Canoeing	3.77	3.26
18. Other sports activities (paragliding...)	3.74	2.65
19. Fishing	3.69	3.59
20. Horseback riding	3.56	2.01
21. Mountain biking	3.48	2.64
22. Programs for bad weather	3.31	2.27
23. Cultural sites (movie theatre, cultural exhibits, poetry evenings)	3.30	-
24. Hunting	3.26	3.04
25. Programs for children	3.19	2.10

Wellness/beauty/health, Offer of public transport and visitor information were recognized as the most important. In order to find the most urgent areas for improving the tourist offer crosschecks between importance and assessed quality have been made. The biggest differences between high importance and actual quality are recognized at Condition of roads, Horseback riding, Offer for the public transport, Other

² The marks for assessing the quality range from 5-very good, 4-good, 3-medium, 2-rather bad and 1-very bad

³ The marks for assessing the importance range from 5-very high, 4-high, 3-medium, 2-low, 1-very low



sports activities (paragliding...), Programs for children, Visitor information, Cultural events and Programs for bad weather.

Many of the respondents (60.0%) suggested improvements of relevant aspects of the tourist offer. Every second of them suggested improving the roads and every fifth suggested to make more and better information available about the leisure offer and the region itself.

The relevance of the National Park

95% of all tourists in the region know about the National Park Biogradska Gora (Montenegrin 98.4%, Serbian 92.6%, international 86.4%).

Watching wild life is the preferred choice of Montenegrin and International tourist and of visitors up to the age of 35 years.

<i>Visitors would you like to practice these activities in the NP</i>		<i>%</i>
1.	Watching wild life	73.1
2.	Walking and hiking	66.6
3.	Camping	42.3
4.	Participate in a guider tour	22.6
5.	Photo safaris	18.4
6.	Mountain biking	13.1
7.	Other	4.3
8.	Scientific visit	3.6

How much money do tourists spend for accommodation and food?

Spending for accommodation and food per person and day

Euro	All guests (%)	Guests that do not stay in own holiday house or with family and friends (%)
0-10	26,8	10,9
11-20	43,3	19,6
21-30	15,1	26,1
30 and more	4,8	43,5

Visitors from Montenegro and Serbia mostly spent less than €10 per day (32% and 30% respectively) as well as those staying in family/friend's house (29%). About one third of International visitors spend €1 to €20 per day.

When excluding visitors that stay in their own holiday house or with family and friends the average spending is much higher.

The satisfaction with vacations in the Bjelasica and Komovi region

Satisfaction: Visitors are generally very satisfied (80,8%) or rather satisfied (18,5%) with their vacations in the Bjelasica and Komovi region.

Satisfaction with the tourist offer is also expressed by the fact that a high percentage of visitors (84.0%) would recommend the region of Bjelasica & Komovi would recommend this tourist destination to their families and friends

Complaints: One third of the visitors reported complaints concerning their vacation in the Bjelasica and Komovi region: 29.1% of these mentioned bad weather, and 27.2% mentioned bad road infrastructure as well as poor entertainment/cultural programs.

Positive experience: More than a fourth (26%) of the respondents mentioned forming new friendships as the most positive experience of their holidays in the B%K region. This is followed by enjoying the scenery and hiking (18% and 12%, respectively).



Some conclusion

Many guests know the Bjelasica & Komovi region quite well and they have strong relations with the region.

Also half of the Serbian and international guests come into the region for vacation to stay in their own holiday house or the house of their family or friends.

Summer guests stay relatively long in the region.

The National Park Biogradska Gora is very well known with all guest segments and it is an important tourist attraction in the region.

Guests are generally very satisfied with the quality of the regional tourist offer (Accommodation, Restaurants, leisure offer)

Anyway certain improvements of the tourist offer are needed:

- **accommodation:** improving the quality standards of rooms and bathrooms (especially in private pensions) and provide small leisure offer (table tennis, darts, sauna, children playground, room to play on rainy days) in and around the accommodation,
- **restaurants:** guests proposed, “to have a broader offer of regional specialties” (especially international guests) and “lower prices” (mainly Montenegrin and Serbian visitors). Further suggestions were concerning the “hygienic conditions” and “better foreign languages of the service staff” (mainly international guests), as well as menus translated to many languages according to the campaign “Year of good food”;
- **leisure offer:** provide more visitor information to tourists so they can be better aware of what is offered in this region (brochures, publications, bulletins);
- Improve the condition of the roads, develop the offer of horseback riding, improve public and taxi transport within the region, introduce and develop other sports activities (arching, paragliding...), develop better offer and programs for children, have more cultural events and create programs for bad weather.

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