

THE SEARCH OF SATISFACTION OF TOURISTS IN ORDER TO IMPROVE THE QUALITY OF MONTENEGRO TOURISM

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Abstract:

This paper is based on the survey that was conducted from June to September 2012 in Montenegro. The results of the survey are presented in public for the first time. The survey itself seeks to reach the expectation, needs and desires of tourists, to understand their attitudes and beliefs, as well as to highlight the main advantages and disadvantages of tourist offer in order to improve the quality of Montenegrin tourism and suggest the main marketing- management strategies for positioning of Montenegro as an attractive, unique, desired whole year destination with a recognizable image on global market.

Key words: Montenegro, tourism, quality, improvement.

Jel Classification: L83

INTRODUCTION

Montenegro is a small country on the Adriatic Sea which covers a surface area of only 13812 square kilometres. But, in spite of its size, it is very important to point out that the country itself boasts some of the most spectacular scenery not only in Europe, but also in the world. The prime attractions of Montenegro include richness and diversity of not only natural such as stunning coastline, mountain ranges, wild forests, preserved natural landscapes, beautiful mountain lakes and rivers, national parks, flora i fauna etc., but also cultural resources influenced by Orthodox, Slavonic, Islamic, Central European and Adriatic cultures. Having on mind the natural and cultural potentials, as well as the government's commitment to tourism development, the fact that Montenegro's international arrivals have grown from about 100000 in 2000 to around 1.1 million in 2010 is not surprising at all. It is also not surprising the fact that WTTC suggest that Montenegro will enjoy annual growth in visitor exports of around 9.4% which will put it on the second position of WTTC's Global League Table Rankings and on the first position comparing to its regional competitors. In spite of all these facts, it is inevitable to admit that the great potential and the willingness are important, but not the only conditions that should be fulfilled in order to create attractive and unique

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destination with competitive advantages on the market which is completely capable to meet all expectations, needs and desires of the existing and potential tourists.

This paper will be based on the research of the satisfaction of tourists in Montenegro in order to try to identify the main strategic points which will help all stakeholders in tourism to improve the quality of tourist offer, especially in terms of seasonality, regional development, diversity and variety of contents, development of new products and markets and improvement of the existing ones.

THE RESEARCH OF SATISFACTION OF TOURISTS IN MONTENEGRO

The main goal and objectives of research

The main goal of this research is to understand and describe the beliefs, attitudes, needs, expectations and motivations of tourists in Montenegro in order to improve the quality of tourism in Montenegro, as well as the satisfaction of the tourists themselves.

The main objectives of the survey are:

- to obtain relevant information about the profile of visitors in Montenegro
- to rate the satisfaction with the existing tourist offer
- to identify the main advantages and disadvantages of tourist products
- to suggest strategies for improvement of future development of tourism.

The description of the research and methodology

The research was carried out from June to September 2012. The questionnaire has 31 questions and is divided into three parts. The first part relates to the demographic characteristics of the visitors and the collection of data such as gender, age, country of origin, education data, employment data, monthly income etc. The second part relates to organization of holiday itself in order to find out who had organised the tourists' holiday, what kind of transport do they use, what type of accommodation do they choose, are they travelling alone or in a company, how long are they going to stay, how much money and in which purpose are they going to spend etc. The third part refers to the rating of the respondents' level of satisfaction through identification of the main reasons for visiting Montenegro, sources of information that they usually use in destination, advantages and disadvantages of the tourist offer, kind of activity that they realize in the destination itself etc.

The surveys were conducted in English, Russian, Montenegrin/ Serbian and Albanian by interviewing 285 tourists in twelve municipalities in Montenegro (Budva, Kotor, Tivat, Herceg Novi, Bar, Ulcinj, Zabljak, Kolasin, Plav, Pluzine, Podgorica and Cetinje). The respondents were randomly selected among all visitors. All surveyors were provided the same detailed instructions on how to identify respondents and conduct interviews.

The main characteristics of respondents

The subjects of research have the following characteristics:

- 52% of respondents are male and 48% female
- 25% of respondents are domestic tourists, 25% are from neighboring countries (Serbia, Bosnia and Herzegovina, Croatia, Slovenia, Macedonia, Kosovo and Albania) and 50% are from other countries. It is clear that the structure of respondents does not match the structure of arrivals in the last years, but it was led by the fact that Montenegro's international arrivals have positive trend, with tendency of future growth. Because of that, special accent in the research is put on the tourists from EU and some other markets such as the USA, China etc.
- 74% of respondents were interviewed in the South, 21% in the North and 5% in Central part of Montenegro. The structure of respondents does not match the share of arrivals in last years, because of the fact that the South region generates more than 95% share of arrivals, but it is based on the fact that future development of tourism should be based on diversification and usage of the huge potential of Northern region. That explains the fact that 21% of respondents are interviewed in the municipalities in the North. It is also important to point out that more than 5% of people were interviewed in Central part of Montenegro (especially in Cetinje), but these tourists are usually day-trippers who are stopping en route to or from the coast and the capital or the mountains.
- In the South part of Montenegro, 46% of respondents are international tourists, 28% are tourists from neighboring countries and 26% are domestic tourists. In the Northern region, 62% of respondents are international, 23% are domestic tourists and 15% are from neighboring countries. Regarding to the Central part of Montenegro, 85% are international tourists and 15% are tourists from neighboring countries.
- 7% of tourists are from 15 to 19, 26% from 20 to 29, 26% from 30 to 39, 19% from 40 to 49, 15% from 50 to 59 and 7% are more than 60 years old;
- The majority of tourists have high school diploma (40%) or university degree (40%), 18% have higher school diploma and 1% finished primary school;
- 71% are employed, 13% are students, 9% are pensioners and 7% are unemployed.
- 46% have average monthly income, 20% above the average, 15% significantly above the average, 11% below the average and 8% significantly below the average of their country.
- 74% of tourists are situated in the South, 21% in the North and 5% in the Central part of Montenegro

Key results of the research

The research showed that domestic tourists usually use their own accommodation (56%), 31% private accommodation and 13% hotel accommodation (22% 4* hotel, 56% 3* hotel, 22% 2* hotel). Tourist from neighboring countries often use hotel accommodation (3% 1* hotel, 45% 2* hotel, 23% 3* hotel, 9% 4* hotel), 42% private accommodation, 13% own accommodation. International tourists usually use hotel accommodation (8% 2* hotel, 35% 3* hotel, 46% 4* hotel, 10% 5* hotel), 42% private accommodation, 19% camps and 6% own accommodation.

Among all respondents, 56% have already visited Montenegro, 44% of them have visited Montenegro for the first time. Most of the tourists from former neighboring countries have already visited Montenegro, while more than a half of international tourists have visited Montenegro for the first time.

When asked about the main reason for choosing Montenegro, most of the tourists emphasized the satisfaction with previous visits (26%), natural beauties (24%), low prices (22%), gaining new experiences (18%) and recommendation of relatives and friends (9%). Tourists from Montenegro usually choose Montenegro because of the low prices 63% (this result is probably caused by the fact that more than a half of respondents have their own accommodation (56%) and 31% use private accommodation, then satisfaction with previous visits (26%) and natural beauties (11%). Tourists from neighboring countries are mostly satisfied with previous visits (28%), but as a very important motive they mention natural beauties (24%) and low prices (22%), as well as gaining of new experiences (18%) and recommendation of relatives and friends (9%). For the international tourists the most important factors are natural beauties (31%) and gaining of new experiences (29%) and after them satisfaction with previous visits (17%), low prices (12%) and recommendation of relatives and friends.

Domestic tourists usually use car for their holiday (66%), then public bus (22%) and train (12%). Tourists from neighboring countries also mostly use car (52%), public bus (27%) and bus (tour operator), plane and train (7% each). International tourists usually use plane in order to reach Montenegro (72%), car (21%), bus – tour operator (7%) and train (2%). By analysing the main kinds of transport that are used in order to reach Montenegro, we should not avoid to emphasize that the inadequate access and infrastructure are one of the main weaknesses of Montenegro tourism product. This problem is especially notable in the mountain region and although there were a lot of projects focused on the improvement of the road system, this matter still represents a huge disadvantage of the tourism offer and should be solved as soon as possible. The situation with air transport is not much better- Montenegro has two international airports- one situated in Podgorica and the other one situated in Tivat. Having in mind that fact that international tourists usually use plane in order to reach Montenegro, the aircraft in Montenegro should be improved – especially the capacity of the airport in Podgorica and the aircraft movements after 16.00h at the airport of Tivat. It should also consider the possibility of building new airports- one in the North part of Montenegro, and another one in the South part (Ulcinj for example).

Domestic tourists usually go on holiday with a spouse or partner and children (43%) and friends (34%), alone (14%), with boyfriend/girlfriend (6%) and with parents (3%). Tourists from neighboring countries usually go on holiday with spouse or partner and children (40%), girlfriend or boyfriend (25%), friends (24%), parents (7%) and alone (4%). The international tourists mostly come with friends (39%), a spouse or partner with children (38%), alone (10%), with boyfriend/girlfriend (8%) and alone (10%). It is interesting to notice that there is a quite number of respondents who spend their holiday alone- 14% of domestic tourists, 4% of tourists are from neighboring countries and 10% of international tourists and that these are mostly tourists with incomes which are above or significantly above the average (with tendency of future increase), so the strategy of tourism development in Montenegro should specially pay attention to this segment of the market.

Most tourists from neighboring countries make their own arrangements (68%), tourist agencies from abroad (25%) and travel agency from Montenegro (7%).

Although international tourists often make their own arrangements, it is also important to mention that a great number of them needs assistance from Montenegrin Travel Agencies (28%), as well as agencies which are not from Montenegro (25%). These numbers show significant opportunities for Montenegrin Travel Agencies to increase their products and services targeted at EU and Russian tourists.

Most of the respondents stay 7 days in Montenegro (40%), 19% of them stay 14 days or more, 26% of them stay 10 days and 15% up to five days. These data are probably caused by the fact that a large number of domestic tourists have their own accommodation especially in the South part of Montenegro. Tourists from Montenegro usually stay 10 days (41%), 23% of them stay more than 14 days (mostly tourists in own accommodation), 27% of them stay 7 days, while 9% of them stay up to five days. Tourists from neighboring countries usually stay 7 days (39%), 10 days (27%), up to five days (15%), 14 days and more (18%). International tourists usually stay 7 days (47%), but there is also a large number of them who stay up to 5 days (17%). It is interesting to mention that there is a large number of international tourists who stay ten days or more (36%) – these are usually tourists from Russia who purchased real estate in Montenegro and bring families and friends in their apartments and villas in Montenegro. Unlike them, tourists from EU usually stay up to 7 days.

Respondents were not sure about the amount of money they will spend on their vacations. Most of them (42%) have planned to spend up to 500€ per person (including food and accommodation), 32% up to 250€, 16% up to 1000€ and only 10% of them have planned to spend more than 1000€. Having on mind the results of the research and the global trends in tourism and hospitality, as well as some weaknesses of tourism products such as inadequate access and poor infrastructure and the lack of high-quality of accommodation facilities, it seems that the concept of “elite tourism” is not the appropriate concept for future development of the destination itself. This does not mean that some segments of offer should not be created for “elite tourists”, but we may conclude that most of the products should be created in order to meet the needs and expectations of “mass tourists” with average monthly income. When observing tourists from neighboring countries, it is also easy to notice that these are mostly tourists with average income and they mostly plan to spend up to 500€ (52%), up to 250€ (27%) up to 1000€ (17%) and more than 1000€ (4%). 24% of international tourists plan to spend up to 1000€, 35% up to 500€, 26% up to 250€ and 15% of them more than 1000€. It appears that tourists who spend most money are from EU (especially France, Germany and United Kingdom), Israel (100% more than 1000€) and China (100% more than 1000€), while the tourists from Russia mostly spend up to 250 or up to 500€ (73%).

Most of the tourists plan to spend most of the money on food and accommodation (78%), while 9% plan to spend most money on excursions. Domestic tourists usually spend money on food (41%), accommodation (31%) and excursions (21%). Tourists from neighboring countries spend most of the money on food (41%), accommodation (30%) and excursions (21%), as well as international tourists – food (50%), accommodation (33%) and excursions (15%). It is interesting to mention that international tourists which are placed in 5* or 4* hotels spend most of the money on accommodation (72%), food (22%) and excursions (8%), which tourists accommodated in 3* or 2* hotels spend most of the money on food (47%), transport (30%) and excursions (23%).

Comparing to what they had heard about Montenegro before they came, most of the respondents declared that Montenegro has completely met their expectations (Figure 1).

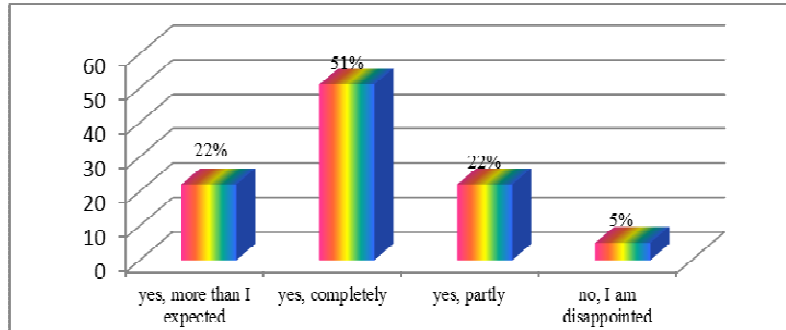


Figure 1. The fulfilment of expectations

Most of the tourist from neighboring countries (56%) declared that Montenegro completely fulfilled their expectations, for 14% it has exceeded their expectations, 25% of them declared that their expectations are partly met and 4% of them are disappointed. International tourists also declared that Montenegro has met their expectations (51%) and for 26% it has exceeded their expectations. 21% of them are partly satisfied, while 2% of respondents are disappointed.

When asked about association on “wild beauty” most of the respondents declared that this slogan associate them on wilderness and natural beauties (Figure 2).

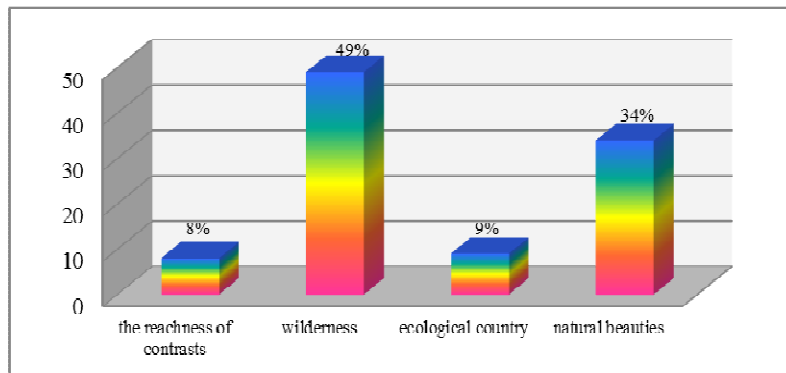


Figure 2. The perception of the slogan “wild beauty

It is important to mention that 57% of domestic tourists declared that the slogan associate them on natural beauties (57%) and wilderness (27%) as well as the richness of contrasts (12%) and ecological country (4%). 39% of tourists from neighboring countries connect “wild beauty” with natural beauties and 39% of them with wilderness, 10% with richness of contrasts and 12% with ecological country. 19% of international tourists connect the slogan with natural beauties and 10% of them with ecological country. It is concerning that 65% of international tourists connect “wild beauty” with wilderness which may lead to the conclusion that mentioned slogan does not represent the real nature of tourism products nor it highlights their main competitive advantages. In other words, we suggest that the slogan should be based on main competitive advantages of tourism destination such as the richness of contrast, the diversity of natural and cultural resources

etc. In that sense, we believe that slogans “pearl of Mediterranean”, “the place where beauty lives” or “the land of contrasts” are more appropriate and more in accordance with the nature of tourism products of Montenegro .

Most of the tourists believe that Montenegro is a destination that should be visited during summer (Figure 3).

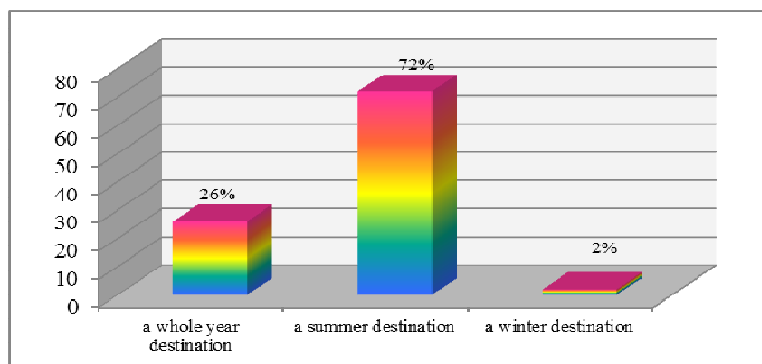


Figure 3. The perception of the period of the year in Montenegro should be visited

Asked about their opinion about the part of the year in which Montenegro should be visited, 53% of the domestic tourists declared that Montenegro is a destination that should be visited during whole year, 44% consider it as a destination that should be visited during summer and 3% of them that it should be visited during winter. 73% of respondents from neighboring countries believe that Montenegro is a destination that should be visited only during summer and 27% believe that Montenegro is a destination that provides a lot of different experiences during whole year. It is also worrying that 84% of international tourists perceive Montenegro as “a summer destination”, only 13% of them as a destination that should be visited during whole year, and 3% of them perceive it as “winter destination”. These results clearly indicate one of the most critical issues in tourism in Montenegro which is the problem of high seasonality. Considering the fact that four summer months (June to September) accounted for as much as 85% of arrivals and 92% of total overnight volume, it is clear that some important actions should be carried out in order to position Montenegro as a year- round destination. In that sense, it is necessary to improve the existing infrastructure (especially because of the fact that some parts of the country are difficult to access in winter months), to upgrade winter tourism accommodation capacities and improve facilities, to develop some alternative tourism products such as business, golf, health & wellness, event tourism etc., as well as to pay special attention on countrywide promotion and marketing in order to attract demand tourists (domestic and international) outside the main holiday periods.

When asked to choose three main advantages that make Montenegro unique and special comparing to other destinations, most of the respondents recognized natural beauties as one of the greatest advantages of the destination itself (Figure 4). The richness of contrasts was also highly ranked (61% of respondents), as well as preserved nature and national parks (38% of respondents). It is interesting to mention that most of the tourists between 15- 39 years old recognized nightlife (62% of respondents) and events (26% of respondents) as one of the top three advantages of Montenegro. 51% of

respondents chose the hospitality of local people and 51% rich cultural heritage (mostly domestic and tourists from neighboring countries).

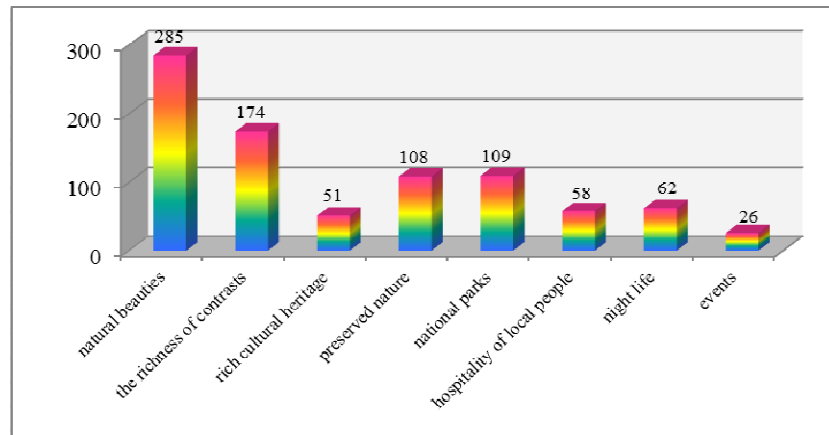


Figure 4. The main advantages of tourist destination

When dealing with identification of three main disadvantages, 86% of the respondents identified poor infrastructure (Figure 5), then crowd, noise and dirtiness (60% of respondents), low quality of services (60% of respondents), high prices (39% of respondents, mostly domestic tourists), unkindness of staff and lack of facilities (35% of respondents each) and 8% of total number of respondents recognized the unkindness of local people.

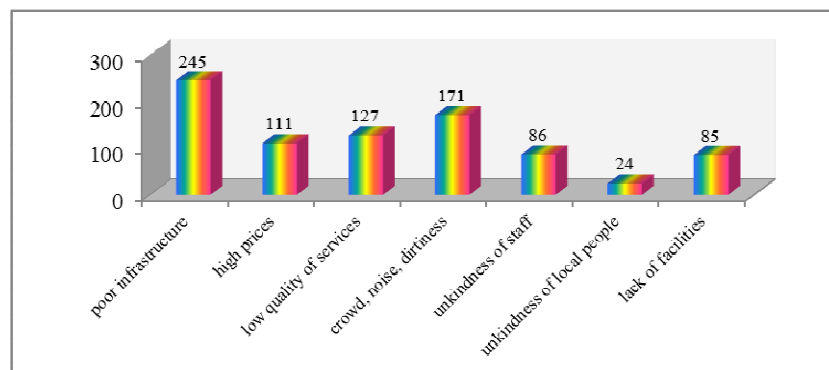


Figure 5. The main disadvantages of tourist destination

Respondents are mostly completely satisfied with the quality of activities that they realize in Montenegro (46%), 34% of them are quite satisfied, 15% are partly satisfied and 5% of them are unsatisfied.

For the tourists from the neighboring countries, the main sources of information for 37% of respondents are family or friends. Internet as the source of information is rapidly increasing among these tourists (also 37%) especially among young people (52% of respondents between 15 and 39 years old use internet as the main source of information

in the destination), while people of 40–49 years usually rely on recommendation of relatives and friends (57%), as well as respondents of 50 years and more. It is also interesting to mention that respondents who are placed in their own accommodation usually rely on recommendation of family and friends (77%), while tourists who are placed in private accommodation usually rely on internet (46%) and recommendation of local people (20%). International tourists usually consult tourist organizations (26%) and internet (26%) - especially among younger people, while 15% rely on recommendations of agencies, 13% on recommendation of hotel/ accommodation staff, 12% on recommendation of relatives and friends, 4% on local people and 4% on visitors' centres.

When asked about the availability of the information in the destination, most of the tourists described information's as "unavailable" and "insufficient" (Figure 6).

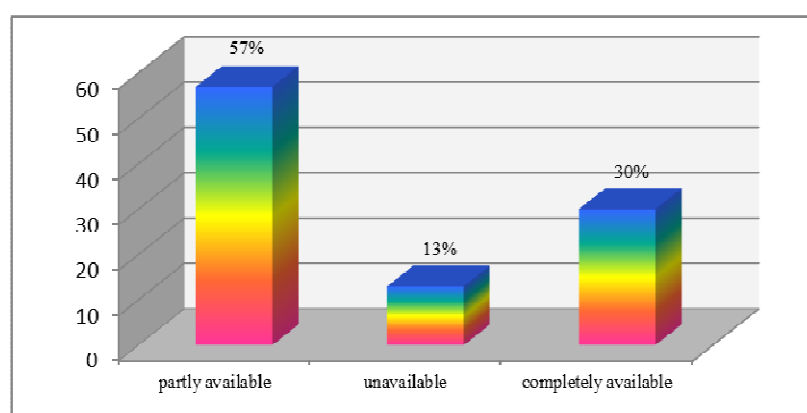


Figure 6. The availability and sufficiency of information in the destination

71% of domestic tourists concluded that the information are completely available and sufficient, for 6% of them information are partly available and sufficient and 23% of them consider that information are unavailable and insufficient. For 54% of tourists from neighboring countries, tourists information are available and sufficient, for 13% of them information are partly available and sufficient and 33% believe that information are unavailable and insufficient. 51% of international tourists think that information are unavailable and insufficient, 17% believe that they are partly available, while 32% consider that they are completely unavailable. These are very worrying results having on mind the importance of the availability and sufficiency of information in destination itself which encourage visitors to stay longer and spend more; to explore different tourism products as well to return to destination and recommend it to others. So, it is clear that the provision of high quality visitor information in the destination itself plays a key role in enhancing the overall visitor experience by creating a positive image of a destination, providing a hospitable and friendly welcome and by creating a genuine sense of place. This can lead to wider improvements in the performance of the visitor economy and generate local benefits that directly support the principles of "wise growth".

Regarding to the satisfaction with the quality of the holiday in Montenegro, most tourists are satisfied with their holiday in Montenegro and describe it as "good" (Figure 7).

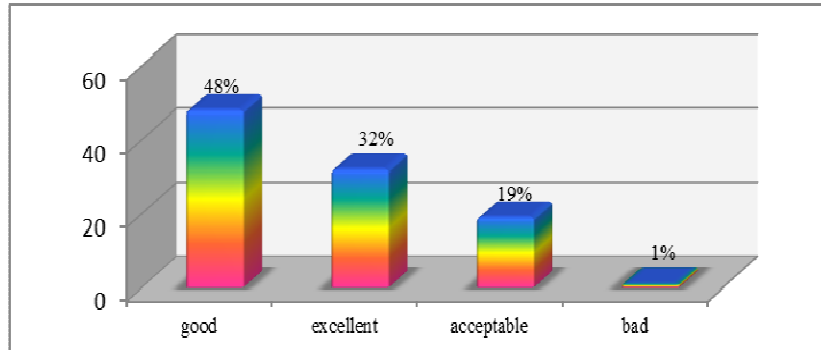


Figure 7. The ranking of the satisfaction with holiday

40% of domestic tourists ranked their holiday as “good”, 29 % as “excellent” and 31% as “acceptable”. Tourists from neighboring countries mostly ranked their holiday as “good” (58%), 23% as excellent, 18% as “acceptable” and 1% as “bad”. 47% of international tourists ranked their holiday as “good”, 38% as “excellent”, 14% of “acceptable” and 1% as “bad”.

Most of the tourists is going to visit Montenegro again (Figure 8).

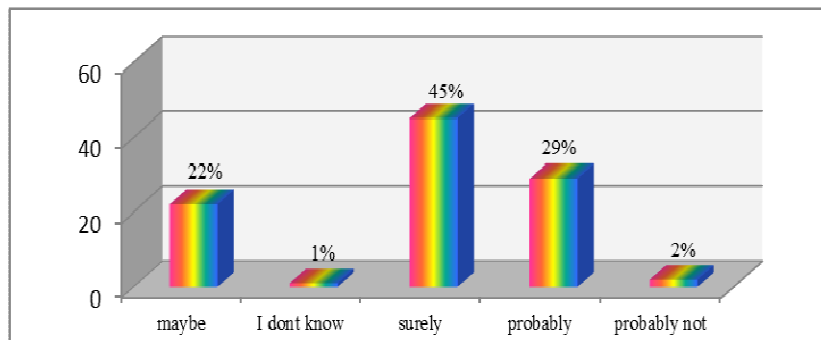


Figure 8. The ranking of the holiday

69% of domestic tourists are surely going to visit Montenegro again, 20% of them will probably and 11% will maybe spend a holiday in Montenegro again. Most of the tourists from neighboring countries will come to Montenegro again (42%), 37% of them will probably and 18% of them will maybe come again, while 3% will probably never spend holiday in Montenegro again. When talking about international tourists, 35% will surely come again, 30% will probably and 29% will maybe come, while 3% are not sure and 3% will probably never spend holiday in Montenegro any more. The satisfaction of the tourists is one of the most important issues in tourism, especially having on mind the fact that “word of mouth marketing” is more credible than any type of advertising. On the other hand, this kind of marketing can also have very negative effects, so it is clear that all participants in tourism continually strive to make a positive impression on all visitors, without exceptions.

The encouraging result is that most of the respondents will surely visit Montenegro again (Figure 9).

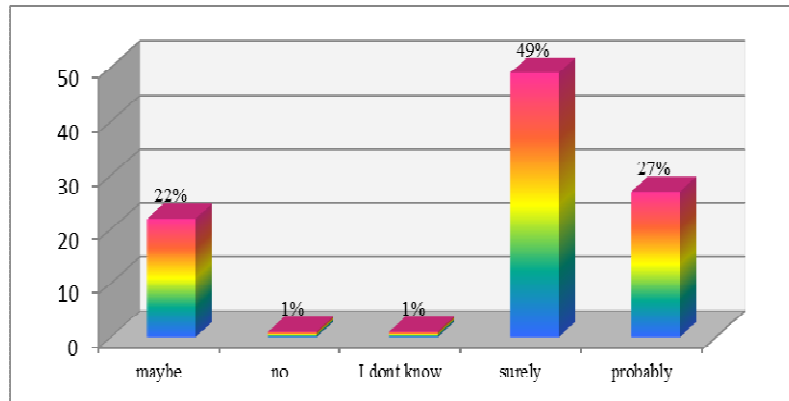


Figure 9. Revisit to Montenegro

Most of domestic tourists will surely recommend Montenegro to family and friends (74%), 14% will probably and 12% will maybe recommend it. 32% of tourists from neighboring countries will surely recommend Montenegro to their relatives and friends, 41% will probably and 24% will maybe recommend it, while 2% will probably not recommend Montenegro and 1% will not recommend it. When dealing with international respondents, the research shows that 44% will surely recommend Montenegro to cousins and friends, 27% will probably and 26% will maybe recommend it, while 2% do not know and 1% will not recommend it to anyone.

CONCLUSION

The results of the research clearly show that tourists not only recognize all the advantages of Montenegrin tourist products, but also perfectly identify the main competitive advantages of Montenegro on the market and clearly perceive all the weaknesses and disadvantages of the tourist offer. Survey results also point out the fact that the quality of offer is not at a satisfactory level, especially in terms of regional development, seasonality, development of new products and markets and improvement of the existing ones and they should be used as the starting point of the future development of tourism in Montenegro. In that sense, all stakeholders in tourism should pay attention to the results of the research in order to create marketing-management strategies which are based on the attitudes, beliefs, expectations, desires and needs of particular target groups (strategy of segmentation), as well as on the elements that make Montenegro different, special and unique comparing to the competition (strategy of differentiation) in order to position Montenegro as an attractive, unique, desired, whole year destination with a recognizable image on the global market (strategy of positioning).

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