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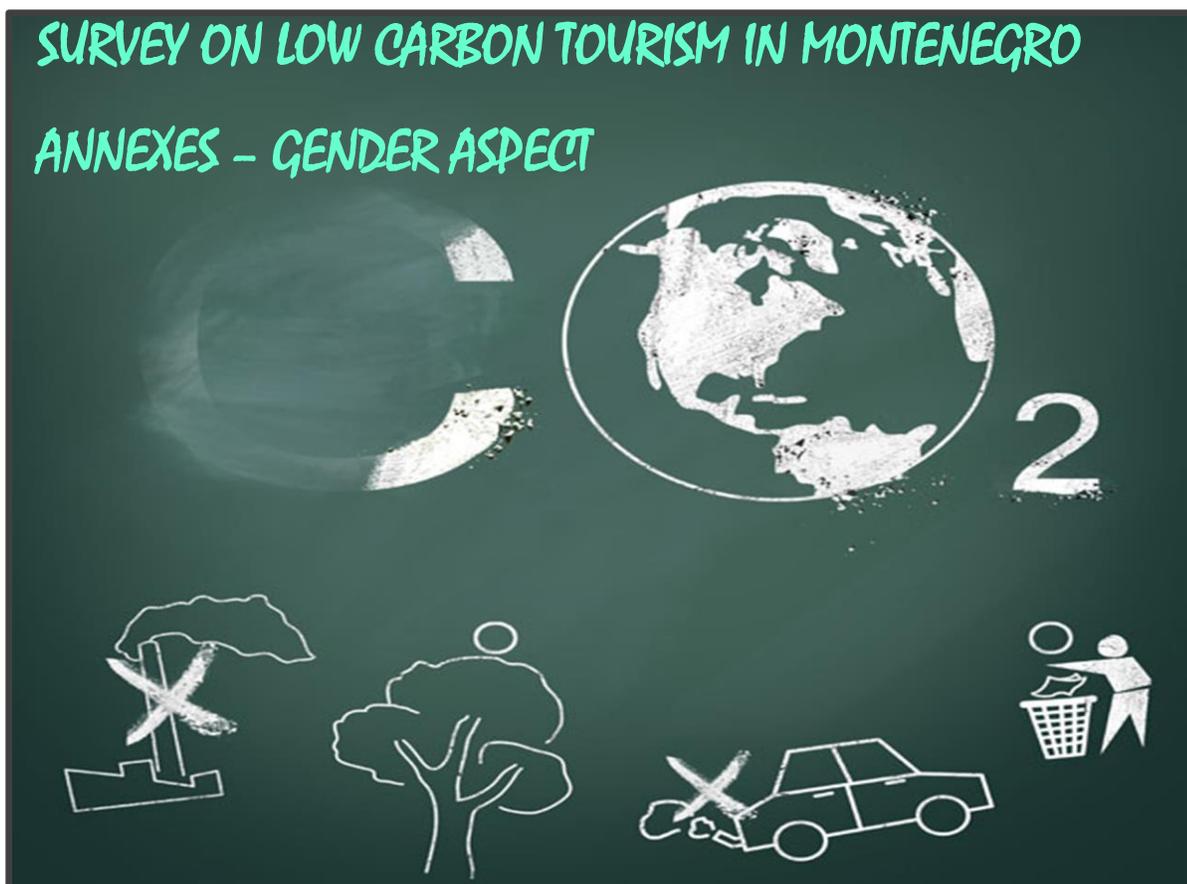
MINISTRY OF SUSTAINABLE DEVELOPMENT
AND TOURISM



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SURVEY ON LOW CARBON TOURISM IN MONTENEGRO

ANNEXES – GENDER ASPECT



Report prepared by:

E3 Consulting
Energy-Ecology-Economy



2015.

Survey on Low Carbon Tourism in Montenegro is conducted in July 2015 in cooperation with the Centre for sustainable development and E3 Consulting Podgorica.

Annex: Gender Aspect of the Survey on Low-Carbon Tourism among tourists

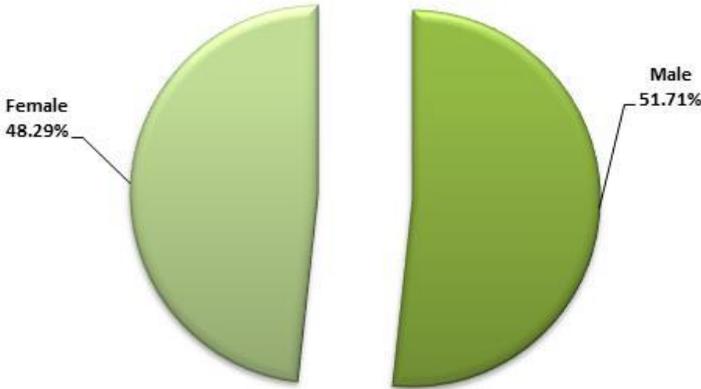
Introduction

The Survey on Low-Carbon Tourism in Montenegro was conducted among three target groups: 1) 1,000 visiting tourists; 2) 100 travel and tourism sector representatives; and 3) relevant central & local authorities in the area of tourism and environmental protection.

Travel and tourism sector representatives and relevant central & local authorities in the area of tourism and environmental protection were not analyzed by gender as responded interviewed as representatives of those two target groups represented institutions.

Survey targeting 1,000 visiting tourists in 6 coastal municipalities in Montenegro (Ulcinj, Bar, Budva, Kotor, Tivat, Herceg Novi) and the Old Royal Capital of Cetinje, situated in the central region was deeply analyzed by gender. Survey showed that male and female were closely represented in the sample, although that was noticed to pollsters, but not required.

Graph 1: Respondents' gender

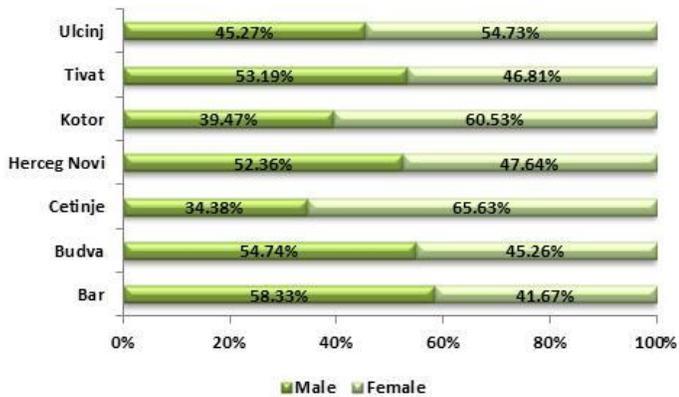


Sample structure by gender showed that more women (65.6%) were interviewed in Cetinje, while most male respondents were in Bar (58.3%).

Considering country of origin of interviewed tourists, more interviewed women (61.9%) were coming from the rest of the world (excluding Europe), while most male respondents were from Other European Countries (59.6%).

Table 1: Tourists by Visiting City & country of origin by gender

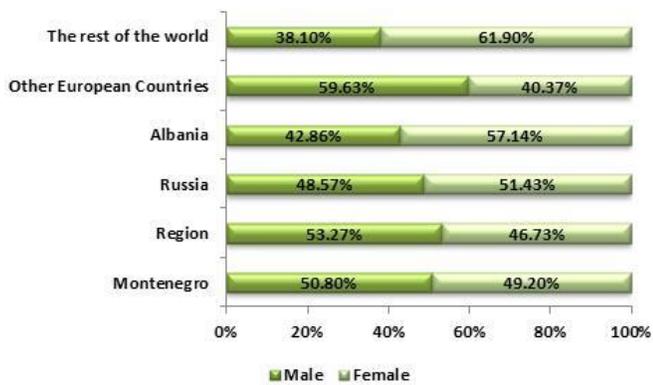
Graph 2: Visiting City by gender



Gender
Male Female

	Male	Female
Bar	58.3%	41.7%
Budva	54.7%	45.3%
Cetinje	34.4%	65.6%
Herceg Novi	52.4%	47.6%
Kotor	39.5%	60.5%
Tivat	53.2%	46.8%
Ulcinj	45.3%	54.7%
Total	51.7%	48.3%

Graph 3: Country of origin by gender



	Male	Female
Montenegro	50.8%	49.2%
Region	53.3%	46.7%
Russia	48.6%	51.4%
Albania	42.9%	57.1%
Other European Countries	59.6%	40.4%
The rest of the world	38.1%	61.9%
Total	51.7%	48.3%

Socio-economic characteristics of respondents

- The Survey showed that more female respondents were in age 18 to 25 (53.3%), more female widows (78.9%), more female respondents with completed primary school (85.7%), all homemakers were women and slightly more women earn from 10,000 EUR to 20,000 EUR (50.9%).
- On the other side, more male respondents were in age over 66 (55.6%), divorced (56.9%), with completed faculty (Bachelor Degree) (55.1%), more male respondents were self-employed (67.7%) or with “other” source of income (mostly “dependents”) (83.3%) and more male respondents stated average annual income higher than 60,000 EUR (72.7%).

Table 2: Socio-economic characteristics of respondents by gender

		Gender	
		Male	Female
Age	18 to 25	46.7%	53.3%
	26 to 35	52.1%	47.9%
	36 to 45	55.0%	45.0%
	46 to 55	50.4%	49.6%
	56 to 65	50.0%	50.0%
	Over 66	55.6%	44.4%
	Total	51.5%	48.5%
Marital Status	Married	51.3%	48.7%
	Cohabiting	50.0%	50.0%
	Single	54.0%	46.0%
	Divorced	56.9%	43.1%
	Widow	21.1%	78.9%
	Total	51.7%	48.3%
Level of Education	Primary school	14.3%	85.7%
	High school	48.8%	51.2%
	Higher education	53.2%	46.8%
	Faculty (Bachelor Degree)	55.1%	44.9%
	Postgraduate studies (Master Degree)	47.4%	52.6%
	Doctoral studies (PhD)	54.5%	45.5%
	Total	51.7%	48.3%
Employment status	Employed fulltime	52.5%	47.5%
	Employed part time	56.5%	43.5%
	Self-employed	67.7%	32.3%
	Student	40.9%	59.1%
	Retired	51.1%	48.9%
	Homemaker	0.0%	100.0%
	Unemployed	42.9%	57.1%
	Other	83.3%	16.7%
	Total	51.7%	48.3%
Basic source of income	Salary	53.7%	46.3%
	Pension	50.0%	50.0%
	Social help	25.0%	75.0%
	Other	41.7%	58.3%
	Total	51.6%	48.4%
Average annual income	Up to 10,000 EUR	49.2%	50.8%
	From 10,000 EUR to 20,000 EUR	49.1%	50.9%
	From 20,000 EUR to 30,000 EUR	59.2%	40.8%
	From 30,000 EUR to 40,000 EUR	56.4%	43.6%
	From 40,000 EUR to 50,000 EUR	55.2%	44.8%
	From 50,000 EUR to 60,000 EUR	62.5%	37.5%
	More than 60,000 EUR	72.7%	27.3%
	Total	51.1%	48.9%

Holiday behavior

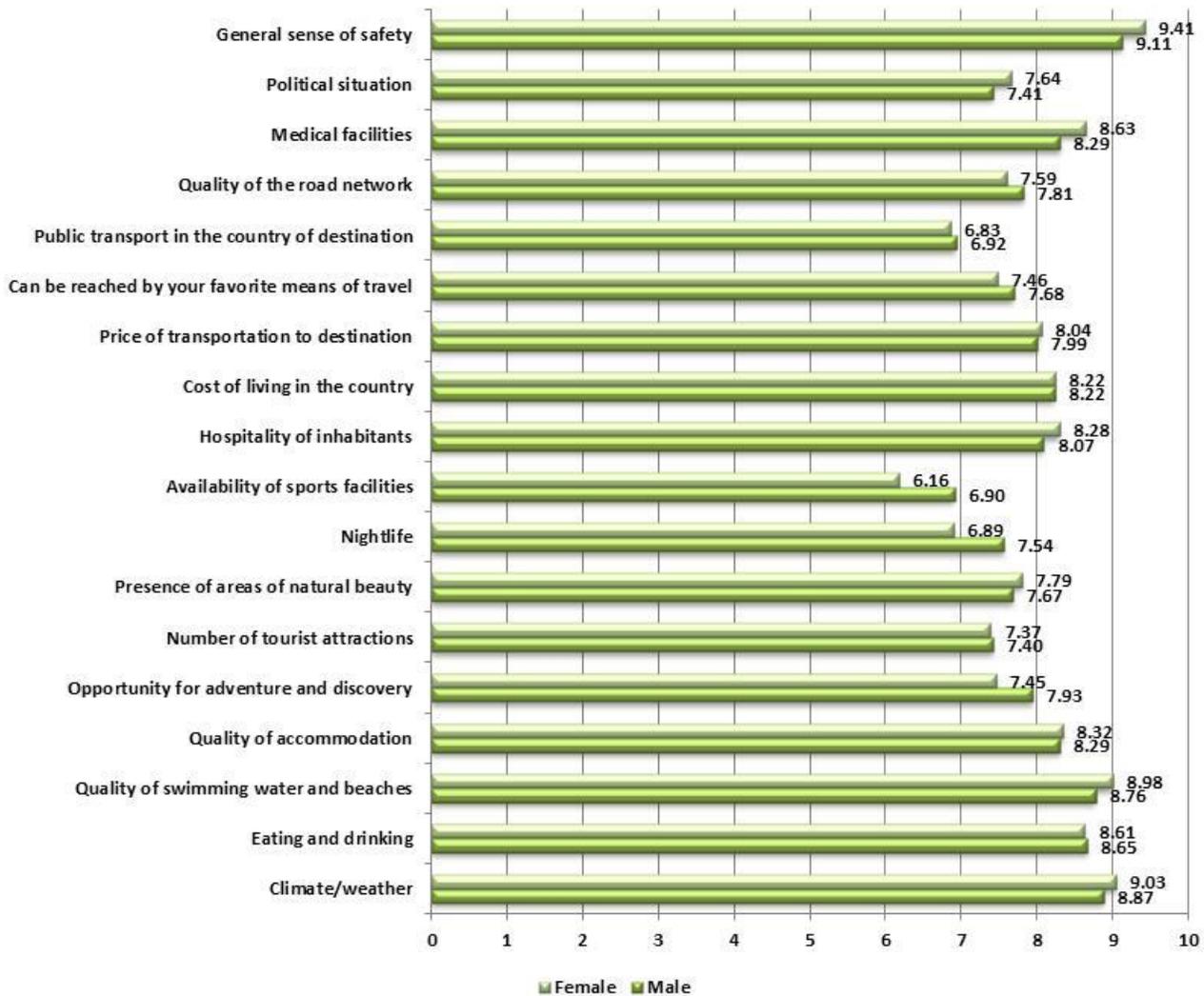
- The Survey showed that more female respondents usually go on holiday more than five times per year (58.8%), more female respondents do not go on summer holidays every year (50.2%), more female respondents are planning to be on summer holiday this year from 3 to 4 weeks (54.0%), more female respondents choose a location where to go on holiday from books and guides (52.6%) and the same percentage of female and male respondents organized holidays independently with organized tours.
- On the other side, more male respondents usually go on holiday more five times per year (66.7%), more male respondents go on summer holidays every year (52.2%), more male respondents are planning to be on summer holiday this year more than 4 weeks (54.50%), more male respondents choose a location where to go on holiday on fairs and exhibitions (70.0%) and tour operator organized holidays for more male respondents (69.6%).

Table 3: Holiday behavior by gender

		Gender	
		Male	Female
How often you usually go on holiday	Once a year	48.9%	51.1%
	Twice a year	53.0%	47.0%
	Three times per year	54.7%	45.3%
	Four times per year	59.0%	41.0%
	Five times per year	66.7%	33.3%
	More than five times per year	41.2%	58.8%
	Total	51.7%	48.3%
Do you go on summer holidays every year	Yes	52.2%	47.8%
	No	49.8%	50.2%
	Total	51.7%	48.3%
For how long you are planning to be on summer holiday this year	Up to 1 week	52.9%	47.1%
	From 1 to 2 weeks	51.2%	48.8%
	From 2 to 3 weeks	52.8%	47.2%
	From 3 to 4 weeks	46.0%	54.0%
	More than 4 weeks	54.5%	45.5%
	Other	25.0%	75.0%
	Total	51.7%	48.3%
How do you choose a location where to go on holiday	From the Internet	49.9%	50.1%
	From friends and relatives	51.5%	48.5%
	From media	52.5%	47.5%
	From books and guides	47.4%	52.6%
	On fairs and exhibitions	70.0%	30.0%
	Other	52.2%	47.8%
	Total	51.7%	48.3%
How are you holidays organized?	Independently	51.3%	48.7%
	Independently with organized tours	50.0%	50.0%
	Non-profit group organized tours	58.3%	41.7%
	Tour Operator	69.6%	30.4%
	Travel agent	52.1%	47.9%
	Other	0.0%	100.0%
	Total	51.8%	48.2%

- Tourists graded how important are listed aspects when choosing a holiday destination (in range 1 as the lowest to 10 as the highest importance). Although graded importance of listed aspects when choosing a holiday destination at almost equalized way, female respondents gave higher importance to some of aspects in comparison to male respondents, as presented in the Graph below:

Graph 4: On a scale from 1 to 10 indicated importance of the following aspects when choosing a holiday destination by gender



Visiting Montenegro

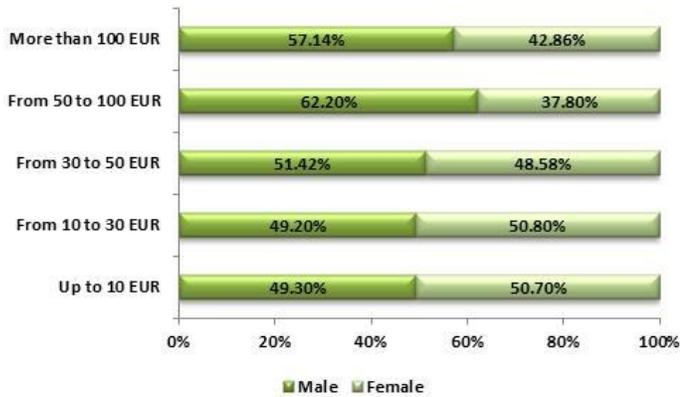
- More male respondents visited Montenegro for the first time (57.1%).
- More female respondents choose Montenegro as a destination for holidays because of pure nature (52.5%), while more male respondents because of quality of accommodation (56.4%).
- More female respondents used bus (56.5%), while more male respondents used motorbike (71.4%) when traveled to Montenegro.
- All tourists that stayed in health spa were male respondents, while more female respondents (60.0%) stayed in camping sites.

Table 4: Visiting Montenegro by gender

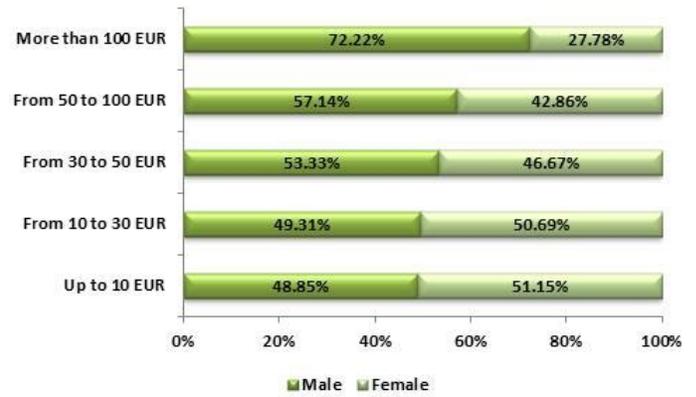
		Gender	
		Male	Female
Is this your first time to visit Montenegro	Yes	57.1%	42.9%
	No	49.9%	50.1%
Why did you choose Montenegro as a destination for holidays	Pure nature	47.5%	52.5%
	Quality of accommodation	56.4%	43.6%
	Quality of food	52.8%	47.2%
	Good prices	50.6%	49.4%
	Tourism facilities	53.9%	46.1%
	Quality of service	54.4%	45.6%
	Other	47.3%	52.7%
Which type of transportation you used when traveled to Montenegro	By plane	52.2%	47.8%
	Own car	55.5%	44.5%
	Rent-a-car	58.3%	41.7%
	Motorbike	71.4%	28.6%
	Boat	66.7%	33.3%
	Train	44.4%	55.6%
	Bus	43.5%	56.5%
	Other	0.0%	100.0%
In what kind of accommodation you stay while in Montenegro	Hotel	52.6%	47.4%
	Hotel-apartment	56.3%	43.7%
	Boarding-house	46.4%	53.6%
	Motel	55.6%	44.4%
	Tourist settlement	55.6%	44.4%
	Tourist apartment	54.4%	45.6%
	Overnight accommodation	60.0%	40.0%
	Private households (renting rooms)	49.7%	50.3%
	Health spa	100.0%	0.0%
	Workers' hostels	50.0%	50.0%
	Camping sites	40.0%	60.0%
Other	46.3%	53.7%	

- Considering personal daily costs for accommodation and food and drinks, the following graphs shows that male tourists spend more than female.

Graph 5: Personal daily costs for accommodation

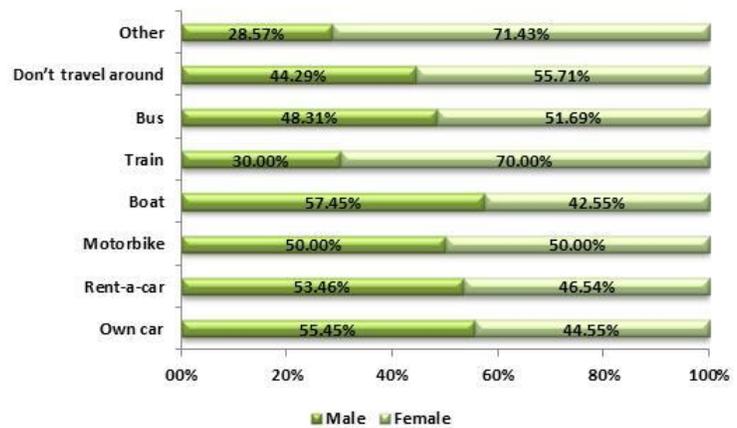


Graph 6: Personal daily costs for food and drinks



Graph 7: Means of transportation used to travel around Montenegro by gender

- Survey showed that more female respondents used train (70.0%), while most male respondents used boat (57.5%) to travel around Montenegro. It is also significantly more female respondents (55.7%) that don't travel around Montenegro.

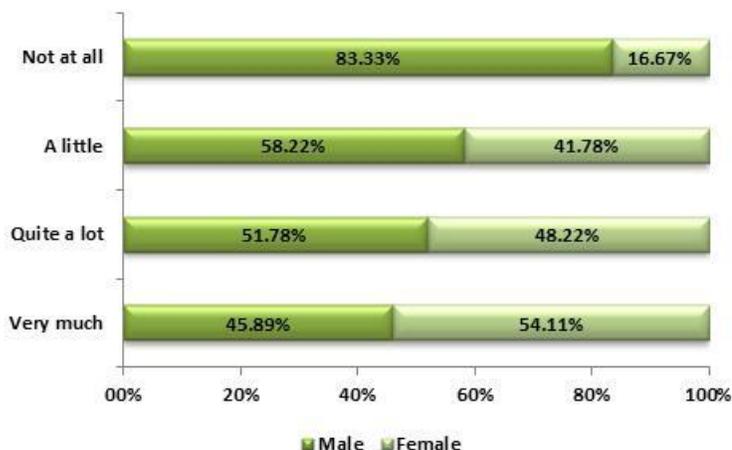


- More male respondents think that environmental protection is on a satisfactory level in Montenegro (52.6%).

Nature-friendly tourism

Graph 8: To what degree tourists behave on environmentally conscious way by gender

- More female respondents consider themselves to behave on environmentally conscious way very much (54.1%), while significantly more male respondents consider themselves not to behave on environmentally conscious way at all (83.3%).



- More male than female respondents have heard (50.9%) about nature friendly tourism holiday, but also more male than female respondents have not heard (53.3%) about nature friendly tourism holiday.
- On the other side, more female respondents have ever been on nature friendly tourism holiday (51.0%).
- Female respondents in more cases heard about nature friendly tourism holidays from magazines/books (58.5%), while male respondents in more cases heard about nature friendly tourism holidays from TV (51.9%).
- Female respondents in more cases seek the most when on nature friendly tourism holiday to see unusual plants and animals (56.7%), while male respondents in more cases seek the most when on nature friendly tourism holiday for interaction with native people (52.0%).

Table 5: Firstly heard about nature friendly tourism holidays & what tourists seek the most when on nature friendly tourism holiday by gender

		Gender	
		Male	Female
How firstly heard about nature friendly tourism holidays	Internet	47.8%	52.2%
	Magazines/Books	41.5%	58.5%
	Friends/Relatives	50.0%	50.0%
	TV	51.9%	48.1%
	Other	40.0%	60.0%
In general what tourists seek the most when on nature friendly tourism holiday	Visiting un-crowded destinations	51.1%	48.9%
	Experiencing remote and unspoiled nature	49.4%	50.6%
	Increasing knowledge of wildlife	54.7%	45.3%
	Interacting with native people	52.0%	48.0%
	Supporting economic benefits to local communities	48.2%	51.8%
	See unusual plants and animals	43.3%	56.7%
	I don't seek for eco-tourism holiday at all	44.4%	55.6%
	Other	100.0%	0.0%

- Female respondents in more cases usually travel with business/colleagues on nature friendly tourism holiday (71.4%), while male respondents in more cases usually travel alone on nature friendly tourism holiday (53.6%).
- Female respondents in more cases organized nature friendly tourism holidays independently with organized tours (57.1%), while tour operator organized nature friendly tourism holidays for more male respondents (66.7%).
- Female respondents in more cases spent more than 2,000 EUR on nature friendly tourism holiday approximately (64.7%), while more male respondents spent from 1,500 EUR to 2,000 EUR on nature friendly tourism holiday approximately (53.8%).

Table 6: Tourists' behavior on nature friendly tourism holiday by gender

		Gender	
		Male	Female
Who usually travel with on nature friendly tourism holiday	Alone	53.6%	46.4%
	Family	48.7%	51.3%
	Friend/s	50.0%	50.0%
	Business/Colleagues	28.6%	71.4%
	Part of an organized group	42.9%	57.1%
How is nature friendly tourism holidays organized	Independently	50.3%	49.7%
	Independently with organized tours	42.9%	57.1%
	Non-profit group organized tours	41.7%	58.3%
	Tour Operator	66.7%	33.3%
	Travel agent	42.9%	57.1%
How much spent on nature friendly tourism holiday approximately	Up to 500 EUR	45.2%	54.8%
	From 500 EUR to 1,000 EUR	58.6%	41.4%
	From 1,000 EUR to 1,500 EUR	50.0%	50.0%
	From 1,500 EUR to 2,000 EUR	53.8%	46.2%
	More than 2,000 EUR	35.3%	64.7%

- Summer holidays in general are in more cases completely based on contact with nature for female respondents (56.5%), while summer holidays are not based on contact with nature at all for more male respondents (58.3%).
- Similar situation is with this summer holiday in Montenegro, which is in more cases completely based on contact with nature for female respondents (52.9%), while this summer holiday in Montenegro is not based on contact with nature at all for more male respondents (54.2%).
- Slightly more male respondents think that are well informed about the nature friendly tourism in Montenegro (50.9%), as well as that are not well informed about the nature friendly tourism in Montenegro (52.0%).

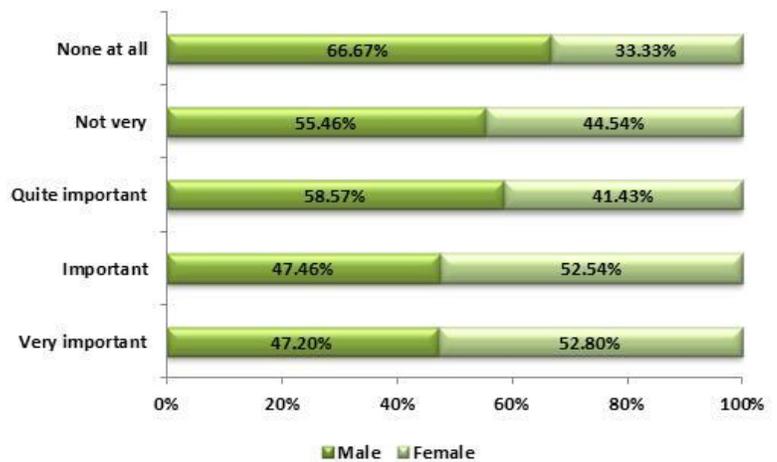
- Slightly more male respondents do things to reduce the use of natural resources and energy on holiday (50.5%), but somewhat more male respondents do not do things to reduce the use of natural resources and energy on holiday (55.7%).

Graph 9: Activities tourists do in order to reduce use of natural resources while in Montenegro by gender



- Slightly more female respondents think that nature friendly tourism is likely to be very important for the future (52.8%), while more male respondents do not think that nature friendly tourism is likely to be very important for the future at all (66.7%).

Graph 10: How important nature-friendly tourism is likely to be for the future by gender



Low-carbon tourism

- More female respondents stated “other” as the statement that best describes what low carbon tourism is (80.0%) (majority “other” stated “I don’t know”), while more male respondents stated that ecological footprint best describes what low carbon tourism is (55.2%).
- More female respondents are interested to decrease own impact on nature through the low carbon tourism (51.1%).
- More female respondents define carbon footprint as “decreasing CO2 emissions in air transport” (56.5%), while more male respondents define carbon footprint as “decreasing CO2 emissions in water transport” (77.8%).
- More male respondents ever calculated own carbon footprint (57.1%).
- More male respondents are interested in calculating own carbon footprint (51.6%).
- More female respondents are willing to pay for calculating own carbon footprint on annual basis from 10 to 50 EUR (54.2%), while more male respondents are willing to pay for that from 50 to 100 EUR (64.3%).
- More female respondents are willing to pay more for vacation if it will fund low carbon projects in Montenegro (50.6%).

Table 7: Tourists’ opinion on low-carbon and carbon footprint by gender

		Gender	
		Male	Female
Statements that best describes what low carbon tourism is	An economic growth pattern under the guidance of the concept of sustainable development	50.6%	49.4%
	Measure to decrease CO2 emissions in the atmosphere	51.5%	48.5%
	Ecological footprint	55.2%	44.8%
	Decreasing human impact on nature	51.1%	48.9%
	Other	20.0%	80.0%
Interested to decrease own impact on nature through the low carbon tourism	Yes	48.9%	51.1%
	No	59.3%	40.7%
Define what carbon footprint is	Decreasing CO2 emissions in land transport	46.4%	53.6%
	Decreasing CO2 emissions in air transport	43.5%	56.5%
	Decreasing CO2 emissions in water transport	77.8%	22.2%
	The total sets of greenhouse gas emissions caused by an organization, event, product or person	47.6%	52.4%
	Decreasing CO2 emissions in accommodation	63.8%	36.2%
	Decreasing CO2 emissions in tourism activities	46.9%	53.1%
	Don’t know	53.4%	46.6%
	Other	0.0%	0.0%
Ever calculated own carbon footprint	Yes	57.1%	42.9%
	No	51.6%	48.4%
Interested in calculating own carbon footprint	Yes	51.6%	48.4%
	No	51.9%	48.1%
How much are willing to pay for that on annual basis	Up to 10 EUR	52.3%	47.7%
	From 10 to 50 EUR	45.8%	54.2%
	From 50 to 100 EUR	64.3%	35.7%
	More than 100 EUR	50.0%	50.0%
Willing to pay more for vacation if it will fund low carbon projects in Montenegro	Yes	49.4%	50.6%
	No	54.2%	45.8%

